

Campus Exchange Standard Service Agreement (SA)

University of Michigan
Information Technology Central Services (ITCS)
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First Principles

ITCS will provide Microsoft Exchange mailboxes for active faculty, staff and students. The service is focused on the needs of academic units.

ITCS will operate the Exchange service on behalf of the major units using the service. These units will make every effort to make decisions by consensus.

The service will provide a secure, robust and reliable platform for Exchange services.

ITCS will facilitate campus collaboration to build a community of Exchange knowledge.

The service infrastructure will be aggressively upgraded including major new software releases as well as maintenance releases. At times this will require eliminating outdated features.

1.0 Overview

This Service Agreement (SA) is between ITCS and a Unit at the University of Michigan. Under this SA, ITCS agrees to provide mailboxes hosted on Microsoft Exchange at the service rates and duration specified. Specifically, this service covers individual (username), departmental (not associated with an individual) and calendar resource (for scheduling of rooms and other campus resources) mailboxes.

2.0 Purpose

The purpose of this SA is to establish a cooperative partnership between Units and ITCS by clarifying roles and expectations, and providing mechanisms for resolving problems.

3.0 Funding of Services

- 3.1 Service rates are detailed at www.umich.edu/~lannos/exchange/service.html and will be reviewed annually and may be adjusted to reflect changing cost structures affected by campus adoption (scaling) and features provided. Any revisions will be made by ITCS, in consultation with the Exchange Partners Group.
 - 3.2 Campus units are billed monthly, based on the number of active mailboxes on the 19th of that month.
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4.0 Terms of Agreement

This SA becomes effective from the date of the first mailbox request until the last mailbox has been removed from the system.

Any changes or modifications to this SA will be posted to www.umich.edu/~lannos/exchange/service.html. Notification of changes will be made via e-mail to the unit administrative contact.

5.0 ITCS Responsibilities

- 5.1 Provide a secure, robust and reliable platform for Exchange services, with access via standard protocols.
- 5.2 Provide all server hardware, server software, and networking necessary to deliver the 24x7 production service to campus units.
- 5.3 Provide 24x7 monitoring and maintenance of server hardware, software upon which Exchange relies, and network up to the campus backbone.
- 5.4 Provide at least two days advance notice of routine maintenance events. When it occurs, routine maintenance is scheduled on Thursday night, starting at 10:00pm.
- 5.5 Provide at least two weeks advance notice of routine maintenance events that require action on the part of departmental administrators. If the changes required are significant,

- appropriate notice and planning will be provided. This notice may be shorter for critical security patches, or other critical or time-sensitive fixes.
- 5.6 Provide considerable advance notice of planned software upgrades (bare minimum of one month). Major upgrades will be scheduled during times that have the least impact on campus users (for example, summer or holiday break) and communicated with the U-M Exchange community with as much notice as possible.
 - 5.7 Diagnose all reported service problems pertaining to the Exchange server hardware and software relied upon by Exchange. Provide notification of server outages, degradations and maintenance according to ITCS standards 24 hours per day, 365 days per year.
 - 5.8 Protect and secure the Exchange environment from virus attacks and other types of intrusions that can affect performance, user access, loss of data, etc. Run anti-virus software on the Exchange server and strip all known infected messages of the infected content.
 - 5.9 Provide anti-spam measures for the Exchange environment. Run anti-spam software to tag suspected spam. The user must configure an Exchange rule to determine how the tagged spam is handled.
 - 5.10 Provide backup and disaster recovery. Backups are held for 1 week. Non disaster restores will be done on a time and materials basis according to prices currently published at <http://www.umich.edu/~lannos/exchange/service.html>. Tracked time includes all System Administrator time and does not include tape time. (Note: deleted mailboxes are retained in the system for 30 days and can be reattached upon request.)
 - 5.11 Provide support for end users and departmental systems administrators via e-mail to online.consulting@umich.edu and via phone to 764-HELP.
 - 5.12 Provide second level support for departmental systems administrators via e-mail to exchange.support@umich.edu.
 - 5.13 Facilitate campus collaboration to build a community of Exchange knowledge via the web, regular e-mail and in-person interactions.
 - 5.14 Maintain campus Exchange website with information of interest to departments and systems administrators about service delivery and to aid in supporting end users.
 - 5.15 Maintain presence on ITCS front page linking to information for end users, including documentation on configuration, use and Frequently Asked Questions determined by campus user input.
 - 5.16 Provide project management for the campus Exchange service, including accounting, customer billing, and other business functions.
 - 5.17 Grant permissions necessary to allow Self-Serve units create, modify and delete mailboxes for their users, and their users only.
 - 5.18 Do all administrative tasks necessary to create and manage the mailbox lifecycle for Full Serve units.
 - 5.19 Provide user training for Outlook through Education Services (for fee).

6.0 Campus Unit Responsibilities

- 6.1 Provide contact(s) for administrative aspects of Exchange accounts, including billing information. Inform ITCS of changes to contact information.
- 6.2 Provide technical contact(s) for communicating technical aspects of the Exchange service, including client configuration issues. Inform ITCS of changes to contact information.
- 6.3 Provide mailboxes for active faculty, staff and students only (in compliance with the terms of the campus Microsoft Software License Agreement).
- 6.4 Provide technical support to Exchange mailbox users to configure their e-mail clients (including anti-spam rule configuration), modify their UMOD entries and help them understand the internal mail delivery process used by Exchange.
- 6.5 Provide calendar-only mailboxes (Calendar Resources or Calendar Only User Mailboxes) for calendaring purposes only. Communicate with users of these mailboxes that they are not to be used for sending, receiving or storing e-mail messages, but only calendaring items.
- 6.6 Maintain users' e-mail clients at the minimum supported level.
- 6.7 Perform all requested maintenance or configuration changes required by changes to the service within the appropriate time frame (2 weeks for routine maintenance, shorter for critical security patches, or other critical or time-sensitive fixes).
- 6.8 Assist the user in migrating e-mail and calendaring information both initially and as required by any version changes.
- 6.9 When user leaves the university, assist users in saving off needed e-mail.
- 6.10 When user leaves unit for another university unit, help user request mailbox move to new unit or assist users in saving off needed e-mail.

Self Serve Unit Responsibilities

- 6.11 Maintain Active Directory Delegated Accounts OU for unit.
- 6.12 Move users from the People OU into the unit's Accounts OU for unit management.
- 6.13 Create Exchange OU structure in AD according to ITCS guidelines*.
- 6.14 Create unique, departmental and calendar resource mailboxes for unit appropriately within Exchange OU structure.
- 6.15 Follow naming conventions when creating and managing mailboxes*.
- 6.16 When user leaves the university, delete their mailbox after assisting user in saving off needed e-mail.
- 6.17 When user leaves unit for another university unit, help user request mailbox move to new unit or delete mailbox after assisting users in saving off needed e-mail.

Full Serve Unit Responsibilities

- 6.18 Provide authorized requestor(s), who will, in addition to the administrative contact(s), be the only individuals permitted to request Exchange mailboxes for the unit.

- 6.19 Request mailbox creation for users, departmental mailboxes and calendar resources.
 - 6.20 Follow naming conventions when requesting mailboxes.
 - 6.21 Provide assistance to the Exchange mailbox user to configure their e-mail client and modify their UMOD entry.
 - 6.22 When user leaves the university, request that their mailbox be deleted after assisting user in saving off needed e-mail.
 - 6.23 When user leaves the unit for another university unit, help user request that their mailbox be moved to their new unit or request that their mailbox be deleted after assisting user in saving off needed e-mail.
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7.0 Performance, Reliability, and Availability Indicators

Technical Performance

- 7.1 ITCS has architected and will continue to architect the Exchange service for high performance, availability and reliability. This architecture is documented on the Exchange web site at www.umich.edu/~lannos/exchange.
- 7.2 ITCS monitors and responds to problems with the performance, reliability and availability of the Exchange service 24 hours a day 365 days a year.

Scheduled Maintenance

- 7.3 ITCS performs scheduled maintenance on Exchange (and the Active Directory service Exchange depends upon) Fridays, beginning at 10:00pm and ending by 1:00am Saturday. If a particular maintenance requires a longer outage, it will begin no earlier than 8:00pm. ITCS aims to limit scheduled maintenance to no more than twice per month.
- 7.4 Notification of maintenance events are published to status.itcs.umich.edu and the joinable UMOD e-mail group Exchange.Outage.Notify@umich.edu 48 hours in advance of the maintenance. Details of the work being performed during the maintenance are sent to Exchange.Outage.Notify@umich.edu on the day of the event.

Emergency Maintenance and Unexpected Outages

- 7.5 ITCS performs emergency maintenance on Exchange (and the Active Directory service Exchange depends upon) as needed to insure the integrity of the service. ITCS minimizes the necessity for emergency maintenance, in part, by performing regular scheduled maintenance.
- 7.6 Notification of emergency maintenance events and unscheduled outages are published to status.itcs.umich.edu and the joinable UMOD e-mail group Exchange.Outage.Notify@umich.edu as soon as the situation is known. Regular updates to the status are posted in the case of an extended outage.

User Perceptions of Performance

- 7.7 ITCS and the Unit acknowledge that performance and performance measures are affected by many factors that may be difficult to define and/or anticipate due to the nature and uses of the underlying systems and clients. Further, we recognize that “perceived

response time” by users is a critical performance measurement. Therefore, in cases where the “perceived response time” by users becomes an issue, problems will be resolved by the procedures outlined in Section 8.0, “Problem Resolution.”

8.0 Problem Resolution

- 8.1 To help determine the existence and scope of a possible problem, the System Administrator may call 647-8888, or send a message to trouble@umich.edu.
- 8.2 Problems with the back-end service will be communicated to Campus Units via status.itcs.umich.edu and the joinable UMOD e-mail group Exchange.Outage.Notify@umich.edu.
- 8.3 When performance measures do not meet the standards specified in this SA, the Campus Unit and ITCS will jointly work to:
 - ⊕ Identify the cause of the problem.
 - ⊕ Resolve the problem as quickly as possible.
- 8.4 ITCS and the Unit will collaborate on troubleshooting Exchange problems experienced by users. In particular when troubleshooting message delivery problems, collaboration is critical.
- 8.5 ITCS will own the problem until it is resolved or if the problem turns out not to be Exchange service related, in which case the problem will be articulated to the Unit and transferred to the appropriate party.
- 8.6 If a unit director does not feel that a critical service interruption is receiving adequate attention towards resolution, he or she should escalate the problem to the director of ITCom or the Associate Vice President for ITCS immediately.
- 8.7 If resolution of a non-service interruption issue has not been adequately addressed within 24 hours, then the Unit and/or ITCS may escalate the problem to the unit’s assigned ITCom Project Manager (PM). If a resolution is not achieved within 72 hours, then the Unit Director and the Director of ITCS will be notified

9.0 Upgrades and Technology Changes

- 9.1 ITCS hosts Exchange to support those campus units who choose to function with a higher level of collaboration software than vanilla e-mail. In order to provide the ongoing support that these units expect, the Exchange service will aggressively perform upgrades to hardware and software necessary to keep pace with changing demands of the service.
- 9.2 Hardware upgrades cover the Exchange servers, storage and backup hardware.
- 9.3 Timely upgrades to the application and operating system software are made as released from the vendor and in collaboration with campus units. ITCS reviews and tests upgrades as soon as they become available and presents an implementation plan within 6 months of release date. The Exchange Partners and ITCS determine the best implementation plan for upgrades, taking into consideration the cost, benefit, disruption to users and timing within the academic calendar.

- 9.4 Enhancements to the service are investigated, tested and deployed based on campus input, the guidance of the Exchange Partners (see Section 12.0 Governance), current capabilities of the software and the judgment of ITCS Exchange systems administrators.
 - 9.5 These upgrades and enhancements will be made with minimal disruption of service.
 - 9.6 As new features, technologies and services are enabled, campus units agree to perform necessary client upgrades and, at times, to incur additional costs in order to do so.
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10.0 Security/Confidentiality

- 10.1 Data stewardship is important thus all parties will pay particular attention to security and confidentiality. Some data may be subject to regulation by specific laws.
 - 10.2 ITCS will act in good faith to secure and protect the Exchange and network environment. All parties understand that there exists a constant threat of viruses and other conditions beyond ITCS' control that can cause services to be unavailable for long periods of time. ITCS will make every reasonable effort to mitigate this risk.
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11.0 Accountability

- 11.1 All parties agree to take reasonable measures within their resources to ensure the performance, availability, and integrity of the Exchange Service as covered in this agreement.
 - 11.2 All parties understand that, as with all services that rely on third party hardware and software, there is an understanding that ITCS is not responsible or liable for any actions or conditions that may result from this hosting the service on that software. ITCS will take all steps necessary to responsibly manage and minimize this risk.
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12.0 Governance

- 12.1 The first principles outlined at the beginning of this document outline the goals and governance of the campus Exchange service.
 - 12.2 ITCS will work with a group of campus partners (Exchange Partners) to make significant decisions such as major upgrades to Exchange software, and the selection of additional features, anti-virus software and anti-spam software. The input of this group will enable ITCS to reflect the wishes of campus units in the Exchange service. Day to day operational decisions will be made by ITCS, but may be reviewed and influenced by the Exchange Partners.
 - 12.3 Initially the group will have Business, CoE, LSA and ITCS as members. Additional members may be added as deemed appropriate by the group. The interests of academic units not in the group are represented and interpreted to this group by ITCS.
 - 12.4 The group will preferably make decisions based on consensus. If consensus can not be reached a decision will be approved if only one member disapproves.
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12.5 The Exchange service is a core ITCS service that is independent of the imap e-mail entitlement (e.g. in evaluating anti-virus/anti-spam RFP). For this reason, decisions regarding the Exchange service will be made independently, taking into account the specific needs of the Exchange service.

* Documentation and further information about participating in the U-M Windows Active Directory and Exchange environments can be found at www.umich.edu/~lannos.