Managing Email for Information Governance

City of Columbus RFP # SA0005020 / Information Archive System

Tim Wells
SourceOne archiving & eDIscovery
EMC Corporation

Patrick DeZellar
Senior Account Executive
AdvizeX

Date: 7/18/2013

This proposal contains confidential material that is proprietary to EMC Corporation and to AdvizeX. The materials, ideas and concepts contained herein are to be used exclusively to evaluate the capabilities of EMC Corporation & AdvizeX to provide a solution for The City of Columbus. The information and ideas herein may not be disclosed to anyone outside of The City of Columbus to be used for purposes other than the evaluation of EMC Corporation's capabilities.

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EMC SourceOne:
Managing Unstructured Data for Information Governance

July 18, 2013

Gary R. Cavin, CIO
City of Columbus, Ohio
Department of Technology

Dear Mr. Cavin and Technology Selection Team,

Email today is a vital operational tool, providing not only swift communications but also an ongoing business record. The growth in email volume and average size makes managing email among the top pain points for IT administrators. Add in regulatory requirements and the fact that email content is a prime target in legal disputes, and it's clear that a proactive, holistic approach to email management is needed.

EMC's Email Archiving solution leverages EMC SourceOne Email Management to offer you tools to address your email challenges. With these tools, you can reduce storage costs, improve backup and recovery operations, and expedite message retrieval while providing seamless user access and simplifying management. Our solution will help you:

- Manage storage growth and reduce costs in your messaging environment

- Improve operational efficiency in your messaging environment

- Enable litigation readiness

- Automate retention policies to meet regulatory obligations or internal corporate governance requirements

- Manage and even eliminate personal archives such as Microsoft Outlook PST files

- Improve user productivity by lifting restrictive mailbox quotas

- Leverage a tiered storage infrastructure to store emails in the appropriate storage tier based on business value

The proposal that follows describes the EMC Email & File Archiving solution with the SourceOne family of products and how it will assist you in proactively managing your messaging and file sharing environment.

We look forward to reviewing the proposal with you.

Sincerely,

Patrick Dezeller   Tim Wells
Account Executive   SourceOne archiving & eDIscovery
AdvizeX   EMC
(614) 580-2494   (954) 325-8503

Table of Contents

5.1   SECTION 1 : TRANSMITTAL LETTER

City of Columbus Ohio RFP # SA0005020 / Information Archive System

RFP response provide by :

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614.580.2494
UTC # BPCMP45B (specific to EMC products)

5.1.1 Offer Period

This proposal is valid for 180 days from 7-18-2013

5.1.2 Signature

Patrick J DeZellar has authority to legally bind the vendor to the extent of this potential contract with the City (DOT)

5.1.3 Identify Materials

Inclusive in this proposal are all items stated / required in RFP # SA005020. Pricing, technical justification, reference architecture, qualifications, system diagrams, support, SLA expectations, AdvizeX Technologies statement letter of financial condition and other related documents.

5.1.4 Contact Information

Name	Responsibility	Contact Information
Daniel Sedney	Account Manager	(312) 339-8287 / daniel.sedney@emc.com
Patrick DeZellar	AdvizeX Account Manager	(614) 580-2494 / pdezellar@AdvizeX.com
Mark Mill	EMC Backup & Recovery Systems	(724) 504-8768 / mark.mill@emc.com
Tim Wells	EMC SourceOne	(954) 325-8503 / tim.wells@emc.com

5.2   SECTION 2 : COMPETENCE

5.2.1 Company History / Facts

AdvizeX

AdvizeX Technologies has over 38 years of providing IT solutions with several blue chip manufacturers. We have over 120 technologist providing presales and post sales delivery expertise and 73 sales executives, with over 800 technical certifications. We have 12 regional operation centers providing solutions and results focused upon infrastructure, applications and managed services. Our customer base is greater than 2000 covering state and local government, healthcare, education, manufacturing, business services and retail. Our leading technologies involve comprehensive solutions from EMC, Cisco, VM Ware, Microsoft, and HP & ORACLE. AdvizeX Technologies currently holds the DOT EMC UTC on contract # BPCMP45B. Our current value added activities are focused on partnering with DOT personnel managed by Jim Bodi (jabodi@columbus.gov) & Chris Anelick (cdanelick@columbus.gov).

On November 2, 2012 AdvizeX Technologies was acquired by Rolta International (http://www.rolta.com/index.html) , this strategic acquisition provided AdvizeX entry into managed services activities focusing upon a high leveled skill set with Oracle.

The combined revenue between both companies eclipses $500M. We currently have active projects in over 40 countries. This partnership allows us to redefine customer value by joining the Best in Class Infrastructure from AdvizeX with the Best In Class Application support from Rolta.

EMC

EMC is a global leader in enabling businesses and service providers to transform their operations and deliver information technology as a service (ITaaS). Fundamental to this transformation is cloud computing. Through innovative products and services, EMC accelerates the journey to cloud computing, helping IT departments to store, manage, protect and analyze their most valuable asset - information - in a more agile, trusted and cost-efficient way.

We work with organizations around the world, in every industry, in the public and private sectors, and of every size, from startups to the Fortune Global 500. Our customers include global money center banks and other leading financial services firms, manufacturers, healthcare and life sciences organizations, Internet service and telecommunications providers, airlines and transportation companies, educational institutions, and public-sector agencies. EMC also provides technology, products, and services to consumers in more than 100 countries.

Our differentiated value stems from our sustained and substantial investment in research and development, a cumulative investment of more than $12 billion since 2003. To strengthen our core business and extend our market to new areas, EMC has invested $14.5 billion in acquisitions over the same period and has integrated more than three dozen technology companies since 2006 alone.

EMC is supported by thousands of technical R&D employees around the globe, the industry's broadest portfolio of systems, software, and services, our ability to create total integrated solutions, and our

commitment to delivering the best Total Customer Experience in this or any industry. Our service excellence has been recognized by distinguished awards from the Technology Services Industry Association and is validated by our all-time high customer satisfaction scores we achieved in 2011.

We operate R&D centers in Belgium, Brazil, China, France, Ireland, India, Israel, the Netherlands, Russia, Singapore, and the U.S., and manufacturing facilities in the U.S. and Ireland. We hold the most stringent quality management certification from the International Organization for Standardization (ISO 9001), and our manufacturing operations hold an MRP II Class A certification.

EMC ranks152 in the Fortune 500 and had reported revenues of $20 billion in 2011, the largest revenue year in EMC's 33-year history.

EMC employs approximately 53,500 people worldwide. We are represented by approximately 400 sales offices and scores of partners in more than 85 countries around the world. We have the world's largest sales and service force focused on information infrastructure, and we work closely with a global network of technology, outsourcing, systems integration, service, and distribution partners.

We are a publicly traded company, listed on the New York Stock Exchange under the symbol EMC, and are a component of the S&P 500 Index. In 2011, EMC was included in the Dow Jones Sustainability Index (DJSI) for North America, which tracks the financial performance of leading sustainability-driven companies. We are committed to acting in a socially and environmentally responsible manner and to being an attentive and thoughtful neighbor in our local and global communities. We score at the top, or near the top, of regional rankings of the best places to work.

5.2.2 Qualifications

EMC is one of the leading archiving and information governance vendors in the world. The proposed EMC SourceOne Email Management & eDiscovery solution has been deployed at thousands of public and private sector locations to help our customers manage unstructured information for information governance, storage management, retention management, regulatory compliance, public information and litigation support. In 2012 alone we added over 1000 new customers to the SourceOne install base. The EMC SourceOne family of information management software helps our customers:

- Improve storage management and operational efficiency in their messaging environment

- Enable litigation readiness

- Automates email and file retention policies to meet regulatory and corporate governance requirements

- Minimize overall costs and complexity of supporting their Email and File Sharing infrastructures

- Improve end user productivity by offering a virtually infinite mailbox and file storage

- Provide search & audit for Public Information requests

Pursuant to EMC Source One, AdvizeX Technologies is actively selling and supporting this mail archival product. References are listed in section 5.2.3

5.2.3 Related Experience

EMC and AdvizeX have implemented a number of very similar archiving & compliance projects for customers in the Ohio Valley and Midwest US since the SourceOne product was introduced in April or 2009. Similar customers include:

Omnicare, in Dublin, Ohio, who now manages nearly 15000 user mailboxes with EMC SourceOne and was installed and configured by EMC & AdvizeX.

Excela Health, Pittsburgh, Pennsylvania, who manages 4500 user mailboxes with EMC SourceOne and was installed and configured by EMC & AdvizeX.

Auto Owners Insurance, Lansing, Michigan, who manages 4000 user mailboxes with EMC SourceOne and was installed and configured by EMC & AdvizeX.

5.2.4 Project Staff Information

EMC Global Services at a Glance

- Professional and support services, solutions, and training for every stage of the information lifecycle

- 11,000+ information infrastructure service and support professionals

- Global network of professional and customer service partners

- Focus on delivering the best possible Total Customer Experience

Strategize, implement, and derive maximum business value from your information infrastructure

EMC's information-focused service and support professionals leverage proven methodologies, deep expertise, and industry best practices to help you address your business and IT challenges and attain your near-and long-term business objectives.

Long recognized as industry leaders, EMC's service and support teams assist at every stage of the technology deployment lifecycle, transforming products into IT solutions that address your specific business challenges.

From assessment through design, implementation, validation, and operation, EMC Services will help you optimize your infrastructure.

Within Global Services, EMC has a team dedicated to the SourceOne product family, in addition to our platform, storage and Business consulting practices. It is made up of very senior technology professionals, most of whom have been managing deployment projects and implementing customer solutions since the product began shipping over 4 years ago. On the SourceOne PS team for the Americas, there are currently 16 consultants, 5 Project Managers, 1 Delivery Manager, 1 Director and 3 back office support and administration people. This team is growing to meet growing SourceOne customer demand for services. demand . Solution Architects and Consultants who may be utilized to deploy the EMC SourceOne archive & eDiscovery solution for the City of Columbus. Representative resumes for a Project Manager, Solutions Architect and Consultant are supplied here. These and other similar resources may be utilized to deploy various portions of the City of Columbus archive, and their functions are described in the sample project plan in Section 5.3.2.

Alvino Morales Jr – **Consultant:** Experience includes 4 years as a compliance and archival storage solutions consultant with EMC. Prior to that Al spent 2 years as a lead Exchange and Messaging administrator, US Army Forces Command. He also spent 10 years as an Information Systems Supervisor and Chief, US Army IT, where he maintained, managed and supervised operational, logistical and training requirements for US Army automated mainframe and COTS systems. His product skills and certifications include SourceOne Email Management, Discovery Manager & Supervisor, Microsoft Windows Active Directory, Microsoft Cluster Services, Business Continuity, Microsoft Exchange environment design, management, migrations and consolidations.

Michael Tramont – Senior Architect: Experience includes 20 years of enterprise IT experience with an emphasis on storage management and archiving. Ten years experience implementing email eDiscovery systems, SEC-compliant email archival systems, and NASD-compliant email supervision systems. Areas of expertise include: requirements gathering, business/technical process analysis and design, business continuity and best practices. His product skills and certifications include SourceOne Email Management, Discovery Manager & Supervisor, SourceOne eDiscovery – Kazeon, DiskXtender for Windows, MS SQL Server, Microsoft Windows, Microsoft Cluster Services, Statistical Data Analysis and Business Continuity.

Barbara A Moore – Project Manager: Experience includes over 20 years of enterprise IT experience designing, developing, training and managing imaging and information governance projects. Areas of expertise include: project management, project risk management, application development lifecycle, and business/technical process analysis and design.

5.3   SECTION THREE : QUALITY AND FEASIBILITY

5.3.1 Proposed Solution

The EMC solution that follows consists of products and services that will enable The City of Columbus to put information at the center of its business, keep it available and secure around the clock, and streamline processes for greater efficiency. Supporting virtualization across your enterprise, EMC solutions are designed to help you maximize productivity and minimize your total cost of ownership.

All EMC products are tested thoroughly in EMC's E-Lab to assure our storage network customers that their multi-vendor environment has been tested and qualified for interoperability, and that it is supported by EMC's industry-leading service organization.

EMC Interoperability

1,000+ servers from 27 server vendors

50 operating systems in 300 variations

125+ storage-software products

200+ network-connectivity elements

650+ Cooperative Support Agreements

The E-Lab Promise:

EMC delivers the highest level of interoperability assurance…and supports every configuration it qualifies-no disclaimers, no excuses

EMC is not proposing any additional hardware as part of the City of Columbus Information Archive proposal. All proposed software and services will leverage the City's existing VMware and EMC storage investments. The existing infrastructure will support connectivity, availability, and scalability of the proposed solution. EMC SourceOne software adds functionality to the existing MS Exchange and file storage infrastructure. It enables the City of Columbus to meet its operational and business requirements as set forth in this RFP.

5.3.1.2 On Premise Solution

Implementing an on-premise EMC Email Archiving solution with SourceOne Email Management can help organizations like The City of Columbus better manage storage growth in their email environment, which in turn helps improve backup and recovery operations. Message retrieval is complete, significantly faster, and more efficient when IT can search through a de-duplicated, full-text indexed, centralized archive. Companies can also offer an "infinite mailbox" to users by moving email to a secure, online archive platform, eliminating a key reason that users create personal archives such as PST files.

With SourceOne Email Management, organizations can reduce storage costs, increase message server performance, and improve their backup and recovery operations by automatically migrating emails and attachments into a centralized message archive, compressing and removing duplicates. SourceOne Email Management also helps organizations retain and manage email as a record of business by capturing emails, attachments and Instant Messages in real-time to ensure a complete, authentic archive. All major messaging environments are supported including Microsoft Exchange and IBM Lotus Notes/Domino as well as SMTP messaging and Instant Messaging. Further, SourceOne Email Management is fully internationalized with Unicode support, in order to archive and search messages in any character set.

How EMC SourceOne Email Management Works
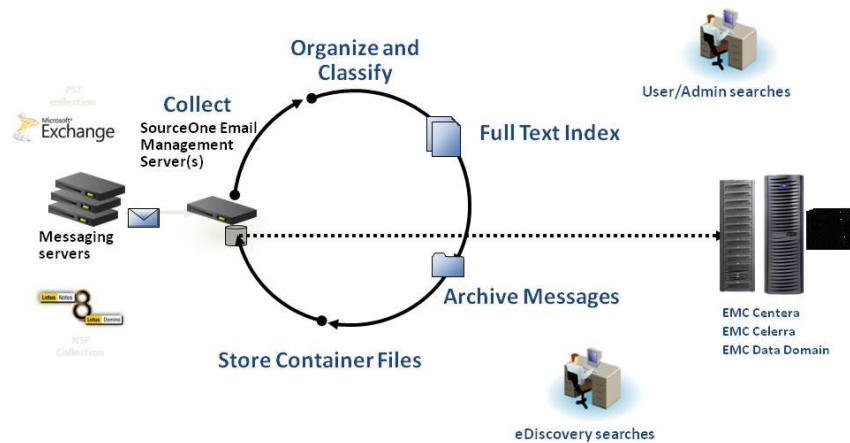
How SourceOne Email Management Works

SourceOne Email Management is a next-generation email archiving offering that provides a revolutionary underlying architecture designed to meet commercial customer needs, but can also scale out to meet large, distributed global customer requirements. The architecture is distributed, allowing customers to scale out their server resources to meet specific performance and workloads. In addition, the architecture is highly available to ensure zero data loss and continuous process in the instance of a server failure. Finally, SourceOne Email Management provides full international support and the administrator and user interfaces are localized into four European languages (French, Italian, German, and Spanish) as well as three Asian languages (Korean, Japanese, and Simplified Chinese).

SourceOne Email Management with SourceOne for Files provides a centralized, online email and file archive that is single instanced, compressed, and full-text indexed to provide fast access to stored messages, attachments and files. Companies can choose to capture all inbound and outbound messages in real-time, or schedule an archive task in off hours based on specific retention policies. Combined with retention and aging policies for files and MS SharePoint, this provides a single solution for unstructured data with common policy management and controls. This archive is available for user & eDIscovery search utilizing a simple web interface as well as the SourceOne Discovery Manager legal and public information client.

Through the shortcut process, companies can eliminate the burden of attachments on the primary message server and aged files on file shares while providing seamless access to the content for end users. The simple yet powerful Web-based search interface allows users and administrators to retrieve content from the archive that may no long be in the user's inbox or file shares. SourceOne's flexible retention policies enable each company to specify policies and periods that meet their specific business needs. With the new File Restore interface introduced in Release 7.0, administrators can now restore files from the archive in groups or hierarchies as they were archived. This provides a powerful alternative to daily or weekly backups for retained data that is unchanged or infrequently modified.
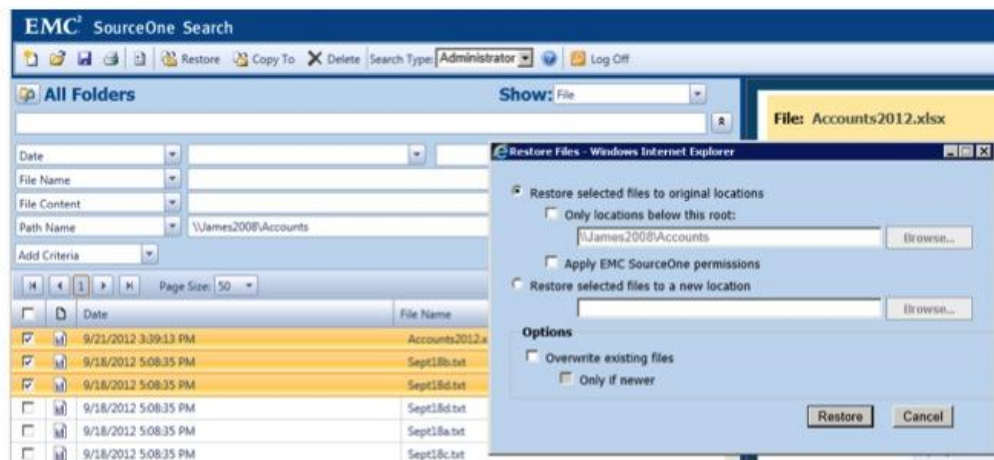
The new File restore feature is added to the standard Web Search and functions when SourceOne for File Systems Archiving is installed. This provides recovery of groups of files and file hierarchies as an alternative to backup of low change rate or no change rate data.

1

Solution Benefits

SourceOne Email Management and SourceOne for Files provide customers with the tools to address many facets of email message and file management, including the following:

Storage Growth

- Proactively manage mailbox sizes and file storage with techniques such as shortcuts to reduce the capacity burden of attachments and files on production servers while still making the content accessible to end users.

- Leverage a tiered storage infrastructure to eliminate unchanging, aged content over time on primary message and file servers, and migrate data to the appropriate storage tier based on business value.

- Reduce production storage requirements and costs for messaging and file management.

- Improve backup and recovery performance and backup media costs by reducing the amount of data to be backed up.

- Realize better, more consistent performance in production messaging environments by shrinking the size of the production environment.

- Realize better, more consistent performance in file serving & file sharing environments by shrinking the amount of data retained on production file systems.

- Accelerate message retrieval with full text indexing and advanced search filters that provide a fast, efficient search response.

Personal Archives

- Offer users a virtually unlimited mailbox through shortcutting to eliminate a root cause for users to create personal archives in the first place – restrictive mailbox quotas.

- Provide consistent access to shortcut messages whether online or offline, so users have access to content anytime, anywhere. This includes Web access clients, mobile devices, and other mail clients running against Exchange such as Microsoft Entourage for MAC users.

- Auto-locate Microsoft PST files on the corporate network and collect them in a central archive where they will be single instanced, compressed, subject to retention policies and full-text indexed for future access.

Email Retention Management

- Enforce policy-based email retention to ensure messages are retained according to corporate policies or regulatory mandate.

- Define retention policies for record-keeping to reduce the risk of fines and penalties associated with non-compliance to regulations such as Sarbanes-Oxley, SEC 17a-4, NASD 3110, HIPAA, and others.

- Eliminate risk posed by unmanaged archives by indexing and archiving PST files and Notes local archives into the central archive where they are subject to corporate retention policies.

Enable Litigation Readiness

- Capture inbound and outbound email as it is sent or received to prohibit end users from altering email prior to archiving, and to ensure a complete and accurate archive. Messages are archived in their native format.

- Capture files with specific retention and management requirements as soon as they are created to prevent deletion or alteration prior to mandated retention period end, and to ensure a complete and accurate archive. Files are archived in their native format.

- Full-text index all messages, attachments and files, including multiple layers deep, to facilitate efficient search and retrieval.

- Index and archive all distribution lists, members of the distribution list, and all alias information related to an end user as part of the email record. This ensures all relevant information about a user is archived for complete and accurate search results.

- Hold all relevant legal content in a secure archive folder for the duration of the legal matter.

Technologies Employed

SourceOne is a family of products that make information governance actionable. Its modular archiving, compliance, and e-discovery products provide actionable content intelligence while enabling common policy management and centralized information access to manage risk and ensure compliance. SourceOne products drive reduced IT costs and greater efficiencies by leveraging tiered storage and deduplication capabilities, and driving efficiency from existing infrastructure investments.

The SourceOne family:

- **SourceOne Email Management** provides all core e-mail archiving capabilities for Microsoft Exchange, IBM Lotus Notes/Domino, SMTP, and Instant Messaging systems to improve IT efficiency and reduce costs of the messaging environment, enables litigation readiness and consistently enforces retention and disposition policies to meet regulatory and/or corporate governance requirements.

- **SourceOne Email Supervisor** is an optional add-on application for SourceOne Email Management that enables users to easily monitor inbound and outbound e-mail correspondence for compliance to corporate policies, NASD regulations, and governance mandates.

- **SourceOne for Microsoft SharePoint** supports and enhances an organization's use of SharePoint by optimizing it for enhanced performance, reducing storage costs, and extending control and governance to SharePoint content without impacting the end-users' experience.

- **SourceOne File Intelligence** is an appliance-based product that offers full-text indexing information about the contents of unmanaged, file-based content as well as deep-level, rich reporting capabilities that provide actionable intelligence about the activities and resource consumption associated with targeted file content.

- **SourceOne for File Systems** is an add-on product for SourceOne Email Management and SourceOne for Microsoft SharePoint that that extends the SourceOne platform, allowing companies to add the management of unstructured content residing on file servers to their SourceOne environment.

- **SourceOne Discovery Manager** provides discovery search and secure legal hold of e-mail found in EmailXtender 4.8 SP1 and SourceOne Email Management archives.

- **SourceOne eDiscovery – Kazeon** is a solution that automates the in-house identification, collection, and preservation of unstructured content that reside on live data sources such as desktops, laptops, Common Internet File System (CIFS) and Network File System (NFS) file shares, NAS, Microsoft Exchange and SharePoint repositories, and EMC Documentum.

SourceOne Components included in the City of Columbus configuration

- **7500 licenses for SourceOne Email Management**: This provides all core e-mail archiving capabilities for Microsoft Exchange 2003, 2007, 2010 and 2013 to meet City of Columbus requirements. Licenses are based on active user mailboxes, regardless of the final architecture of the City's archive infrastructure.

- **7500 licenses for SourceOne Discovery Manager:** This provides public information search, discovery search and secure legal hold of e-mail and files found in the proposed SourceOne archive. This is an end user tool that allows the records, legal and compliance personnel to easily locate relevant information for public information requests, audit activities and data collection for legal cases. Discovery Manager is a role based product and may be secured by Active Directory roles and organization as well as individual matter scope defined by the City.

- **26 Terabytes of EMC Data Protection Suite for File and SharePoint:** This provides al functionality requested for managing unstructured file data in the City's RFP. The EMC Data protection Suite for archiving includes the following EMC SourceOne archiving components for an unlimited number of users based on the amount of data to be managed.

- o **SourceOne for File Systems** provides full retention management, preservation, shortcutting, index / search and disposition of unstructured content residing on file servers and Network Attached Storage into the City's SourceOne archive. SourceOne for Files supports ANY file systems / shares exposed as a file share. S1 for Files also Includes Item and folder level recovery from the archive.

- o **EMC Cloud Tiering Appliance / Virtual Edition** provides tiered storage management and transparent stubbing of content located on file shares presented by the City's EMC VNX Enterprise Storage platforms. The EMC Cloud Tiering Appliance Virtual Edition supports File Stubbing for EMC VNX, EMC Celerra & NetApp. It provides File Migration to EMC VNX, EMC Data Domain, EMC Centera EMC Atmos, EMC Isilon, MS Windows and other archive storage platforms. The VM version of Cloud Tiering Appliance (CTA) includes Cloud Tiering Appliance HA, a second virtual appliance that provides HA failover and other features to support tiered storage for the Enterprise.

- o **SourceOne for Microsoft SharePoint** supports and enhances an organization's use of SharePoint by optimizing it for enhanced performance, reducing storage costs, and extending control and governance to SharePoint content without impacting the end-users' experience.

  - - Includes Content externalization with MS Remote Blob Store (RBS)
  - - Includes Content archiving in S1 Repository
  - - Provides Full text search of data in the archive for end user and legal / compliance / records search.
  - - Provides item and folder level recovery from the archive into MS SharePoint repository.
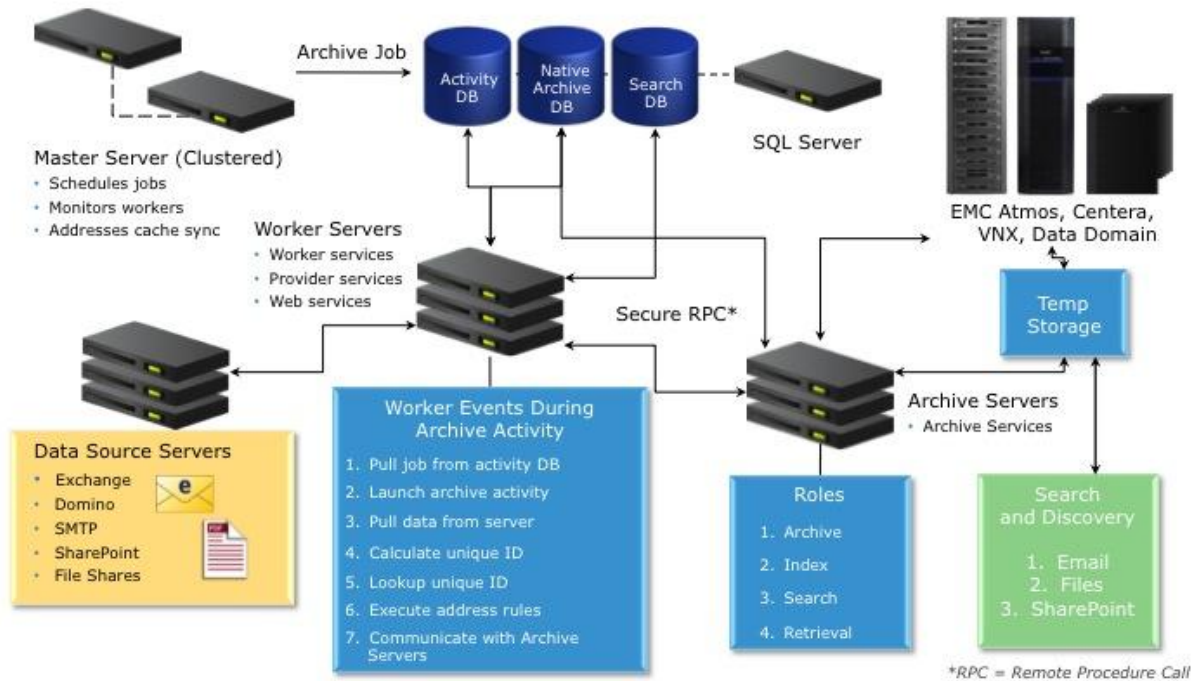
In this RFP, The City indicated a need to manage approximately 20 TB of file storage as well as a possible 600 GB of MS SharePoint data. This proposal includes enough capacity to provide for up to 25% growth for the current environment with no additional licensing required.

Product Architecture

The SourceOne architecture is based on a master-worker model and is very flexible and configurable to meet the City of Columbus' archive infrastructure needs today ad as they grow into the future. The SourceOne design provides process high-availability as part of the initial design. No additional software is required to meet high uptime requirements. The Master Server may be located on its own VM or server and clustered, or may be co-located with one of the worker server instances. Should the Master go down, it can quickly be restarted. Running tasks are not affected by a worker failure or restart, since multiple workers with similar roles can be running at the same time, and one worker will take over any requests that are scheduled in the archive environment. With multiple worker machines, tasks are distributed to any available worker with the proper roles configured and they will automatically and dynamically share the load. With this architecture, the City can easily add to your environment by simply adding additional machines.

SourceOne has been designed to run on VMware. SourceOne has been certified as "VMware Ready," which means that the product and solution category requires successful completion of specific integration and interoperability testing. You can rely on VMware-Ready products and solutions to reliably interoperable with a vSphere environment and to deliver unique features with significant value.

Let's take you through the components of the architecture and briefly explain what each component does during an archiving activity.

The Master will schedule the archiving activity—whether it is journaling, historical, PST ingestion, etc.

1. This job gets put into the activity database.

2. The Worker Servers are responsible for running the various SourceOne activities (journaling, shortcutting, historical archiving, etc.) as well as performing some front-end processing of messages.

3. At this point, the Worker Server gets busy.

4. The Worker Server pulls the job from the activity database.

5. It will launch the archive activity (journal, historical, or user-directed archive activity).

6. The Job Business Component (activity) pulls the content from the server.

7. It calculates the unique id based on the content, looks the unique ID up in the Archive database to see if it has been previously archived, and executes address rules to see if and where (which folder) to archive the content to.

8. The Job Business Component is then responsible for communicating with the Archive Server, handing the content to be archived to the Archive Server. The Archive Server can have four roles…

9. First, if the Archive Server has the archive role, it would put the content to a volume in temporary storage and then eventually it would get pushed off to permanent storage.

The other three roles or personalities that an Archive Server or servers can take on are:

10. Index. If an Archive Server has this role, it can index messages as well.

11. Search.

12. Retrieval. This is retrieving content that is shortcut or retrieving content that has been searched for and has been clicked on for viewing.
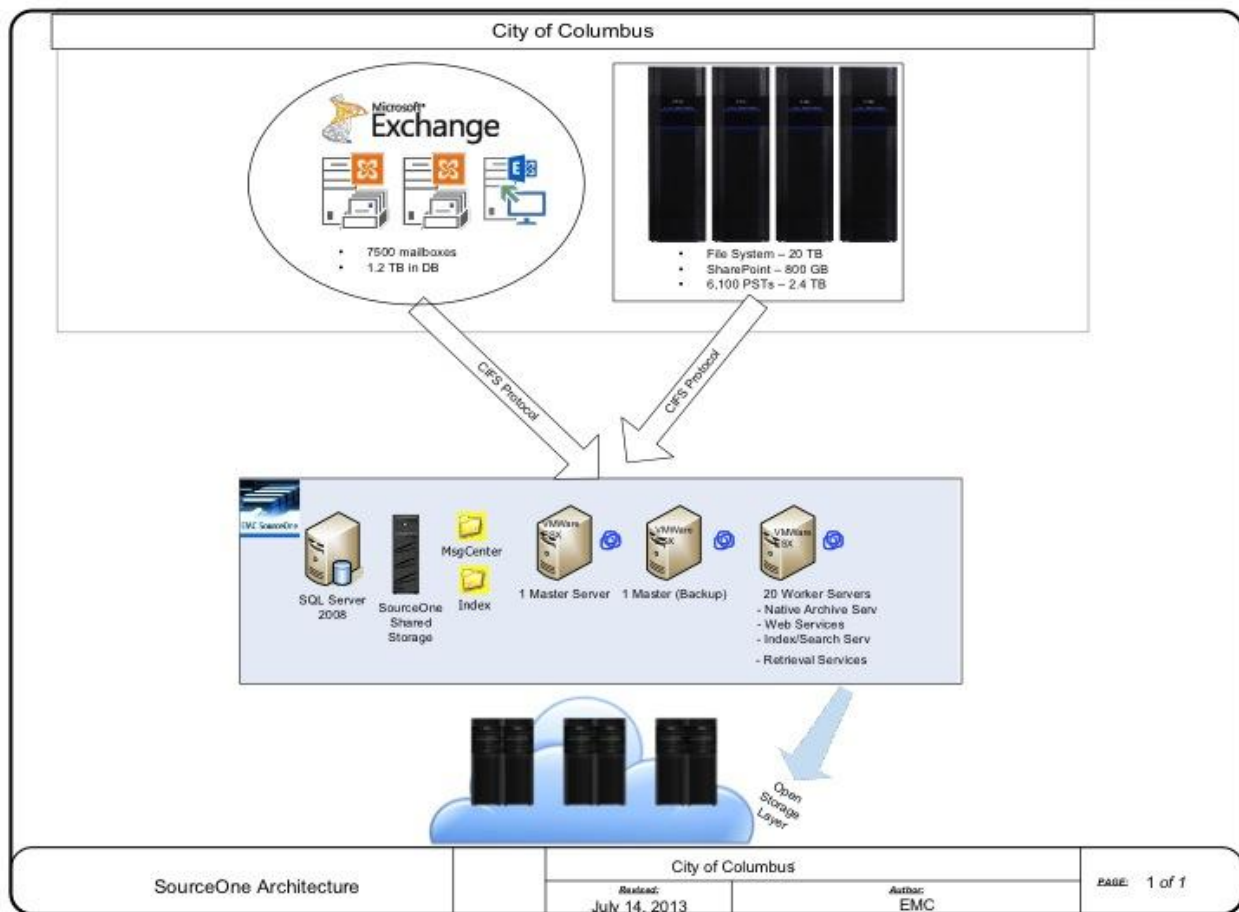
The SourceOne solution architecture for the City of Columbus will include archiving and retention for all message and file data as well as legal hold. This data will be stored in archive folders located on the current EMC VNX platforms or other current storage designated by the City. This data may be relocated to other storage platforms that may be selected by the City as part of other data storage infrastructure enhancements.

Release Versions

The current release of EMC SourceOne Email Management is version 7.01, which was released for General customer Availability (GA) in June, 2013. This version contains all functionality requested by The City of Columbus and proposed by AdvizeX / EMC in our RFP response.

The EMC SourceOne product is on a release cycle that usually includes two functionality releases as well as support pack updates for support of new technology platforms as well as bug fixes.

SourceOne Product Family – Roadmap

1H 13	2H 2013	2014
SourceOne for File Systems v6.8 GA (Mar) • Seamless Access • Index in Place **SourceOne 7.0 GA (June)** • Centralized Monitoring (MS SCOM) • Unified E-Discovery • Improved Archive Platform **SourceOne Supervisor v7.0 GA (June)** • Improved Stability • 3rd Party Certifications for client	**SourceOne v7.1** • Support Exchange/Outlook 2013, Office 2013 docs • Improved Support for Exchange 2010 • (Archive Folder support) • Enhanced Private Cloud Support • Improved Files Infrastructure • ATMOS Rest API support **SourceOne Supervisor v7.1** • Supervisor Web UI • Enhanced Review **3rd Party Certifications** • Exchange 2013 • SharePoint 2013 • Office 2013 • Outlook 2013 • Domino/Notes 9.0 • Windows 8 • Windows Server 2012	**SourceOne v8.0** • Improved Administration • Ease of install • Improved Scalability • Improved Supportability • Enhanced Virtualization Support • Integrated Web UI experience for Discovery Manager and Supervisor • Improved Reporting for Supervisor **SourceOne Big Data** • GreenPlum based scalable solution for deep analytics **SourceOne Cloud Archiving** • Hosted/off-premise archiving

NOTE: The contents and timeframes in this roadmap are subject to change without notice.

Integration, Customization & Extension

The proposed EMC SourceOne archiving and eDiscovery solution for the City of Columbus is a complete solution that does not require any customization, code modification or scripting to support the requirements set forth in the RFP. It is fully integrated product family that provides archiving & eDiscovery capabilities for Email Systems, File Shares, and MS SharePoint that can be configured using the Administration UI to tailor application behavior to the City's specific Organizational Policies. EMC provides an object interface that allows certified 3rd party development partners to provide complimentary solutions for instant messaging, social media, strict financial and regulatory supervision and other requirements.

Documentation, Customization & Extension

The EMC SourceOne documentation is composed of the following books:

◆ *EMC SourceOne Installation Guide*

Describes how to plan for and install EMC SourceOne software, including email management, SharePoint archiving, and file archiving.

◆ *EMC SourceOne Administration Guide*

Describes how to use, configure and manage the EMC SourceOne software, including email management, SharePoint archiving, and file archiving. Much of the content of this book is also available in the EMC SourceOne Console online help. This book is separated into the following parts:

Part 1: "Common Information," describes topics of use to email management, SharePoint archiving, and file archiving administrators.

Part 2: "Email Management-specific Information," describes topics that are specific to EMC SourceOne email management.

Part 3: "SharePoint Archiving-specific Information," describes topics specific to SharePoint archiving.

Part 4: "File-specific Information," describes topics specific to file archiving.

◆ *EMC SourceOne Search User Guide*

Describes how to use EMC SourceOne Search to search for content that has been archived. Much of the content of this book is also available in the EMC SourceOne Search online help.

◆ *EMC SourceOne Release Notes*

Describes supplemental information about all EMC SourceOne components, including email management, SharePoint archiving, and file archiving.

◆ *EMC SourceOne Products Compatibility Guide*

Describes the components, operating systems, and products that are supported for use with EMC SourceOne products.

Training

EMC Education Services provide technical training that develops the skills and expertise required to optimize your storage environment. Training is available in a variety of formats (classroom, video, online, on-site) to accommodate your specific requirements.

Award-winning EMC training is designed to be relevant, timely, convenient, and cost effective. Our training and certification programs help users to make the most of their infrastructure investments, including preparing them for managing data growth.

EMC Proven Professional from Global Education Services

- EMC Proven Professional is a rigorous, exam-based curriculum that validates your credentials as an Information Storage and Management Professional

- Get the most from your investment through advanced training and certification

- Gain skills for decreasing downtime, reducing support requests, and increasing productivity—while keeping up with industry-leading technologies and trends

Subject Name: EMC SourceOne Email Management   Duration: 40 hours (5 days)

Delivery Option 2: Public Classroom or Live Online virtual classroom

Included for 3 City of Columbus IT Administrators

SKU: CE-S1CLASS ($770 each, quantity of 15)

Course Description: This course provides training for administrators of the EMC SourceOne Email solution. It presents the purpose, architecture, installation and configuration of the core software. The course teaches what is required to plan an EMC SourceOne Email installation, install and configure EMC SourceOne with the targeted mail server, capture and archive email messages in the EMC SourceOne server, and to perform basic searches with EMC SourceOne. Processing PST and NSF files and troubleshooting also will be covered, along with managing workers, jobs, archives, and activities. Shortcutting and Offline access are also covered. Also included are discussions about what an administrator needs to know about installing EMC SourceOne Discovery Manager, EMC SourceOne Email Supervisor, and EMC SourceOne for File Systems companion products. The instructions involving Domino are also included. The lab exercises are based on Exchange and Native Archive until a future date.

Subject Name: EMC SourceOne Discovery Manager   Duration: 16 hours (2 days)

Delivery Option 1: Onsite Training at City of Columbus Facility

Included for up to 10 City of Columbus knowledge workers who will utilize eDIscovery search & legal hold

SKU: CE-EDISONSITE ($6000 per day, 2 days included)

Course Description: This course will provide training for end users who will utilize the SourceOne eDiscovery tool – Discovery Manager – to manage Public Information requests and litigation support. The course will teach what is required to set up a case, populate the case metadata, create new searches to collect data using keywords, date ranges, custodians lists and other information to identify relevant material. Also covered will be legal hold management and export of case / matter data for use by other legal and compliance tools. The lab exercises will be based on searching and extracting email and file data from the SourceOne Archive.

System Administration

Managing the entire Email and File archive & retention environment within the SourceOne console is simple & easy, and requires very little maintenance once the initial implementation and configuration have been completed. The administration console is a Microsoft Management Console snap-in, making it very familiar to staff that already support other Microsoft applications, such as MS Exchange. The console is used to configure and manage all SourceOne archive components, such as SourceOne Email Management, SourceOne for Files Systems and SourceOne for Microsoft SharePoint.

Central Administration
Common, mmc-snapin for all unstructured data management
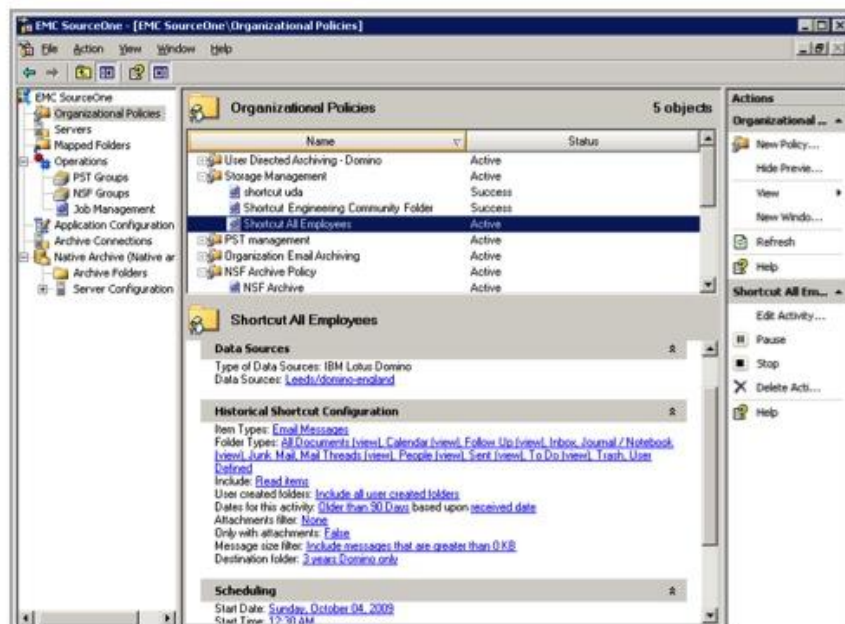
EMC SourceOne leverages existing customer investments in system monitoring & management tools. This ensures that the System performs optimally, allows for proactive management of the archive, by existing staff using their preferred tools for system management.

In SourceOne 7 EMC introduced new support for Microsoft System Center Operations Manager (SCOM).

SourceOne version 7.01 includes a Management Pack for Microsoft SCOM. This module checks the entire deployment status, monitors SourceOne key component status, collects SourceOne performance information, and notifies the administrator on exceptional conditions. Using MS SCOM, admins will be able to view the following:

– Automatically discover all SourceOne servers and installed SourceOne components
– Deployment structure status diagrams
– Alerts views
– Performance views
– State views
– Reports

SourceOne System Monitoring

- **Benefits**
  - Leverage existing investments, increase ROI
  - System performs optimally, allows for proactive management of archive
- **Provide a Management Pack for Microsoft SCOM**
- **SNMP Trap Support**
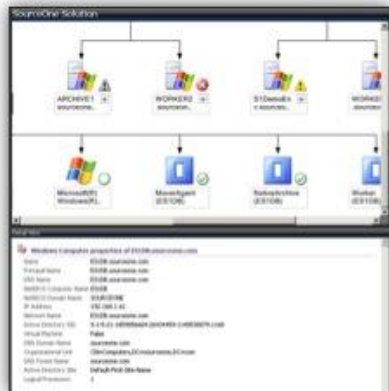
2

Management & Audit Reporting

Auditing and reporting of activities in SourceOne include the following, based on the needs of your organization. These same audited activities can be reported on by administrators and can be generated based on date/time, period of time, and Activity types. Reports will show the total number of documents received, how many are successfully archived, and how many failed to archive. In addition, you can report on Business Folder permissions changes (additions, edits, deletes), Search and View Activity, Delete Operations, and Copy To/Restore Activity.

1) **Storage Capacity Management**

There are System Management and Storage Management reports included with the system that can identify the amount of data being processed by SourceOne. An example of this is the Data Source Processing Report.

System Reports/Data Source Processing Report
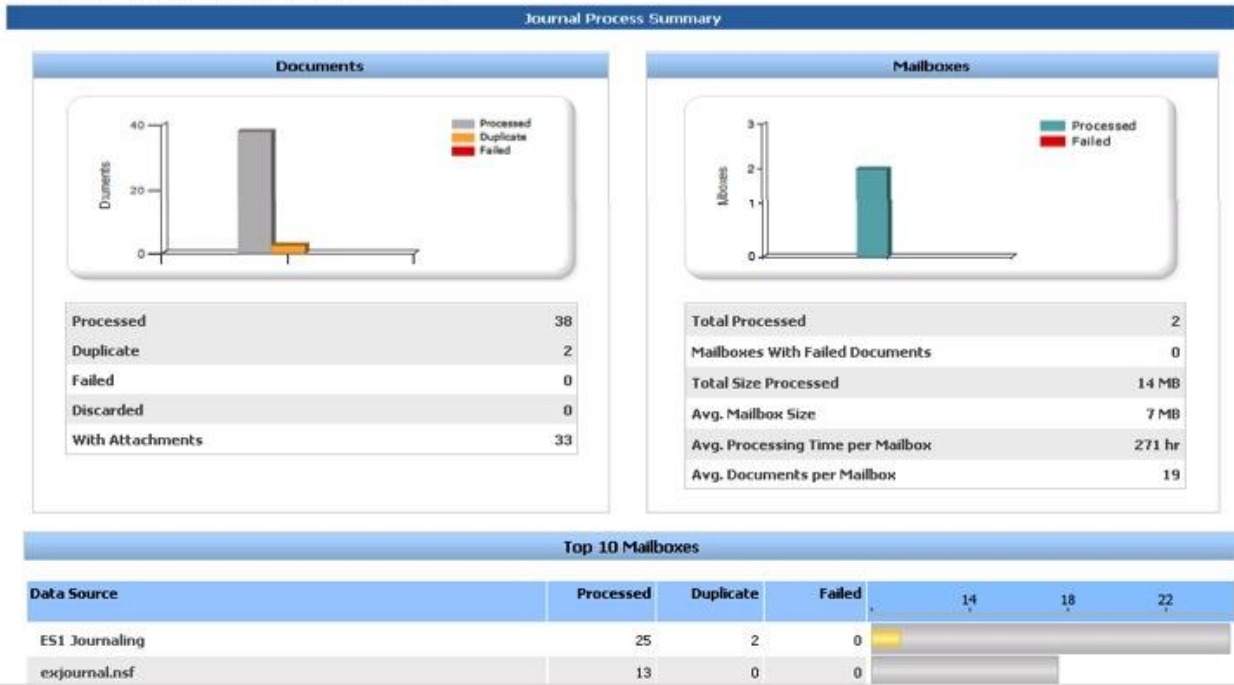
2) **Aging Reports**

There are no specific item level aging reports in SourceOne. However, the contents of individual archive folders may be inspected based on the folder retention policy, the age and population of individual archive containers, how many items have been archived into a specific retention month / year, etc. Items may also be searched by retention folder and specific creation month & year, modification date, etc.

3) **Error Reports**

Error conditions are highlighted on the Email Management Activity Dashboard. Information includes the amount of Data Processed for the cycle, the amount of duplicate data, any error conditions that were encountered, and the archive activity throughput for the period, etc. Here is an example of this dashboard.

System Reports/Email Management Activity Dashboard

4) **Auditing reports for archive search, items archived, items removed from archive, etc.**

The SourceOne solution includes many reports that provide audit information for activities performed against the archive. Audit reports include user & admin archive search, eDiscovery search, export activity. Security (folder permissions), the number of items processed per mailbox, items restored to the mailbox from the archive, and others. Deleted item reports are also provided – by default, only a system administrator with proper authentication can delete from the archive repository. Here are examples of a deleted item report and the Search Activity Dashboard.

Search Audit Reports/Search Delete Report

Date ⬍	User ⬍	Search Role	Deleted ⬍	Failed ⬍	Audited ⬍
2	1		45	0	0
⊞ 2012-05-16 15:30:16	emcadmin	Administrator	23	0	0
⊞ 2012-05-17 20:09:31	emcadmin	Administrator	22	0	0

System Reports/Search Activity Dashboard
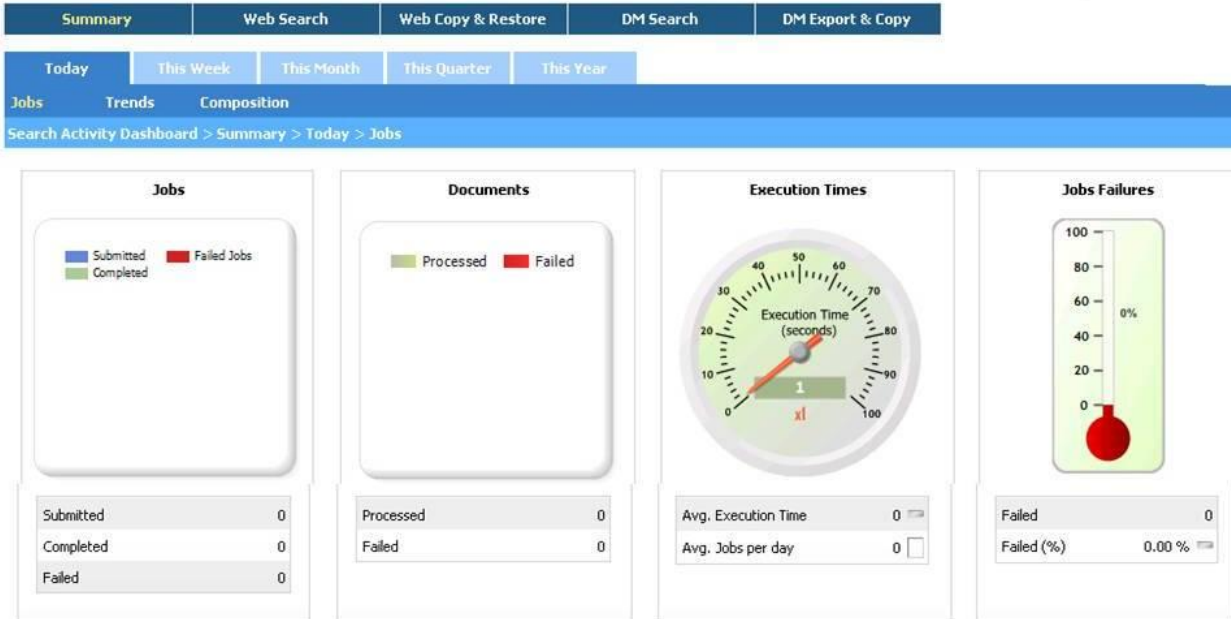
Software Support & Maintenance

EMC Support Options are your access to the industry's leading customer support experience. Backed by the trusted expertise of our global network of technical support professionals, we use proven processes and innovative service tools to help you achieve business objectives. EMC Support Options offer you three clear choices—Basic, Enhanced, and Premium—to meet a range of application and business requirements.

EMC has proposed Enhanced Software Support with this proposal, since it does not include any new hardware. This provides the best value to address the City's operational requirements:

- **EMC Basic Support Option** — Business hours support essentials, including technical support, delivery of replacement parts, rights to new software releases, and 24x7 access to online support resources.

- **EMC Enhanced Support Option** — 24x7 support for production environments, including around-the-clock technical support, next business day onsite response, proactive remote monitoring and resolution, and installation of non customer replaceable units.

- **EMC Premium Support Option** — Mission critical support for fastest resolution, including 24x7 technical support and monitoring, priority onsite response for critical issues, installation of operating environment updates, and installation of all replacement parts.

	BASIC Business Hours Support Essentials	ENHANCED 24x7 Support for Production Environments	PREMIUM Mission Critical Support for Fastest Resolution
Installation of operating environment updates			✓
24x7 remote monitoring and repair		✓	✓
Onsite response with parts installation		NBD*	24x7x4**
Replacement parts delivery	NBD	NBD	24x7x4**
Global technical support***	9x5	24x7	24x7
Rights to new releases of software	✓	✓	✓
24x7 access to online support tools	✓	✓	✓

* Non-CRU (customer replaceable units) only
** Severity 1 issues (sev 2 = within 12 hours, sev 3/4 = next business day)
*** See EMC's <u>warranty and maintenance</u> page for detailed response objectives and severity level definitions

This chart is provided for informational purposes only and shall not have any binding effect on EMC. The specific details of EMC's warranty and maintenance offerings are set forth on the applicable EMC website, currently located on the <u>warranty and maintenance</u> page, and shall control in case of any discrepancy with the information on this page.

For additional information, please consult https://support.emc.com/

5.3.2 Service Delivery Plan

EMC's approach to implementation is based on Project Management Institute (PMI) best practices. We will meet with your technical team to:

- Identify of stages in the implementation
- Define who does what and when
- Document deliverables, processes, and activities
- Establish milestones
- Provide ongoing assessment and management of risks throughout the implementation process

IMPORTANT: The Implementation Plan shown below is intended as a representative approach, and should not be construed as a Statement of Work (SOW).

EMC and AdvizeX understand that the City requires that our team will provide services to fully deploy and configure up to 100 end users in the pilot phase of the Enterprise Archive deployment. Deployment for this pilot group will include sizing, design and a deployment plan for the entire 7500 users, so that the City will be able to simply "turn on" additional resources to move from pilot to full production. This will include configuring to be able to push the SourceOne Offline Access module to the pilot workstations, setting up SourceOne activities to identify and ingest PST files for the pilot group, and knowledge transfer to the City of Columbus IT Team so that they will be able to decide which deployment activities they would like EMC / AdvizeX to manage and execute, and which they may choose to do for themselves. Based on this pilot deployment, the City will be left with a design for up to 8000 users and beyond, simple deployment strategy and a process to roll out the remaining mailbox and file archive users within the City of Columbus using either vendor resources or their own staff.

The pilot group will consist of:

- Users with Outlook 2003
- Users with Outlook 2010
- Users with Windows XP operating system
- Users with Windows 7 operating system
- Users with Windows 8 operating system
- People utilizing OWA with MS Exchange 2010 or earlier MS Exchange version.
- Users accessing email through smart phones

EMC recommends the use of MS Exchange 2010 or current City of Columbus MS Exchange version for the pilot. Once SourceOne archive and Email Management has been configured with the MS Exchange version currently in use at the City, shortcut and archive rules can be utilized for information "Spring Cleaning" and shortcutting of data to reduce the amount of mailbox items and storage required to perform the MS Exchange 2013 upgrade. EMC SourceOne currently does not support Outlook Web Access Services for Exchange 2013, and does not support MS Outlook 2013 with the current Version 7.01. This functionality will be generally available in the 4th calendar quarter of 2013. A Restricted Availability version of SourceOne V7.1 will be required if the City chooses to deploy immediately with OWA 2013 and / or MS Outlook 2013. All other capabilities of MS Exchange 2013 – journaling, historical archiving, full text and metadata search, eDIscovery, legal hold, data collection & export – are supported by S1 Email Management today, and are currently in production use at a number of SourceOne customer sites.

The timeline below highlights the milestones for your RFP # SA0005020 full implementation. Adherence to this schedule will ensure completion by the end of November.

Implementation Plan			
Planning	**Execution/Control**	**Closure**	**Signoff**
2 weeks after City Council Approval **9/30/2013**	**2 weeks after Planning begins - includes Pilot and Design for 7500 user, 20+ TB system** **10/14/2013**	**4 Weeks after Phase II Start:** **11/11/2013**	**1 Week after Phase III Start:** **11/18/2013**
• Determine engagement process • Develop project plan • Kickoff meeting • Develop test and acceptance plan	• Implementation and review meeting • Validate site • Install and configure • Deliver test and acceptance plan	• Documentation • Functional Overview • Acceptance • Coordinate project closeout	• Sign-off

Phase Definitions

- **Determine engagement process** — Develop timeline to work backward from, establish key dates, and agree upon meeting formats.

- **Develop project plan** — Collaborate and agree upon project plan details to ensure successful implementation. Generate the actual plan.

- **Kickoff meeting** — Review project scope, expectations, communication plans and availability of required resources.

- **Develop test and acceptance plan** — Develop installation and configuration requirements.

- **Implementation and review meeting** — Meeting to review products sold, delivered, and how they will be installed. Review environmental details (if not done already).

- **Validate site** — Ensure site where products will reside has proper space, flooring, power, etc.

- **Install and configure** — According to project plan, make sure the site is set with latest version and any migrations are in place to put solution into production. Check EMC support matrix and EMC tools to conform latest versions are installed.

- **Deliver test and acceptance plan** — Provide documented installation and configuration details to customer. Show test results, and with customer acceptance, installation is complete.

- **Functional overview** — Review configuration to show functional overview of tools (knowledge transfer).

- **Coordinate project closeout** — Agree to close project based upon meeting milestones.

- **Sign-off** — Final signature indicating that the project is complete.

See Appendix C: Detailed Project Plan for work effort and activities breakdown.

5.3.3 Satisfaction of Requirements

EMC has provided an electronic copy of the detailed list of requirements as well as a printed copy. Please see Appendix C: Functionality Matrix, for a printed copy of our responses.

All responses to the requirements matrix are based on current capabilities of the SourceOne Version 7.01, which has been in general customer availability since June of 2013. This solution can be implemented and configured to meet the City of Columbus requirements with no customization required.

5.4 SECTION FOUR : ABILITY

5.4.1 Workload

EMC will provide Architect, Consultant and Project Management resources from our pool of SourceOne and extended Backup & Recovery Systems technical team to meet the City's implementation timeline. Ample resources exist to complete the project, as described in section 5.2.4.

5.4.2 Financial Responsibility

AdvizeX Technologies is a current business partner with the City of Columbus and the holder of EMC UTC # BPCMP45B. This can be validated via Jim Bodi (jabodi@columbus.gov) & Chris Anelick (cdanelick@columbus.gov)

EMC is a $23B Fortune 100 Corporation (http://www.emc.com/utilities/globalsiteselect.jhtml?checked=true)

5.4.3 Disclosure

In the last 5 years , neither AdvizeX Technologies nor EMC has filed for bankruptcy or undergone the appointment of a receivership.

5.5   SECTION FIVE : PAST PERFORMANCE

AdvizeX and EMC are providing 3 Professional References for the City's Information Archive System project. EMC has completed many email archiving and eDiscovery / Public Information projects of similar scope and complexity.

Omnicare
4936 Blazer Parkway
Dublin Ohio 43017 (13,000+ SourceOne licenses deployed)
Contact Adam Barnett adam.barnett@omnicare.com

Auto Owners Insurance
6101 Ana Capri Blvd
Lansing, MI 48917 (4100 Source 1 licenses deployed)
(customer has internal compliance policies prohibiting reference or collaboration)
t
Excela Health
134 Industrial Park Road
Greenburg Pa 15601 (4500 Source 1 licenses deployed)
(pending vacation return)

Nucor Steel

912 Cheney Avenue

Marion, ohio 43302

Vic.johnson@nucor.com

AdvizeX and EMC respect the privacy and confidentiality of each and every one of our clients. EMC has an agreement with its reference customers not to disclose their contact information. The intent of this agreement is to protect their time and resources. Reference calls / meetings will be arranged by AdvizeX and EMC upon notification of selection as a finalist in the City's bid review process, or upon specific request.

5.6   SECTION SIX : COST & PAYMENT TERMS

5.6.1 Cost

EMC SourceOne Archiving & eDiscovery

	Count	Unit Cost	Year 1	Year 2	Year 3	Year 4	Year 5	Total ($)
City-provided Services and Infrastructure								
UNIX Server		$ 31,141.28	$ -	$ -	$ -	$ -	$ -	$ -
Windows/Linux Server	1	$ 7,003.15	7,003.15	$ 7,003.15	$ 7,003.15	$ 7,003.15	$ 7,003.15	$ 35,015.75
MS-SQL DB (per Processor)	1	$ 35,760.54	35,760.54	$ 35,760.54	$ 35,760.54	$ 35,760.54	$ 35,760.54	$ 178,802.70
Oracle DB (per Processor)		$ 23,360.17	$ -	$ -	$ -	$ -	$ -	$ -
Storage/Recovery (per MB)		$ 0.04	$ -	$ -	$ -	$ -	$ -	$ -
Ongoing Application Support from IT Staff (annual hours)	24	$ 161.28		$ 3,870.72	$ 3,870.72	$ 3,870.72	$ 3,870.72	$ 15,482.88
Ongoing Application Support from Functional Users (annual hours)	16	$ 126.51		$ 2,024.16	$ 2,024.16	$ 2,024.16	$ 2,024.16	$ 8,096.64
Implementation Total IT Technical Resources (hours)	40	$ 161.28	6,451.20					$ 6,451.20
Implemntation Total IT Project Management (hours)	20	$ 126.51	2,530.20					$ 2,530.20
Implementation Total Functional Users (hours)	40	$ 126.51	5,060.40					$ 5,060.40
Total City-provided Services and Infrastructure			$ 56,805.49	$ 62,700.37	$ 62,700.37	$ 62,700.37	$ 62,700.37	$ 251,439.77
Vendor-provided Services and Infrastructure								
Implementation Professional Services			$ 92,140.00					$ 92,140.00
Ongoing Professional Services				$ -	$ -	$ -	$ -	$ -
Hosting Fees (for SaaS proposals)			$ -	$ -	$ -	$ -	$ -	$ -
Software Licenses			$ 171,478.00	$ -	$ -	$ -	$ -	$ 171,478.00
Software Maintenance and Support			$ 174,531.00	$ -	$ -	$ -	$ -	$ 174,531.00
Training			$ 18,604.00	$ -	$ -	$ -	$ -	$ 18,604.00
Total Vendor-provided Services and Infrastructure			$ 456,753.00	$ -	$ -	$ -	$ -	$ 456,753.00
Total Costs			$ 513,558.49	$ 62,700.37	$ 62,700.37	$ 62,700.37	$ 62,700.37	$ 708,192.77

The EMC solution consists of software, services, and training. It enables The City of Columbus to put information at the center of business with complete protection, while making maximum use of that core asset.

All capacity and license counts are based on the quantity of users described in the City of Columbus RFP document. SourceOne Email Management and Discovery manager are licensed on a per active mailbox user basis, so adding more capacity for these products is very easy and can be done at any time, if the number of users requiring archiving changes. For file and MS SharePoint data archiving, per TB archive pricing has been included that will handle up to 26 TB without the need to add licenses. If the file storage population exceeds 26 TB, then additional capacity can be easily added in 1 TB blocks of capacity for the Data Protection Suite.

The following table summarizes costs associated with this proposal. A detailed price quote for this proposal can be found in **Appendix A: Detailed Bill of Materials.**

Purchase Price	
Software License	$171,478.00
Professional Services	$92,140.00
Training	$18,604.00
Prepaid HW/SW Maintenance	$196,275.00

Total Five Year Cost	$478,497.00

5.6.2 Payment Terms

The EMC professional services included in this proposal are fixed fee services that are normally purchased at the time of award of the contract. As services are consumed, hours will be invoiced according to Milestones established between AdvizeX and the City of Columbus.

Payment terms contracted between AdvizeX Technologies and the City of Columbus will remain at net 30 days. This will be pursuant to the EMC Source 1 licensing , training and 1 year support coverage. That dollar amount equates to $229,337.

Our professional Services fees are $92,140. AdvizeX can create a milestone payment schedule that is agreeable to the DOT / City of Columbus, once the contract is awarded.

APPENDIX A: DETAILED BILL OF MATERIALS

Line #	Qty	Product ID	Description	Total List Price (USD)	Discount	Total Deal Price
1	1	S1-DISC-MGR	S1 DISCOVERY MANAGER MEDIA KIT	0	0%	0
2	1	S1-EM-EXCHNG	S1 EM EXCHANGE MEDIA KIT	0	0%	0
3	7500	457-100-130	EMC SOURCEONE DISCOVERY MANAGER	225,000	0%	225,000
4	7500	456-102-250	S1 EMAIL MGMNT - MS EXCHANGE 5001+ USER	187,500	0%	187,500
5	2	PS-BAS-S1A2	EMC S1 EM IMPLEMENTATION: Add-on T2	11,260	0%	11,260
6	2	PS-BAS-S1DMA2	EMC S1 DM IMPLEMENTATION: Add-on T2	5,060	0%	5,060
7	1	PS-BAS-S1DMT2	EMC S1 DM IMPLEMENTATION: BASE T2	20,080	0%	20,080
8	1	PS-BAS-S1T2	EMC S1 EM IMPLEMENTATION: BASE T2	28,800	0%	28,800
9	2	CE-EDISONSITE	SOURCEONE EDISCOVERY ONSITE TRN PER DAY	12,000	0%	12,000
10	1	M-ENHSWL-002	ENHANCED SOFTWARE SUPPORT		0%	
11	10	CE-S1CLASS	SOURCEONE CLASSROOM/ONLINE TRN PER DAY	7,700	0%	7,700
12	1	S1-FILE-SYS	S1 FOR FILE SYSTEMS MEDIA KIT	0	0%	0
13	1	S1-MS-SPT	S1 FOR MS SHAREPOINT MEDIA KIT	0	0%	0
14	1	DX-WIN-FSM-S	DISKXTENDER FOR WINDOWS FILE SYS MGR	0	0%	0
15	1	S1-LS	S1 LIC SOL	0	0%	0
16	1	456-105-102	S1 CPTYBDL MS SP STORMGT PREM=UA	0	0%	0
17	1	456-105-104	S1_DISKXTENDER_FOR_WINDOWS_2TB=CA	0	0%	0
18	1	457-101-286	S1_DX_FOR_WIN_FILE_SYS_MGR_S=IA	0	0%	0
19	1	456-105-103	S1_DISKXTENDER_FOR_WINDOWS_1TB=CA	0	0%	0
20	26	456-105-093	S1 CPTY SP 26 TO 50 TB=CA	0	0%	0
21	1	456-105-100	S1 CPTYBDL EM_EXCH=UA	0	0%	0
22	26	456-105-086	S1 CPTY FILES 26 TO 50 TB=CA	0	0%	0
23	5	456-105-129	S1_DX_WIN_FSM_SERVER=IA	0	0%	0
24	26	457-101-279	S1 CPTY FILES_SP 26 TO 50 TB=CA	132,600	0%	132,600
25	1	DXWINDOWS	DISKXTENDER WIN PRODUCT LINE MEDIA KIT	0	0%	0
26	1	M-ENHSWL-002	ENHANCED SOFTWARE SUPPORT (12 months)	39,255	0%	39,255
27	1	S1-CTA-VE	S1 CPCTY BDL CTA-VE	0	0%	0
28	1	S1-CTA-VE-HA	S1 CPCTY BDL CTA-VE-HA	0	0%	0
29	2	PS-BAS-FMAVE	CTA-VE QuickStart Implementation	9,160	0%	9,160
30	1	PS-BAS-S1	EMC S1 EM IMPLEMENTATION: BASE T1	17,230	0%	17,230
31	2	PS-BAS-S1A	EMC S1 EM IMPLEMENTATION: Add-on T1	5,640	0%	5,640
			Software Summary	**$ 545,100**	**69%**	**$ 171,478**
			Services Summary	**$ 97,230**	**5%**	**$ 92,140**
			Education & Training	**$ 19,700**	**5%**	**$ 18,604**
			Prepaid SW Maintenance Summary (12 mos)	**$ 39,255**	**70%**	**$ 39,255**
			Total Price (USD) (12 mos support)			**$ 321,477**

APPENDIX B: FUNCTIONALITY MATRIX

EMC SourceOne

Score **95.61%**

Place an "x" in the one column that best describes the proposed solution.

		Importance	Fully Meets	Partially Meets	Does Not Meet	Score	Comments
1	**Data Capture**						
1.1	Does the solution offer the ability to capture all email as it is sent or received, separate from how it does or does not exist in the production data stores (similar to Microsoft Exchange Journaling features)?	3	X			3.00	EMC SourceOne Email Management supports real time capture of emails via Exchange Journaling and Envelope Journaling.
1.2	If all sent and received email can be captured, can this email be removed after a certain period of time if it has been deleted by the user?	3	X			3.00	Archived mail is normally deleted after reaching it's retention cycle and if automatic disposition is set. User delete, if desired, is a configuration option that must be set to remove messages from the archive when they are deleted from user mailboxes.
1.3	Does the solution offer the ability to capture all files stored on specified Windows servers, NAS devices, NFS file shares, etc.?	3	X			3.00	SourceOne for File and the EMC Data Protection Suite provides this capability
1.4	Does the solution offer the ability to capture all files stored on specified NAS or CIFS devices?	3	X			3.00	SourceOne for File and the EMC Data Protection Suite provides this capability
1.5	Does the solution offer the ability to capture all files stored on specified Unix/Linux server?	2	X			2.00	Files may be archived from any NFS share accessible via UNC path
1.6	Does the solution offer any third party integration with structured applications systems such as MS Dynamics or Lawson?	1			X	0.00	At this time, there is no third party integration with these applications
1.7	Does the solution offer any API for third-party or custom integrations for record archiving?	1	X			1.00	EMC SourceOne has a development partner program for 3rd parties who wish to integrate with compliance, social media and other applications.
1.8	Does the solution offer the ability to archive data in structured formats, such as SQL or Oracle databases?	2			X	0.00	EMC SourceOne does not archive data from MS SQL, Oracle or other structured data sources. There are other EMC solutions that can be added to specifically address structured DB's.
1.9	Does the solution offer the ability to exclude certain target repositories from capturing data? If so, explain how.	2	X			2.00	EMC SourceOne can exclude specific content by owner, group, folder location or other attributes.

1.10	Does the solution offer multiple layers of policy to be applied to individual or groups of target repositories?	3	X			3.00	EMC SourceOne provides this capability
1.11	Can specific files, emails, records, etc., within a specified target be excluded from archiving? If so, explain the offered exclusion levels.	2	X			2.00	The solution allows very granular archive policy configuration, for example, you may filter against item types, folders, dates, attachments, message type and size.
1.12	Can PST files be natively imported into the archive by the individual users?	3	X			3.00	PST files can be imported into the SourceOne archive for individual users and then retained or removed, depending on policy.
1.13	Does the solution provide built-in reports of data captured, expired, etc.?	2	X			2.00	SourceOne provides several system reports that display statistics about mailbox and PST processing, email management activities, and search activities for both Web Search and Discovery Manager.
2	**Data Storage and Security**						
2.1	Can archived data be encrypted at rest?	2	X			2.00	EMC SourceOne Email Management leverages a proprietary container file format and hardware level encryption to meet this requirement.
2.2	Can archived data be encrypted during transport?	2	X			2.00	Various security and encryption protocols are used during email archiving. To pull messages from the journal mailbox, SourceOne uses implicit Windows Authentication and opens a MAPI session between the SourceOne worker server and the Exchange server. To containerize the messages, a secure RPC call is made between the SourceOne worker and archive server. The RPC server only accepts calls from an authenticated Windows user, the SourceOne service account. The call must also have packet privacy enabled. By default packet privacy uses 128bit RC4 encryption
2.3	Can specific data sets be targeted for encryption in the archive?	3			X	0.00	Since hardware based encryption is utilized, specific datasets cannot be targeted
2.4	Can archived data be moved to different storage tiers or targets based on rule sets?	2	X			2.00	Archived data can be directed to different storage targets based on rule sets, such as archiving City Commissioners' email in a 5 year retention folder on WORM capable storage. Data can also be moved to different tiers based on policies such as age
2.5	Can access control be administered through Active Directory authentication?	3	X			3.00	SourceOne is fully integrated with Active Directory 2003 and above and users access the archive / web search utility using their active directory credentials.

2.6	Can the solution utilize pass-through authentication with active directory or single sign-on?	3	X			3.00	Single sign-on is configurable and utilized for users that are in the AD domain or forest.
2.7	Does the solution provide deduplication or single instance storage of data across all targets? Please explain any deduplication methods used (block, file, etc.)	3	X			3.00	EMC SourceOne Email Management supports single instancing at the software layer by maintaining a globally unique message identifier for each message and computing a SHA-1 hash algorithm standard to identify duplicates. Additionally, the solution has the ability to separate messages from attachments based on attachment size for additional hardware file level de-duplication (Centera/Celerra) and block level de-duplication (Data Domain).
2.8	Can access to broad e-discovery searches be restricted to a Active Directory group?	3	X			3.00	The SourceOne Discovery Manager is roles based - so permissions can be set to allow designated AD users and groups search rights
2.9	Can access controls be segregated by Active Directory group?	3	X			3.00	SourceOne leverages active directory user and group permissions to set access at the mapped folder level
2.10	Does the solution support nested Active Directory group authentication?	2	X			2.00	SourceOne supports nested AD group authentication in single forest and resource forest topologies.
2.11	Can e-discovery searches be restricted to specific data sets based on attributes?	3	X			3.00	EMC SourceOne address rules can be used with applications that assign custom metadata to email messages. For example, you can specify that messages with the department attribute field set equal to a value of "HR" should match the rule and be directed to a separate archive folder. You can then designate this as a search folder within a Discovery Manager matter and assigned a role with permissions to search.
2.12	Can access controls authenticate to multiple Active Directory domains?	1	X			1.00	Users can be authenticated into multiple domains to maintain separation of management and resources.
2.13	Can offline storage such as tape or optical disk be used for long term retention?	1	X			1.00	EMC SourceOne integrates with DiskXtender for Windows fileserver archiving and provides for storage tiering to offline media. The standard way that SourceOne is deployed is to utilize online, tiered storage.
2.14	Are archived items stored in a native file format?	2	X			2.00	EMC SourceOne preserves native file formats inside of the SourceOne email archive.
2.15	Are archived items stored within a structured database (i.e., BLOB)?	2		X		1.00	The original messages, attachments, files, etc. are all stored in their native form in container files based on retention folder properties. Metadata information is stored in the MS SQL database

2.16	Can archived items be easily restored to the original location? If so, explain the process?	3	X			3.00	The EMC SourceOne solution easily allows end-users to search the archive for their own email and file data and retrieve and restore to their own mailbox or the original location on the file system. Administrators have the capability to search across all archived data and specify restore locations.
2.17	Does the solution support direct attached storage?	1	X			1.00	Yes, the EMC SourceOne solution can utilize direct-attached storage platforms as archive repositories. However, most customers utilize some type of networked storage for this purpose.
2.18	Does the solution support network attached storage or NAS devices?	3	X			3.00	Yes, EMC SourceOne supports this storage option
2.19	Does the solution support SAN attached storage through iSCSI or Fiber Channel?	2	X			2.00	Yes, EMC SourceOne supports this storage option
3	Retention Policies						
3.1	Can expiration of data be set on multiple attributes, not just date (i.e., x days since accessed)?	3	X			3.00	SourceOne automatically disposes of any content in an archive folder that is older than the specified number of months.
3.2	Can archived data be automatically deleted upon expiration?	3	?			3.00	SourceOne Email Management can automatically dispose of expired emails using Automatic Disposition. SourceOne creates a Windows Scheduled Task to check for expired data in the archive folder at the regularly scheduled intervals. When expired data is discovered, the message metadata, full-text indices, and container files for that data are deleted from the environment.
3.3	Can users be notified of data expiration?	2			X	0.00	SourceOne has no user notification for data expiration. Data is expired for all relevant data based on City policies.
3.4	Can users elect to keep expired data for an extended period of time with user intervention?	1	X			1.00	Before automatic disposition is effected, users may elect to extend retention by directing messages to a particular mail folder with a longer retention cycle
3.5	If expiration policies can be extended, can a maximum extension time be set by administrators?	2	X			2.00	Users may select retention by directing messages to a particular mail folder. The administrator controls the retention of that data through folder policies.
3.6	Can custom retention periods be specified based on attributes, such as author, location created date, or modified date?	3	X			3.00	The solution provides for retention periods to be set based on business rules using metadata such as sender, recipient, to/from a specific distribution list, or external domain, with specific words in the subjects or messages with custom metadata

3.7	Can retention policies be set for individuals, groups, teams, departments or the entire organization?	3	X			3.00	See response to 3.6
3.8	Does the solution allow for retention of emails, files, etc., for employees who are no longer with the company?	3	X			3.00	Access can be granted through delegate permissions
3.9	Are retention and archive policies layered so that multiple policies may apply to an individual mailbox, file share, or web site? If so, briefly explain how policies are applied.	2	X			2.00	When multiple archive and retention policies apply to the same dataset, the most conservative apply.
3.10	Are changes to retention policies auditable and logged?	3	X			3.00	EMC SourceOne Email Management provides system configuration reporting and auditing.
4	eDiscovery and Search						
4.1	Does the solution allow for delegated searches based on access controls? For instance, can someone in Finance be set to only search Finance data?	3	X			3.00	Data can be organized by department into specific archive folders and the Discovery Manager role set to allow designated AD users and groups search rights to only those folders
4.2	Does the solution allow the administrator to delegate the ability to place items on a legal hold?	2	X			2.00	Yes, using the SourceOne Discovery Manager User Interface
4.3	Does the solution allow a user to export items from the archive to native or standard formats? Please list all data formats.	3	X			3.00	Export formats include PST, NSF, TSV, CSV and EDRM.XML
4.4	Does the solution audit and keep records of all searches, legal holds, or data exports?	3	X			3.00	SourceOne Email Management tracks all search and hold operations.
4.5	Can items be placed on a legal hold through a bulk selection based on attributes, such as group, department, or multiple individual selection?	3	X			3.00	The SourceOne Discovery Manager search and review process provides for bulk selection
4.6	Based on searches performed, are individual messages visibly flagged when placed on a legal hold?	1	X			1.00	Provided in Discovery Manager solution
4.7	Are users aware when their items have been part of a search or legal hold? If so, how are they notified?	1	X			1.00	There is no visible indication (tag, etc.) in the file folder or mailbox that a Discovery search has been performed or that items have been put on legal hold. Legal hold notifications are an option available with EMC SourceOne Kazeon eDiscovery Legal Hold Notifications module.
4.8	For data extraction, does the solution allow for any redaction of sensitive information?	2	X			2.00	EMC SourceOne works with industry standard redaction tools to allow for redaction of sensitive information. Information can also be tagged in the matter management application for exclusion from a case due to sensitivity, privilege, etc.

4.9	Are search indexes generated automatically?	2	X			2.00	Messages captured by SourceOne are full text indexed. Once the indexing has occurred, messages may be searched by SourceOne Supervisor, Discovery Manager or Web Search.
4.10	Can multiple indexes be set on archived data for searching?	2	X			2.00	Yes
4.11	Does the solution allow for multiple search criteria to be used, including date, sender, recipient?	3	X			3.00	Yes
4.12	Does the solution include a full text search of email attachments?	3	X			3.00	Yes
4.13	Does the solution allow for searches within email attachments only, as needed?	2	X			2.00	Yes
4.14	Does the solution support Boolean logic searches?	2	X			2.00	Yes
4.15	Does the solution allow for searching based on email message header information?	2	X			2.00	Yes
4.16	Does the solution allow for wildcard searches for both target mailboxes and search criteria?	3	X			3.00	Yes
4.17	Can search results be ordered by all defined attributes?	2	X			2.00	Yes
4.18	Can search results be grouped by all defined attributes?	1	X			1.00	Yes, using the SourceOne Discovery Manager UI
4.19	Does the solution provide built-in reports of legal holds, searches, exports, etc.?	2	X			2.00	Yes, using the SourceOne Discovery Manager UI and also through the SourceOne reports menus
1.5	Infrastructure						
5.1	Are there existing installations of the solution that currently support at least 8000 mailboxes and 12 TB of file storage?	3	X			3.00	Yes. The largest SourceOne email Management customer has roughly 200,000 mailboxes under management. Data Protection Suite customers may have hundreds of TB's of file storage under management.

5.2	Are their redundancy options available for the solution (i.e., load balancing, cluster, etc.)? If so, please briefly explain.	2	X			2.00	SourceOne is written in Visual C++, utilizing the .NET framework and ASP.NET therefore leveraging the inherent object oriented and highly available aspects of this development environment and web based environment. The role-based, master/worker architecture enables surviving workers to take over for failed workers inherent in SourceOne design. There is one master that can be clustered for automated failover and multiple workers performing different roles.
5.3	Does the solution run on the Windows 2008 R2 or higher?	3	X			3.00	SourceOne is certified to run Windows 2008 R2 server. Please consult the SourceOne Compatibility Guide for list of latest supported platforms
5.4	Does the solution utilize standard MS-SQL or Oracle relational databases for its operation? If so, list compatible databases.	3	X			3.00	SQL server is utilized by the solution to house the activity, search and native archive databases.
5.5	Can the solution be installed on virtual servers utilize VMware?	3	X			3.00	EMC SourceOne is fully supported in VMware environments
5.6	Is the solution able to take advantage of standard VMware features such as vMotion and High Availability?	3	X			3.00	Yes.
5.7	Does the client interface operate natively through a Internet Explorer or Google Chrome?	3	X			3.00	The EMC SourceOne Web Search is supported on MS Internet Explorer versions 6.0, 7.0, 8.0 & 9.0. Please consult the SourceOne Compatibility Guide for updated certified product versions.
5.8	Does the solution support Microsoft Exchange 2013, 2010, and 2007?	3	X			3.00	Yes. Please consult the SourceOne Compatibility Guide for updated certified product versions.
5.9	Does the solution support Microsoft SharePoint 2013, 2007, and 2003?	3	X			3.00	Yes. Please consult the SourceOne Compatibility Guide for updated certified product versions.
5.10	Does the solution support access through Outlook 2013, 2010, and 2007?	3	X			3.00	Yes. Please consult the SourceOne Compatibility Guide for updated certified product versions.
5.11	Can the solution be backed up through industry standard methods and software packages such as Symantec Netbackup?	3	X			3.00	Yes
5.12	Can granular backups and restores be performed down to the item level?	2	X			2.00	Yes.
5.13	Can items be restored from backup to an alternate location?	2	X			2.00	Yes, information may be restored from the archive to an alternate mail folder, mailbox, file share location, etc.

5.14	Does this solution provide for availability and access even when the native applications (i.e., Exchange, SharePoint, files systems) are not available?	3	X			3.00	Yes
5.15	Can all data be bulk exported into native data formats and locations back to the original target locations (or alternate locations)?	2	X			2.00	Yes
5.16	Does the solution include built-in reports for managing capacity, incidents, etc.?	3	X			3.00	Yes. System reports allow an administrator to identify performance issues with a single glance.
5.17	Does the solution include any dashboard capabilities for administrators to monitor and support the solution?	1	X			1.00	SourceOne Activity Dashboard provides a summary view into the health of your Email Management system.
5.18	Does the solution support syslog or Windows Event monitoring standards?	1	X			1.00	Yes - can we provide event monitoring example/picture?
6	**Cloud**						
6.1	Are cloud-based or hybrid solutions available?	1	X			1.00	
6.2	Are service level agreements established for at least 99.9% availability?	2	X			2.00	EMC hosting partners provide service level uptime to meet enterprise requirements.
6.3	Can the solution be hosted in the cloud, and then migrated to a completely on-premise solution later?	2	X			2.00	
6.4	Are no cost processes in place to migrate from cloud to on premise if needed?	2	X			2.00	Migration options from cloud to on-premise are available through EMC hosting partners
6.5	Are all archived files provided in native format with all metadata if service is cancelled?	2	X			2.00	
7	**User Interface**						
7.1	Does the solution work without software installation or web browser plug-ins?	3	X			3.00	Yes
7.2	Is archive data available through directly through Microsoft Outlook (not a redirected web page)?	3	X			3.00	Yes
7.3	Does the solution provide the ability to replace archived data with a link or "stub" for all items?	3	X			3.00	Yes

7.4	For email archiving, does the solution allow the user to open the archive as another set of folders, similar to accessing a different mailbox or PST file?	3		X		1.50	The EMC SourceOne archive is accessible using HTML based shortcuts or through the SourceOne Web Search user interface
7.5	Are selected archived items returned in full to the user in under 10 seconds?	3	X			3.00	Yes
7.6	Are archived items returned in the native format and programs when opened?	3	X			3.00	Yes
7.7	Are archived mailbox items available via Microsoft Exchange OWA?	3	X			3.00	The EMC SourceOne Web services allow EMC SourceOne to support Web-based components, such as EMC SourceOne Search and the Outlook Web Access (OWA) mail client
7.8	Are archived mailbox items available via mobile devices utilizing Microsoft ActiveSync?	1	X			1.00	Yes. All mobile device support of email is done via the mobile device's native connectors to Exchange. EMC SourceOne Email Management does not require any software be installed on the mobile device.
7.9	Can individual users mark items to be archived themselves?	2	X			2.00	Yes, by dragging email messages or files to a user-directed archive folder or IT designated Outlook folder file directory / folder.
7.10	Can individual users mark items to not be archived?	1	X			1.00	Yes, by dragging email messages to a "do not archive" message folder.
7.11	Does the solution interface with any third-party software for integrating searches and archived data access, such as SharePoint, ProLaw, Lawson, etc.?	1	X			1.00	We integrate with any search tools that can access a PST file, XML file, CSV, TSV file format; we can also integrate with other legal apps like Concordance, Summation, RingTail and others using formatted load files.
7.12	Can individual users permanently delete items or mark items for deletion from the archive, utilizing native interfaces such as Microsoft Outlook or Windows Explorer?	2	X			2.00	Yes, user delete is supported using standard Microsoft Windows and Outlook interfaces
8	**Training and Support**						

8.1	Are different support options offered (i.e., 24x7x365, 8x5x5, etc.)?	3	X			3.00	EMC Support Options are your access to the industry's leading customer support experience. We use proven processes and innovative service tools to help you achieve business objectives. EMC Support Options offer you choices— Enhanced, and Premium—to meet a range of application and business requirements. Select the EMC Support Option that provides the best value to address your operational requirements: EMC Enhanced Support Option — 24x7 support for production environments, including around-the-clock technical support, next business day onsite response, proactive remote monitoring and resolution, and installation of non customer replaceable units. EMC Premium Support Option — Mission critical support for fastest resolution, including 24x7 technical support and monitoring, priority onsite response for critical issues, installation of operating environment updates, and installation of all replacement parts Designated Support Engineer - An EMC Designated Support Engineer (DSE) is your central point of contact who provides scheduled technical support reviews, priority case handling, and issue escalation for a specified product.. Consider this higher level of support for any software or hardware product that is critical to your ability to conduct business. Your DSE delivers: Fast issue resolution —Benefit from a single, direct point of contact who is familiar with your environment. Increased productivity —Get a high level of knowledge transfer to your IT staff. Customized support —Leverage informed strategic planning and recommendations based on your specific business requirements. Coordinated training efforts —Enable better coordination of all training efforts with monthly reports related to all activities involving technical issues.
8.2	Are on-site training classes offered?	1	X			1.00	EMC Education Services provides technical training that develops the skills and expertise required to optimize your storage environment. Training is available in a variety of formats – classroom, video, online, on-site – to accommodate your specific requirements
8.3	Are remote or online training classes offered?	3	X			3.00	EMC Education Services provides technical training that develops the skills and expertise required to optimize your storage environment. Training is available in a variety of formats – classroom, video, online, on-site – to accommodate your specific requirements

8.4	Are there free or low-cost CBT or video based training options available for end users?	2	X			2.00	EMC Education Services provides technical training that develops the skills and expertise required to optimize your storage environment. Training is available in a variety of formats – classroom, video, online, on-site – to accommodate your specific requirements
8.5	Are significant software updates released on a regular basis, at least yearly?	2	X			2.00	EMC typically presents major release and service patches every 6-9 months. Each major release is preceded by a 3 month Controlled Release with a small EMC customer group before being made available for General Release.
8.6	Do you have an on-line knowledge base accessible to customers?	2	X			2.00	Yes, the on-line knowledge base is available to customers with current support contracts at https://support.emc.com
8.7	Are there any established user groups or peer support structures for the solution?	2	X			2.00	Yes, including interest group sessions at EMC World user events

APPENDIX C: DETAILED PROJECT PLAN

Total available hours for the following standard PS packages: EMC S1 EM IMPLEMENTATION: BASE T2 + add-ons for users over 6000, EMC S1 DM IMPLEMENTATION: BASE T2 + add-ons for users over 6000, and SourceOne for files Initial install + add-on hours for additional users & capacity	Project Manager	Technology Consultant	Solutions Architect	Implementation Specialist	Total Billable	Comments for Users
Phase I: Planning and Design	**29.00**	**0.00**	**73.00**	**4.00**	**106.00**	
1.1 **Perform Project Planning**	20.00				20.00	Project planning for deployment of 7500 Email Management clients, 7500 Discovery / public information search mailboxes and 20+ TB of File Management and archiving
1.2 **Conduct External Customer Kickoff Meeting**	2.00		2.00	2.00	6.00	City staff communications & involvement for information gathering
1.2.1 Introduce the Professional Services PM and the Engineering Team						
1.2.2 Establish a Communication Plan						
1.2.3 Verify the Customer Contact Information, Including Roles and Responsibilities						
1.2.4 Define the Customer's Email and Computer Policies				2.00		
1.2.5 Review the Project Scope and Customer Expectations						
1.2.6 Review the Project Plan and Activities Schedule with the Customer						
1.2.7 Confirm the Installation Date and Implementation Schedule						
1.3 **Perform SourceOne Planning & Design**			28.00		28.00	overall infrastructure design for deployment; adds to specific info gathering and validation for Email, Files & eDiscovery
1.3.1 Gather Customer Environment Information for Planning and Design for Email Management	3.00		8.00		11.00	
1.3.2 Gather Customer Environment Information for Planning and Design for eDIscovery	2.00		8.00			
1.3.3 Gather Customer Environment Information for Planning and Design for File archiving	2.00		8.00			
1.3.4 Plan the Customer Environment Solution						
1.3.5 Identify all Configuration Parameters Required for the Solution						
1.3.6 Verify the *Test Plan* to Validate the Design			8.00		8.00	
1.3.7 Draft a *Configuration Guide* to Document the Proposed Architecture			11.00		11.00	
Phase II: Implementation and Testing	**26.00**	**0.00**	**0.00**	**132.00**	**158.00**	
2.1 **Install SourceOne Core Software**	4.00			37.00	41.00	Overall implementation activities for archive foundation
2.1.1 Configure Anti-Virus software to work with SourceOne Components						
2.1.2 Install SourceOne Databases on the SQL Server						
2.1.3 Install the Master Service						
2.1.4 Install the Console Application						
2.1.5 Install the Worker Service						
2.1.6 Install the Web Service						
2.1.7 Install the Search Application						
2.1.8 Install the Native Archive Service						
2.1.9 Install the Mobile Services						
2.1.1 Install the OWA Extensions for 2003/2007						

		Project Manager	Technology Consultant	Solutions Architect	Implementation Specialist	Total Billable	
0							
2.1.11	Install the Add-in for Outlook						
2.1.12	Install the SourceOne Discovery Manager Package						
2.1.13	Install the SourceOne Discovery Manager SQL Server Databases						
2.1.14	Install the SourceOne for Files package				10.00		
2.2	**Configure SourceOne Core Software**	4.00			37.00	41.00	Overall Configuration activities for Archive policies and testing
2.2.1	Configure SourceOne for an Exchange Active Directory Environment						
2.2.2	Configure PST Processing across Active Directory Forests				6.00		
2.2.3	Connect the SourceOne system to the Native Archive						
2.2.4	Configure the SourceOne System to the Native Archive						
2.2.5	Configure/Associate Mapped Folders with the Native Archive						
2.2.6	Configure Worker Service						
2.2.7	Configure Web Service						
2.2.8	Create Organization Policies to Group Related Activities						
2.2.9	Configure Rules and Activities to Journal and Archive Email						
2.2.10	Configure Native Archive to Archive Messages						
2.2.11	Configure Native Archive to Index Messages						
2.2.12	Configure the SourceOne Discovery Manager Package						
2.2.13	Connect the SourceOne Discovery Manager to the Native Archive				4.00		
2.2.14	Configure the SourceOne Discovery Manager to the Native Archive				4.00		
2.2.15	Configure/Associate Mapped Folders with the Discovery Manager				4.00		
2.2.16	Configure file share data sources				6.00		
2.2.17	Configure policies and business rules with SourceOne for Files				8.00		
2.5	**Perform the Required Tests using the *Test Plan***	18.00			16.00	34.00	Testing of all components, policies, data access & reporting functionality for Email, Files & eDIscovery
Phase III: Documentation, Functional Overview, and Acceptance		**12.00**	**0.00**	**0.00**	**21.00**	**33.00**	
3.1	**Finalize and Submit all Project Documentation**	4.00			8.00	12.00	
3.2	**Conduct *Functional Overview***				10.00	10.00	
3.3	**Conduct Project Closeout, Review, and Sign-Off**	8.00			3.00	11.00	
3.3.1	Conduct a Post-Implementation Customer Meeting						
3.3.2	Obtain Sign-Off on the *Project Completion Form*						
3.3.3	Review the EMC CSAT Process and Obtain Customer Feedback						
	Total Estimated Billable Hours	**67**	**0**	**73**	**157**	**297**	

APPENDIX D: ADDITIONAL REFERENCES

EMC respects the privacy and confidentiality of each and every one of its clients. EMC has an agreement with its reference customers not to disclose their contact information. The intent of this agreement is to protect their time and resources. When/if The City of Columbus needs to speak with our customers EMC will arrange contact at that time, depending on customer availability. We provide these references in addition to those requested in the City's RFP, as additional confirmation of EMC experience with information archiving and our SourceOne Family of products.

The following customers have all had excellent experiences with EMC products and services included in this RFP response:

Customer References		
Nucor Steel	Charlotte, NC	Over 10,000 EMC SourceOne Email Management and Discovery Manager licenses
Memorial Health	Miramar, FL	Over 13,000 EMC SourceOne Email Management licenses

APPENDIX E: SUPPORTING DOCUMENTS

Information contained in this Appendix is provided in support of the solution proposed in this document.

Product Collateral

EMC SourceOne Archiving Family of Products

EMC SourceOne Email Management for Microsoft Exchange

http://www.emc.com/collateral/software/data-sheet/h2859-cloud-tiering-appliance-ds.pdf