ActiveRoles Server Remote Expert Assist Intermediate

Description

The ActiveRoles Server (ARS) Remote Expert Assist Intermediate Services Offering consists of three (3) prepaid eight-hour Days during which Quest will provide remote services to assist Customer with the scripting, customization, and tasks for current Active Roles implementation project of the ActiveRoles Server Software (the "Activities"). Additionally, Quest will assist with the update and configuration of the ARS web interface. Items indicated as being part of said customization include: modifying Field attributes, creating custom attributes, workflow customizations, and interface customizations.

This remote service offering includes the following:

- Installation guidance and assistance of the ActiveRoles Server Software
- Configuration of the ActiveRoles Server Components and Services
- Knowledge Transfer on the ActiveRoles Server product and configured components and services in the customer's deployment environment

Activities

A Quest Professional Services consultant will work with the necessary customer stakeholders and subject matter experts on the following activities. The actual activities performed will vary based on the complexity of the customer's environment and technical needs outlined during the Planning Session and are contingent upon the time available.

Planning

Quest will host a planning session with the customer to verify environment readiness and establish the base deployment architecture.

- Finalize logistics including scheduling, remote access requirements and web conferencing needs
- Review current systems to audit process and understand requested changes fully. Identify tasks that can and cannot be done within the current infrastructure.
- Assist with the creation of process flow, needs identification, and design approach.
- Review import scripts and process
- Review customizations of interface
- Review new attribute fields for display
- Review PIN number attribute process
- Review AR entry screen customizations
- Review customized views for department reviews
- Review fields for helpdesk to use for database updates
- Review Workflow procedures

Installation

Quest will provide assistance to the customer to install ActiveRoles Server Components and Services on Designated Server(s) in accordance with the deployment architecture defined during the planning session.

- Quest and the customer to Install ActiveRoles Server on Designated System(s) in accordance with the deployment architecture defined during initiation and planning.
    - Install Prerequisites
    - Install ActiveRoles Server Software
- Quest and the customer to Install ActiveRoles Server Services on Designated System(s) in accordance with the deployment architecture defined during initiation and planning.

Configuration

Quest will provide assistance to the customer with configuring the ActiveRoles Server Components and Services on the Designated Server(s) in accordance with the deployment architecture identified during the planning session.

- Quest and the customer to Review and Implement Helpdesk Changes/Settings in accordance with the deployment architecture defined during initiation and planning.
- Quest and the customer to Review and Implement Reporting Changes/Settings in accordance with the deployment architecture defined during initiation and planning.
- Quest and the customer to Review and Implement Database Import/Scripts in accordance with the deployment architecture defined during initiation and planning.
- Quest and the customer to Review and Implement Web Interface Options in accordance with the deployment architecture defined during initiation and planning.
    - Provide up to 1 Customized Attribute Site
- Quest and the customer to Review and Implement Workflow Procedures and/or Policies for Provisioning/De-Provisioning in accordance with the deployment architecture defined during initiation and planning.
- Quest and the customer to document Architectural Overview of the customer's environment that includes Users lifecycle management processes.
    - Understand and document the customer's user
        - Access model - what is the necessary access users need to do their daily role?
    - Understand and document the customer's staff role and different approval stages
        - Who Needs Access
        - What Needs to be Accessed
- Test the ActiveRoles Server Functionality as it applies to the customer's processes.
- Validate the ActiveRoles Server configuration
- Observations and Recommendations

Knowledge Transfer
Quest will provide guidance to the customer by performing a knowledge transfer and product overview of the ActiveRoles Server Components and Services implemented into the Customer's Environment during the course of the engagement.

- Installation Overview
- Configuration Overview
- Console Overview
- Web Interface

Services Effort

	Number of Forests	Number of Domains	Provisioning/De-provisioning	Workflows	Reports
ActiveRoles Server Intermediate (3 Days)	1	Up to 2	Up to 10	Up to 10	Up to 10

Prerequisites and Assumptions

Customer agrees to cooperate with Quest in its delivery of the Services. Customer agrees to the following responsibilities

- Ensure that the existing infrastructure and hardware configuration of their environment is sufficient to support the products to be implemented.
- Commit a technical resource on a full time basis to provide Quest with the assistance required.
- Provide project team members with suitable business expertise, technical expertise, and decision-making authority to ensure efficient project progress.
- Customer will secure and prepare the necessary hardware and pre-requisites, as listed in the System Requirements (Product Installation/QuickStart Guide) prior to the Remote session.
- All activities will be performed remotely utilizing Quest provided web and voice conferencing.
- Quest Product Support will NOT address the excluded items (as described above), as those services may only be addressed by Professional Services.
- Some activities may be performed during a "pre call" that could be required prior to the beginning of the scheduled engagement.