

**PERFORMANCE WORK STATEMENT (PWS)
iManage OPERATIONS AND MAINTENANCE SUPPORT SERVICES
FOR THE OFFICE OF THE CHIEF FINANCIAL OFFICER (CFO)**

The goal of this procurement is to provide the iManage Operations and Maintenance (O & M) Support Services for the U.S. Department of Energy (DOE), Office of the Chief Financial Officer (CFO). The following format has been used for this Performance Work Statement (PWS):

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All acronyms are spelled out the first time they appear. A complete list of acronyms and their meanings can be found in **Appendix 10 – Acronyms**.

1.0 BACKGROUND

1.1 Mission of the Department of Energy

The mission of the Department of Energy (DOE) is to ensure America's security and prosperity by addressing its energy, through transformative science and technology solutions.

1.2 Mission of the Office of the Chief Financial Officer (CFO)

The mission of the Office of the Chief Financial Officer (OCFO) is to assure the effective management and financial integrity of DOE programs, activities, and resources by developing and implementing and monitoring Department-wide policies and systems in the areas of budget administration, program analysis and evaluation, finance and accounting, internal controls, corporate financial systems, and strategic planning.

Functions:

- Serve as the principal advisor to the Secretary and other Departmental officials on matters relating to the Department's financial resources.
- Provide for and assure the financial integrity, formulation, execution, and analysis of the Department's annual and multi-year budget.
- Provide for consolidated finance and accounting services.
- Plan and perform Department-wide reviews to determine compliance with the requirements of the Federal Managers' Financial Integrity Act and Departmental accounting and financial policy.
- Provide required reports which include a description and analysis of the status of financial management in the Department, annual financial statements, audit reports, and internal accounting and administrative controls systems.
- Manage Departmental payroll services and, as appropriate, cross-servicing to other Federal Agencies.
- Plan for and develop the DOE Strategic Plan.
- Serve as liaison to the Office of Management and Budget (OMB) and to the Congressional Appropriations Committees for all matters related to the Departmental budget.
- Provide oversight and guidance to Field Offices on financial management activities.
- Budget for and maintain the DOE Working Capital Fund.
- Review and make recommendations on Mission Need Statements (Critical Decision-0) for proposed acquisition of new capital assets.
- Develop program performance measures, manage the Department's performance tracking system, and serve as the Department's principal advocate for improved performance management.
- Develop, operate, and maintain an integrated agency-wide financial accounting system, including systems for cash management, credit management, and debt collection, with

appropriate financial reporting and internal controls, under the Integrated Management Navigation (iManage) Program Office (PMO).

- In addition to the traditional financial management systems, the iManage PMO maintains and operates the agency-wide procurement, financial assistance, and human capital management systems.

1.3 Mission of the Office of Corporate Information Systems

The mission of the Office of Corporate Information Systems is to plan and manage the design, development, operation and maintenance of DOE's iManage program and projects; identify and implement business process automation initiatives; provide technical support for legacy systems O & M ; provide technical support for web design, development and maintenance; manage cyber security and enterprise architecture activities; and serve as the liaison to Chief Information Officer's (CIO) Information Technology (IT) services.

The Office of Corporate Information Systems, through the iManage Program, supports the entire DOE complex, including the Management and Operating (M&O) contractors, including National Laboratories.

Functions:

- Plan and manage the design, integration, and implementation of DOE's corporate business systems through the iManage program, ensuring the approved solution addresses the integration of financial management, cost accounting, budget, procurement, human resources and performance measurements.
- Operate and maintain corporate financial systems utilizing efficient, cost-effective, and appropriate technology to allow for delivery and dissemination of relevant information.
- Maintain compatibility among the corporate business systems to facilitate electronic exchange of data with internal and external stakeholders and maintain interfaces with Headquarters Programs, Field Offices and Management and Operating Contractors.
- Provide qualified IT project management support.
- Manage the OCFO Cyber Security Program.
- Plan and manage iManage projects and CFO IT services and systems.
- Develop and maintain systems documentation and training materials.
- Define website standards for the CFO organizations and manage the CFO web technical infrastructure to ensure compliance with laws, regulations, and recommended practices.
- Serve as the CFO liaison with the CIO for all CFO IT services and represent the CFO on the DOE IT Executive Council.
- Direct the CFO Enterprise Architecture program.
- Serve as co-chair of DOE's Corporate Business Systems Configuration Control Board (CCB).
- Oversee the completion of all internal and external CFO IT reporting.
- Participate on various internal and external IT committees and working groups.

1.4 History of iManage

In September 2000, DOE began a program to modernize, standardize, consolidate and integrate its corporate business systems, and to transform DOE's business processes across the complex. Initially, the program was called the Business Management Information System (BMIS) and its primary focus was the replacement of DOE's aging financial systems. In September of 2003, the program focus was expanded to place more emphasis on the priorities documented in the President's Management Agenda and BMIS was renamed to the iManage. The iManage Data Warehouse (IDW) was the central core of the expanded program and the IDW provided tools and capabilities to accelerate the integration and reporting of corporate information. The revised program also included more detail on DOE's plans to replace/modernize the Procurement and Budget systems.

In 2008, with the exception of the Budget Formulation/Execution, most of the planned system replacement/modernization work had been completed and DOE started putting more emphasis on the delivery and use of the corporate business information. iManage, as it had been previously defined was rebranded as iManage 1.0, and the CFO organization began iManage 2.0, with the theme being "Connecting our People", "Simplifying our Work" and "Liberating our Data".

Standard Accounting and Reporting System (STARS), Strategic Integrated Procurement Enterprise System (STRIPES), IDW and iPortal are major parts of the iManage program, and have been the centerpieces of DOE's modernization efforts. iManage has other corporate systems that are not part of this requirement. Please see **Appendix 1 – Additional iManage/Corporate Information Systems** for a full list of additional iManage Systems.

In addition to STARS, STRIPES, IDW and iPortal, the iManage Program portfolio is comprised of the Corporate Human Resources Information System (CHRIS), E-Travel System (e-TS), iBudget, which includes Budget Formulation and Execution, and the Funds Distribution System (FDS).

iManage 2.0 and DOE are now focused on improvements to the DOE's business operations and transparency.

1.5 iManage Program

The DOE iManage Program is committed to fostering DOE's mission through the provision of:

- Secure, accurate, and timely business transaction capabilities that enable the DOE Complex to acquire and track needed assets, goods and services.
- Accurate source information that facilitates knowledgeable decision making by the DOE management community regarding budgets, finance, acquisitions, supply/replenishment, property, financial assistance (Grants Management), and travel.
- Improving transparency and accountability of all iManage corporate data.

The DOE Business System (iManage) software applications are currently comprised of:

- iPortal is the single point of entry into the iManage Systems utilizing Oracle WebCenter Suite, Oracle Universal Content Management, Oracle Services Orientated Architecture (SOA), Oracle Access Manager (OAM),
- STARS is DOE's implementation of the Oracle e-Business Suite (Federal Administrator, General Ledger, Accounts Payables, Purchasing, Accounts Receivables, and Fixed Assets),
- STRIPES is DOE's implementation of Compusearch's PRISM (Requisitions, Solicitations, Acquisition and Financial Assistance) life cycle modules,
- IDW is the integration of DOE's corporate business information utilizing Oracle Database and Oracle Warehouse Builder,
- Interfaces including Web interfaces that enable sharing or exchange of data with other business systems.

The scope of the iManage Program as it initially pertains to this acquisition includes:

- Operations support and maintenance of the following iManage major components: STARS, STRIPES, iPortal and IDW,
- Enhancement or upgrade of iManage functionality in response to demands that arise from Congressional, OMB, DOE initiatives/requirements, mandatory policies, the user community, from findings during ongoing operations, from the software vendors, integration with other Federal agencies, and other authorities which require system and data security and privacy,
- Business consulting, communication, job aids and training to field and program offices, as well as National Laboratories, with respect to iManage functionality, i.e., acquisition, financial assistance, logistics, budget, finance, travel,
- Coordination and compliance with DOE Enterprise Architecture requirements.

The iManage has the following strategic objectives:

- Eliminate redundant and outdated systems and processes by implementing a modern integrated DOE-wide system,
- Produce accurate, timely, reliable and relevant corporate business information to assist DOE managers to provide a basis for fact-based operational decisions,
- Comply with applicable federal system requirements,
- Strengthen internal controls by instituting standard business rules, data requirements, and policies across DOE,
- Streamline operational activities to achieve more efficient and cost-effective business performance, and
- Continue to achieve unqualified audit opinions on annual financial statements.

1.6 iManage Program Objectives

The DOE has established a comprehensive set of objectives for iManage 2.0 Program.

“Connecting our People”, “Simplifying our Work”, and “Liberating our Data”

- Advocate and lead business process transformation and integration.
- Strategic vision/planning and innovative ideas to increase DOE’s use and adoption of iManage 2.0 and provide maximum value of the investments deployed with iManage 1.0.

Connecting Our People:

- Continued development, evolution and adoption of the iManage iPortal, with a goal of making it the DOE’s Enterprise portal solution for collaboration, social networking, and virtual workspaces.
- Improve and re-engineer business process workflows and integrations by eliminating out-dated and inefficient legacy business processes and organizational barriers and stovepipes.

Simplifying Our Work:

- Identification, analysis and implementation of opportunities to improve/expand integration of corporate, Government-wide, and applicable commercial business processes and systems.
- Identify, recommend, design, and implement business processes and procedures improvements designed to improve mission support.
- Feasibility, design, development/configuration, integration, and implementation of new (TBD) corporate business systems into iManage, including existing applications and systems developed by the DOE’s program, staff, and field offices.
- Development of iPortal web services to streamline/automate and track recurring operational tasks/responsibilities.

Liberating Our Data:

- Achievement of greater transparency for DOE from a policy, procedures, and systems perspective.
- Expanded use of Business Intelligence capabilities through the use of dashboards, reports and other emerging technologies.
- Identification and deployment of strategies/technologies to make corporate information more readily available to users, eliminating dependencies on legacy

system subject matter experts and specialized IT contractors.

Appendix 2 – the iManage Roadmap provides a high-level overview of the goals associated with each iManage initiative under the iManage program, and a tentative, high-level schedule for achieving these goals.

Please note – Only the systems listed in Task Area 5 – iManage O & M Support Tasks will be included in the initial award. However, additional iManage systems, as specified in Section 4.11 – Optional Task Areas, may be added as needed.

Appendix 1 – Additional Corporate Information Systems contains a list of additional systems. Other systems may be added to the list as necessary.

2.0 COLLABORATION

All contractors involved with the iManage Program will work collaboratively with federal staff and other contractors and follow the direction of the Contracting Officer's Representative (COR), Alternate COR, and/or the designated Federal Project Manager(s)/Lead(s). This collaboration includes day-to-day activities, planning, development, prioritization, knowledge transfer and creating and sharing documentation. Sections 4.0 through 7.0 of this PWS provide specifics of the performance objectives required under this contract.

All contractor staff will follow iManage defined processes and procedures in the completion of their work. The contractors will need to work together to best achieve the iManage vision for the DOE.

3.0 SCOPE

3.1 Acquisition Objectives

The objective of this acquisition is to obtain contractor support to assist in the general O & M activities conducted by the iManage Program. The contracted effort will involve support for the successful O & M of the iManage systems and rapid resolution of any serious system problems that may arise. This includes keeping the iManage fully functional per operational Service Level Agreement (SLA) and to affect modifications needed to respond to any new DOE, congressional, federal integrated partners (e.g., General Services Administration's (GSA) Integrated Acquisition Environment (IAE), Treasury), OMB, regulatory, or departmental requirements. The contractor may also be called upon to provide knowledge on software modifications to assist with the migration of upcoming/future implementations or enhancements as well as modify existing production code that may no longer function appropriately as a result of the impending implementations or enhancements. In addition, the contracted effort will be within the defined security guidelines in support of activities related to the iManage Information System Security Officer (ISSO) for any security related tasks

including Accreditation, Risk Assessment, Risk Management, audit support, and Continuous Monitoring.

The iManage O&M contractor will be responsible for the day-to-day O & M of the iManage applications and systems listed in Section 4.1 through 4.3, as well as those which may be assigned during the period of performance as a subtask assignment. (Note: It is not anticipated at this time that the optional systems listed in Section 4.4 will be included in this contract.) However, the optional systems listed in section 4.4, new systems not listed in Section 4.4, or the development of enhancements as a result of change requests to existing iManage Commercial Off-the-Shelf (COTS) or custom applications may be added to the contract through subtask assignments.

3. 2 Contractor Responsibilities

Independently, and not as an agent of the government, the contractor shall support a variety of activities including ongoing in-process projects, new development, deployment and implementation, and O &M support activities for system and web applications and databases. Applications and databases can be new, previously developed by DOE or by a contractor on behalf of DOE, the OCFO, other Field and Program Offices, and/or transferred to iManage for maintenance.

Support services provided by this acquisition include, but are not limited to system engineering, system planning, system analysis, alternative analysis, system and database design, application and interface support to include development, testing, implementation, change management (CM), and deployment of enterprise-wide and program area specific systems, applications, and databases. The work requirements also include activities related to project management, contract administration, technical research and analysis, system documentation, database administration, end-user communication, end-user training, help desk support and operation and maintenance support for production information system applications.

4.0 PROGRAM MANAGEMENT

Section 4 reviews the tasks from a program perspective. The processes and procedures used here are consistent across all projects, at varying levels and schedules. Many tasks are further defined and detailed by project in Section 5.

The contractor shall provide program management, program administration and control over contract performance activities necessary for the management of this acquisition and resulting contract and task activities. The contractor shall prepare, maintain and follow generally accepted project management and IT standards (e.g. Project Management Institute (PMI) and IT Infrastructure Library (ITIL), etc.) describing their program and project management and IT approach and controls to be employed to meet the cost, schedule and performance requirements throughout this contract execution. The contractor shall meet with the iManage Program Manager and provide monthly contract status and financial reporting monitoring the performance

and progress under the Contract. Project plans and status are expected to be available online through our BI reporting tool and available to management to view progress or issues on a real time basis.

4.1 Application Management

The contractor shall perform routine and recurring application support services necessary to ensure iManage systems and related iManage business operations perform as expected to support the DOE business community and scheduled in accordance with the project specific guidance in section 5. While the specific application management will be executed based on the specific projects outlined in section 5, it is expected that the application management methodology will be consistent across all projects at the discretion of the Federal Project Manager.

4.2 Infrastructure Management and Support

The contractor shall ensure availability and reliability of the iManage Systems found in Section 5 of this PWS in a manner that meets the requirements specified in **Appendix 3 - iManage Help Desk Priority Levels**. In the event that other iManage systems are added in the future under Section 4.11 of this PWS, the same standards specified in **Appendix 3** will apply.

With the exception of the STRIPES Windows environment, DOE/Office of the Chief Information Officer's (OCIO's) Application Hosting Environment (AHE) is responsible for maintaining infrastructure support from the physical server to the Operating System. AHE is responsible for the overall continuity management for DOE, as well as for the backup and recovery of the infrastructure (restoring server operations up to the operating system level) and tape backups used by all iManage projects. Disaster Recovery exercises, which are usually done twice a year are a joint responsibility. The contractor shall coordinate routine and recurring infrastructure support activities required to ensure iManage maintains production and non-production instances. The environments should be maintained to meet the availability, reliability, continuity, and security requirements needed by the iManage project managers and the DOE community. In addition, the contractor shall provide management and subject matter expertise to review technical emerging infrastructure changes requirements related to DOE enterprise architecture or other improvements impacting DOE, attend meetings as necessary to review planned and emerging requirements and provide recommendations. Representative iManage Infrastructure Management activities are presented below but are not inclusive of all expected activities.

- Operations Management activities include but are not limited to:
 - Providing support to install, move, configure, maintain, monitor performance, test, diagnose, and resolve problems for all iManage hardware and software components.
 - Providing technical support for the design, operation, upgrading, and re-configuration of all iManage systems.
 - Supporting life-cycle baseline technical and functional planning and development

- Providing support to develop new, and maintaining, modifying and integrating as required, existing application (enterprise and local) systems in accordance with CFO's System Development Methodology which include, as required, capturing, analyzing, designing, modeling, coding, implementing system requirements and user documentation, program code version control, application library management quality control, change control, testing, deployment, configuration management and related project management, consultation and training.
- Providing 24x7 Data Base Administrator (DBA) production support
- Providing logical access controls for internal privileged users
- Requesting file system space user ids, pseudo access opening
- Monitoring and support of RMAN backups where applicable
- Providing scheduled and emergency weekend production maintenance support
- Providing workflow history purge
- Managing of password changes for admin accounts
- Providing technical and operational input to Configuration Control Board (CCB) activities, participate in CCB meetings (as required), prepare and submit the appropriate documentation for review on "problems" identified (resulting from reported incidents).
- Ensuring media (including disk, storage, backup, and restore) associated with new production releases are available and procedures are in place prior to service activation.
- Reviewing existing processes and procedures necessary to account for the server, services, and data storage; recommend improvements and provide mark-ups to the Federal Project Managers for approval and implementation.
- Providing support and input to the Federal Project Managers for changes in customer requirements that require systems planning, design, development, deployment, and modification workgroups.
- Participating in work group meetings with the various AHE Management Team, working groups, and iManage federal management to ensure the accuracy and efficiency of monitored systems, services, and storage related activities.
- Providing weekly, monthly and quarterly reports on system performance to include but not limited to; performance against service levels for capacity, availability, and identified trends.
- Coordinating the routine audits of the physical media library and ensure consistency of logical and physical media library.
- Performing assigned operational security functions and provide accurate reports of related activities, to include but not limited to patching.
- Providing support for the full breadth of Oracle Application Server's Enterprise Service Bus Architecture.
- Providing support as required during designated critical events and Disaster Recovery Operations; provide IT Service Continuity in coordination with AHE personnel as it relates to Systems and Server infrastructure.
- Provisioning and Access Management activities such as but not limited to:
 - Managing the access to all systems, services, and data to ensure compliance with AHE guidelines.

- Reporting scheduled and unscheduled “Authorized Service Interruptions” (ASI).
- Database Management activities such as but not limited to:
 - Ensuring adequate resources, proper procedures and accurate reporting of backup, restore, and data recovery strategies are consistent with iManage policies and customer requirements.
 - Monitoring, controlling and reporting on system resources, usage patterns and volumes, and the service levels of servers as well as underlying services and storage capacities in order to support current operational and future processes, including capacity planning support for servers, storage media network components, and databases. Prepare impact reports for Federal Project Managers based on analysis.
- Configuration Management activities such as but not limited to:
 - Documenting all actions as described in each Project's Configuration Management documentation
 - Documenting all applicable activities within Team Track
 - Maintaining and documenting all scripts and processes utilized to support the operations of iManage systems
- Environment Management activities such as but not limited to:
 - Creating new environments, reverse proxy, Single Sign-On (SSO)
 - Refreshing of the iManage environments on a scheduled
 - Monitoring, controlling, and updating the integration to the IDW views where applicable
- Application Patch Management activities such as but not limited to:
 - Performing activities required to plan, design, schedule, and deploy service patches/hot fixes to address application, tools, bolt-ons and related components within the iManage infrastructure and other system components. Activities include, but are not limited to:
 - Technical Impact Analysis
 - Deployment
 - Validation and unit testing to include regression and system integration testing
- Deployment Management activities such as but not limited to:
 - Performing activities related to deploying software code and validation that environments have been refreshed as a result of deployed code. Activities include, but are not limited to deploying TeamTrack System Change Requests code and related validation steps to ensure proper deployment.
 - Providing support for OCFO’s Cyber Security Program and comply with all DOE OCIO’s Cyber Security guidelines and requirements.
 - Developing, maintaining, and testing each calendar year a Disaster Recovery Plan for applicable applications.
 - Providing integration support with DOE HQ AHE personnel, processes and initiatives.
- Software Tools Management and Support e.g. Oracle Application Testing Tools (iPortal), Serena, User Productivity Kit, etc.
- The contractor shall propose, develop, and maintain a web solution to provide “one stop shopping” for end users including general iManage project content. This solution should preferably be housed or accessible via on one of DOE’s internal systems. Access and

navigation of the webpage should be intuitive and easily accessible for end users as well as updated within a 24-48 hour period from approval of content. At a minimum the webpage solution should include the following:

- iManage Project Overview
- Account Request Instructions
- End User Documentation
- Project POCs
- Frequently Asked Questions
- Training Materials/Schedules
- Processing Schedules
- Software Release Notes
- Known Issues/Work-Arounds
- Change Request Submission Procedures

4.3 Continuity Management

Consistently across all iManage projects, the contractor shall establish and perform activities required to support Business Continuity Management and coordinate with the Federal iManage project managers to determine potential issues and recovery requirements, translating recovery requirements into infrastructure options and data storage requirements, implementing and testing backup and recovery techniques, as well as periodically reviewing and refining plans to ensure iManage Continuity Management remain effective as business events dictate. For STARS, STRIPES and iPortal services need to be resumed within 5 Business days of an event or disaster that renders the primary operating location unusable.

Continuity Management includes:

- Disaster Recovery Planning, Coordination, Simulation, and Testing in support of the Federal Project Manager.
- Continuity of Operations in support of the Federal Project Manager
- Coordination of activities with the OCIOs AHE

4.3.1 Audit Support

DOE's financial management systems undergo an annual financial audit. While STARS is the main system audited, others systems that support STARS like STRIPES are also audited. The contractor shall support the Federal Project Managers or their designated Audit Lead, in providing data in response to auditor requests as well as perform activities related to addressing requests for access to an IT service or functional/technical support of annual financial audit requirements.

4.4 Software Development Management

The contractor shall evaluate and prioritize iManage services and processes required to meet current and future business requirements, outcomes and priorities based on Federal Project Manager's guidance. The contractor shall perform activities related to developing software code to build/remediate interfaces, extensions, or enhancements to satisfy the DOE business requirements or to fix current production code that have defects. Specific activities are outlined in section 5 on a project basis. The contractor shall ensure that changes are recorded, prioritized, planned, authorized, developed, unit and integration tested and documented in accordance with established individual project configuration management plans. Software Maintenance includes modification of a software system or component after delivery to correct faults, improve performance or other attributes; adapt to a changed environment or maintenance activities focused on anticipated problems, or preventive maintenance. Activities include following industry standards and practices for software development and providing IT solutions support that employ the use of relational database technologies, SOAs, Internet/Intranet/Web-based systems, UNIX based, personal computer (PC)-based, or client/server technologies. Software sustainment includes processes, procedures, people, material, and information required to support, maintain, and operate the software aspects of the iManage systems. It includes sustaining engineering, data management, configuration management, training, survivability, environment, and protection of critical program information, anti-tamper provisions, IT security, supportability and interoperability functions, COTS product management, and technology refresh. The contractor shall ensure that changes are recorded, prioritized, planned, authorized, developed, unit and integration tested and documented in accordance with established iManage Configuration Management Project procedures. These activities include, but are not limited to the contents of the following sub sections.

4.4.1. Break/Fix Management

Break/Fix Management includes activities such as production defects, project stabilization changes, software vendor fixes, data fixes, and statutory/mandatory requirements, for example, the update and implementation of the Federal Acquisition Regulation and Department of Energy Acquisition Regulation (DEAR) clause changes. These items typically have a higher priority due to the nature of the changes and do not follow the "full" Software Change Management (SCM) review process which involves review and prioritization by each project's CCB. The administration of these CCBs and overall Break/Fix management procedures will be consistent across all projects.

4.4.2 Service Improvements

Service Improvements can involve a range of activities including but not limited to improving the quality of existing services that involve manual workarounds, service quality problems, or preventing problems and resulting incidents from happening, to eliminate recurring incidents and minimize the impacts of incidents that cannot be prevented. **These activities only include preparing, submitting, and testing change requests. The following activities are not part of**

this task and are completed under the SCM section- Analyzing and diagnosing the causes of incidents (root cause), determining the resolution, designing, maintaining information about problems and the appropriate workaround/ resolutions, and estimating are done as part of the SCM process. This requirement is specific to the Software Development portion.

4.5. Software Change Management

The contractor shall perform activities required to review, evaluate, prioritize, coordinate and control all changes to IT services (e.g., hardware, software, software configurations) and to take steps to minimize adverse impacts of those changes to business operations and the users of IT services. In addition, the contractor shall provide management and subject matter expertise to the DOE Federal Project Managers and stakeholders to review, investigate, categorize, and prioritize potential software changes for implementation. Activities include reviewing incoming Remedy (DOE is in the process of implementing Service Now) help desk tickets and TeamTrack System Change requests (SCRs) for software changes; evaluating changes being requested; providing input to prioritization of change requests; attending meetings with process/business owners to review candidate software changes and provide subject matter expertise/recommendations on proposed software changes; recording software and configuration changes as they are accepted via the project-specific CCB; conducting Joint Application Design (JAD) sessions for review of proposed changes; presenting to the CCB for prioritizing ; coordinating change impact assessment; coordinating approval of changes; coordinating scheduling of changes; coordinating implementation of changes; and conducting post implementation reviews. These activities are reviewed in more detail in section 5 on a project basis. All projects leverage Serena's TeamTrack for SCRs as well as appropriate Serena ChangeMan for release management.

4.6 Help Desk

The contractor shall support Help Desk activities that include responding to reported incidents via DOE Remedy System, general service requests, and diagnosing and implementing recovery steps, communications to requestors and other parties, incident closure, escalation and incident tracking in accordance with **Appendix 3 – iManage Help Desk Priority Levels**". Help Desk support includes but is not limited to:

- Incident Management - Perform activities required to provide incident detection and recording, classification and initial support, investigation and diagnosis, resolution and recovery, incident closure or incident escalation (problem ticket), incident ownership, monitoring, tracking and communication. Incidents are captured at the time the user contacts the help desk. The outputs of this process are resolved and closed incidents, change requests, or problem tickets.
- Request Fulfillment - Perform activities related to addressing a request from an end-user or other stakeholder, for example, for information or advice, for a standard change, access to an IT service, or functional/technical support of annual audit requirements.

The iManage Help Desk is the customer's point of entry to report problems or request assistance. At the time of the communication with the user, the Help Desk personnel shall ensure all required data is captured in the Government provided management database, which is Remedy. Additionally this information should be tracked in a manner easily leveraged to identify areas of improvement, trends, or other areas requiring management attention. Help Desk personnel shall identify the nature of the request and attempt initial troubleshooting. Whenever possible, a user's problem shall be resolved while on the phone or by e-mail with the user by Help Desk personnel through functional troubleshooting, problem isolation and application of the appropriate fix. If the Help Desk personnel cannot resolve the ticket, it should be escalated in accordance with the relevant escalation procedures. The Help Desk shall ensure the correct, timely and proper escalation of all incidents and problems are assigned to the appropriate Tier.

Each help desk ticket is assigned a priority level indicating its severity and the timeframe in which it should be resolved. **Please refer to Appendix 3 – iManage Help Desk Priority Levels.**

On average, The STRIPES Help Desk logs approximately 932 help desk tickets per month, while iPortal/iDW logs approximately 330 per month and STARS logs approximately 140 tickets per month. However, the number of tickets can vary, depending on the time of year, system changes, and other variables.

Current operations of the iManage Help Desk utilizes the Remedy Help Desk logging system software at a DOE provided building in the Washington, DC Metro area, is from 8AM – 8PM EST, Monday – Friday (STRIPES), and from 8AM – 5PM ET (STARS/iDW/iPortal) excluding Government holidays.

For these purposes the help desk is defined as:

4.6.1 Tier 1

The contractor will provide the initial “triage” and is responsible for entering new customer requests and identifying the appropriate Tier 2 or Tier 3 representative to address software and system issues/requests. For example, Tier 1 performs password resets and references the Frequently Asked Questions provided by each project to resolve user requests. Tier 2 & 3 support personnel are members of their representative project teams and are usually identified to support Help Desk operations in on an “as needed” basis.

The iManage Help Desk is the customer's point of entry to report problems or request assistance. For incident/problem handling, the Help Desk is responsible for ticket creation, management, and escalation and follow-up. Tier 1 personnel shall identify the nature of the call and attempt initial troubleshooting. Whenever possible, a user's problem shall be resolved while on the phone with the user by Help Desk personnel through functional troubleshooting, problem isolation and application of the appropriate fix. Training, FAQs, help desk scripts for the Tier 1 personnel is provided by each project. If the Help Desk personnel cannot resolve the ticket, it should be escalated to the appropriate Tier 2 representative to address software and system issues/requests.

Tier 1 is responsible for the recording of all customer service requests, e-mails, phone calls, etc. At the time of the communication with the user, the Help Desk personnel shall ensure all required data is captured in the Government provided management database, which is Remedy. This information should be tracked in a manner easily leveraged to identify areas of improvement, trends, or other areas requiring management attention. Tier 1 is responsible for providing monthly trend analysis reports to the Federal Project Managers, as well as providing other ad-hoc statistics and reports as designated by the iManage Program Director or Federal Project Managers.

Additionally, Tier 1 maintains and reports statistics on the total number of calls, customer wait time and resolution time, weekly aged ticket report, Critical/Severity Level 1 opened and closed greater than 24 hours.

In addition to STARS, STRIPES, and IDW/iPortal, the contractor will provide Tier 1 support for the systems listed in **Appendix 4 – iManage Help Tickets – Select Systems**. Other systems may be added as necessary.

Appendix 4 – iManage Help Tickets – Select Systems also provides the number of help desk tickets, by system, generated from January 1 through April 18, 2012.

4.6.2 Tier 2

Responsible for providing more in-depth functional support for STARS, STRIPES, IDW/iPortal, and other iManage systems, including application issues that cannot be addressed at the Tier 1 level.

4.6.3 Tier 3

This is generally development or Database Administrator support. Tier 3 staff are typically database administrators, programmers, software developers, etc., who are highly skilled technically. Tier 3 staff is used for more technical related issues, such as, networking issues, and remote access support.

4.7 Technology Assessment and Upgrades

The Contractor shall evaluate technical and application upgrades, updates, and patches to ensure security compliance, remediation of software bugs, as well as to ensure and maintain continued vendor support. This includes but is not limited to hardware, operating systems, technology stack, and browsers and any DOE changes required to conform to enterprise architecture improvements directed by OCIO, OMB or other stakeholder. Activities include:

- Application and Database Upgrades, Service Packs, and Dot Releases

- Coordinating with OCIO's AHE on Hardware and Operating System Upgrades
- Enterprise Architecture Changes

4.8 Test/Quality Management

All iManage systems utilize Serena TeamTrack for issue tracking. Serena TeamTrack is the automated way to capture, track, and manage the status of defects, changes, and issues discovered during systems development. Notifications rules and workflow provide the ability to organize and handle multiple issue types, enable users to analyze issue dependencies; track progress, spot issue trends, and assign team resources effectively. TeamTrack helps define and enforce processes and capture audit trails required for regulatory compliance. Serena TeamTrack enables users to manage and resolve issues actively, effectively and efficiently in a real-time environment.

Projects may also utilize Serena ChangeMan for software application versioning. This product is a full-featured system for version control and revision management in software projects. It is a robust system with security, high performance, and many levels of support for distributed teams. It enables and automates complex team tasks such as parallel development, visual differencing, branching and merging, and identification of merge conflicts. The archive database and optimized file server architecture protect against data corruption as projects grow and enable centralized control of assets across distributed teams.

Other testing tools may also be utilized, such as Oracle Application Testing Suite.

The contractor shall manage the various iManage projects instances consistent with the procedures within Configuration Management and perform Test/Quality Management and Coordination of all testing activities for Instance Validation and all scheduled changes to be deployed into the iManage STRIPES production support environments. **(Please refer to Appendix 5, 6 and 7 - Architecture Overviews of STARS, iPortal/IDW, and STRIPES)** The contractor shall ensure that all testing validates that application functionality and security controls effectiveness are not impacted.

Activities include but are not limited to:

- Instance Validation
 - Functional and technical verification of instance functionality based on requirements triggered by cloning or refresh of existing or new environments.
- System Integration Test Management
 - Coordinate, manage, and report on all test activities, entry/exit criteria, and related test status, defect, resolution, and closure reporting.
- Regression Testing
 - Perform regression testing on all approved software changes to be deployed into production including deployment of vendor required security patches, application patches, and other changes to the production baseline.
- Management of the Quality Assurance Process
 - Management, maintenance and updates to test scenarios and scripts

- Management of test execution including defect tracking and resolution
- Management of the automation scripts and test projects, test cycles, and execution
- Provide test documentation and test status reporting for test execution and defects
- Document all results, lessons learned, test plans to the appropriate TeamTrack SCR

4.9 Organizational Change Management

The contractor shall ensure appropriate coordination across the DOE community, stakeholders, and end users to ensure effective transition of iManage changes into operational use. **Please refer to Appendix 8 – iManage Change Management Standards.**

The contractor shall define, update, and disseminate necessary information and content to support the deployment and/or effectiveness of current and new iManage services. Activities include, but are not limited to:

- Develop, implement, assess, and/or revise as necessary any existing documentation including the Communication, Education and Training Strategy, Transition Strategy, and Stakeholder Participation Strategy plans.
- Impact Assessment
 - Review and evaluation of activities for CM impacts and recommended plan of action.
- Provide effective and efficient communication and coordination for the entire Contractor team by serving as the focal point(s) for direction on policy changes and implementation activities related to professional writing and editing, document control support, information reproduction support, internal communications, metrics, and business and logistics support.
- Provide support for DOE, intergovernmental, and local stakeholder involvement, required for the acquisition, maintenance, dissemination and delivery of program and project knowledge and information.
- Review an evaluation of CM impacts and recommended plan of action
- As needed, assist DOE in conducting assessments at each field location, as necessary, to identify barriers, gaps, risks, and issues that may impede the successful transition of the organization.
- Communications and Outreach
 - Develop and finalize presentations to support internal activities such as but not limited to project kick-off meeting content, standing meeting content/agendas.
- CM Administration
 - Activities include but not limited to provisioning users, troubleshooting technical issues, and migrating developer content from staging to production.
- Training and Materials Development

- Development of new or revised training materials for any iManage initiative. Training materials should be developed primarily using Adobe eLearning Suite and be web based. Other means of development will be based upon approval by the Federal Project managers.

4.9.1 Training

Online training is the preferred method, but there are additional methodologies that could be leveraged. With iPortal and its Business Intelligence tools being the primary method of user engagement, regular training sessions are provided both locally within the DC area as well as potentially 3-4 times a year across the country. STARS, STRIPES and IDW/iPortal training are conducted on an as needed basis and should be coordinated to minimize travel requirements.

The Contractor will develop and maintain training and navigation manuals for all projects. The manuals will be reviewed twice a year or as required due to system/application upgrade(s) to ensure the information is up to date.

The Contractor will also be expected to identify, recommend, and address staff training requirements in response to customer reported incidents as well as researching, evaluating, and providing feedback on problematic trends and patterns in customer support requirements.

The contractor will evaluate the training/exercise in progress, validate management feedback, student evaluations, and instructor evaluations, and participate in formal enhancement activities. The results of these evaluations will be used to influence ongoing analysis and development activities to continuously improve the training program. Feedback forms will clearly identify the site from which it was generated but feedback may be anonymous. The contractor will retain all feedback forms throughout the period of performance on this contract and three years beyond the end of the last scheduled course and provide them to the Government upon request.

All planned courses will be entered/scheduled in the DOE's CHRIS Training Information section.

4.10 Cyber-Security Support

This performance objective is to provide cyber-security support, as required and directed by the Federal Project Manager, in the operation and maintenance (O and M) of the iManage systems. These duties are not meant to replace the duties as provided for under the iManage Program Management contract or Mission Support contracts, or by the CIO, but are meant to provide immediate response capabilities for specific cyber-security incidents, problems, and issues. These duties include:

- Review and assessment of cyber security program plans in response to specific cyber-security incidents, issues, and problems;
- Review, assess and make recommendations how adherence to Federal (NIST, OMB, DOE), executive orders, national security directives, and other regulations could resolve

- or mitigate specific cyber-security incidents, problems, and issues;
- Review and assessment of appropriate backup, recovery, and application protection procedures in response to specific cyber-security incidents, issues, and problems or system failures;
- Review O and M application system operations to ensure maximum effectiveness and efficiency in terms of compliance to Federal and DOE cyber-security requirements;
- Recommend corrective cyber-security actions in response to specific cyber-security incidents, issues, and problems;
- Implement cyber-security fixes in response to specific cyber-security incidents, issues, and problems, as appropriate;
- Provide evaluation and analysis of security testing results in response to specific cyber-security incidents, issues, and problems;
- Participate/lead reviews/interviews with system team in support of cyber-security related activities in response to specific cyber-security incidents, issues, and problems;
- Prepare briefing materials, as needed; and,
- Work collaboratively with the appropriate cyber-security teams in the CFO, CIO, other program offices, and interagency efforts.

4.11 Optional Task Areas

Other iManage Systems. (Note: some of these systems are in the development or in O &M phase with other contractors, while others have not entered into the O & M phase at this time.) These systems may or may not be handled by the contractor as part of the performance of this contract. The Government will decide whether to add some or all of these systems at the appropriate time. The Government does not anticipate adding any of these systems at this time. The systems included in this potential performance objective are listed in **Appendix 1- Additional iManage and Corporate Information Systems**. Other systems may be added at the discretion of the Government, as required.

Provide support for related work funded by other organizations as directed by the Contracting Officer (CO) or the COR.

5.0 iMANAGE OPERATIONS AND MAINTENANCE SUPPORT TASKS

The iManage Corporate Information Systems currently included in this requirement are STARS, STRIPES, IDW/iPortal. iManage has other corporate systems that are not part of this requirement. Please see **Appendix 1 – Additional iManage/Corporate Information Systems** for a full list of additional iManage Systems.

Independently, and not as an agent of the Government, the Contractor shall furnish all the necessary professional IT services, qualified personnel, material, software tools, equipment, and facilities, not otherwise provided by the Government as needed to perform this acquisition.

The professional IT services are broken into three categories (Project Management, Service Operations, and Continuous Service Improvement) and are further described in the following task paragraphs.

Performance measures for iManage O &M Service Operations are set forth in the iManage SLA. **Please refer to Appendix 3 – iManage Help Desk Priority Levels.** Contractor performance will be evaluated by their success in meeting defined SLA metrics. The two SLAs are:

- SLA “A” – Availability, Reliability, and Application Processing (in progress)
- SLA “B” – Incident Management Metrics (in progress)

5.1 Task Area 1 – Standard Accounting and Reporting System (STARS)

As DOE’s core financial accounting system, STARS provides a modern, comprehensive, and responsive financial management system that is the foundation for linking budget formulation, budget execution, financial accounting, financial reporting, cost accounting, and performance measurement. STARS is DOE’s implementation of Oracle Federal Financials and processes DOE accounting information, including General Ledger, Purchasing, Accounts Payable, Accounts Receivable, and Fixed Assets. The system also includes budget execution functionality associated with recording appropriations, apportionments, allotments and allocations, and provides funds control for commitments, obligations, costs, and payments. STARS generates DOE’s quarterly and annual Consolidated Financial Statements, as well as hundreds of financial and managerial reports.

5.1.1 STARS Application Management

The contractor shall perform routine and recurring application support services necessary to ensure DOE systems and related business operations perform as expected to support the business community of approximately 500 users. Application Management includes but is not limited to: monitoring and control of transaction processing; error handling and clearing support; data reconciliation and quality management; daily, weekly, monthly, quarterly, and annual processing; year-end close/new year open, Help Desk Tier 2 and Tier 3, and overall operational support.

Some additional processes requiring support include but are not limited to the following:

- Processing Obligation Documents
- Changing a Purchase Order
- Processing Retirement/Closing Purchase Orders
- Entering Receipts
- Inter/Intra Agency Agreements and Reimbursable Agreements
- Processing Matched and Unmatched Invoices, and Invoice Returns
- Payment Certification
- Processing Automated Standard Application for Payments (ASAP) Payments
- Processing Remittance Advice Notices
- Processing Refunds of Overpayments and Returned Payments

- Processing Third-Party Payments
- Processing Interest Penalties
- Generating a Bulk Interagency Payment and Collection (IPAC) File
- Recording Collections into Suspense
- Processing Refunds
- Entering Customers, Credit Transactions, and Miscellaneous Receipts
- Reversing Receipts and Recording Adjustments to Bills
- Creating Mass Additions and Manual Additions
- Creating Fixed Assets Adjustments
- Processing Asset Retirements
- Entering Transactions for Investments
- Processing Funds Certification
- Processing Upward and Downward Adjustments
- Reversing Journal Entries
- Producing Financial Statements
- Processing FACTS
- Processing Warrants and Credit Warrants

In order to provide support of the above processes, the following activities are required:

- Provide subject matter expertise in the following Oracle Federal Financials modules: Purchasing, Accounts Payable, Accounts Receivable, Fixed Assets, and General Ledger.
- Work with Oracle Support to record issues and identify patches for installation and testing.
- Modify, enhance, and develop new reports based on user requirements.
- Support Month End processing by assisting in issue resolution as necessary, and ensuring reports, including the SF-224, are submitted to Treasury by the required due date
- Support Quarterly production of Financial Statements and other supporting detailed reports such as the SF-133, TFS-2108, and FACTS reporting in accordance to the OMB and other external agencies due dates
- Support Year End Close and Open system activities working in collaboration with key stakeholders,
- Support the annual 1099 and 1042 processing to extract data and prepare the appropriate forms for individuals for tax reporting purposes,

- Support internal project initiatives by providing operational knowledge/expertise to support project activities such as providing knowledge on interfaces/extensions, processes, and accounting principles among others,
- STARS Interface monitoring and correction e.g. Integrated Contractor Interface, Oracle/Compusearch Interface, Automated Clearing House (ACH), E-Travel Interface, IPAC processing, and other interfaces. **Please refer to as Appendix 9 – iManage Interfaces.**
- Support STARS reporting to include the custom CID Balances process, and other reports,
- Provide annual support to the Financial Statement Audit,
- Respond to Help Desk Tier 2 and Tier 3 issues by analyzing reported issues.

5.2 Task Area 2 – Strategic Integrated Procurement Enterprise System (STRIPES)

STRIPES is DOE’s corporate procurement, acquisition, and financial assistance system, and provides for a modernized business environment. STRIPES encompasses activities required or directly associated with planning, awarding, and administering various unclassified acquisition and financial assistance instruments. STRIPES is based on the Compusearch Prism application and contains workload management, workflow capabilities, and reporting capabilities for both internal and external purposes. STRIPES also uses Oracle Application Server’s Enterprise Service Bus (ESB) component to facilitate integration to other internal DOE systems.

In general, the contractor shall provide:

- Project Management
- Application Management
- Training
- Help Desk
- Software Development/Release Management
- Software Change Management (SCM)
- Organizational Change Management (CM)
- Infrastructure Support

The contractor shall not provide advisory and assistance support for any aspect of an actual procurement or financial assistance award.

The contractor shall work closely with the DOE reporting lead to run, distribute and develop standard and customer reports and provide ad hoc reporting support.

5.2.1 STRIPES Application Management

The contractor shall perform routine and recurring application support services necessary to ensure iManage systems and related DOE business operations perform as expected to support business communities. Application Management includes but is not limited to: monitoring and control of transaction processing; error handling and clearing support; data reconciliation and quality management; daily, weekly, monthly, quarterly, and annual processing; Year End close/New Year open; and Help Desk Tier 2 and Tier 3. Within the scope of the STRIPES task, the primary customer base is DOE acquisition, and financial assistance community consisting of approximately 600 GS-1102 Contracting Officers/Specialists, 1200 COR's and several thousand requisitioners. The current number of active STRIPES/Prism users is approximately 3,400. The Contractor shall support this customer base by interfacing with additional customers, as directed by DOE.

Support functions include, but are not limited to:

- Provide project management, functional and technical support, including the Help Desk, for STRIPES across the DOE complex.
- Provide planning analysis support; earned value management systems; project controls; performance evaluation, tracking, and measurement; life-cycle baseline management; budget formulation and execution; strategic and project planning; and integrated project management, data calls, reports, and other STRIPES Project documents.
- Provide technical and application business assistance and advice on planning, program management, controls, and compliance principles and concepts for the STRIPES Project.
- Provide effective and efficient communication and coordination for the entire Contractor team by serving as the focal point(s) for direction on policy and implementation activities related to program-and project-integration management.
- Performing program and project management principles and practices, using recognized high-performing, best in class, Government and industry standards.
- Conduct complex task assignments that support multiple organizational goals. Since the STRIPES Federal community is not co-located at a single site, these task assignments are anticipated to require a great deal of coordination, integration and synthesis of information and workflow.
- Provide for short-term task assignments (under variable work) requiring unique and/or specialized resources and facilities to address STRIPES specific Project and iManage Program issues.
- Technical and management expertise to support reviewing STRIPES activities in relation to scope planning and definition, activity definition and sequencing, duration estimation and schedule development and cost estimating and budgeting for achieving program and project objectives.
- Technical expertise to support independent technical reviews and assessments, feasibility studies, cost-benefit studies, validation of performance and accomplishments, assessments of costs and schedules, life-cycle cost evaluations, performance evaluation, developing performance metrics, risk assessment and mitigation, technical and cost risk analysis, system audits, cyber security, and

configuration management and Project Management plans that integrate and support the goals of STRIPES.

- Stakeholders outreach services to develop, coordinate, and disseminate program and project communication products for STRIPES customers and stakeholders.
- Maintain and update application and operation documentation, as well as the development of publications and presentations, graphics support, multimedia services and products, and other outreach products, including reproduction services

5.3 Task Area 3 - iPortal/Integrated Data Warehouse (IDW)

As a key component of the iManage program, DOE relies on IDW for internal executive, management, and operational reporting. This data-centric approach to managing and integrating data allows DOE to rapidly respond to new and changing demands for information. This effort is important not only to future system development, but also legacy systems by creating the ability to integrate information from all organizational elements in a single corporate repository.

A major part of this integration involves the iManage Portal (iPortal). The iPortal is the key component being used to fulfill the iManage vision of “Connecting Our People”, “Simplifying Our Work”, and “Liberating Our Data”. An integral part of this is the ability for users to sign-on once and gain access to all iManage applications that have been enabled for single sign-on from the iPortal point of entry without the need to log onto individual iManage applications. Along with the robust single sign-on feature, the iPortal has been designed to allow users to develop and maintain business-related collaboration groups and personalized report dash boards. This allows users to see what is important to their job specific role and easily access specific job-related data from their iPortal desktop, thereby minimizing the need for accessing multiple systems.

5.3.1 – iPortal

The iManage iPortal is a single entry point to business applications, content, collaborative tools and web sites. It presents functionality to the user using portlets that focus on strategic communications, news and finance, communities of practice, and finance tools. The portal functionality includes strategic communications, communities of practice, collaboration tools (including web conferencing, instant messaging and group spaces), news and finance, finance tools and links to related applications and web sites.

5.3.1.1 iPortal Application Management

The contractor shall perform routine and recurring application support services necessary to ensure DOE systems and related business operations perform as expected to support the business community of approximately 2,000 currently active users. We expect the number of users to increase, as we position iPortal to become the DOE enterprise portal. Application Management includes but is not limited to: monitoring and maintenance of iPortal zero sign-on and single sign-on; support and maintenance of collaboration tools including web conferencing, instant

messaging, and user group spaces; and management of user access and user roles related to iPortal access. Some of these services include but are not limited to the following:

- Work with Oracle Support to record issues and identify patches for installation and testing.
- Develop and maintain portlets/functions based on new governmental initiatives or user requirements.
- Support internal project initiatives by providing operational knowledge/expertise to provide support and knowledge on group spaces, web conferencing, instant messaging, and Powerpedia among others,
- Provide user training on iPortal topics including group spaces and web conferencing collaboration tools.
- Respond to help desk Tier 2 and Tier 3 issues by analyzing reported issues.

5.3.2 – Integrated Data Warehouse (IDW)

One of the core project components of iManage is the IDW. The IDW links common data elements from each of DOE’s corporate business systems, including accounting, procurement and human capital. IDW continues to evolve, providing a “knowledge bank” of information about portfolios, programs or projects including budget execution, accumulated costs, performance achieved, and critical milestones met. IDW provides personalized dashboards, messaging (thresholds/alerts), reporting, graphing, and data exchange capabilities to DOE executives, managers and staff.

5.3.2.1 IDW Application Management

The contractor shall perform routine and recurring application support services necessary to ensure DOE systems and related business operations perform as expected to support the business community of 500 active users. Application Management includes but is not limited to: Monitoring and Control of Interface Processing; Error Handling and Clearing Support; Data Reconciliation and Quality Management; Daily, Weekly, Monthly, Quarterly, and Annual Processing; Year End Close/New Year Open, and overall operational support. These activities include, but are not limited to the following:

- Maintain the IDW as the nucleus for integrating data from all of DOE’s business management information systems and facilitating corporate reporting and management decision-making.

- Continue to improve access to and expand the use of budgetary, financial, and resource data to more effectively and efficiently manage the mission activities and resources of DOE.
- Expand the content and types of data comprising the IDW.
- Work with Oracle Support to record issues and identify patches for installation and testing.
- Develop, modify and enhance standard dashboards and reports based on new governmental initiatives or user requirements.
- Provide knowledge/expertise and support to assist users in developing and maintaining individual or organizational dashboards and reports
- Support month-end and year-end processing of financial data, working with key source systems and key stakeholders.
- Work with IDW's key source systems to research and coordinate changes in the source systems that impact IDW.
- Provide user training on Oracle Business Intelligence Enterprise Edition (OBIEE) reporting tools.
- Assist in developing presentations for meeting and conferences
- Respond to help desk Tier 2 and Tier 3 issues by analyzing reported issues