Service Description: Unified Communications Scoped Planning and Design Services

This document describes Unified Communications Scoped Planning and Design Services.

Related Documents: This document should be read in conjunction with the following documents also posted at www.cisco.com/go/servicedescriptions/ : (1) Glossary of Terms; (2) List of Services Not Covered; and (3) Severity and Escalation Guidelines. All capitalized terms in this description have the meaning ascribed to them in the Glossary of Terms.

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Cisco shall provide the Unified Communications Scoped Planning and Design Services described below as selected and detailed on the Purchase Order for which Cisco has been paid the appropriate fee. Cisco shall provide a Quote for Services ("Quote") setting out the extent of the Services and duration that Cisco shall provide such Services. Cisco shall receive a Purchase Order that references the Quote agreed between the parties and that, additionally, acknowledges and agrees to the terms contained therein.

Service Summary

Unified Communications Scoped Planning and Design Services provide Deployment Project Management, System Requirements Validation, Architecture Validation, Network Readiness Assessment, Operational Readiness Assessment, Site Readiness Specification, Detailed Design Development, Implementation Plan Development, Low Level Design, Solution Site Acceptance Test Plan, Security Audit and Staff Plan Development service modules to assist in planning and designing the Customer's Unified Communication Network.

Unified Communications Scoped Planning and Design Service

Under this Service, Cisco shall provide the Unified Communications Scoped Planning and Design Services selected by Customer during Standard Business Hours, unless stated otherwise:

Deployment Project Management

- Provide a single point of contact ("Cisco Project Manager") as well as a designated backup for all issues relating to the Unified Communication Scoped Planning and Design Services selected by Customer under this Service Description. The Cisco Project Manager responsibilities typically include, amongst other things, the following:
  - Initiate the project by conducting kickoff meetings, defining project scope, work breakdown structure and identifying risk and mitigation plan.
  - Review and revise Customer's acceptance plan.
  - Develop a project schedule and finalize baseline project plan.
  - Develop a project governance model.
  - Participate in regularly scheduled meetings with the Customer to discuss the status of the project.
  - Define and execute change management process which includes informing customer of risks and negotiating changes to the schedule and the budget based upon the agreed upon changes.
  - Maintain project plan and risk management and change management processes.
  - Manage project cost and resource budget.
  - Manage project delivery performance and progress.
  - Provide periodic project progress report throughout the performance of Service.
  - Develop and deliver implementation schedule.

- Ensure Cisco employees and any subcontractors conform to Customer's reasonable workplace policies, conditions and safety regulations that are consistent with Cisco's obligations herein and that are provided to Cisco in writing prior to commencement of the Services; provided, however, that Cisco's personnel or subcontractors shall not be required to sign individual agreements with Customer or waive any personal rights.
- Provide Customer satisfaction surveys to Customer.

Solution & End User Requirements Validation

- Cisco will verify the components in the Unified Communications solution address the Customer's identified feature and functional requirements. Cisco will perform a solution and end user requirements validation, which typically includes, amongst other things, the following:

  Collect Customer's Unified Communication solution requirements by providing a requirements collection questionnaire and will assist the Customer in answering questions during the requirement gathering process.

  - Perform solution end user voice requirement analysis by reviewing the completed questionnaires and discussing with the Customer's project team to validate the information collected.
  - Review the solution and end user requirements and map them to feature and functionalities available in the Cisco's Unified Communications solutions.
  - Compare solutions requirements with the available features in each Product in the preliminary high-level design. Cisco shall identify and present feature and/or functional gaps to the Customer for acknowledgement and acceptance of deviations from requirements and document gaps for risk assessment documentation. Cisco and Customer will determine whether a gap can be removed by pointing out similar functionality with existing features. Discuss and document feature/functionality alternatives with Customer.
- Provide a Customer-approved Solution and End User Requirements Validation Report.

Architecture Validation

- Cisco will analyze the Customer-provided high level design to determine whether the design will scale to meet the Customer's Network growth requirements and is in conformance with Cisco's Unified Communications leading practices. Cisco will perform an architecture validation, which typically includes, amongst other things, the following:
  - Compare each solution-level requirement with standard Unified Communications solutions and architectures.
  - Perform a gap analysis and provide high-level design recommendations to resolve gaps, as required.
  - Identify change recommendations to the Bill of Materials ("BOM"), as required.
  - Determine overall risk of the design and provide design recommendations and proposed changes to the high-level design to help mitigate risks, as required.
  - Review of revised high-level design and BOM recommendations with the Customer.
  - Update risk mitigation plan with any risks identified in the high level design as part of this architecture validation process.
- Provide solution requirements document which is based on Customer-approved final high level design.

Network Readiness Assessment

- Cisco will perform a detailed evaluation of Customer's Network's ability to support Cisco's Unified Communications products. Cisco will perform a Network Readiness Assessment which typically includes, amongst other things, the following:
  - Review Customer's proposed Unified Communications high-level design and solution requirements.
  - Gather and review Customer's Network documentation.
  - Analyze current Network infrastructure and the Network's readiness to support the proposed Unified Communication design.
  - Assess current voice infrastructure and configuration to support proposed Unified Communications design.
  - Perform and document gap analysis.
- Provide a Network Readiness Assessment Report.

Operations Support Planning Workshop

- Cisco will familiarize itself with Customer's current operational environment and identify unique operations requirements, address common operations failures and detail specific operational practices.
- Provide assistance to Customer in formulating strategies regarding organizational changes, staffing requirements, outsourcing, new process requirements, tools, and operations infrastructure changes.

- Assist in the creation of an operational support plan for Customer's Unified Communications environment but not the implementation of specific recommendations.
- Perform a detailed evaluation of Customer's operational plan and staff to determine the operational readiness to support Customer's proposed Unified Communications design.
    - Gather and review information about the Customer's current support model, processes, procedures and tools usage, for Unified Communications services..
- Provide Operations Support Planning overview presentation, onsite staffing and expertise workshop, incident management process remote workshop, incident management tools remote workshop, problem management process and tools remote workshop, release, configuration and change management remote workshop and an executive summary presentation.

Site Readiness Specification and Customized Site Survey Template Development

- Cisco will identify Hardware, Software, physical and environmental requirements necessary to implement and operate the Unified Communication solution at each Customer location and to develop customized site survey templates to assist the Customer with site-specific readiness activities prior to implementation. Cisco will perform the following activities:
    - Review the detailed the Customer-approved solution requirements and revised high-level design documents to identify the component requirements for the solution at each location.
    - Provide a Site Requirements Specification for one site per model.
    - Provide customized Cisco site survey templates based on the Customers solution requirements for each site model represented in the high level design.

Detailed Design Development

- Cisco will develop an implementation-ready low-level design for the Customer's Unified Communications solution. Cisco will perform detailed design development, which typically includes, amongst other things, the following:
    - Review detailed solutions requirements, high level design, Network remediation plan, and operations remediation plan.
    - Design Unified Communications infrastructure which may include the following:
        - Define IP addressing for voice Network devices.
        - Develop LAN/WAN configuration to accommodate Unified Communications devices such as Cisco's Call Manager servers, Cisco's IP Phones, and voice gateways.
        - Develop QoS configuration for LAN/WAN.
        - Define Network services such as DHCP/DNS/TFTP/NAT related to Unified Communication system.
        - Define power and environments.
    - Design Unified Communications system which may include the following:
        - Call Manager cluster sizing and design options.
        - Design options to provide Call Admission Control (CAC).
        - Design guidance on lightweight directory access protocol ("LDAP") directory integration or directory access.
        - Dial plan architecture and emergency call routing.
        - Design analog, fax and modem solution.
        - Define analog phone requirements.
        - Design of conferencing/transcoding/Music on Hold (MoH) features.
        - Design of security features around Unified Communications components.
        - Design options to integrate legacy PBX/voice mail systems with Unified Communication system.
        - Design and sizing of voice gateways and gatekeepers.
        - Provide Software and Hardware code revisions.

Network Implementation Plan Development

- Cisco will develop a plan that identifies the processes, identified the Hardware and Software and from the site survey identifies the physical and environmental requirements necessary to implement and operate the Cisco Unified Communications solution. Cisco will develop a Network implementation plan which typically includes, amongst other things, the following:
    - Compile required documentation which may include:
        - Site Requirements Specification.
        - Detailed Design.
        - Supplier/customer roles and responsibilities.

- Site-specific implementation human resource requirements.
- Site contacts, location and considerations.
- High level site specific installation requirements.
- Site specific information from BOM, and delivery of equipment for staging and/or installation.
- Third-party support contacts and agreements, in the event that such support is necessary for cutover or migration strategies required for this implementation.

- Review detailed design with emphasis on order of implementation within Customer's Network
- Schedule staging and installation at each Network site.
- Establish site-specific BOM procurement logistics, including ordering and delivery timelines.
- Verify that all time-dependent functions built into the Network implementation schedule align to scheduled delivery and implementation.
- Identify and add site dependencies to the rollout schedule.
- Define Customer-agreed deployment parameters that will be used to assess implementation-readiness at each site.
- Define timelines for post-implementation testing.
- Create and track actions list.
- Maintain Issues log.
- Develop contingency plans.
- Provide Network implementation schedule.

Low Level Design Development

The Low Level Design Development component focuses on activities for design of Customer's centralized single, multi or distributed multi site model. Cisco will typically perform the following:

- Design voice over IP infrastructure:
  - Review network remediation plan
  - Define IP addressing for voice network devices
  - Develop LAN/WAN configuration to accommodate IP Communications devices such as Call Manager servers, IP Phones, and voice gateways
  - Develop QoS configuration for LAN/WAN
  - Define network services
  - Define power and environment requirements
- Design Call Control system:
  - Determine Call Manager cluster sizing and design options
  - Analyze and identify design options to provide Call Admission Control (CAC)
  - Provide design guidance on LDAP directory integration or directory access
  - Design Dial plan architecture and emergency call routing
  - Design Analog, Fax and modem solution
  - Define Analog phone requirements
  - Design conferencing/transcoding/Music on Hold (MoH) features
  - Design of security features around IP Communications system components,
  - Analyze design options to integrate legacy PBX/Voice Mail systems with IPC system
  - Design and determine sizing of voice gateways and gatekeepers
  - Provide Software and Hardware code revisions
- Design Unified Messaging system:
  - Define Unity deployment model
  - Define message store options and sizing
  - Define Unity ports and session sizing
  - Identify the Unity server hardware
  - Define data protection strategies
  - Define message store software licensing
  - Recommend Unity software licensing options
  - Define Unity integration with Call Manager or PBX Systems
  - Define Unity Networking – Interconnecting Unity with other voice mail systems
  - Define Unity customization.
  - Define methods for Securing Unity servers
- Design Conferencing system:
  - Gather and analyze the following information:
    - security and scheduling parameters
    - existing sub-applications
    - backup/disaster recovery requirements
    - video, data, or groupware integration requirements
  - Develop a detailed design for deploying MeetingPlace in the network**.**
- Design network management and operations infrastructure:
  - Identify Network Management design objectives such as the addressing scheme, QoS, scalability, resiliency, fault management, etc.

- Perform operational analysis of the Network Management design against business-critical applications, for example IP contact center, CRM, etc
- Perform operational analysis of the Network Management design against systems/network architecture, for example Data Centers, Campus, Branch, etc.
- Design Network Management system services and/or functions to optimize network performance, capacity, availability, reliability, resiliency, and security.

- Present the Low-Level Design to Customer.

Solution and Site Acceptance Test Plan

- Cisco will identify the testing processes required to verify the Unified Communication system aligns to Customer's identified solution and site requirements and that each site and the entire solution are ready for the production environment. Cisco will develop a solution and site acceptance test plan which typically includes, amongst other things, the following:
  - Compile and review the following:
    - Customer requirements document.
    - Solution and end user requirements document.
    - Detailed design document.
    - Operations Support Roadmap plan document.
    - Network readiness remediation plan.
    - Operational support readiness plan.
  - Identify facility and infrastructure requirements for testing.
  - Identify tools required for executing the test cases.
  - Develop test plan which may include test schedule, test case priorities, test lab topology, role and responsibilities, testing processes, and severity levels.
  - Design a test case for each testable solution requirement, or category of requirements, in the Customer-approved system validation report.
  - Develop the test cases which include test case objective, procedure (step-by-step), expected result, and pass/fail criteria.
  - Work with Customer to develop a subset of the solution test plan that will validate each site's readiness for production.
  - Provide Customer-approved solution and site acceptance test plan.

Security Audit

- Cisco will provide a Unified Communications (UC) Security Audit, recommendations and risk analysis of four critical solution elements - UC network infrastructure, the call processing system, endpoints and applications, described below:
  - UC Network Infrastructure security includes: Assess switches, routers and other devices connecting LAN/WAN links comprising the foundation of UC network carrying converged data - IP data, voice and video traffic.
  - UC Call processing Security Features: Assess primarily focus on Unified CallManager, and router-based Unified CallManager Express call processing systems for call management and control.
  - UC Endpoint Security - includes IP phones, IP soft phones, Cisco Unified Personal Communicator, video terminals and devices that connect to the IP network.
  - UC Applications Security – includes user applications such as Unity Unified messaging, Unity Voice Messaging, Unity Express, Unified Contact Center Express, rich media collaboration MeetingPlace conferencing and MeetingPlace Express.
- Unified Communications Security Audit encompasses security primarily around voice communication applications and includes the following Cisco Unified Communications Portfolio products. Other UC components not listed below are outside the scope of this Security Audit:

  Cisco Unified Communications Manager 4.x/5.x/6.x/7.x
  Cisco Unified CallManager Express
  Cisco Unity Unified Messaging and Voice Messaging 4.x/5.x/7.x
  Cisco Unity Express
  Cisco Unified IP Phones and Cisco Unified Personal Communicator
  Cisco Unified Contact Center Express
  Cisco Digital Voice Gateways
  Cisco IOS Voice Gateways
  MeetingPlace 5.x/6.x/7.x
  MeetingPlace Express
  Cisco Emergency Responder

  Remote access security
  PIX/ASA Firewall Protection

- Under this Unified Communications Security Audit, which addresses the elements described above, Cisco will provide the following:

- Project Management- Cisco will provide project management during the audit to follow a structured methodology for converged networks, managing the scope, schedule, budget and quality of security audit while pro-actively managing issues, risks and overall project communication during the audit.
- UC Security Audit Discovery and Data Gathering – Cisco will carry out a discovery on the UC infrastructure and UC components required to conduct a UC Security Audit.
- UC Security Audit and Data Analysis- Cisco will conduct the UC Security Audit using the data gathered.
- UC Security Audit Reporting and Recommendations- Cisco will provide a report on the UC Security Audit findings and provide best practice recommendations to mitigate the risks found in the UC environment.
- Note: The UC Security Audit does not cover any implementation, remediation plan or staff training.

Service Responsibilities of Customer

Customer shall comply with the following obligations:

- Retain overall responsibility for any business process impact and any process change implementations.
- Ensure key Customer networking, voice and operational personnel are available to participate in interview sessions as required.
- Unless otherwise agreed to by the parties, Customer shall respond within two (2) business days of Cisco's request for documentation or information needed for the Service.
- Customer acknowledges that Cisco's obligation is to only provide assistance to Customer with respect to the activities detailed and that such assistance may not result in some or all of the activities being completed.
- A list of all of the existing and proposed Unified Communications networking, voice and operational system components including but not limited to Hardware, Software and solution configurations.
- A high-level architectural drawing showing the type of Hardware, Software, and application solutions configurations and where they are physically located (for example, geographical location or location within the Network).
- Detailed definitions of the type of applications and features; detailed definition of Customer's implementation strategy and schedule.
- Customer shall be responsible for the co-ordination of any external 3rd party, such as Telco service providers, activities and or deliverables.
- Copies of system implementation plan and product configuration templates.