

Attachment B: Unique Technical and Program Requirements

B.1 Software and Other Asset Reuse

All legacy systems shall be transitioned to the target Service-Oriented Architecture (SOA) enterprise as fast as feasibly and economically possible. The Component SOA shall allow for the reuse of existing assets, applications, and investments where new services can be created from an existing IT infrastructure of systems. Technical solutions shall be chosen with the lowest Total Cost of Ownership and best Return-on-Investment that enables the Component to perform its mission and meet all its user requirements. Given these objectives, DHS Components are interested in reducing software redundancy by taking an enterprise-wide asset view of development, to include enhancement, thereby lowering development and maintenance costs.

B.2. Contractor Teaming Arrangements

B.2.1 Avoidance of Anticompetitive Teaming Arrangements

(a) DHS and its Components recognize that competitors often collaborate or team together in pursuit of business opportunities, and that some collaboration can provide competitive benefits to DHS. Other collaboration, however, can effectively diminish or impair competition, such as where a DHS incumbent contractor teams exclusively with another contractor, substantially diminishing the competitive environment based on the substantial investment the DHS/Component has made in the incumbent's value to DHS. Additionally, there is a general governmental interest in antitrust and inappropriate collaboration among competitors.

(b) Under this solicitation, a prohibited "exclusive teaming arrangement" exists when an incumbent DHS/Component information technology (IT) contractor agrees--in writing, through "understandings," or by any other means--to team with a non-incumbent offeror (as a subcontractor or joint venture partner) to pursue a contract under this solicitation, and, further, agrees not to team with any other non-incumbent competitor.

(c) Proposals under this solicitation will be reviewed for exclusive teaming agreements to determine if they are anticompetitive. If they are, the DHS/Component may reject the proposal, or at its option, allow dissolution of the arrangement and re-evaluate the proposal based on the non-exclusive arrangement proposed. In this case, all other non-incumbent offerors shall be given the opportunity to team with the DHS/Component IT incumbent contractor, with similar re-evaluation.

(d) Offerors are instructed to notify the DHS/Component Contracting Officer prior to entering into an exclusive teaming arrangement with an incumbent DHS/Component IT contractor.

B.3 Applicable References: Technical Methods, Concepts, and Documents

Req #	Functional Requirement Description
B.3.1	Enterprise Base/Overarching
	Provide a web based system.
	Provide the capability to support as few as 10 active users (with 5 concurrent users), up to 2,000 active users (with 1,000 concurrent users).
	In order to ensure data integrity and prevent unauthorized access to the data stored within the system capability, several security measures will need to be implemented.

	<p>System Security:</p> <ul style="list-style-type: none"> ➤ System Security will require each user to enter a valid username and password to login to system. The username and password is validated and access is granted upon authentication. Valid user names shall be enforced in reference to: password length, punctuation, case sensitivity, expiration, and a limit on password retries as required by the Component. <p>User Level Security Based on Defined Roles:</p> <ul style="list-style-type: none"> ➤ User Level Defined Role shall control the capabilities of any individual to navigate through the system by limiting and/or restricting specific data/fields on any given viewable system screen. The security/job roles must accommodate read-only and/or restricted access for external users of system. System will accommodate single sign on. System will adhere to provided standards and guidelines as defined by the Component.
	<p>Provide online tutorial program functionality to be available within the system when user logs on for the first time and anytime thereafter as needed.</p> <ul style="list-style-type: none"> ➤ The tutorial program will provide instructions on specific processes or transactions as selected by the user ➤ The tutorial will contain exercises and will link to the relevant supporting documentation. ➤ Overview balloon function to help with next step process ➤ Visual views per task – screenshot with instructions and graphics ➤ Search function ➤ Tailor towards role and/or group
	<p>Provide the ability to track and manage land, buildings, and/or structures as well as linear (e.g., fences) and/or non-linear assets.</p>
	<p>Provide context sensitive help functionality to be available within the system for all transactions, icons and general application assistance.</p>
	<p>Provide capability to interface and exchange data with internal and external systems such as SAP, ESRI and AutoCAD. Transactions and processes that require data from SAP or send transactions to SAP will be interfaced in real-time or near real-time to keep the systems synchronized. Dual maintenance of master data or transactions is to be avoided wherever possible.</p>
	<p>Provide capability to import/export files from other systems and applications including, but not limited to:</p> <ul style="list-style-type: none"> ➤ Primavera 3 ➤ Primavera P6 ➤ Primavera Expedition ➤ Microsoft Project 2007 ➤ Microsoft Excel.
	<p>Provide capability to incorporate or develop functions that interface with the Component’s electronic mail (e-mail) servers to include but not limited to:</p> <ul style="list-style-type: none"> ➤ Automated notifications to appropriate users when a triggering event occurs ➤ Capability to work with the SAP Workflow process (if applicable). ➤ Provide owner specific notifications ➤ Capability to ensure that there are no duplicate workflow notifications ➤ Ability to define digital signature ➤ Capability to capture and store emails from Component’s electronic

	<ul style="list-style-type: none"> ➤ Provide capability to reject approval workflow ➤ Provide capability to request “More Information” for assigned approval workflow prior to actual approval.
	<p>Provide capability to link to:</p> <ul style="list-style-type: none"> ➤ Facility condition assessment (FCA) software ➤ RS Means or similar database.
	<p>Provide capability to utilize role-based portals.</p>
	<p>Provide capability to modify, delete or add one or more fields at any point in the system. This functionality should be easy to use and allow for:</p> <ul style="list-style-type: none"> ➤ Fields to be associated by type (i.e. date) with tables and picklists ➤ Users should be able to customize their specific transaction screens layouts to add fields, hide fields or reorganize fields to fit their roles ➤ Capability to format new fields as date, autocalculate, or text and validate to ensure that the input has the correct characteristics ➤ Drop down lists (matchcodes) should be available for key fields that will be used for reporting or data selection ➤ Electronic data interchange (EDI) functionality ➤ User level defined roles that are authorized to add, modify and/or delete fields. ➤ Notifications to end user when a role has been added and/or deleted from their current role.
	<p>Provide capability to create and compare multiple scenarios (what-if type) across all functionality of the system.</p>
	<p>Provide the capability to audit system data records by recording the ‘username’, ‘date’, and ‘time of update’ for the last user that modifies a record.</p> <ul style="list-style-type: none"> ➤ This audit information must be available at the transaction level ➤ Ability to produce history of all changes made to the record not just most recent changes ➤ Ability to configure records to be audited; Should not be on/off for whole system ➤ Create audit log that allows the ability to capture the number of failed logons. ➤ Ability to view actual user name and phone number ➤ Ability to view transaction history to include field value.
	<p>Provide data archiving functionality.</p>
	<p>Provide work flow capability across all functions.</p>
	<p style="text-align: center;">Templates/Library Needs</p> <p>Provide capability to attach/view relevant files and documents in standard formats such as MS Word, MS Excel, PDF, JPG, DWG or DWF within system and make them available to all authorized users.</p>
	<p>Provide capability to check in/check out documents by authorized users to include versioning, comments, notes, and threaded discussion.</p>
	<p>Provide capability to utilize templates that provide pre-determined design standards</p>

	and allow for variance reporting.
	Provide indexing capability for all documents and records.
	Provide capability to design templates and forms which will allow for field auto population from existing data.
	Provide means of generating data call information, (surveys, monitoring forms, or web pages) which collects and deposits data directly into the system.
	Provide capability for large file storage.
B.3.2	Project Management
	Provide capability to import and export data from leading scheduling software tools including but not limited to: <ul style="list-style-type: none"> ➤ Primavera P6 ➤ Microsoft Project 2007.
	Provide Gantt chart capability across the system <ul style="list-style-type: none"> ➤ System shall allow for the Gantt chart to appear in PDF and HTML exports.
	Provide project system capabilities that include but are not limited to: <ul style="list-style-type: none"> ➤ Target and measure overall project performance including tracking and managing costs, schedules, resource utilization and identifying potential and/or anticipated delays ➤ Provide analysis and scenario capability including project performance vs. target, critical path analysis and identify out of tolerance areas ➤ Estimate and forecast project costs and schedules, determine cost to budget, create and track multi year budgets and budget changes and create and track multiple project versions ➤ Perform Earned Value Management (EVM) calculations and updates based on the ANSI/EIA-748-A Standard for Earned Value Management System. ➤ Ability to reference past performance on similar project scopes ➤ Ability to provide requirements development and management ➤ Ability to provide change control management ➤ Provide risk management capability.
B.3.3	Strategic Master Planning
	Provide capability to generate, edit, view and track all planning actions to include but not limited to: <ul style="list-style-type: none"> ➤ Historical comparisons and trend analysis ➤ Cost estimating ➤ Forecasted needs.
B.3.4	Capital Budgeting

	<p>Provide capability to generate, edit, view and track all planning and budgeting actions from formulation to execution to include but not limited to:</p> <ul style="list-style-type: none"> ➤ Pipeline funds (prior to commitment) ➤ Cost estimating.
	<p>Provide capability to allow for the following but not limited to:</p> <ul style="list-style-type: none"> ➤ Funding approvals and sources at established points ➤ Assignment of ranking with priority value ➤ Create new project development requests ➤ Management of multi-year budgets ➤ Track budgets by funding program ➤ Cost estimating ➤ Specification of numeric values for pre-determined criteria ➤ Track funded and non-funded projects ➤ Track return on investment (ROI).
B.3.5	Real Property and Lease Administration
	<p>Provide capability to manage vertical and horizontal real property assets, including buildings, structures, land, and easements of land.</p>
	<p>Provide capability to track, add, delete and change Federal Real Property Profile (FRPP) and DHS data element requirements.</p>
	<p>Provide capability to upload the General Services Administration (GSA) rent bill and generate a reconciliation report.</p>
	<p>Provide capability to create, renew/modify, cancel, and monitor lessor and lessee activity including but not limited to:</p> <ul style="list-style-type: none"> ➤ Consumer Price Index (CPI) data ➤ Lessor and lessee information ➤ Creation and renewal of leases ➤ Calculate and track regional rental housing data ➤ Calculate rent on a pro-rata basis ➤ User-determined notifications/alert intervals on critical dates such as lease expiration ➤ Calculate rental adjustments based on specific housing conditions as specified in OMB A-45.
	<p>Provide capability to perform or link to acquisition functions in SAP such as but not limited to:</p> <ul style="list-style-type: none"> ➤ Invoicing ➤ Purchase Orders (form) ➤ Purchase Requisitions (form) ➤ Receiving ➤ Ability to track request for work authorization (RWA) expiration dates.
B.3.6	Space/Move Management
	<p>Provide capability to accurately report on workplace activity to include but not limited to:</p>

	<ul style="list-style-type: none"> ➤ Space allocations, utilization and efficiency ➤ Management of shared space ➤ Occupancy plans/vacancy analysis ➤ Facility master planning and site infrastructure planning ➤ Move management and analysis ➤ Churn rates ➤ Chargebacks ➤ Provide capability for users to create occupant emergency preparedness plans ➤ Stacking plans.
B.3.7	Environmental and Energy Planning and Compliance
	Provide capability to store and track information on National Environmental Policy Act (NEPA) factors.
	Provide capability to track facility environmental compliance factors.
	Provide capability to capture and track environmental requirements related to acquisitions: Green Procurement, RCRA6002, Electronic Stewardship, etc.
	Historical reference – identify previous relevant solutions to current problem based on multiple variables.
	Provide capability to store and track the following but not limited to: <ul style="list-style-type: none"> ➤ Date of Environmental sampling and sampling results ➤ Solid waste material disposed of at the facility and the estimated cost of recycling.
	Provide capability to generate and archive environmental compliance audit-related documentation.
	Provide capability to automate and update each fiscal year existing financial environmental liability cost models.
	Provide capability to capture/store Leadership in Energy and Environmental Design (LEED) credits/points for certification to include but not limited to: <ul style="list-style-type: none"> ➤ Calculation of environmental scores for sustainability of workplace assets and operations for each building.
	Provide capability to include the following system functions but not limited to: <ul style="list-style-type: none"> ➤ Collect and store all details of utility invoice cost and consumption for all types of utilities at each facility ➤ Calculate data collected in the utility invoices and reconcile that information into customized energy reports ➤ Project anticipated consumption or cost changes over time and compare to actual facility budgets and costs ➤ Track new facility utilities and utilities associated with facility disposal ➤ Perform all functions currently required to complete the annual energy report including carbon emissions calculations ➤ Track utility rates and incentives by utility vendor and facility ➤ Track energy management systems and equipment by facility

	➤ Energy production (solar panels, windmills, etc.).
	Provide capability to create environmental templates and forms that capture previous environmental protection needs throughout the facilities lifecycle.
B.3.8	Computer-aided Drafting (CAD) Integration
	Provide capability to convert CAD drawings into web-based images via a bi-directional link that allows users to work on facility management activities either directly in the CAD application or in the selected system.
B.3.9	Geographic Information System (GIS) Integration
	Provide capability to map and layer information through the use of CBP's Enterprise Geospatial Information System (eGIS). Provide compatibility with ESRI ArcGIS).
B.3.10	Maintenance Management
	Provide capability for facility and equipment deferred maintenance management.
	Provide capability for facility equipment warranty and life-cycle management.
	Provide capability for facility repair management.
	Provide capability for facility equipment inventory management system using industry recognized bar-coding system.
	Provide capability for facility and related plant equipment preventative maintenance management.
B.3.11	Facility Condition Assessments
	Provide for an industry recognized facility condition index system.
B.3.12	Service Desk/Work Order Management
	Provide capability for facility services desk/work order management.
B.3.13	Mobile Technology
	Provide capability to interface with Mobile Technology Devices to include but not limited to: <ul style="list-style-type: none"> ➤ Barcode Scanning ➤ Radio Frequency Identification (RFID) ➤ Wireless devices that track maintenance/repair ➤ Wireless devices that capture, import and export data from the system.

	<ul style="list-style-type: none"> ➤ Handheld PDA's ➤ GPS measurement tools such as Trimble GeoXT (or similar).
B.3.14	Enhanced Reporting/Dashboards
	<p>Provide standardized dashboards as well as the capability to create personalized dashboards within the context of the user's role in the organization to include but not limited to:</p> <ul style="list-style-type: none"> ➤ Set user-defined targets for key performance indicators ➤ Create user-defined thresholds for caution and alert ranges ➤ Present actionable data to support critical analysis and decision making ➤ Highlight at-risk projects with color-coded flags ➤ Flexible drill-down formats. ➤ Predetermined as well as user-defined criteria to reflect color-coded flag notifications.
	<p>Provide standardized as well as the capability to create ad hoc reports to include, but not limited to:</p> <ul style="list-style-type: none"> ➤ Provide a robust standard report portfolio (including pre-defined federal and industry standard reports) that will be representative of all major functionalities of the system ➤ Provide capability to export to graphs; spreadsheets (excel); word processing; HTML; etc. ➤ Provide capability to create, change or delete layout and selection variants ➤ Provide capability to designate variants as user only or universal ➤ Provide extensive drill-down to record level (details) with change or display capability ➤ Provide capability to design Ad Hoc tabular data, charts, and key performance indicators (KPI) for projects/portfolios across all functionalities ➤ Provide capability to create on demand-trigger reporting ➤ Provide capability to designate filters when pulling data from any point in the system information ➤ Provide capability to consolidate data from multiple sources into an organizational-wide view ➤ Provide standard performance reports covering functionality across the system ➤ Ability to modify data within the system prior to export. Export information to an excel spreadsheet to mimic modified fields in system ➤ Ability to see what a given report would have looked like if it had been run at a user defined point in the past ➤ Provide strong library of mandatory Environmental reports ➤ Provide scorecard capability ➤ Ability to incorporate photos into reports ➤ Ability to print batches (multiples) of reports.
	<p>Provide strong query capability across the system to include the following but not limited to:</p> <ul style="list-style-type: none"> ➤ Update/refresh report after change ➤ Select all/deselect all ➤ Select multiple/filter ➤ Sort by any column ➤ Sum/Sub totals

	<ul style="list-style-type: none"> ➤ Format print ➤ Find ➤ Dynamic ability to rearrange columns on screen w/o rerunning reports
	Provide pre-defined performance metrics across all aspects of the system.
	Provide capability to create scorecards to include but not limited to: <ul style="list-style-type: none"> ➤ Facilities Management Performance ➤ Operational and Maintenance Performance ➤ Portfolio Performance ➤ Project Management Performance.
B.3.15	Asset Management
	Provide capability to manage and track all assets (that are not real property) including, but not limited to: <ul style="list-style-type: none"> ➤ Fleet Management ➤ Warehousing/Inventory Management ➤ Telecommunications and Cable Management ➤ Furniture and Equipment Management. ➤