Obsidian IT
Simple / Scalable / Outsourced IT

Windows Server Essentials to Windows Server Standard Migration

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Professional Services - With MSA **$2,324.00**

Product	Quantity	Price	Amount
Professional Services Labor estimates are based on the information currently available regarding the customer's environment and anticipated project requirements.	16	$145.25	$2,324.00

Professional Services - Without MSA $2,800.00

Product	Quantity	Price	Amount
Professional Services Labor estimates are based on the information currently available regarding the customer's environment and anticipated project requirements.	16	$175.00	$2,800.00

Scope of Work:

1. Project Objective and Baseline

Migrate the existing Windows Server Essentials environment to Windows Server Standard while preserving the existing domain, user access, file permissions, and QuickBooks company data. Minimize business disruption through advance preparation, verified backups, controlled cutover, and documented testing.

- Existing environment: one Windows Server Essentials server; exact version and build to be confirmed.
- Domain population: fewer than 10 users. Workstation and device counts to be confirmed.
- Data volume: less than 2 TB; actual volume, file count, and QuickBooks company-file count to be inventoried.
- Current workloads: DNS, Active Directory Domain Services (AD DS), File Services, and QuickBooks hosting.
- Target: Windows Server Standard; release, hardware, and deployment layout subject to compatibility review and client approval.

Proposed migration approach: Build a clean destination server alongside the source and migrate workloads in stages, rather than perform an in-place operating-system upgrade. Microsoft recommends a clean installation for AD DS migration.

The base scope assumes one existing domain, one source server, and one destination Windows Server Standard instance. Co-hosting QuickBooks with domain services is not assumed to be vendor-supported; the final layout must pass compatibility review. If a separate application server or intermediate migration step is required, obtain a written scope adjustment before implementation.

2. Discovery and Prerequisites

- Inventory source operating system, installed roles, hardware, storage, network settings, domain and forest functional levels, domain controllers, and directory replication health.
- Document users, groups, organizational units, Group Policy, mapped drives, shares, NTFS permissions, DNS zones, forwarders, and client DNS settings. Identify where DHCP is managed; migrating DHCP is not included.
- Identify QuickBooks edition, year, release, license status, hosting mode, concurrent users, company files, attachments, and integrations. Confirm whether users run QuickBooks locally or through remote server sessions.
- Validate that the selected target Windows Server release and deployment layout are supported for the installed QuickBooks release. Obtain vendor confirmation where necessary. Do not treat successful installation as proof of support.
- Check AD functional-level and SYSVOL replication compatibility, required schema preparation, and source-edition coexistence or retirement restrictions. Resolve blocking issues through an approved change request.
- Approve destination capacity using measured data volume, QuickBooks requirements, operating-system needs, and agreed growth allowance.
- Confirm administrative access, installation media, product keys, backup access, maintenance window, test users, and client decision-maker.

Licensing prerequisite: The client will supply valid Windows Server Standard core licensing and the required Windows Server user or device Client Access Licenses (CALs). A small user count does not remove the CAL requirement. Confirm quantities and version rights with the reseller before deployment.

Backup and readiness gate: Before production changes, take and verify recoverable server/system-state, file-data, and QuickBooks backups. Keep recovery copies separate from the destination. Demonstrate a representative file restore and a QuickBooks backup restore to an isolated test location; document the directory recovery procedure and responsible administrator. Migration will not proceed until backups, compatibility, licensing, and the cutover plan are approved.

3. Server Preparation

- Install and activate the approved Windows Server Standard release on client-provided infrastructure.
- Configure storage, server name, static addressing, time settings, updates, security protection, and administrative access.
- Join the existing domain. Prepare the approved roles and migration tooling without replacing the production source prematurely.
- Configure destination backups and document recovery credentials through a secure handoff, not in this document.

4. Workload Migration

4.1 Active Directory Domain Services and DNS

- Promote the approved destination to a domain controller in the existing domain; configure DNS and Global Catalog as required by the design.
- Validate replication of directory objects, Group Policy, SYSVOL, and AD-integrated DNS zones. Transfer or recreate non-integrated zones and server-specific DNS settings as applicable.
- Transfer Flexible Single Master Operations (FSMO) roles after health checks pass; configure and validate the domain time source.

- Update client DNS settings through the existing DHCP authority or static configuration, as applicable. Validate domain name resolution and user authentication.

- Preserve existing domain identities and workstation membership. A new domain, mass rejoining of workstations, and unnecessary functional-level increases are outside the base scope.

4.2 File Services — Less Than 2 TB

- Inventory agreed shared folders, share names, access permissions, ownership, and mapped-drive dependencies.

- Perform an initial data copy using a method appropriate to the source and destination roles; preserve agreed NTFS permissions and file metadata.

- Review copy logs and exceptions. Compare file counts and sizes, investigate discrepancies, and verify representative files and permissions.

- During cutover, stop source writes and perform a final incremental copy. Recreate and validate shares; update mapped drives, shortcuts, and dependent paths where needed.

- Document the approved server-name and path strategy. Do not assume the destination can inherit the source domain controller identity through a generic file-server cutover.

4.3 QuickBooks Hosting

- Record all agreed company files and supporting folders. Have the client validate company-file health and provide a verified application backup before cutover.

- Install the matching approved QuickBooks hosting components. For multi-user hosting, install Database Server Manager on the server that stores the company files, configure folder permissions and required firewall access, and scan the company-file folders.

- Require all users to close QuickBooks and stop source hosting before the final company-file migration. Retain original files and backups without allowing concurrent production use on both servers.

- Reconnect participating workstations to the destination company files. Test concurrent multi-user access where licensed, user permissions, representative reports, and an approved reversible test transaction.

- Have the client's accounting representative confirm company identity and agreed report totals against the pre-cutover baseline.

- Do not upgrade QuickBooks, convert company-file versions, repair corrupted data, or alter accounting records without a separate written authorization.

5. Cutover, Rollback, and Retirement

Scheduling: Complete preparation and the initial copy before the approved maintenance window. File shares and QuickBooks will be unavailable during final synchronization and switching. Approve the outage window after measuring transfer performance and validating the test plan; this scope does not guarantee zero downtime.

- Notify affected users, confirm backups, close applications, enforce the write freeze, and record the final source state.

- Complete final synchronization, switch paths and DNS settings, activate destination hosting, and execute acceptance tests.

- Hold a go/no-go review with the client decision-maker before releasing users to normal production work.

Rollback triggers: Failed authentication or DNS, unresolved critical file-copy or permission errors, inaccessible QuickBooks company files, or failed accounting validation. The provider will stop cutover and obtain the client decision-maker's approval to restore service using the documented recovery plan.

Rollback procedure: Stop destination writes and QuickBooks hosting; record any destination changes. Before new production transactions are permitted, restore source paths, client DNS settings, and source hosting as appropriate. Directory-role reversal or recovery must use the approved AD recovery procedure, not a generic server snapshot rollback. If users have written new files or accounting transactions on the destination, preserve and reconcile those changes before resuming the source. Recovery time and acceptable data loss: [Agree before cutover].

Retirement gate: Keep the source available only for the approved rollback period and within applicable Essentials coexistence restrictions. After written acceptance and a successful destination backup, safely demote the old domain controller, remove obsolete DNS references, and retire it from production. Source retention period: [Agree during discovery]. Hardware disposal and secure media destruction require separate authorization.

6. Acceptance Criteria and Deliverables

- AD DS: Existing users can sign in from agreed domain workstations; directory, SYSVOL, Group Policy, Global Catalog, and FSMO checks pass without unresolved migration-related critical errors.

- DNS: Internal domain/service records and external name resolution work from participating workstations using the approved DNS settings.

- File Services: All agreed shares and data are migrated; copy exceptions are resolved or accepted in writing; authorized users can read/write and restricted users remain denied.

- QuickBooks: Every agreed company file opens from participating workstations; licensed concurrent access works; agreed reports and accounting validation pass.

- Recovery: Destination backups complete successfully and representative file and QuickBooks restore tests pass.

- Handoff: Deliver the final server configuration, share/permission inventory, DNS and directory-role information, QuickBooks hosting details, backup instructions, migration logs, test results, and known exceptions.

- Acceptance: The client decision-maker signs off on service tests and any outstanding noncritical items before source retirement.

Post-cutover support: [Agreed support period and hours]. Support covers migration-related defects within this scope; ongoing administration is excluded unless separately contracted.

7. Responsibilities and Exclusions

Provider responsibilities: Perform discovery, prepare the migration and recovery plan, configure the approved destination, migrate in-scope workloads, validate results, document exceptions, and provide the agreed handoff and support.

Client responsibilities: Supply suitable infrastructure, licenses, installation media, administrative access, backup storage, and maintenance-window approval. Designate an accounting tester and a decision-maker; ensure users observe the write freeze and complete acceptance testing.

Excluded unless added by written change order:

- Hardware procurement, cabling, firewall replacement, new virtualization platforms, additional production servers, or high-availability design.
- New domains, domain renaming, multi-site redesign, directory cleanup beyond migration needs, and remediation of pre-existing corruption or unsupported configurations.
- DHCP migration, printing, email, certificates, remote access/VPN, Remote Desktop Services, cloud migration, and workloads other than the four listed services.
- Re-creating Essentials Dashboard, client computer backup, remote web access, or cloud integrations if discovered; required replacements must be separately scoped.
- QuickBooks upgrades, company-file conversion or repair, add-on redevelopment, payroll/banking troubleshooting, accounting reconciliation, and third-party vendor fees.
- Data cleanup, archiving, hardware disposal, secure media destruction, and ongoing managed services.

8. Schedule, Fees, and Change Control

Discovery/build dates: [To be agreed]

Cutover window: [Date and start/end time]

Labor: Approved estimated hours and rate, Approx 16 hours

Hardware/software/CALs: Client supplied or separately quoted

After-hours and vendor charges: [To be agreed]

No fixed duration or price is committed in this draft. Discovery will determine effort and outage requirements based on data-transfer performance, file counts, source health, client availability, and QuickBooks compatibility.

Additional roles, users, data, unsupported application versions, required intermediate upgrades, extra destination instances, or pre-existing defects will be documented with the cost and schedule impact. Work beyond this scope requires written client approval before proceeding.

Risks/Dependencies:
Service will be performed during business hours 8-5 Monday – Friday unless otherwise arranged, afterhours rates would apply.

Subtotal	$2,324.00
Shipping	$0.00
Tax	$0.00
Total	**$2,324.00**

Included Agreements & Conditions:

- **Master Service Agreement (MSA): Version 9.1.25**
- **Service Level Agreement (SLA)**
- **Standard Rate**
- **Terms and Conditions**
- **Hardware as a Service (HaaS) Addendum: Version 3.4.26**
- **Backup, Data Residency, and Client Responsibility Agreement: Version 6.1.26**

Getting Started and Support Resources:

- **Creating Tickets and My Support Team**