

Statement of Work

Lake County

**MITEL SOLUTION WITH MICROSOFT
TEAMS VOICE SBC DEPLOYMENT**

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SOW Prepared By:

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Project Overview

This Statement of Work (“SOW”) reflects the services and material to be provided by Heartland Business Systems, LLC, hereinafter referred to as “HBS” for Lake County, hereinafter referred to as “Customer”.

The objective of the Project is to implement a new Mitel cluster with a Session Border Controller for integration between the Mitel PBX and Microsoft Teams.

- HBS to provide all new Mitel UCCv4 licensing.
- The licensing will be used to configure a new solution for up to 175 total accounts, including-
 - Virtual Micollab application server
 - 2 Virtual MiVoice Business phone systems
 - 2 Virtual Mivoice Border Gateways
 - 2 AudioCodes SBC -HA
- The new solution equipment will be configured to allow future expansion up to 1,000 users. Additional licensing and labor will be required to enable the user count beyond the 175 users of this proposal, and is not included in this proposal.
- Customer will order 50 new SIP trunks and assist with a port of up to 175 existing numbers to connect to the new virtual equipment.
- Customer will provide re-used devices for all desktop phones, 53xx series or newer.

Project Scope

HBS will provide the following services and material, herein referred to as “Scope”:

HBS’s timeline for this project is 10 weeks to complete from the project kick-off. In the event that an extension to the project timeline is required, the parties shall utilize the Change Order process

In Scope

- HBS will assign a project manager and conduct design and database gathering meetings
 - Customer to assign a responsible party to complete “cut sheet” documents with usernames, numbers, and device information.
- All work is to be completed during normal business hours After hours work is available with an additional charge.
- This project will be a single solution installation-
 - Deployment of new virtual machines in existing customer environment
 - Micollab application server VM will be deployed in a primary customer provided VMware environment
 - Primary Mivoice Business VM will be deployed in primary customer provided VMware environment
 - Will house the users during normal operation
 - Secondary Mivoice Business VM will be deployed in secondary customer provided VMware environment
 - Will house the users during failover operation
 - Primary Mivoice Border Gateway VM will be deployed in primary customer provided VMware environment



- Will provide SBC services for SIP trunking during normal operation
 - Secondary MiVoice Border Gateway VM will be deployed in the primary customer provided VMware environment
 - Will provide SBC services for SIP trunking during normal operation
 - Customer to order new SIP trunk delivery at primary and secondary location.
 - 175 customer owned DID's will port to these new trunks
 - HBS project manager will coordinate porting
 - These trunks shall provide e911 services
 - This SIP trunk will provide a total of 50 SIP channels
 - 25 SIP channels per location
 - SIP trunks will failover from primary to secondary location and vice versa on carrier end.
 - HBS will configure and "cluster" all deployed servers
 - Configuration of up to 50 Micollab templates for user deployment
 - Deployment of up to 175 user/device records via Micollab bulk user provisioning tool
 - Design and configuration of up to 95 hunt/ring/keyline groups
 - HBS will provide labor to place and re-pin up to 175 customer provided desktop devices
 - HBS to provide cutover support for the SIP port, and provide 4 hour, day one cutover support for up to 3 sites.
 - Build 100 total SIP trunks to the SBC for direct calling to Teams
 - Connection to pre-existing Mitel Solution for up to 175 numbers within the dial plan
- SBC Provisioning
 - Implement redundant AudioCodes Mediant Virtual SBC's
 - Configure MS Teams Direct Routing Integration
 - Configure Mitel SIP integration
 - Microsoft Teams Voice Deployment
 - Prior to the onsite installation:
 - Provision Microsoft Teams Voice Admin Site
 - Onsite deployment per Discovery Phase:
 - Configure Site Features
 - Configure dial plan for integration to Mitel
 - Configure User Features for up to (250) users
 - Configure voicemail to email
 - Deploy Automated Attendant
 - Configure hunt groups
 - Configure additional features
 - Complete Inbound and Outbound Test Plan
 - Validate E911 and Notifications
 - Update User Coexistence Mode
 - Validate/Migrate (250) users to 'Teams Only' Coexistence Mode per the customer-defined migration plan
 - Testing
 - During design meetings HBS and Lake County will develop a testing plan which includes testing, SIP failover, user failover, E911, CID passthrough numbers.
 - Training and Documentation



- Provide end-user quick reference guides and documentation
- Document all system components and call flows

Out of Scope

- Troubleshooting existing PRI and analog trunks for integration into the system
- Configuration or changes to the customer network or virtual environment
- Configuration changes after the design is complete and approved.
- Manual user-level changes to phones, keys, mailbox settings after the bulk user provisioning import
- Head end patching in MDF or IDF closets for IP phones
- Main Line Auto-Attendant and/or call flow
- Calendar integration
- Voicemail to email delivery
- Micollab Client
- Audio and Web conferencing
- Analog trunking and ports will not be deployed with new system, this is a pure IP solution
- Any work or material not specifically identified in this document is not included in this Agreement. The out-of-scope items shall include the following: Deployment of any additional equipment not specifically listed in this SOW or Quote for the project.
- Installation & Troubleshooting 3rd party software
- Upgrade of any applications not listed above
- Implementation of new features not explicitly outlined above
- Deployment of MS Teams software or Desk Phones

Assumptions and Dependencies

- Customer will provide times for outage windows during which the UC applications can be unavailable as the cutover takes place.
- Customer will provide adequate network access and credentials required for the assessment of all components listed in the scope
- Customer will provide a detailed list of all users, phones, and extensions prior to project implementation phase
- Customer will provide detailed call flows for all automated attendants, call queues, and hunt groups prior to the project implementation phase
- Customer will provide a Letter of Authorization (LOA) for Support Contracts
- Customer to provide remote access prior to and throughout the project
- Customer will provide enough space for installing the new equipment
- Customer will allow the Heartland Business Systems engineer to connect their computer to Customer network in order to perform their duties. Heartland Business Systems is willing to allow Customer to examine said notebook for current anti-virus software if needed.
- Customer agrees that Heartland Business Systems will have unescorted and un-supervised access to any new components being installed as a part of this project. Requirements for supervised access to equipment must be discussed at the project kick off meeting and extra charges may need to be added to the project to compensate for the additional time.
- Customer will have working Internet access available to the engineer at the location where the work will be performed



- All professional services work will be completed during the normal business hours of 8:00am – 5:00pm M-F, local time, unless other arrangements are agreed to. Any time incurred after 5:00pm and before 8:00am will be charge at a rate of 1.5 per hour.
- All travel expenses occurred on this project will be applied to the project hours accordingly.
- Heartland Business Systems staff is available for additional hands-on training after implementation on a time and materials basis.
- HBS and Customer will both ensure that adequate resources for which each respective party is responsible are available when needed throughout the duration of this engagement. The timely completion of this engagement will depend on the availability of the necessary Customer personnel committed to this effort. This SOW assumes that Customer's subject matter expert, technical resources, and any named resources will be available as scheduled to provide information and access to the HBS team for the duration of the project.
- Customer will provide a single point of contact with decision-making authority to interface with the HBS project manager. This person shall have the authority and is responsible for signing this SOW, any Change Orders, and the Acceptance documents throughout the project.
- Customer is responsible for resolving problems outside the SOW that are beyond the control of HBS (i.e. software bugs, hardware failures, telecommunication circuits, server issues, and desktop issues). HBS can assist with these out of scope issues through the Change Management process.
- The timely completion of this engagement will also depend on the availability and delivery of the product(s) associated with this SOW from other vendors.
- Any potential dependencies discovered prior to implementation will be communicated to Customer to determine impact.

Additional Requirements and Conditions

- HBS and Customer will both ensure that adequate resources, for which each respective party is responsible, are available when needed throughout the duration of this engagement. The timely completion of this engagement will depend on the availability of the necessary Customer personnel.
- The timely completion of this engagement will also depend on the availability and delivery of the product(s) associated with this SOW from other vendors. Any shipping and delivery dates are approximate and are not guaranteed and are subject to the current availability of products from third party vendors, production schedules of third party vendors, and supply chain delays and shortages, all of which are outside the control of HBS. Such delays may extend the duration of the project and may result in budget impacts and increased time to manage resources against the estimated product delivery. In the event that a delay may impact the project, the parties shall utilize the change order process in order to address the impacts of such delay.
- Any potential dependencies discovered prior to or during implementation will be communicated to Customer and HBS to determine impact to the timing, scope and pricing for the project, and the parties shall utilize the Change Order process as necessary.

Customer Responsibilities

Site and System(s) Readiness

The items listed below shall be the responsibility of the customer:

- Customer to perform any changes required to the VMware environment and the network to support the new solution
- Customer to provide adequate network and VMware resources to support the new solution



- Customer to complete all head end, MDF and IDF patching to liven any cable locations needed for IP phones

Working Conditions and Access

The items listed below shall apply to the extent applicable:

- Customer will provide a Single Point of Contact with decision making ability to interface with HBS. This person is responsible for signing off on Scope of Work and Change Order documents throughout the project.
- Customer will provide Subject Matter Experts (SMEs) when required by project personnel and/or project activities. If delays in the project timeline are a result of delayed access to SME personnel or any other Customer delays, Customer may be subject to additional charges.
- Customer will provide HBS with access, including all password and logins, to required existing network or system assets listed in the scope.
- Customer will provide HBS with proper access and workspace areas at Customer locations that includes internet, physical and remote access to in scope infrastructure or systems.
- Customer will allow the HBS engineer to connect their computer to Customer network in order to perform their duties. HBS will allow Customer to examine said notebook for current anti-virus software, if needed.
- Customer will allow HBS unescorted access to computer rooms, equipment closets and the general facility. If unescorted access is not available, Customer shall assign access levels appropriately and coordinate escorts.
- Customer will provide adequate access and credentials required for the assessment of all components or systems listed in the scope.
- Customer will provide remote access prior to, and throughout, the project if required.
- Customer will have working Internet access available where the work will be performed.
- Customer is responsible for resolving problems outside the SOW that are beyond the control of HBS. These shall include but not be limited to software/firmware bugs, vendor engineering support cases, hardware failures, telecommunication circuits, server issues, desktop issues, the acts or omissions of any third party, or any other occurrence not caused by HBS. HBS can assist with these out-of-scope issues through the Change Order process or on a time and materials basis.

Testing, Notification and Change Control

- Customer will provide advanced notification of any network outages or changes during the implementation period.
- Customer will assist with the creation of and perform user acceptance testing and post-migration end-point validations.
- HBS and Customer will provide 48-hour notification of any schedule changes.
- Customer will assist with the design, testing and validation of the project Deliverables .
- Customer and HBS agree that work shall progress when Customer staff is not available to participate.

Deliverables

The following are the deliverables HBS will provide to Customer (herein referred to as “Deliverables”) for this Project:

Any change to the Deliverables listed below will require a Change Order.

#	Deliverable
1	Implementation of solution per the “In Scope” section
2	Documentation



3	Training
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Responsibilities

Customer Responsibilities

The items listed below shall be the responsibility of the customer.

- Apply user licensing
- Provide user and extension lists
- Participate in system and workflow discovery
- Provide room for staging
- Communication of outages
- Assistance with testing and validation

Estimated Hours

This is an estimate of hours and, by its nature, is a “best guess,” based on industry standards and best practices, HBS’ experience, and Customer’s needs as communicated thus far. HBS used input from its most experienced team members to generate this estimate. The pricing is set forth on the attached Quote.

Project Completion

The Project will be complete when all Deliverables have been provided to Customer.

Customer will have three (3) business days to review each Deliverable. If HBS is not provided a written notice of rejection describing the basis for rejection within this period, the Deliverables will be considered accepted.

After the completion of the project, support may be obtained by contacting the HBS Account Manager. Support will be billed at an agreed upon rate for services rendered.

Change Management

Additional products and services beyond the In-Scope deliverables listed above are considered out of scope and require a change request approved by the customer before any work can be continued. Any additions/deletions/modifications to the agreement, regardless of modification to project value, require a change request approved by the customer prior to either party performing work.

HBS will submit a formal Change Request for customer approval that documents the out of scope work, and any associated costs or schedule changes. When a Change Request is approved and signed by Customer, it becomes a Change Order and is formally considered a part of this Agreement.



Terms

Binding Agreement. This SOW describes the professional services and/or products, and results to be provided by HBS. Upon execution, this SOW shall be contractually binding on the parties. The HBS Standard Terms and Conditions are also made part of this Agreement.

- SourceWell Contract #022719-MBS

Order of Precedence. Any ambiguity or inconsistency between or among the statements of this SOW and the Standard Terms and Conditions shall be resolved by giving priority and precedence in the following order:

- Statement of Work
- Lake County and HBS Standard Terms and Conditions dated November 10, 2021

Work Hours. All professional services work will be completed during the normal business hours of 8:00 am – 5:00 pm Monday - Friday Central Time. Any work occurring after 5:00 pm or before 8:00 am or on weekends is subject to a bill rate of 1.5 times the normal rate, unless the parties agree otherwise in writing. [In the event that any change to the above-stated work hours is required, whether due to shipping or delivery delays or any other reason, the parties shall utilize the Change Order process.](#)

General. No other promises have been made related to this SOW except for those stated in this SOW. This SOW supersedes all other agreements or promises related to this project and SOW. HBS shall not be responsible for any delay caused by the Customer or its vendors or contractors, equipment or shipping delays, or any other occurrence not caused by HBS.

Confidentiality. Each party may have access to confidential information concerning the methodologies, pricing, and business practices of the other. Neither party shall make any use of such information of the other party except in connection with the exercise of its rights and responsibilities under this SOW.

Approval

An authorized signature below indicates acceptance of all terms of this SOW. The individual signing warrants and represents that the individual is a duly authorized representative with full authority to enter into this Agreement on behalf of the individual's organization.

Lake County Government

Heartland Business Systems, LLC

Authorized Signature

Authorized Signature

Printed Name / Title

Printed Name / Title

Date

Date



Mitel with SBC MS to Mitel

Quote #279297 v3

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Lake County Government

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Date Issued:

06.29.2022

Expires:

07.05.2022

Mitel Voice Solution Single Cluster		Price	Qty	Ext. Price
MiVB				
54004491	SIP TRUNKING CHANNEL PROXY	\$30.00	50	\$1,500.00
54005330	Enterprise License Group	\$600.00	1	\$600.00
54005339	MiVoice Border Gateway Virtual	\$150.00	1	\$150.00
54005380	MiCCClient Licnse - Peering Adv Server	\$0.00	1	\$0.00
54005381	MiCCClient Licnse - Federation Adv Server	\$0.00	1	\$0.00
54005401	MiVoice Business SIP Trunks x50	\$2,400.00	3	\$7,200.00
54005442	MiCollab Virtual Appliance	\$597.00	1	\$597.00
54005748	MiVoice Business Virtual for Enterprise	\$897.00	1	\$897.00
54006539	UCCv4.0 Entry User for MiVoice Bus x1	\$135.00	25	\$3,375.00
54006540	UCCv4.0 Entry User for MiVoice Bus x50	\$5,610.00	3	\$16,830.00
54009186	SWA Std 1y MiCollab System	\$63.00	1	\$63.00
54009208	SWA Std 1y UCC Entry MiVB	\$8.40	175	\$1,470.00
54009220	SWA Std 1y MiVBus System	\$79.20	1	\$79.20
54009221	SWA Std 1y MiVBus DLM	\$0.00	1	\$0.00
54009229	SWA Std 1y MiV BG System	\$15.76	1	\$15.76
54009230	SWA Std 1y MiV BG SIP Connect	\$3.70	50	\$185.00
MiVB2				
54005339	MiVoice Border Gateway Virtual	\$150.00	1	\$150.00
54005748	MiVoice Business Virtual for Enterprise	\$897.00	1	\$897.00
54009220	SWA Std 1y MiVBus System	\$79.20	1	\$79.20
54009229	SWA Std 1y MiV BG System	\$15.76	1	\$15.76
Subtotal				\$34,103.92

Mediant Virtual Edition SW SBC		Price	Qty	Ext. Price
MSW/LOW/R	HA-pair of Mediant SE/VE low-capacity (up to 250 sessions) Session Border Controllers (SBC)	\$0.00	1	\$0.00

Mediant Virtual Edition SW SBC		Price	Qty	Ext. Price
ACTS24X7-MSW_S51/YR	Annual Support for MSW/LOW/R	\$285.00	1	\$285.00
SW/SBC/10S/10-250/R	SBC session license upgrade for 10 sessions for an HA Active-Redundant SBC pair, when ordering within the 10-250 sessions (1 to 25 units)	\$840.00	5	\$4,200.00
ACTS24X7-SBC_S91/YR	Annual Support for SW/SBC/10S/10-250/R	\$142.00	5	\$710.00
		Subtotal		\$5,195.00

Services		Price	Qty	Ext. Price
HBS-FF-PROJECT	Fixed Fee Project	\$12,710.00	1	\$12,710.00
HBS-FLEX-SERVICES	HBSFLEX Services Flexible Services block- Rates for services based on attached HBS FLEX Volume Service Schedule	\$71,220.00	1	\$71,220.00
		Subtotal		\$83,930.00

Quote Summary			Amount
Mitel Voice Solution Single Cluster			\$34,103.92
Mediant Virtual Edition SW SBC			\$5,195.00
Services			\$83,930.00
Total:			\$123,228.92

This quote may not include applicable sales tax, shipping, handling and/or delivery charges. Final applicable sales tax, shipping, handling and/or delivery charges are calculated and applied at invoice. The above prices are for hardware/software only, and do not include delivery, setup or installation by Heartland ("HBS") unless otherwise noted. Installation by HBS is available at our regular hourly rates, or pursuant to a prepaid HBSFlex Agreement. This configuration is presented for convenience only. HBS is not responsible for typographical or other errors/omissions regarding prices or other information. Prices and configurations are subject to change without notice. HBS may modify or cancel this quote if the pricing is impacted by a tariff. A 15% restocking fee will be charged on any returned part. Customer is responsible for all costs associated with return of product and a \$25.00 processing fee. No returns are accepted by HBS without prior written approval. This quote expressly limits acceptance to the terms of this quote, and HBS disclaims any additional terms. By providing your "E-Signature," you acknowledge that your electronic signature is the legal equivalent of your manual signature, and you warrant that you have express authority to execute this agreement and legally bind your organization to this proposal and all attached documents. Any purchase that the customer makes from HBS is governed by HBS' Standard Terms and Conditions ("ST&Cs") located at <http://www.hbs.net/standard-terms-and-conditions>, which are incorporated herein by reference. The ST&Cs are subject to change. When a new order is placed, the ST&Cs on the above-stated website at that time shall apply. If customer has signed HBS' ST&Cs version 2018.v2.0 or later, or the parties have executed a current master services agreement, the signed agreement shall supersede the version on the website. Any order(s) that exceeds the credit limit assigned by HBS shall require upfront payment from customer in an amount determined by HBS. HBS shall make this determination at the time of the order, unless customer has previously submitted the required onboarding paperwork. In such event, HBS shall make this determination at the time of quoting. QT.2021.v1.0

Acceptance			
Chicago Illinois Office		Lake County Government	
Loretta Rogalny			
Signature / Name		Signature / Name	Initials
06/29/2022			
Date		Date	