Microsoft 365 Implementation Services

RFP Questions & Answers

April 2021

Question	Response
1. Do vendors need to physically meet with the OCERS staff for meetings?	No, a fully remote engagement is acceptable (and preferred).
2. Can companies from outside the USA submit a proposal? (Like from India or Canada.)	Our preference is to contract with an organization with all operations contained within the United States.
3. Can companies from outside the USA, (like from India or Canada), perform the tasks outside the USA?	Our preference is to contract with an organization with all operations contained within the United States.
4. Is it a requirement that individual members of the project team possess citizenship or residency of any specific country?	Our preference is to contract with an organization where project team members are citizens of the United States.
5. Can we submit the proposal via email?	Email submission is our preferred method. Please see Sections 3 and 5 of the RFP.
6. What exchange version are you running?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
7. Are you using any public folders?	No.
8. Is the exchange server in the same forest as the AD accounts?	Yes.
9. Is your objective to fully deploy Office 365 or Microsoft 365?	Both. We are open to performing a full deployment in multiple phases.
10. You state that you are already using Intune - assumption is that you have Azure AD already provisioned - is that correct? The Office 365 Tenant should be associated with that same Azure AD instance - are you provisioning O365 in that manner?	Correct regarding both questions.
11. For Fast Track, are you interested in working with a Fast-Track Ready Partner?	If it is determined that using FastTrack services will yield the best implementation result, we would be more inclined to use a FastTrack Partner.
12. You list as part of managing passwords and authentication to "enable multi-factor authentication" - is that to be done in conjunction with Conditional Access, or to rely on the "3rd-party MFA Solution"?	We would like to discuss with the selected vendor the benefits and drawbacks of each solution and make a determination based on the information provided.
13. In your task "configure OneDrive for Business client" do you want deployment of the sync client included as part of the effort for the proposal?	We are currently undecided if we will using the OneDrive for Business sync client. If we do use it, the selected vendor would only need to assist with setup on a subset of client machines (5-10), and IT staff can deploy to the remaining client systems.

14. Can you define what "configure mobile devices" entails? Do you want them to be Intune managed and have Office Software deployed to them? (specifically Outlook in the contact of mail migration?)	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
15. In your reference to "Office 365 Client App" are you referring to installation of Office Pro Plus?	We are referring to what was formerly known as "Office 365 ProPlus" and is now named "Microsoft 365 Apps". Please see https://docs.microsoft.com/en-us/deployoffice/name-change for further information.
16. On your task "configure Distribution Groups" do you intend to manage these as cloud-only, or continue to use AD-based sync'd via AD Connect?	The current plan is to continue using AD-based synchronization via AD Connect.
17. For "Plan and configure journal rules" – what are your journaling requirements? Do you have an on-premises journaling system that would ingest journaled entries from Office 365?	Journaling is not currently in place, but would be configured to respond to legal and regulatory compliance requirements. Journaling must also tie in with our record retention policy.
18. For your task to setup and configure and on-premises SMTP relay – Microsoft best practices and recommended architecture are to maintain a single Exchange system on-premises if AD Connect is to continue to sync AD objects – do you intend to completely remove the Exchange system on-premises after migration or follow Microsoft's recommendations and maintain Exchange on-premises?	We typically follow the vendor's and manufacturer's advice regarding best practices. We have various systems on premise that will need to send emails to internal and external recipients.
19. In your task "configure EOP with on-premises Exchange servers" – is it your intent to point your MX record(s) to EOL and configure non-authoritative mail flow to forward to on-premises Exchange prior to completing the migration?	We would discuss the various options available with the selected vendor and select the best option based on the information received.
20. For OneDrive for Business migration, how many files/folders do you estimate to be migrated?	We do not have an estimation at this time.
21. Do you have existing policies for which AIP would be applied?	No. Our Data Classification policy and Data Handling Guidelines are currently under development.
22. Do you have existing retention and DLP Policies for which these systems would be applied in Office 365?	No. Our Records Retention policy is currently being revised and we are just beginning to evaluate our DLP options.
23. For Microsoft Defender Advanced Threat Protection, is deployment to all devices to be included in the overall scope of this project?	The selected vendor would only need to assist with setup on a subset of client machines (5-10), and we could deploy to the remaining client systems.
24. Did OCERS engage a consultant to prepare this RFP? If so, did they assist with current and future design of solution(s)?	No, this RFP was developed by OCERS staff.

25. What are the systems that would need possible integration with Microsoft 365? • 3rd party cloud based secure email gateway (SEG) solution (existing) • 3rd party cloud based single sign-on (SSO) and Multifactor Authentication (MFA) solution existing • 3rd party cloud based security information and event management (SIEM) solution (existing) • 3rd party cloud based privileged access management (PAM) solution (existing)	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
26. How many domains does OCERS support that will be part of this implementation?	One.
27. During COVID work from home has become a need, will you have employees working from home once OCERS is able to return to on-site work?	We expect to be a hybrid workforce post-COVID.
28. Can you provide any budgetary constraints for this project?	$150,000 - $180,000.
29. How long do you expect implementation to take? What is your target date for implementation?	We would like to implement what is reasonably feasible during calendar year 2021, understanding that more time may be needed. Our expectation to complete the entire scope of services identified in the RFP is approximately 18 months.
30. What is OCERS expected growth or reduction in M365 users over the next 3 years?	We don't expect substantial growth over the next 3 years. Perhaps 5 additional users.
31. What cybersecurity policies do you have in place? Can we get copies of these?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
32. What cybersecurity standards are you targeting and how far along are you in each?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
33. Does OCERS have any user planning to use MacOS in the present or future?	No.
34. Will this project be executed on site, remotely or a combination?	Our office is not open yet, so a remote engagement is the preferred model.
35. If consultants are able to work remotely, will you provide internal policy training to our consultants to ensure we are working within your policy requirements?	We will inform the selected vendor of our expectations prior to the work commencing.
36. Will there be a physical location for our consultants to work at your facility when it is prudent or required to be working on site?	Our office is not open yet. If on-site meetings are feasible and needed, then we will provide adequate space.
37. If we are providing the workstations to be used on this project, what are the minimum software and	Specific requirements have not been identified at this time.

cybersecurity requirements or configurations for those machines?	
38. Will you require detailed asset information for each consultant workstation?	This has not been determined yet.
39. Will you provide a space on your network for all our project documents? If so, will this space be made available to access via an existing MS Teams interface?	The preferred location for project documentation and how all project team members will access that information has not yet been determined.
40. Does your equipment listing include equipment used by employees working remotely? • If not, what are the specifications and counts for the workstations that are working remotely? • Can you describe the basic architecture you are using for remote work infrastructure? Please include product names and versions that are related to this.	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
41. Can you describe the cybersecurity implementation that exists on each type of device (laptop, tablet, smartphone) and operating system? • Please include any anti-virus or endpoint detection and response (EDR) software. • Please include any non-default firewall rules.	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
42. Can you provide all the different operating systems and current versions in use for your current environment?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
43. Can you define all the non-Microsoft software that is part of your standard configuration for user workstations?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
44. Can you provide the standard specifications you use for purchased device equipment? Include Brand, RAM, and SDD/HDD size.	Intel i5-i7, 16GB RAM and 256-512 GB SSD hard drive.
45. Can you define the method used to keep your operating systems and 3rd party software up to date on all machines?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
46. Do you use an RMM to manage user machines? If so, which product do you use?	No.
47. Other than iPhone and Android Phones, can you list all the non-Microsoft based operating systems and platforms that you currently have, or are planning to have, that will need to interact with the M365 implementation?	No other non-Microsoft based operating systems.
48. What product(s) do you use for password management? Do you intend to change this product before the end of this implementation?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.

49. Can you list the M365 components you expect to remain on-prem or to be implemented with a hybrid solution?	No expectations at this point, we will review the advice of the selected vendor as appropriate.
50. Do you already have retention policies and data governance in place and just need this to be integrated into M365? • If so, do these need to be reviewed for changes outside of M365 changes? • If not, do you expect these to be developed to include items that fall outside of the M365 environment?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
51. Does OCERS currently have encrypted file sharing capability? • If so, what is the product being used and do you expect to integrate this will M365? • If not, would OCERS want this feature included in the proposal?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
52. As a retirement system, you carry a high volume of highly sensitive and protected data. Will any of this data be expected to be on the cloud or will it all be maintained on-premises? If on-premises can you describe the types of files you are targeting for OneDrive?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
53. Can you describe your current Intune environment and usage?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
54. Does OCERS plan to use MDM or MAM for company-owned devices or BYOD?	Both.
55. Does OCERS want to manage or restriction on AppStore or Google Play Store access for its users?	Yes, eventually we want to control all software allowed for staff.
56. What is the internet usage on mobile devices?	OCERS provides mobile devices to select staff. Internet usage is for business only, but limited personal use is allowed. Current policy is under review with plans to update in 2021.
57. Does OCERS require VPN connection to any application on mobile devices?	No.
58. Does OCERS use FTP protocol on these mobile devices? (Such as GlobalScape FTP.) If so, which product is used?	No.
59. Does OCERS have any compliance policy for mobile devices?	Current policy is under review with plans to update in 2021.

60. Does OCERS use conditional access to restrict mobile device access or registered access with company Portal App?	No.
61. How many distribution groups does OCERS have?	Less than 75.
62. Will distribution owners manage their own membership? (This is important because when we enabled hybrid mode for Exchange users who are migrated to Office 365, mailboxes can't manage these distribution groups anymore—even they are the owners of them. Only Backend Exchange administrators can modify the distribution groups membership.)	OCERS IT System Administrators will manage distribution lists and other Exchange objects.
63. Does OCERS grant mailbox permissions and access using distribution groups or security group?	Security groups.
64. Does OCERS have mailboxes or archive mailboxes larger than 100GB?	No.
65. How big is OCERS allowed send/receive email with attachment size?	15MB.
66. What type of applications are running in OCERS environment that sends out mail notifications or using mail relay to send out application notifications to internal and external users?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
67. Out of 75 servers, how many applications are using current Exchange servers as mail relay?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
68. Will any of these servers be migrated to Azure Cloud or other third-party cloud technology?	Not at this time.
69. Would we be expected to change the mail relay to native Office 365 Online Exchange and completely remove the current on-prem Exchange?	We would be open to the selected vendor's recommendation and the manufacturer's best practices.
70. How long does OCERS expect the hybrid mode to coexist with Online Exchange environment?	We would be open to the selected vendor's recommendation and the manufacturer's best practices.
71. How does OCERS manage or assign Office 365 E5 licenses? Manually or Automatic?	Licenses have not being assigned at this time.
72. What is the on-boarding and off-boarding process for current Exchange and for Office 365 environment?	Current process is manual, with IT team creating or deleting AD accounts and mailboxes as staff are hired or terminated. Process is under review and will be updated with migration to Microsoft 365, including security and SSO/MFA options.

73. Will calendar free busy expect to work during hybrid mailboxes migration	Yes.
74. Who has delegation access to VIP/Executives/Manager's mailboxes or shared mailboxes or conference room mailboxes?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
75. Will the mailbox migration schedule be moved in multiple groups or all mailboxes cutover at the same time?	After initial pilot testing, would like to move in groups.
76. Can OCERS provide the mailbox statistics for all OCERS mailboxes?	Yes.
77. Can OCERS provide all mailbox delegates, permissions, send as and send on behalf?	Yes.
78. Does OCERS use any email encryption technology on current Exchange environment? What type of encryption or level of encryption?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
79. Does OCERS use eDiscovery, litigation holds, export and production of emails for legal discovery or court subpoenas?	Current eDiscovery and litigation hold requests are handled manually. OCERS would like to leverage M365 tools and functionally once migrated.
80. Is OCERS interested in Microsoft certification for internal staff?	Yes.
81. What is your current level of cybersecurity training for users? How often?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
82. What password policies does OCERS currently have in place/enforce with its users?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
83. Are there workloads hosted in Microsoft Azure today? Are these workloads in scope for security hardening or process enhancement efforts related to this project?	No.
84. What version and Exchange cumulative / rollup update is installed on-premises?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
85. What is the Exchange build number?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
86. How many servers are in the on-premises Exchange organization?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
87. What operating systems are running on client workstations (Windows 7, Windows 10, etc.)? What version of Windows 10 are deployed (1803, 1809, 1903, etc.)?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.

88. What versions of Microsoft Office are deployed on client endpoints today?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
89. What is the size of the OCERS IT team? Is first-tier end user support required as part of migration / Microsoft 365 deployment?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
90. Are there specific compliance standards the environment must meet (HIPAA, PCI, etc.)?	No.
91. What is the desired hybrid identity model (password hash synchronization, pass-through authentication, AD FS, etc.)?	Our preference will be based on the vendor's recommendation and the manufacturer's best practices.
92. What applications currently integrate with the on-premises Exchange environment today?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
93. Is vendor responsible for reconfiguration of mail on mobile devices following migration?	We would like the vendor to document the process, and then internal IT staff would assist users with the mobile device reconfiguration.
94. Are PSTs used today? If so, do they need to be migrated to Microsoft 365?	Yes, some users have PST files, but we do not intend to migrate them.
95. If PSTs are in use today, where are they stored (local computers, file shares, etc.)?	Both local drive and network share, depending on the user.
96. Will all mailboxes be migrated to Microsoft 365, or will some mailboxes remain on-premises and require long-term coexistence?	The preference is for all mailboxes to be migrated to Microsoft 365.
97. Are all Windows workstations and mobile devices enrolled in Intune? If not, how many are enrolled?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
98. Is there a standard tool used by OCERS for software deployment to user endpoints (SCCM, Intune, etc.)?	No.
99. Are there any existing litigation / legal holds on mailboxes? If so, how many are in place today?	No.
100. Are public folders in scope for migration? If so, what is the total size of the public folders? How many are in scope for migration?	No.
101. Are there specific archiving and retention policies which must be configured in Microsoft 365?	To be determined, but yes, there will be specific rules to be configured.
102. Are there any mail flow requirements which will require transportation of mail through on-premises environment following migration to Microsoft 365?	There will be on premise systems that still need to send emails (internally and externally) post migration. Those are the only systems we are aware of that may need to send emails through on premise mail systems.

103.	Is integration of smart hosts with Exchange Online required (spam filtering, antimalware, journaling, etc.)?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
104.	Is telephony or unified messaging currently integrated with Exchange (for example, voicemail integration)? Does this need to be reconfigured in Exchange Online?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
105.	Are there requirements for configuring Voice / telephony functionality in Microsoft 365 (voice, auto attendant, etc.)?	Due to the confidential nature of OCERS systems, a detailed response cannot be provided at this time.
106.	How many departments / roles require information barriers to control communications?	None.
107.	What applications are integrated with Microsoft 365 today? Which applications will require security configuration in Cloud App Security?	None today. To be determined as to requirements for Cloud App Security.
108.	Will Azure Sentinel be used in the environment? Is deployment / configuration of Azure Sentinel in scope?	No.
109.	Is configuration of passwordless authentication for Windows systems required (Windows Hello for Business, FIDO2, etc.)?	Yes.
110.	Is configuration of SPF, DKIM and DMARC settings in scope for Exchange Online configuration?	Yes.
111.	Are there specific requirements for log retention?	One year.
112.	The RFP notes that Microsoft 365 E5 licenses are currently procured. Will Microsoft 365 E5 licenses be procured for all users?	Yes.
113.	Will Win10 machines be domain joined (on-prem) as well as Azure AD joined?	Our decision will be based on the vendor's recommendation and the manufacturer's best practices.
114.	Will there be any BYOD machines joined to Azure AD?	No.
115.	Is there any Windows Hello for Business configuration in place?	No, implementation of Windows Hello for Business is one of the services we are requesting in the RFP.
116.	Are you considering a hybrid joined device scenario in which policies are also being applied from on-premises Active Directory? (via VPN or when on corp net)	Our decision will be based on the vendor's recommendation and the manufacturer's best practices.

117.	Will the hardware vendor be registering machines at purchase to the tenant?	No.
118.	Are you planning to hardware register current Win10 devices to the tenant for management? This is used for passing policies against the device rather than the user account.	Our decision will be based on the vendor's recommendation and the manufacturer's best practices.
119.	Does the company have an Anti-virus software in use that will be tied into Intune? How about firewall or VPN?	OCERS has antivirus, firewalls, and VPN. Our decision to integrate those with MEM/Intune will be based on the vendor's recommendation and the manufacturer's best practices.
120.	Are you planning for remote management of devices such as wipe, remote access? If so, do you already have software for this?	We do want to have remote management of devices. We do not have software implemented for this today.
121.	Win10 Software Push - Any plans to directly push software to Win10 machines? If so, will the software be pushed automatically or at user request from a portal/company page?	Our decision will be based on the vendor's recommendation and the manufacturer's best practices.
122.	Apple/Android Devices - Will users be using BYOD or company issued devices? Both?	Currently both, with the desire to move to company issued devices only.
123.	Does the company already have an Apple Business account for device management? How about for Google?	No.
124.	Windows Information Protection -Does the company have a list of applications currently in use that will need to be considered when protecting data? Not all applications support information protection policies and thus each will have to be evaluated	No.
125.	The RFP mentions OneDrive migrations, how much data is in scope specifically for OneDrive, and what is the source environment of existing user data?	The amount of data that is in scope for OneDrive migration has not yet been determined. The source is personal network drives.
126.	What kind of content exists on the on premise environment? (IE: Mostly office files, CAD files, video files, etc.)	Predominantly Office files and PDFs. Other file types are possible but in smaller volumes.
127.	Is there frequent collaboration with external users? What is the nature of this collaboration?	No.
128.	How do users in the organization typically work? On Laptops/Desktops, Mobile Devices, tablets?	Predominantly laptops, with some users having smartphones.
129.	Is integration with any third-party components desired?	We expect that integration with some of our existing technologies / systems will be required. The selected vendor will be expected to provide the

	Microsoft expertise, our other partners will provide expertise for the third party components.