

## TERMS OF REFERENCE

### Procurement of MS Exchange / MS SharePoint Upgrade and Migration Services

The Energy Regulatory Commission (ERC) intends to engage the services of a Contractor, as IT Services<sup>1</sup> Provider, duly authorized and with the necessary expertise, experience, and capacity to install, data migration, and testing of MS Exchange Server 2016 messaging platform and MS SharePoint 2016 Portal platform while utilizing the upgraded Active Directory of MS Windows Server 2012 with the following detailed requirements:

#### I. PROJECT COVERAGE

The scope of services covers the following:

1. Upgrade the MS Exchange 2010 to MS Exchange 2016 including its data migration; and
2. Upgrade the MS SharePoint 2010 to MS SharePoint 2016 including its data migration.

#### II. CONTRACT PERIOD

The contract period shall **cover forty-four (44) days** upon receipt of Notice to Proceed (NTP).

#### III. APPROVED BUDGET FOR THE CONTRACT

1. Fund for this engagement shall be sourced from the General Appropriation Act (GAA) for the fiscal year 2020 of the ERC.
2. The ABC for the project is **One Million Pesos (PhP1,000,000.00)**, inclusive of all applicable government taxes, other fees and charges.

---

<sup>1</sup> **IT services** refers to the application of business and technical expertise to enable organizations in the creation, management and optimization of or access to information and business processes. (Gartner, <https://gtmr.it/2DFjojl>)

#### IV. MODE OF PROCUREMENT

The Mode of Procurement shall be **Competitive Bidding**, as provided under Section 10, Rule IV of the 2016 Revised IRR of Republic Act (RA) No. 9184.

#### V. QUALIFICATIONS

The Contractor should have the necessary eligibility, experience and expertise in providing the *MS Exchange and MS SharePoint Upgrade and Data Migration* project, to wit:

- Microsoft Gold Certified Partner with competencies on Advanced Infrastructure, Portals & Collaboration and Volume Licensing.

#### VI. SCOPE OF WORK

Upgrade the MS Exchange 2010 to MS Exchange 2016 including its Data Migration:

<b>Activities</b>	<b>Estimated Working Days</b>
1. Validate and consider existing network infrastructure to identify constraints and dependencies 2. Conduct planning, run through critical solution capabilities of Active Directory and Exchange 2013 3. Design review considerations for: <ul style="list-style-type: none"><li>• Exchange 2010</li><li>• Exchange 2016</li><li>• Office Online Server</li></ul>	<b>32 Days</b>

3

Activities	Estimated Working Days
<p>4. Prepare Active Directory and Exchange organization</p> <ul style="list-style-type: none"> <li>a. Upgrade all Exchange Server 2010 to SP3 and Update rollup 11</li> <li>b. Configure Default Offline Address book</li> </ul> <p>5. Build Active Directory Server</p> <p>6. Build Exchange Server 2016</p> <ul style="list-style-type: none"> <li>• Install 2 Exchange Server 2016</li> <li>• Create an Exchange 2016 mailbox databases</li> <li>• Create and Configure DAG</li> <li>• Create DAG copies</li> <li>• Install Office Online Server</li> </ul> <p>7. Prepare for Co-Existence</p> <ul style="list-style-type: none"> <li>• Configure AD replication</li> <li>• Configure Exchange Services</li> <li>• Configure Exchange 2016 External URLs</li> <li>• Configure Exchange 2016 Internal URLs</li> <li>• Configure Exchange 2016 Certificates</li> <li>• Move arbitration mailbox</li> <li>• Configure Outlook Anywhere</li> <li>• Configure service Connection point</li> <li>• Configure DNS records</li> </ul> <p>8. Migrate mailboxes</p> <ul style="list-style-type: none"> <li>• Create test mailbox</li> <li>• Move 50 pilot mailboxes from</li> </ul>	<p style="text-align: right; color: blue;">3</p>

Activities	Estimated Working Days
<p>Exchange 2010 to Exchange 2016</p> <p>9. Finalize Deployment</p> <ul style="list-style-type: none"> <li>• Activate Exchange Server 2016 License</li> <li>• Complete Post-Installation tasks</li> <li>• User Acceptance Testing</li> </ul> <p>10. Shift mail flow (MX records) from Exchange 2010 to Exchange 2016</p> <p>11. Decommission Exchange 2010 servers</p> <p>12. Provision of formal documentations on:</p> <ul style="list-style-type: none"> <li>• Step by step System Administration Manual and as built configuration for Exchange 2016</li> <li>• Office Online Server</li> </ul>	

**Upgrade the MS SharePoint 2010 to MS SharePoint 2016 including its Data Migration:**

Activities	Estimated Working Days
<p>1. Planning Phase</p> <ul style="list-style-type: none"> <li>• SharePoint environment validation</li> <li>• Functional specifications documentation</li> </ul> <p>2. Implementation Phase</p> <ul style="list-style-type: none"> <li>• Setup and Configure in the SharePoint Server 2013 for temporary migration repository</li> <li>• Setup and Configure in the SharePoint Server</li> </ul>	<p><b>25 Days</b>  <b>(The Contractor will begin after the Final Deployment of MS Exchange 2016)</b></p> <p style="text-align: right;">8</p>

Activities	Estimated Working Days
<p>2016 activation and configuration.</p> <ul style="list-style-type: none"> <li>• Migrate Sites and Services from OLD SharePoint to the NEW SharePoint Farm</li> <li>• Unit Testing and System Integration Testing</li> </ul> <p>3. System Turnover and User Acceptance</p> <ul style="list-style-type: none"> <li>• System walkthrough with users. The contractor will demonstrate all use cases of the system, ensuring that all features and functions specified in the Functional Specifications document has been implemented.</li> <li>• User Acceptance document and User acceptance testing</li> </ul> <p>4. Deployment Phase</p> <ul style="list-style-type: none"> <li>• System deployment to production environment</li> <li>• Deliverables: <ul style="list-style-type: none"> <li>i. System ready for go-live document</li> <li>ii. Build Document</li> <li>iii. End-User manuals</li> </ul> </li> </ul>	

## Final and closing engagement:

Activities	Estimated Working Days
1. Admin Training / Knowledge Transfer 2. Project Closeout <ul style="list-style-type: none"><li>• Finalize and submit documentation</li><li>• Project sign-off</li></ul>	<b>5 Days</b> <b>(The Contractor will begin after the Final Deployment of MS Exchange 2016 and MS SharePoint 2016)</b>

**Total No. of Days: 44**

## VII. TERMS OF PAYMENT

Payment to the Contractor shall be made One-Time payment only upon submission of billing statement, duly accomplished service and inspection report forms and other documentary requirements.

## VIII. WARRANTY

The Contractor warrants that for a period of six (6) months, the Services provided shall conform strictly to the terms and conditions of this Terms of Reference. And, the Contractor shall correct and fix the issues/problems encountered during the warranty period,

## IX. LIQUIDATED DAMAGES

1. Where the Contractor refuses or fails to satisfactorily complete the work within the specified contract time, plus any extension time duly granted and is hereby in default under the contract, the Contractor shall pay ERC for liquidated damages, and not by way of penalty, an amount, as provided in the conditions of the contract, equal to one tenth (1/10) of one percent (1%) of the cost of the unperformed portion for every day of delay. The maximum deduction shall be ten percent (10%) of the amount of the contract, of which ERC may rescind or terminate the contract, without prejudice to other courses of action and remedies available under the circumstances such as but ~~not~~

limited to forfeiture of performance security and/or blacklisting of the latter.

2. For entitlement to such liquidated damages, ERC need not prove the damages actually incurred. Said damages in any amount shall be deducted from any money due or which may become due the Contractor under the Contract and/or collect such liquidated damages from the retention money or other securities posted by the Contractor at ERC's convenience.

## **X. RESERVATION CLAUSE**

The ERC reserves the right to accept or reject any quotation, to annul the procurement process, and to reject all quotations at any time without thereby incurring any liability to the affected supplier/s.