

PROPOSAL

**RFP No. 23-086-IT INFOR LAWSON
SERVER MIGRATION**

Prepared for: THE COUNTY OF DUPAGE



Prepared by:

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7/24/2023

intellias[®]



Anthony McPhearson
Information Technology Department
421 North County Farm Road
Wheaton, IL 60187

Re: RFP No. 23-086-IT INFOR LAWSON SERVER MIGRATION
Date of Submission: July 24, 2023

Dear Anthony,

Thank you for considering Intellias, Inc. for your Infor/Lawson consulting needs. We are pleased to present you with a solution for your Infor Lawson Server Migration. We have a clear understanding of your system environment and specific requirements for this effort, based on the received RFP and associated addenda, and look forward to the opportunity to work with The County of DuPage, IL ("DuPage County").

With an established Infor Alliance partnership and experience completing multiple server migrations (both from Windows 2008 to 2012 and Windows 2012 to 2019), Intellias understands both the importance of this initiative as well as the sensitive timeline. Our team will utilize our knowledge of Infor applications, our experience with similar migrations, and a thorough understanding of DuPage County's requirements to develop a comprehensive solution that meets your organizational needs.

Intellias believes in the importance of fully understanding goals and investigating challenges to deliver innovative, cost-effective results. We work closely with our clients to develop a true partnership, enhancing our ability to deliver successful projects.

As of the date of this response submission, Intellias has twenty-four (24) server 2012 to server 2019 upgrade/migration projects underway and/or completed. Our team of technical consultants have encountered a variety of configurations and functional requirements and have delivered successful results for each client. We are confident we can achieve this same success with the server migration for DuPage County.

If you have any questions regarding this proposal, please don't hesitate to reach out to the primary contact for this response.

Primary Contact:

Chandra Herrin, Director - Business Development
cherrin@intellias.net
303-905-6846

Thank you,



Chad Mitchell
President



Firm Qualifications

As a member of Infor's Alliance Partnership Network, Intellias provides Infor consulting services, including Implementations, Business Application Consulting, Technical Services & Upgrades, and Cloud Migrations. We are fully certified and bring the expertise, knowledge, and professionalism our clients expect from a trusted partner.

Intellias has over twenty (20) years of experience working with Infor applications and 25 full-time employees dedicated to delivering high-quality solutions. We are headquartered in Farmers Branch, TX, (Dallas area), with an office in Chicago, IL, and remote-based consultants located across the country. Intellias will tap into expertise from resources who have completed multiple migrations from Server 2012 to Server 2019 to complete DuPage County's server migration.

The proposed project lead, TJ Mann, has been involved in almost all of our 20+ server migration projects. He's highly skilled in working with the technical aspects of Infor Lawson applications and is extremely efficient in completing server migration efforts.

He reports up to Rob Flannery, VP of Services, who has extensive experience working with DuPage County. Rob will be lending his knowledge of your organization and expertise in Lawson applications to help ensure a successful project.

The project team will also feature a project manager to manage communication, the project plan and timeline, and oversee the successful completion of each deliverable. More information on the proposed team can be found in Section 3 – Key Qualifications.

Intellias has partnered with DuPage County on multiple initiatives leading up to this engagement, including the server migration from Windows 2008 to Windows 2012 (partnered with/subcontracted by Cherry Road for this effort). With respect to migrations from Windows 2012 to Windows 2019, we have successfully completed twelve (12) projects with an additional twelve (12) in progress.

Additionally, Intellias has served as a leader in the Infor space in providing informative content since the announcement of the decommissioning of Windows 2012, as well as strategic planning support for clients seeking an understanding of version compatibilities and support timelines. Our latest webinar on the topic ([Infor Lawson System Upgrades Requiring Immediate Action](#)), as well as our entire [YouTube library](#) allows for further exploration and validation of our knowledge on the subject.

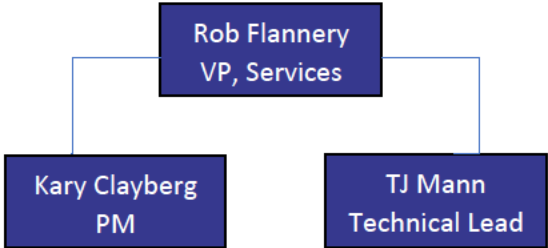
As mentioned above, Intellias has experience working with DuPage County to provide Infor Lawson technical expertise. Additionally, we have worked multiple public sector entities on various engagements over the past 5+ years including:

- City of St Charles, IL
- City and Borough of Juneau, AK
- West Basin Municipal Water District
- Chicago Housing Authority
- Fresno Unified School District
- Community Unit School District 300 (Algonquin, IL)
- Atlanta Public Schools
- ISO New England

Client References	
Client & Contact Info	Engagement Profile
City of St Charles Penny Lancor Manager, Enterprise Applications Ph: 630-762-7089 E: plancor@stcharlesil.gov	Server Upgrade/Migration in progress. Also previously completed: <ul style="list-style-type: none"> - Implementation of Infor’s SSO solution (AD FS) - BSI Upgrade - Crystal Server Upgrades - Multiple other technical projects
City & Borough of Juneau Chris Murray Director, IT Ph: 907-586-5295 E: chris.murray@juneau.gov	Server Upgrade/Migration from 2012 to 2019 in progress. Also previously completed the implementation of Infor’s SSO solution (AD FS) and updated user interface (Infor OS). Similar to server upgrades, allowed client to maintain compliance/support and utilize new functionality.
West Basin Municipal Water District Isaiah Suarez IT Supervisor Ph: 310-660-6254 E: isaiahs@westbasin.org	Server Upgrade/Migration from 2012 to 2019. Implementations of EMSS and Requisitions functionality, as well as general support.


Key Qualifications


Intellias has a technical team of resources featuring experts dedicated to server upgrade projects. For the DuPage County migration project, Intellias proposes the following team and project structure. The Technical Lead resource proposed in this response has extensive experience leading server upgrade projects and is available to complete this effort by October 2023 or as close to the deadline as possible.




From a project structure standpoint, the PM will provide regular status updates that include deliverable progress and budget monitoring to ensure our team is completing the effort on time and on budget. As reflected in the organizational chart above, all roles involved in this project report to Rob Flannery. Not only do our resources have a direct line of communication to internal leadership, but if at any point the project requires executive escalation, Rob Flannery will actively engage to resolve any issues.

Team Member Profiles

	<p>Rob Flannery Role: VP, Services Location: Chicago, IL Years of Experience: 10 Years with Intellias: 6 Clients Currently Assigned: n/a</p>	<p>Area of Expertise/Responsibility: Rob will serve as the Point of Escalation and provide background of the technical environment, ensuring success on this project. He has extensive experience with all aspects of the Infor suite of products, including server upgrades. In addition, due to his previous undertakings with DuPage County, Rob has more in-depth knowledge of the system landscape and team requirements.</p>
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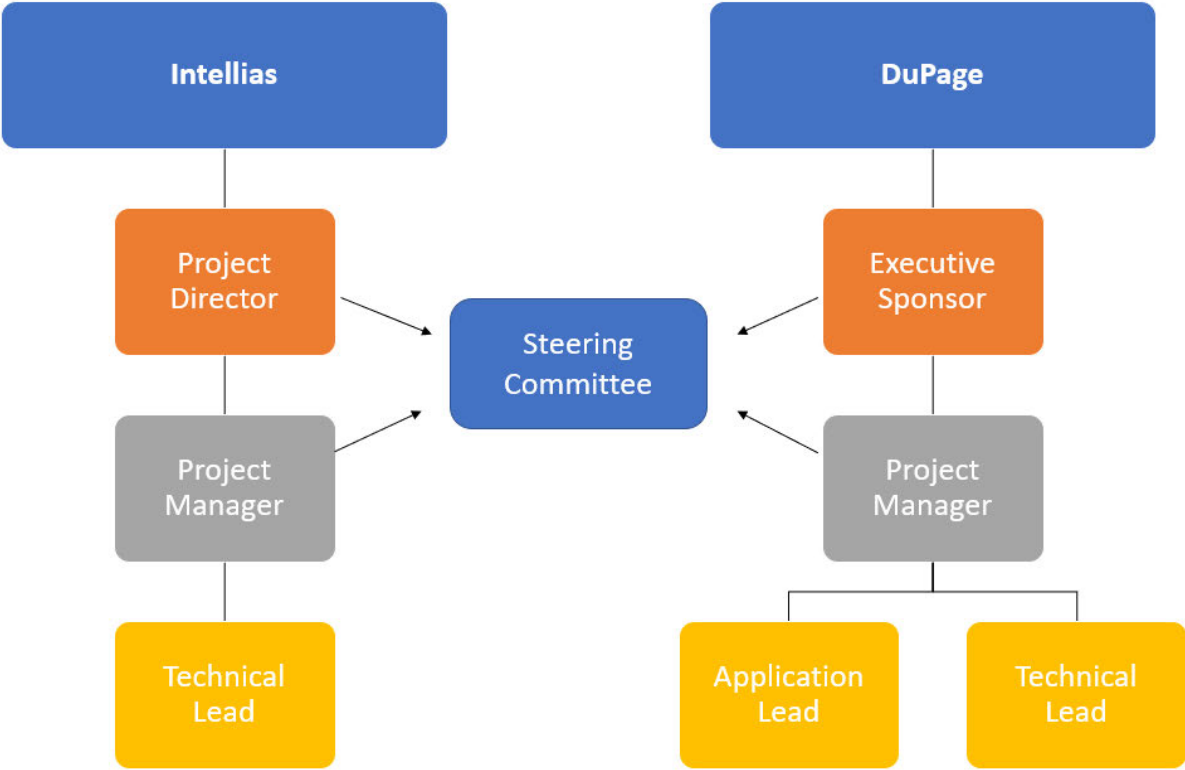
	<p>Kary Clayberg Role: Project Manager Location: Texas Years of Experience: 2 Years with Intellias: 2 Clients Currently Assigned: 2</p>	<p>Area of Expertise/Responsibility: Kary will serve as the Project Manager, leading the planning and management for this engagement. Kary will specifically help with further discovery via system assessment interviews, project planning, and deliverables management throughout the project. She and the project team presented in this proposal will be available to begin this effort upon contract execution and will support the engagement through the post go-live support period.</p>
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	<p>TJ Mann Role: Technical Lead Location: New Jersey Years of Experience: 20+ Years with Intellias: 5 Clients Currently Assigned: 4</p>	<p>Area of Expertise/Responsibility: TJ will serve as the key resource for the server migration, including addressing any technical issue resolution. He has served in a similar role for the majority of our successful server migration projects.</p> <p>As an Infor Certified System Administrator and a Lawson Security Authorization Certified Consultant, he assists with enterprise system implementation projects including installs, upgrades, security, conversions, and application enhancements. He has worked with Lawson versions through their evolution, and also holds certifications in the latest Infor technology, such as Birst Analytics.</p>
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“Early and Often” is the key to successful communication and is the foundation for our communication plan. It is vital to have early involvement and sponsorship from DuPage County’s leadership (Steering Committee). Their role in promoting the project will foster buy-in from project team members and power users.

Empowering DuPage County’s project team to take ownership of the system and testing requirements and providing them with the knowledge and documentation for ongoing support, will increase the likelihood of success while migrating to new servers.

The following displays the project roles involved from each of our organizations and their respective responsibilities, which demonstrates how our teams will work and communicate with each other.



Project Understanding

Our firm's interest in supporting server migrations has been steadily displayed since the announcement of the decommissioning of Windows 2012. Intellias has led the Infor space in providing informative content and served as a strategic partner for our clients seeking an understanding of version compatibilities and support timelines. Our latest webinar on the topic ([Infor Lawson System Upgrades Requiring Immediate Action](#)), as well as our [YouTube library](#) allows for further exploration and validation of our knowledge on the subject.

DuPage County currently utilizes Infor Lawson applications to manage HCM, Financial and Supply Chain functions within the organization. With the announcement from Microsoft of end of support for Windows Server 2012, Intellias understands that DuPage County desires to migrate all Infor Lawson applications to new Windows 2019 servers, without updating any versions so long as the server build and installations are compliant with the latest Infor compatibility matrix. Doing so allows DuPage County to maintain compliance and stability for their Infor Lawson applications.

The following Scope of Work and demonstrate the services and performance metrics/deliverables involved in our project management and technical work. Our methodology and experienced resources will provide a custom solution and timeline to meet DuPage County's expectations. The following Scope, Deliverables and Project Plan reflect our understanding of your project and the required tasks involved in a successful implementation.

Scope of Work

The scope for this proposal includes installing the same versions of Infor Lawson applications on a Windows 2019 platform. All existing configurations, customizations and data will be migrated to the new servers. Intellias will provide testing and data validation guidance, support and issue resolution. Detailed documentation of configurations, setup instructions and troubleshooting guidelines will be provided upon successful Go Live.

In-Scope

The following activities are In-Scope for completion of this effort:

- Project Planning & Management
- LSF Installation
- Landmark Installation
- LBI Installation
- Data Migration
- Testing Support
- Go Live/Post Go Live Support

Out-of-Scope

- AD FS Upgrade (DuPage County is already on Windows 2016)
- Infor OS Upgrade (DuPage County is already on Windows Server 2019/SQL Server 2019)
- Smart Office Upgrade (should be retired by the time this project goes live)

Deliverables

The following table details Scope Activities and the associated Details/Deliverables for the Server Upgrade Project. The detailed deliverables reflect our performance metrics for each task.

Activity	Details/Deliverables
LSF Installation	<p>Included Components:</p> <ul style="list-style-type: none"> -Windows Server 2019 -LSF Core Technology 10.0.11.X (latest version) -Lawson MSP 10.0.X (latest version) -Portal (Lawson For Ming.le) 10.1.X (latest version) -DSP 11.0.X (latest version) -WebSphere 8.5.5.X (latest FP) -AD LDS -IIS Web Server -VisualCOBOL 5 -Bouncy Castle -Java 8 (Oracle or Amazon Corretto JDK) -Perl (latest version) -Implement LDAP Channel Binding -AD FS -Configure SSL Encryption -BSI Tax Factory 11 -Employee/Manager Self-Service (EMSS) (including external web server deployment) <p><i>NOTE: Oracle JDK requires a separate license agreement</i></p>
Landmark Installation	<p>Included Components</p> <ul style="list-style-type: none"> -Windows Server 2019 -Landmark 11.0.X (latest version) -Infor ION Grid (latest version) -Infor Process Automation -WebSphere 8.5.5.X (latest FP) -IIS Web Server -Bouncy Castle -Java 8 (Oracle or Amazon Corretto JDK) -Perl (latest version) -Implement LDAP Channel Binding -AD FS -Configure SSL Encryption <p><i>NOTE: Oracle JDK requires a separate license agreement</i></p> <p>Out of Scope/Additional Fee: SSCM, Landmark Financials, external web server deployment</p>

Activity	Details/Deliverables
Lawson Business Intelligence Installation	<p>Included Components</p> <ul style="list-style-type: none"> -Windows Server 2019 -Infor Lawson BI 10.6 (latest HF) -WebSphere 8.5.5.X (latest FP) -Crystal Reports Server (latest version) -Java 8 (Oracle or Amazon Corretto JDK) -AD FS -Configure SSL Encryption <p><i>NOTE: Oracle JDK requires a separate license agreement</i></p>
Data Migration	<p>3 total passes (1 in new TEST and 2 in new PROD)</p> <p>One of the three migration passes is to be reserved for go-live.</p> <p>Includes application and environment data (users, security, bookmarks, jobs)</p> <p>Out of Scope/Additional Fee: Migration of Landmark transactional data (work units)</p>
Testing Support	<ul style="list-style-type: none"> - Guidance, support and issue resolution for testing and data validation - Documentation of configurations and setup instructions
Post go-live support	<p>1 week of post go-live support</p>
Project Management	<p>Coordinate Project Kickoff to include:</p> <ul style="list-style-type: none"> - Initial planning and interviews with project stakeholders/resources. - Establish and coordinate communication plan. - Review project deliverables and timeline. <p>Develop project plan, attend status calls and manage Intellias resources.</p> <p>Monitor and report on project progress and budget.</p>

Timeline

We anticipate this project will require ten (10) weeks to complete all necessary deliverables and services. The chart below details each phase and estimated timeframe for completion.

Month	1				2				3			
Week	1	2	3	4	5	6	7	8	9	10	11	12
Plan												
<i>Project Kick Off</i>												
<i>Project Planning</i>												
<i>Infrastructure Design/Deployment</i>												
Design												
<i>System Installations</i>												
<i>First Data Migration</i>												
<i>System Validation</i>												
Train												
<i>Deliver Exit Documentation</i>												
<i>Knowledge Transfer</i>												
Test												
<i>Second Data Migration</i>												
<i>User Acceptance Testing</i>												
<i>Issue Resolution</i>												
Deploy												
<i>Final Data Migration</i>												
<i>System Live</i>												
<i>Final System Validation</i>												
Post Live												
<i>Production Support</i>												

Management Plan

We approach Project Management by assuming both Project Managers (representing Intellias and DuPage County) will be peers, but with slightly different roles. Our Project Manager will bring the Infor knowledge, expertise, and implementation experience, while DuPage County’s Project Manager provides an understanding of the political landscape and organization goals. This dynamic ensures a cohesive team, leading to a positive work environment and a successful project for your organization.

Intellias believes that a strong project plan is essential in aligning both parties and creating a clear path forward. Our Project Manager will work with your Project Manager/Project Team to plan and manage the project throughout its entirety.

Deliverables

- Creation of Project Plan based on agreed upon dates and deliverables
- Management of Project Plan throughout project
- Execution of milestones and deliverables
- Management of Intellias project team
- Lead weekly/bi-weekly status calls
- Management of project issues or risks
- Work in tandem with client Project Manager throughout project
- Updates to the project steering committee
- Weekly status reports to client Project Manager

Risk and Issue Management

With the end of support for Server 2012 in October 2023, the primary risk for this initiative is not completing the effort before that date. However, this risk is mitigated by starting the project as quickly as

possible in/around August 2023. Our timeline above demonstrates how a Go-Live before or shortly after the end of October 2023 is attainable, given an August start date is achieved.

Other external risk factors include:

- Hardware Procurement
- Server Provisioning
- 3rd party licensing (Infor, Microsoft, MicroFocus, etc)

If an issue should arise that requires escalation, the following Risk and Issue Management process will be adhered to. If a change of scope is required, Intellias proposes the Change Management procedure as presented below.

Issues Management: If unforeseen conditions are discovered or unforeseen events occur that materially affect the original scope of work, the Intellias Project Manager will notify the DuPage County Project Manager. From there, Intellias will work with DuPage County to adjust the scope, cost and schedule as appropriate. The project timeline is partially dependent on resources outside of Intellias control. Such dependencies will be documented where possible as part of routine project communications.

Risk Management: Successful projects always have a comprehensive risk management plan in place. Intellias will work with DuPage County team members throughout the project and especially during the crucial cutover planning stage to:

- Identify potential risks and their impact
- Assess the likelihood of occurrence for each
- Develop mitigation strategies, including risk prevention and contingency plans
- Delegate responsibilities for risk mitigation and response
- Monitor identified risks and evaluate the management plan as risks evolve during the lifecycle of the project

Recommendations will be made with best practice and risk mitigation strategies in mind.

Change Management/Incident Reporting Process

Intellias' Change Management process will be used to manage any incidents or alterations to any Work Order/Statement of Work (SOW). Examples of alterations include but are not limited to: changes in scope, to deliverables (including accepted deliverables), to the schedule and to costs occurring for any reason, including failure of DuPage County to fulfill its roles and responsibilities, unforeseen events, delays caused by DuPage County, and inaccurate assumptions and dependencies. Intellias will work in conjunction with DuPage County to manage work efforts until the Change Request has been approved.

1. Either party may notify the other of intended changes by completing a Change Request (CR) form which provides justification for the change and the proposed impact to the project's scope, schedule, and cost.
2. If DuPage County has initiated the CR, Intellias will respond to the CR with the impact to the project's scope, schedule and cost, also referred to as a CR in this process.
3. The DuPage County approver will approve or reject the CR within ten (10) business days from the receipt of the CR form.

4. If the DuPage County approver does not approve or reject the change request within ten (10) business days from the receipt of the CR form and does not communicate a reasonable timeframe in which a decision will be made, the requested change will be considered deferred:
 - a. The change request status will be logged, tracked and managed as a 'deferred' request.
 - b. Work will progress without incorporating the requested change into the work plan.
 - c. Where an approval or rejection decision is necessary for the project to progress, Intellias and DuPage County will employ an Issues Escalation process.
5. For change requests that are outside the stated project scope, the DuPage County approver will authorize budget and/or schedule allowance for Intellias on a time and materials basis for the initial analysis of a change request.
6. Intellias and DuPage County shall resolve disputes regarding the 'in scope' or 'out of scope' classification of work using the Issues Escalation process.

The following persons have been designated as responsible for obtaining signature approval of change requests for the project:

Intellias Inc.	DuPage County
Name: Rob Flannery	Name: TBD
Title: Vice President	Title: Senior TBD

Price Proposal

Included in as separate attachment: INFOR LAWSON SERVER MIGRATION 23-086-IT_SECTION 8 BID FORM PRICING