GSA

Transition Manager's Meeting

AIA Boardroom

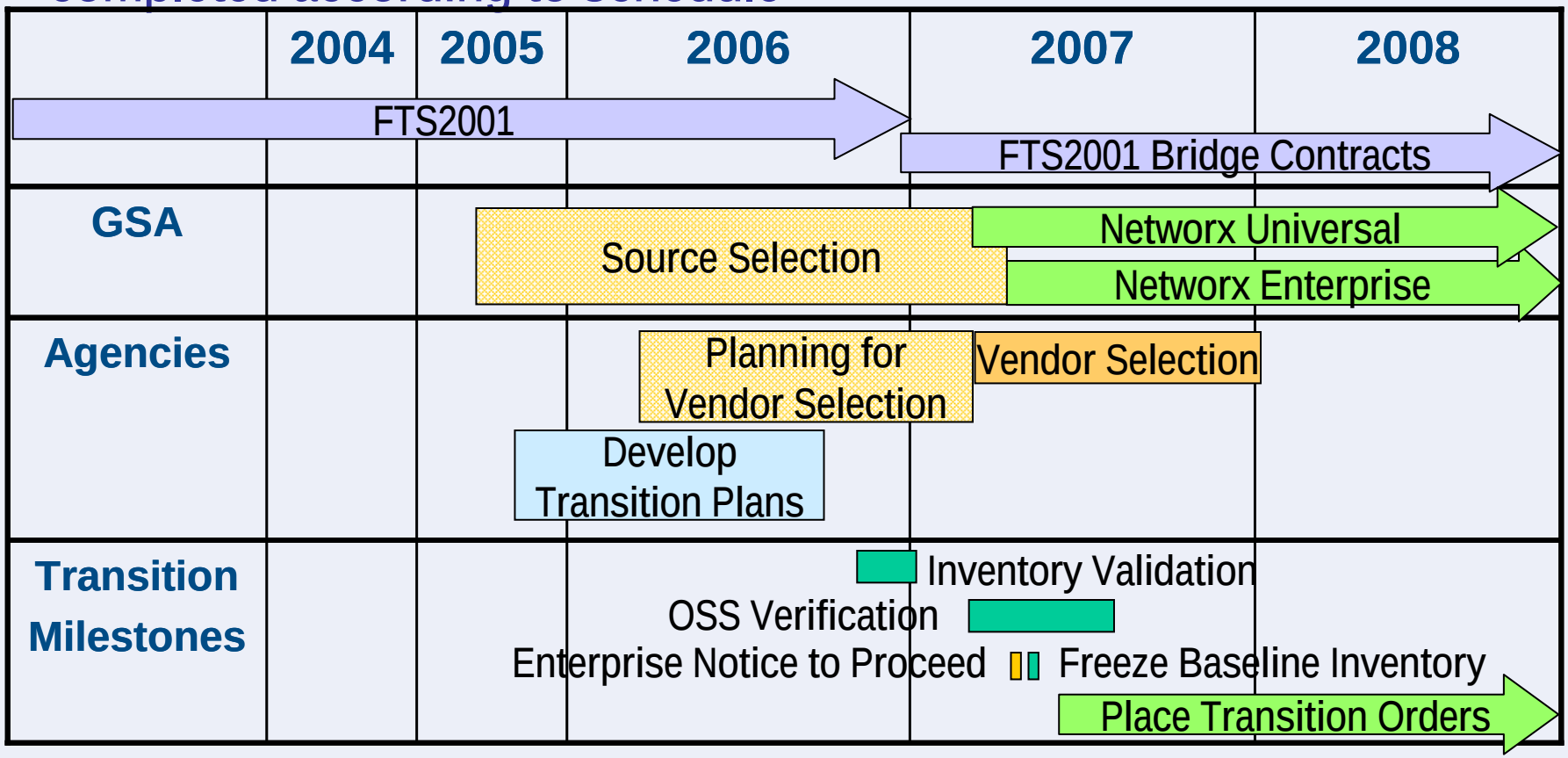
October 25, 2006

Meeting Topics & Agenda

- Introductions and Administrative Remarks
- Networx Schedule
- Updates
    - GAO Audit/GAO Guiding Principles
    - Transition Summit Recap
    - Transition Coordination Center
- Reconciliation Process for Customer Design Documents
- Transition Baseline Inventory Tool & Validation
- TBI Testing
- Planned Major Milestones
- Proposed 2007 Meeting Schedule
- Adjournment

Networx Schedule

GSA is working to ensure transition milestones and activities are completed according to schedule



Five Guiding Principles

(GAO Report: Guidance Based On Sound Practices)

FTS provided transition guidance that fully addresses two of the five sound practices

Sound transition planning practice	Example of how the practice has been addressed
1. Strategic Analysis of Telecom Requirements	Available guidance recommends that Agencies involve the enterprise architect to ensure that planning is consistent with enterprise architecture guidance and to determine, based on the level of complexity of the transition, whether any changes should be made before or after the transition.
2. Resource Identification	Available guidance indicates that necessary staffing and financial resources should be anticipated early and accurately and that Agencies should develop a forecast of required resources throughout the transition to Networx. Available guidance also suggests that Agencies examine current resources to determine if adequate personnel exists; address shortfalls that may require contractor support; and identify personnel to receive training, and the desired scheduled and locations of training.

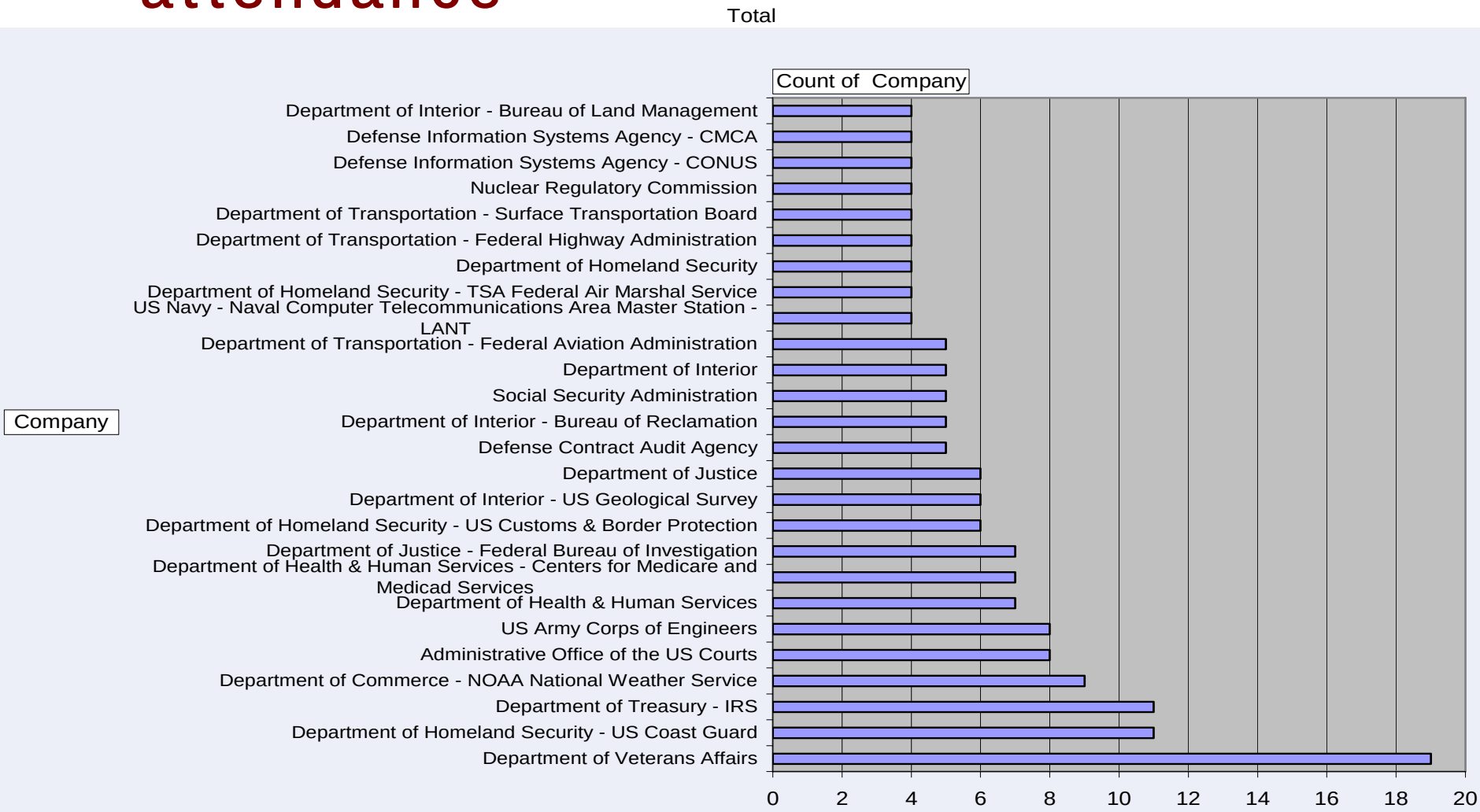
Guidance has not been provided on aspects of the three remaining practices

Sound transition planning practice	Aspect of the practice not addressed
3. Telecommunications Inventory	FTS is compiling a baseline inventory to aid Agencies during the transition, but has not provided guidance on establishing an inventory process that can be utilized to maintain telecommunications inventories during and after the transition.
4. Structured Transition Management Approach	Guidance provided suggests that transition managers should ensure that Agencies have adequate internal project management support for the expected transition workload, and, if appropriate, a hierarchy of transition teams at the sub-agency level. However, the guidance reviewed does not address the importance of Agency use of project management, configuration management, and change management processes.
5. Transition Plan	Available guidance indicates that Agencies should identify transition goals and develop a prioritized list of tasks and a schedule with key dates to assist in transition management. However, none of the guidance reviewed addressed Agencies establishing measures of success or performing a transition-specific risk assessment.

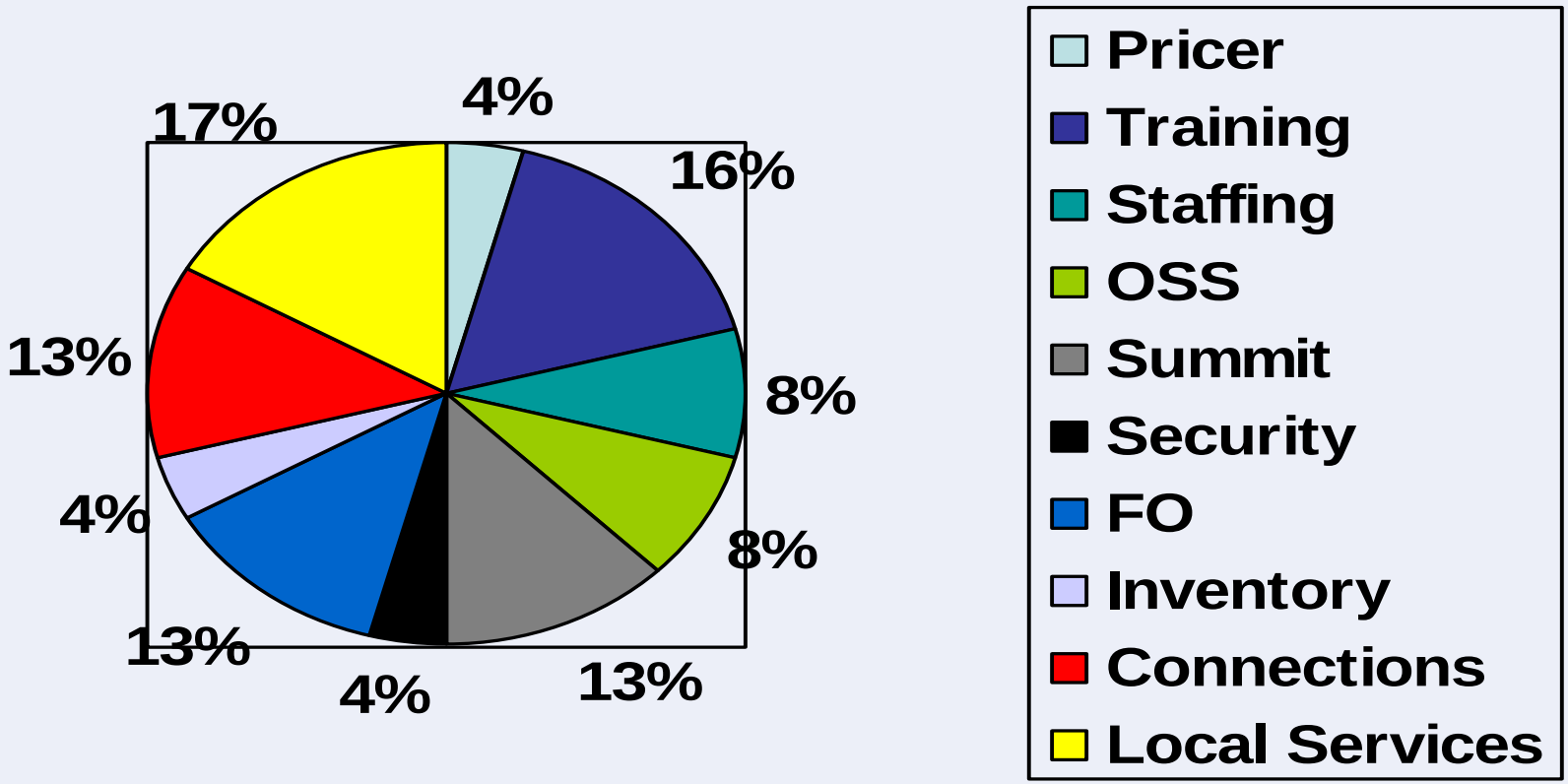
Networx Transition Summit Summary

- Total Attendees: 904
- Subtotal—Government: 503
- Subtotal—Industry: 401
- Proposed Next Summit: January 30-31, 2007, same location

Top 20 Government Agencies in attendance



Summit Questions



twenty-one answers posted to the Web site at gsa.gov/networxtransition on the "Transition Summit" page

Transition Coordination Center (TCC)

- GSA currently refining Transition support activities:
  - Transition Tracking and Reporting
  - Strategic Guidance
  - Issue Resolution
  - Customer Outreach
  - Vendor Liaison
  - Cutover Planning Support
  - Schedule Coordination
  - Tier 2 Help Desk Referrals
  - Tier 3 Referrals
- Several of these functions may reside within the TCC
- GSA currently developing TCC CONOPS

GSA

Accommodating FTS-2001 Custom Designs in NETWORX

October 25, 2006

The slides on the FTS2001 CDD/MDDs are available on the private Transition Website

GSA

FTS2001 Transition Baseline Inventory Tool

Adam Lesser
GSA Networx Transition Team (Booz Allen Hamilton)
October 25, 2006

Introduction

- Agency Transition Planning begins with the Inventory
- The on-line Transition Baseline Inventory (TBI) tool is designed to assist Transition Managers and other Government authorized users with the validation of their FTS2001/Crossover transition baseline inventory (TBI)
- This briefing reviews the validation process and provides an introduction to the TBI tool using an overview of the TBI training
- Beta Testing on the TBI tool is scheduled for 3-17 Nov 2006
- Production release of the TBI tool will occur after successful TBI Beta testing

Inventory Establishment

- Accurate inventory identified as critical success factor for effective transitions
  - GAO Report "Guidance Based on Sound Practices", June 2006
    - "Establish a telecommunications inventory" identified as one of five sound transition planning practices
    - "…the development of an accurate and reliable inventory is important to ensuring that the agency will be prepared to transition quickly."
  - FTS2001 Lessons Learned document, March 2005
    - "A complete and accurate baseline inventory prior to contract award is critical."
    - Developed by the IMC Transition Working Group (TWG)
    - Identified 28 "lessons learned"
- GSA has worked to compile a consolidated FTS2001 inventory known at the Transition Baseline Inventory (TBI)

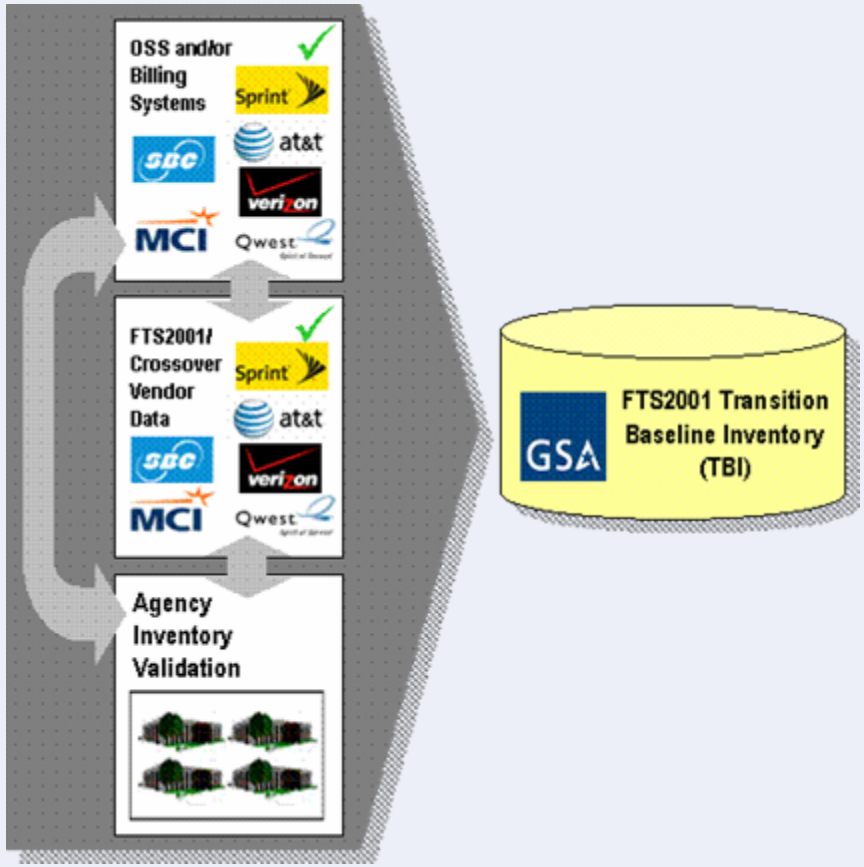
Inventory Template

- TWG developed an inventory template
  - Identified data elements for each service type
  - Requested consistent data from all vendors for TBI
  - Available for download on TM website (login req)

CSS Audio Teleconference Service						
Item Number	C.1	C.2	C.3	C.4	C.5	C.6
Data Elements	FTS2001 Contractor Name	Unique Inventory Record Id.	Agency Bureau Code	Agency Hierarchy Code	Agency Name	Sub Agency Name
Element Description		Up to 16 alphanumeric character code	4 character code	28 character code	Department, Agency	Bureau, division, etc.
Dedicated Transmission Service (DTS)						
Item Number	C.1	C.2	C.3	C.4	C.5	C.6
Data Elements	FTS2001 Contractor Name	Unique Inventory Record Id.	Agency Bureau Code	Agency Hierarchy Code	Agency Name	Sub Agency Name
Element Description		Up to 16 alphanumeric character code	4 character code	28 character code	Department, Agency	Bureau, division, etc.
Optical Wavelength Service (OWLS)						
Item Number	C.1	C.2	C.3	C.4	C.5	C.6
Data Elements	FTS2001 Contractor Name	Unique Inventory Record Id.	Agency Bureau Code	Agency Hierarchy Code	Agency Name	Sub Agency Name
Element Description		Up to 16 alphanumeric character code	4 character code	28 character code	Department, Agency	Bureau, division, etc.

Inventory Process

- GSA is developing a FTS2001/Crossover inventory
  - Requested that TWG inventory template be used
  - Captured data from FTS2001/Crossover vendors
  - Currently developing a plan for regular updates to maintain data
- GSA developed a preliminary TBI
  - Used for transition tracking and inventory validation
- Agency inventory validation will follow



Transition Baseline Inventory

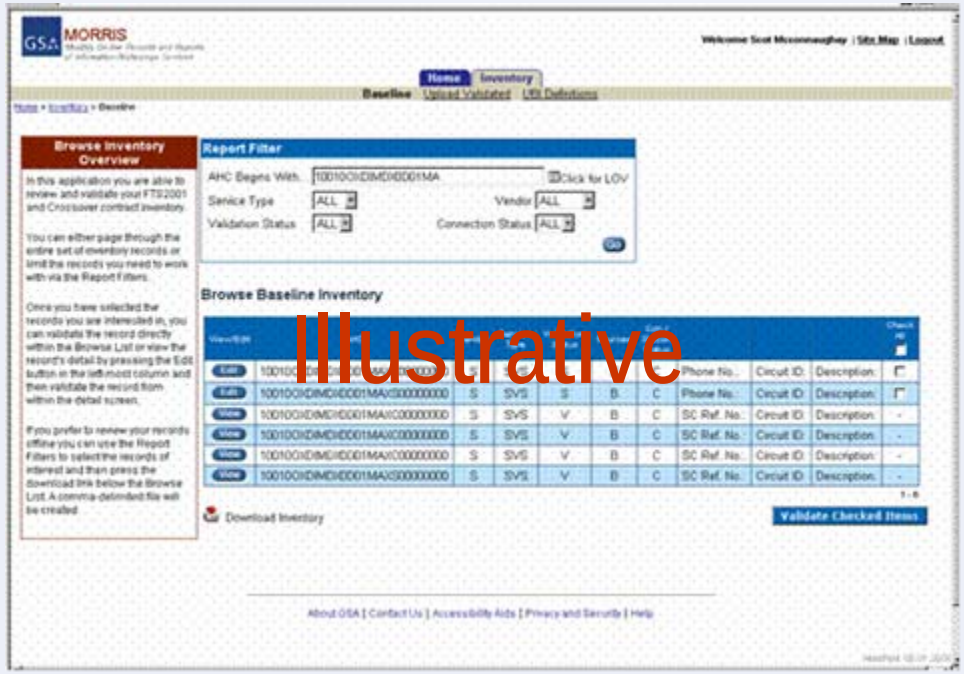
- Transition Baseline Inventory (TBI) will support key activities in an Agency's transition to Networx
  - Supports the Fair Opportunity process
    - Aids in the development of Agency acquisition planning
    - Enhances the effectiveness of GSA provided tools
  - Establishes a baseline for transition tracking
  - Supports the transition credit reimbursement process
- Validating the TBI is needed to improve its accuracy
- GSA developed an online inventory validation tool (MORRIS) to facilitate the validation effort

Inventory Validation Process

- Agencies will access their inventory records online via the tool
- What is validation?
  - Validation is the confirmation from an Agency that a certain circuit or service is that Agency's
  - The purpose is to make sure all Agencies are aware of their inventories so they can effectively plan for their transition to Networx
- GSA and appropriate stakeholders will provide assistance with issues that arise from the inventory validation process, including billing issues
- Validation can occur using several methodologies

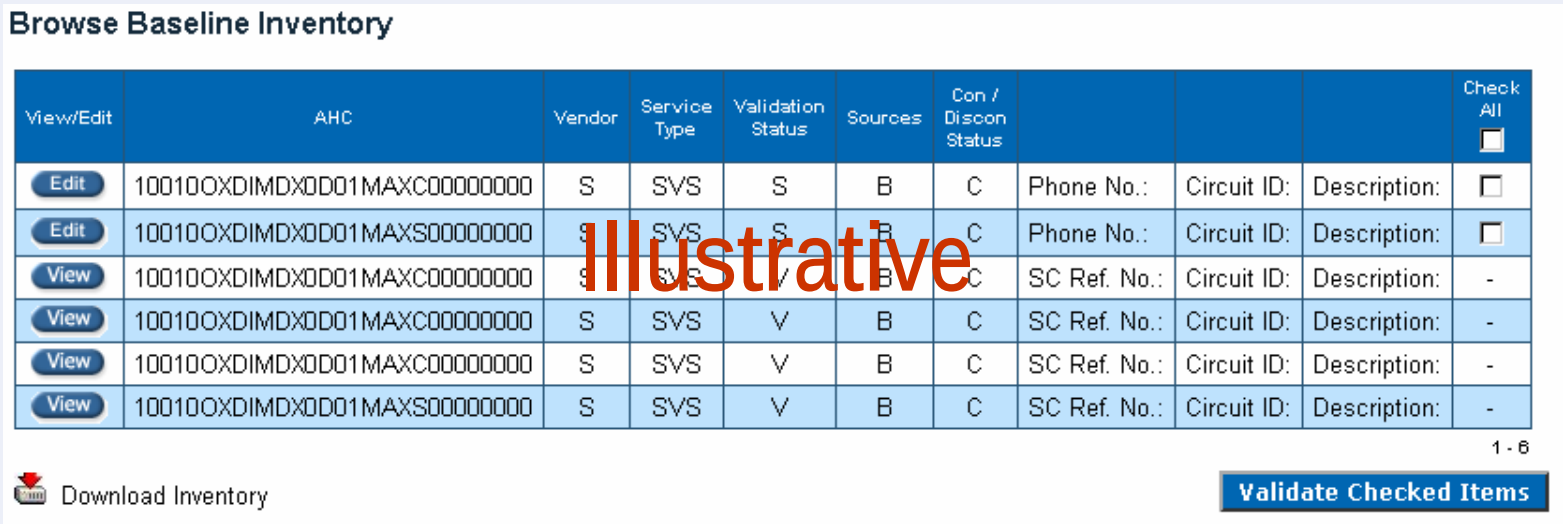
Inventory Validation Process

- Option #1: Validate records online using TBI tool
- Option #2: Validate inventory offline and upload the validated data back to TBI tool
- Option #3: Upload an existing Agency inventory to TBI



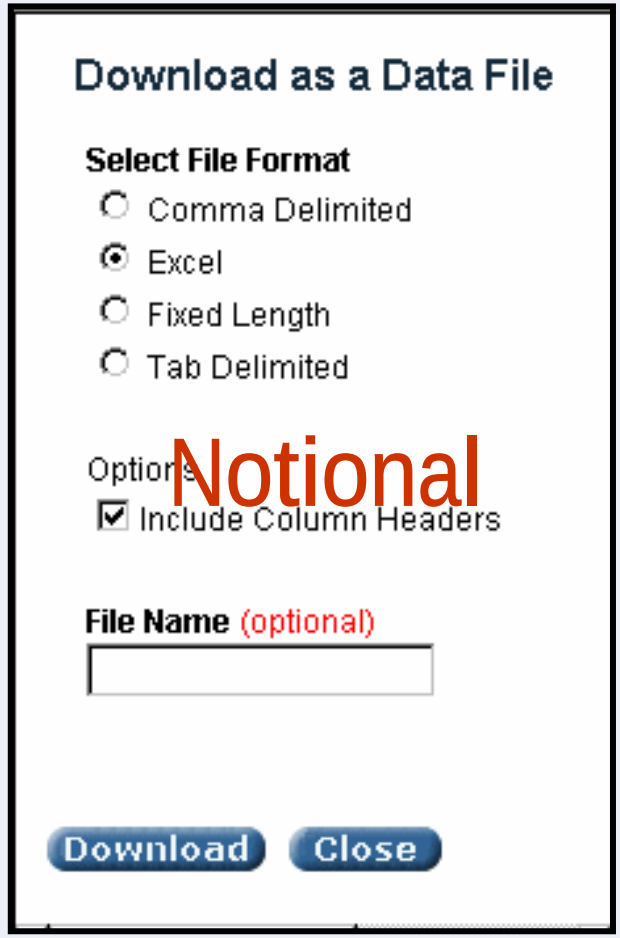
Inventory Validation Process – Option 1

- Once a user logs into the system, the user can access and begin validating its inventory data
  - Navigation on screen will allow users to scroll through data
  - Use filters to limit data
  - Data will be “locked” once validated



Inventory Validation Process – Option 2

- Conduct offline data comparison and validation
  - Maintain inventory template format
  - All address and service features can be modified
  - Once validated, upload inventory back to the TBI tool
  - Preferred for Agencies with existing inventory data



Inventory Validation Process – Option 3

- Agency is responsible for providing its own validated data set to be uploaded to the TBI tool
  - Data should maintain the same format as the download file for consistency
  - Data should include complete unique identifier fields
  - Once uploaded, the data will be assumed to be “validated”

Inventory Validation Process

- Validated data will be “locked” as validated in the TBI tool
  - Users can “unlock” validated data, if additional changes are needed
  - By validating the data, an Agency accepts ownership for that inventory item
- Agencies may also encounter data sets that are unknown
  - The TBI tool will allow Agencies to identify these data sets
  - Agencies should work with GSA to resolve

TBI Tool Training Overview

- The Networx team established training objectives to cover all of the on-line Transition Baseline Inventory (TBI) tool validation options
- Each training objective contains useful information on how to understand and complete the required steps
  - Detailed descriptions of the system functionality
  - Step-by-step processes to complete the objective(s) within MORRIS
  - Some objectives contain short review questions to understand basic concepts and processes

Objectives

Objective Number	Objective Description
1	Successfully login to the MORRIS system on the first attempt and understand system access restrictions
2	Navigate MORRIS inventory screens and locate a specific functionality by the second attempt
3	Successfully upload and download inventory data by the second attempt
4	Explain the fields that can be modified, difference between validated and un-validated records, and demonstrate validation of records

Objectives

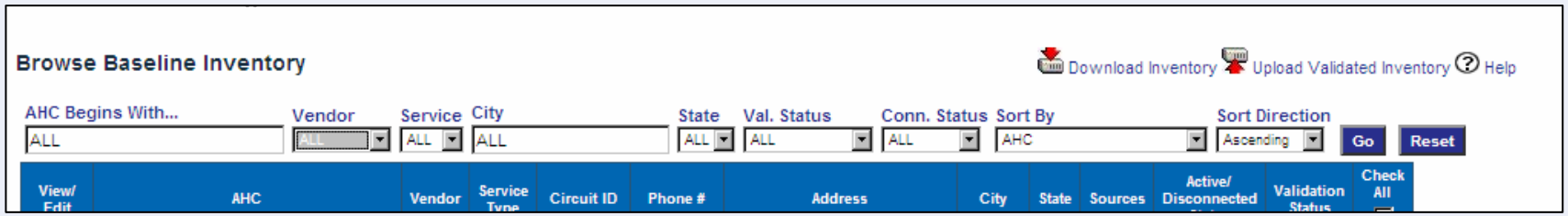
Objective Number	Objective Description
5	Understand the methodologies for online validation and be able to explain those restrictions to other potential users
6	Understand the process for resolution of issues, including data accuracy issues, unknown data issues, etc., and recall or locate the contact points to get help
7	Understand GSA schedules for updating records in the inventory and for backing up data
8	Locate helpful information from the user's guide or through the Networx PMO help desk on the first attempt

Objective 1 – Logging In

- Objective: Successfully login to the TBI tool and understand system access restrictions
  - User id and password required to log in
  - Passwords must follow MORRIS password guidelines
  - Login restricted by AB Code for each user
  - New accounts requested via the MORRIS Help Desk

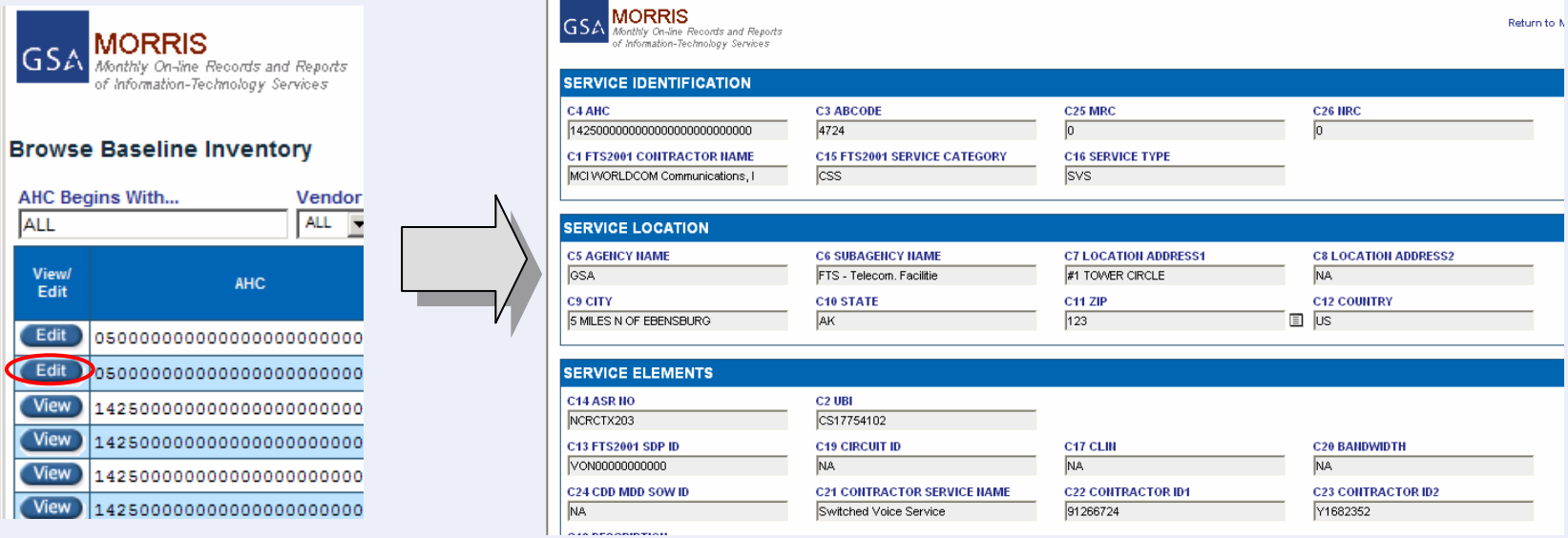
Objective 2 - Navigation

- Objective: Navigate TBI tool screens and locate a specific functionality by the second attempt
  - Inventory Browse Page
    - Review records, based on applied filters
    - View/Edit individual records
    - Contains Report Filer region
      - Sort by AHC, Vendor, Service Type, State, Validation Status, etc.
      - All filters use pull-down menus except AHC and City



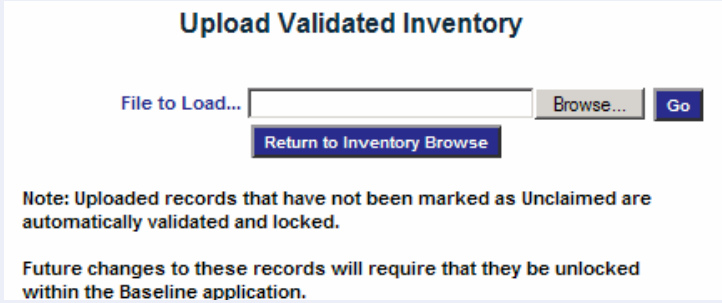
Objective 2 - Navigation

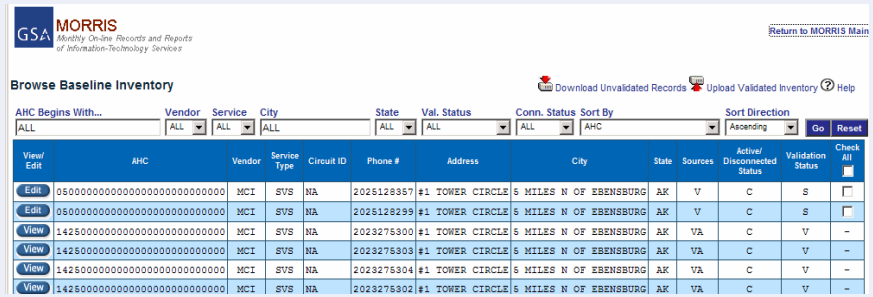
- Objective: Navigate inventory screens and locate a specific functionality by the second attempt
  - View/Edit page
    - Allows for viewing/modification of record data
    - Functionality depends on validated/unvalidated status



Objective 3 – Upload/Download

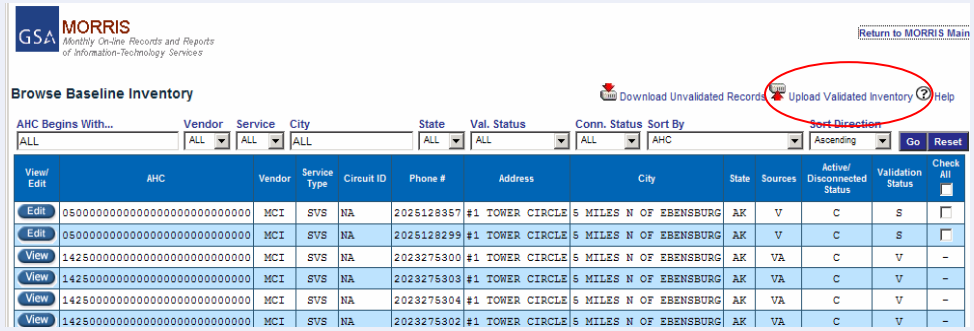
- Objective: Successfully upload and download inventory data by the second attempt
  - Several validation methodologies require uploading/downloading
  - 1 upload/download per service type
  - Must adhere to TBI template format
  - .CSV (comma delimited) format required

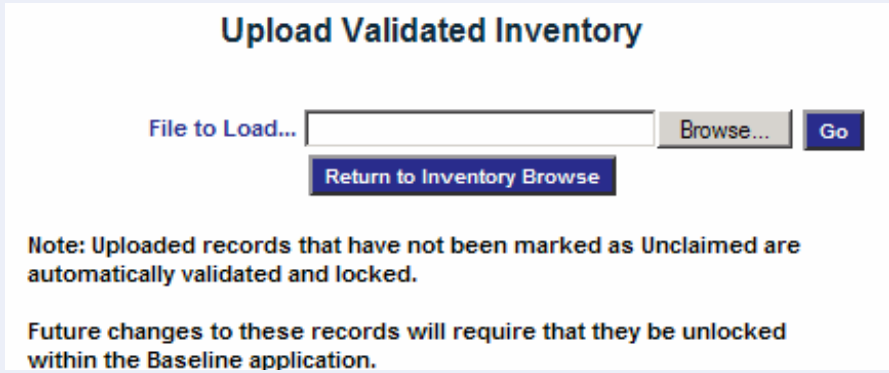




Objective 3 – Upload/Download

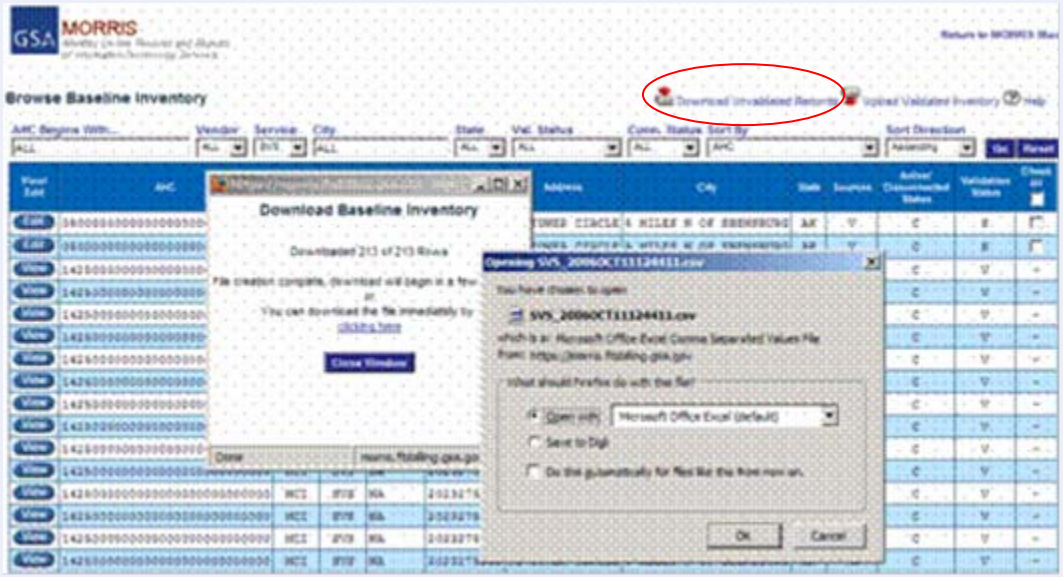
- Uploading inventory data
  - Select “Upload Validated Inventory” from Browse page
  - Select “Browse” to locate the validated inventory file and select “Go” to begin the upload.
  - Verify that the upload was successful by looking for their submitted job in the “Upload” page.
  - Repeat for additional uploads, if necessary.





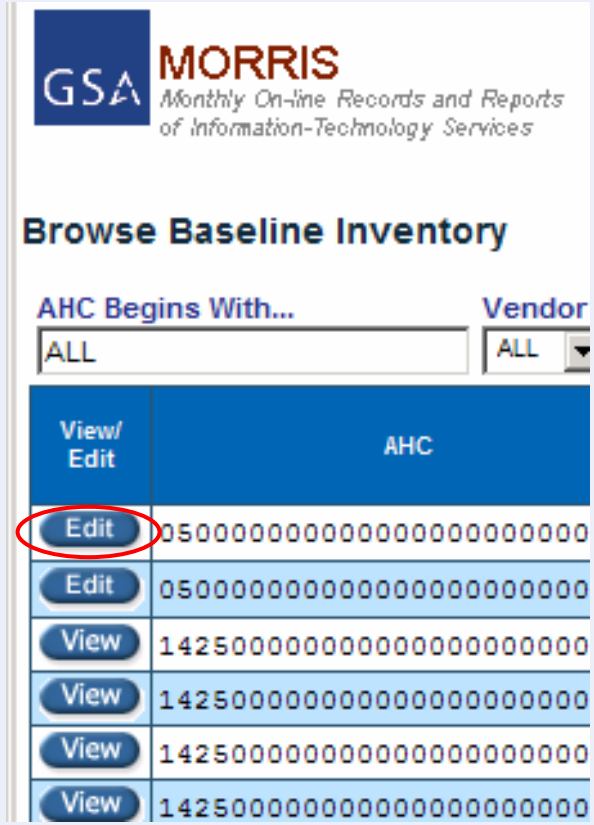
Objective 3 – Upload/Download

- Downloading inventory data
  - Select a service from the inventory headings
  - Apply filters, if required and click “Go” to display selected inventory data on the screen.
  - Click on the “Download Unvalidated Records”
  - Save to desired location and/or open downloaded file for viewing.
  - Repeat as needed



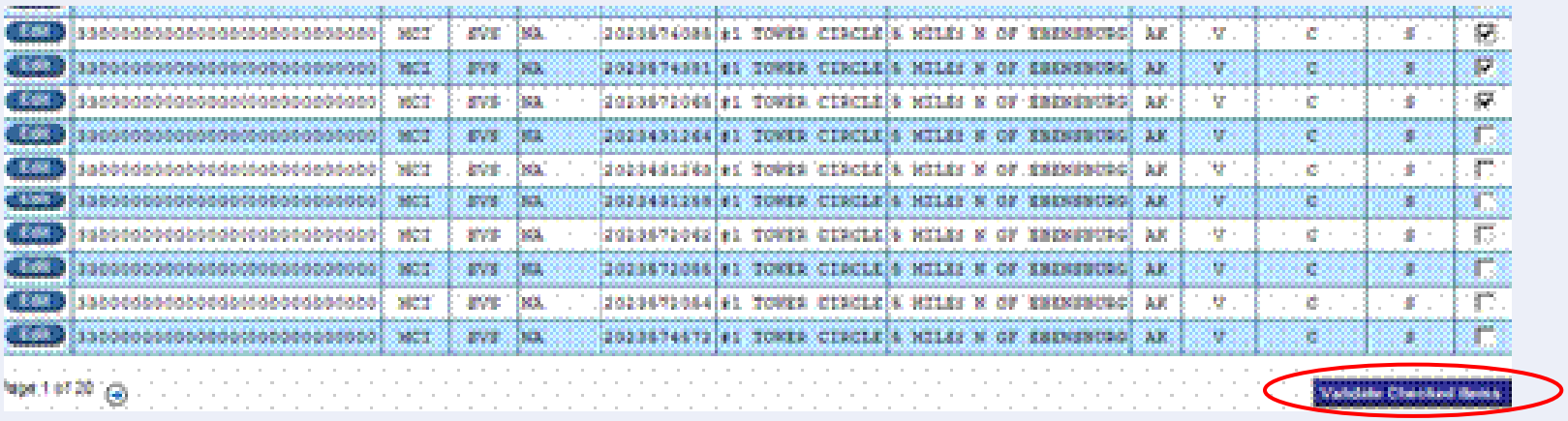
Objective 4 – Understanding Data

- Objective: Explain the fields that can be modified, difference between validated and un-validated records, and demonstrate validation of records
  - Data can be modified using the “Edit” function
    - Data must be in “Unlocked” status
    - Certain record identifying fields can not be edited
    - Data can be saved by selecting “Validate & Save” at the bottom of the Edit page
  - Validation can occur individually by record, or multiple records at a time



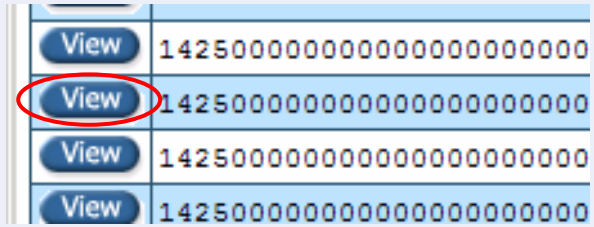
Objective 4 – Understanding Data

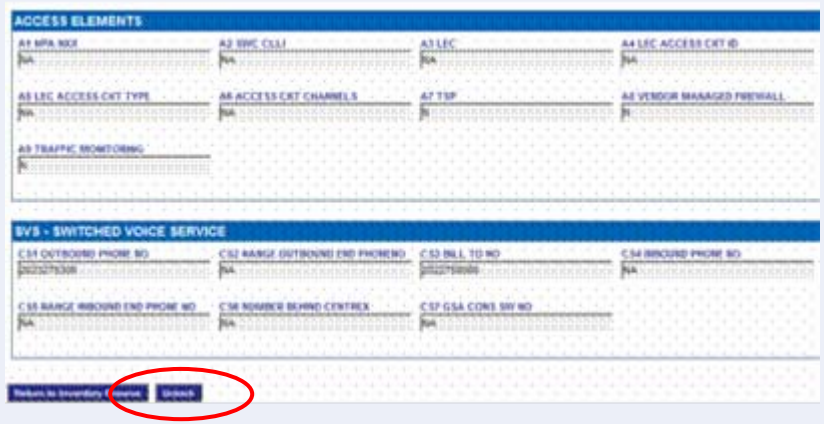
- Data can also be validated multiple records at a time
  - Click “Validate” check boxes from the Browse page
  - Select “Validate Checked Items”
  - All checked records will be validated



Objective 4 – Understanding Data

- Validated data might require changes
  - Click “View” to view an individual record from the Browse page
  - Select “Unlock” to invalidate that record
  - Once unvalidated, click on the “Edit” page to modify the record
  - Click “Validate and Save”





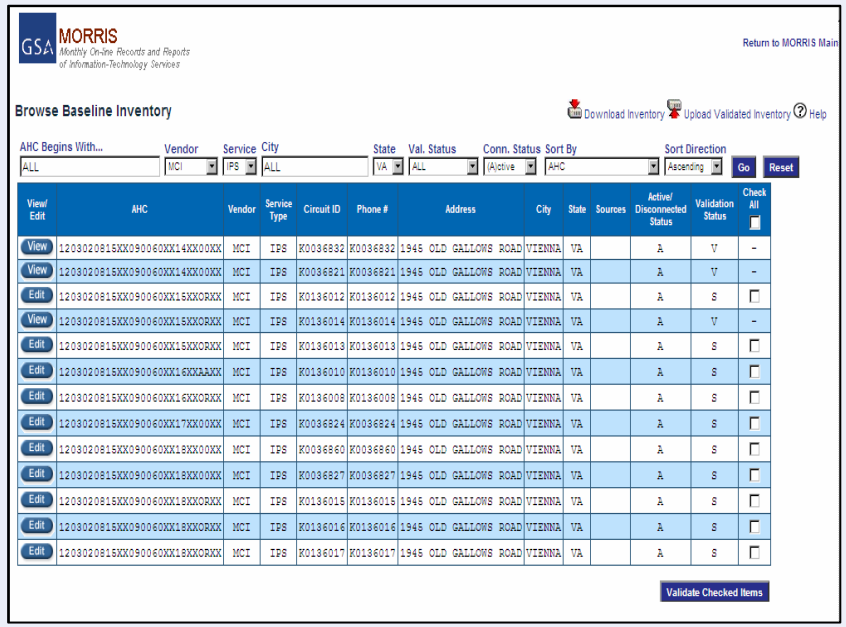
Objective 5 – Validation Methodologies

- Objective: Understand the methodologies for online validation and be able to explain those restrictions to other potential users

Methodology Number	Methodology Description
1	Users validate their complete inventory online
2	Users download their Agency's inventory data for offline comparison with any existing Agency data
3	Users upload their existing inventory data

Objective 5 – Validation Methodologies

1. Users validate their complete inventory online
   - Check one or multiple inventory element(s) or “Check All” from to identify which record elements should be validated
   - Click “Validate Checked Items”
   - Repeat as necessary until all data records indicate they have been validated

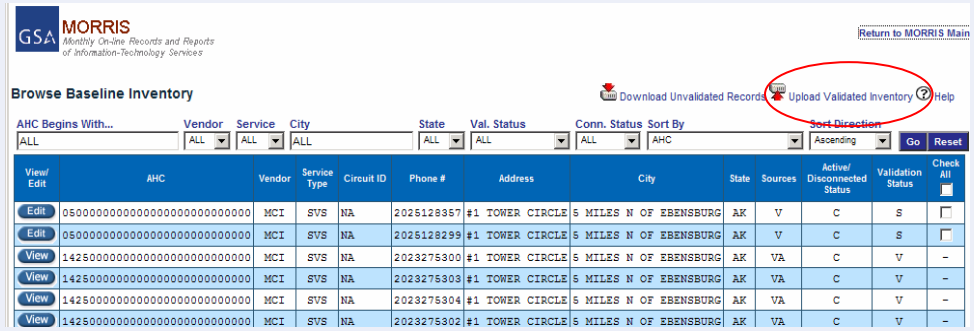


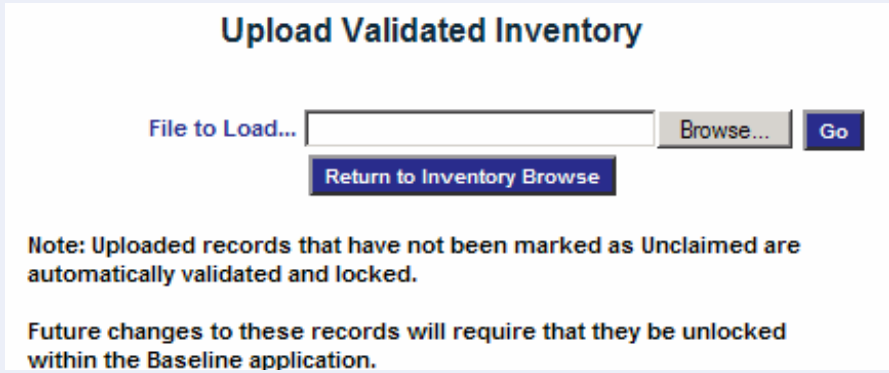
Objective 5 – Validation Methodologies

2. Users download their Agency's inventory data for offline comparison with any existing Agency data
   - Select a service from the inventory headings (i.e. SVS, ATM, FR, etc) and apply filters
   - Click "Go" once selected inventory data is on the screen.
   - Click on the "Download Unvalidated Records" and save
   - Conduct data validation/modification analysis offline.
   - Upload validated data back into the TBI tool by selecting "Upload Validated Inventory" icon
   - Repeat, if necessary

Objective 5 – Validation Methodologies

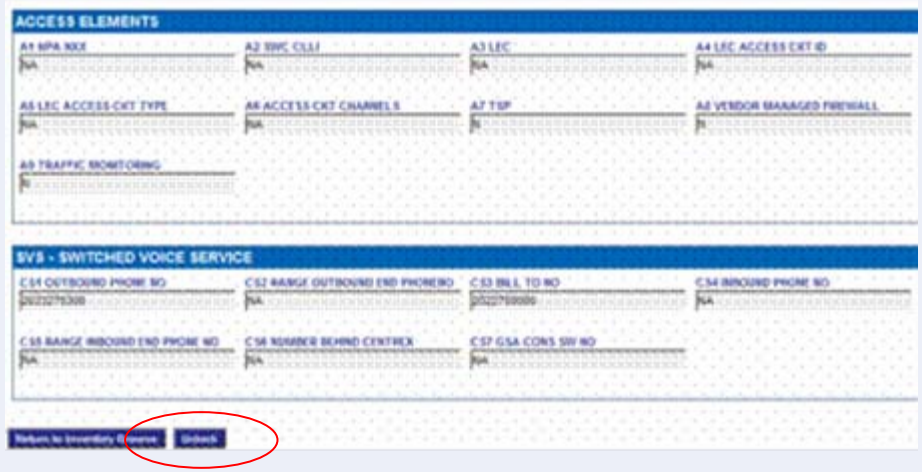
3. Users upload their existing inventory data
   - Make sure data is in the TBI tool template format
   - Select “Upload Validated Inventory” and locate upload file
   - Repeat for additional uploads, if necessary





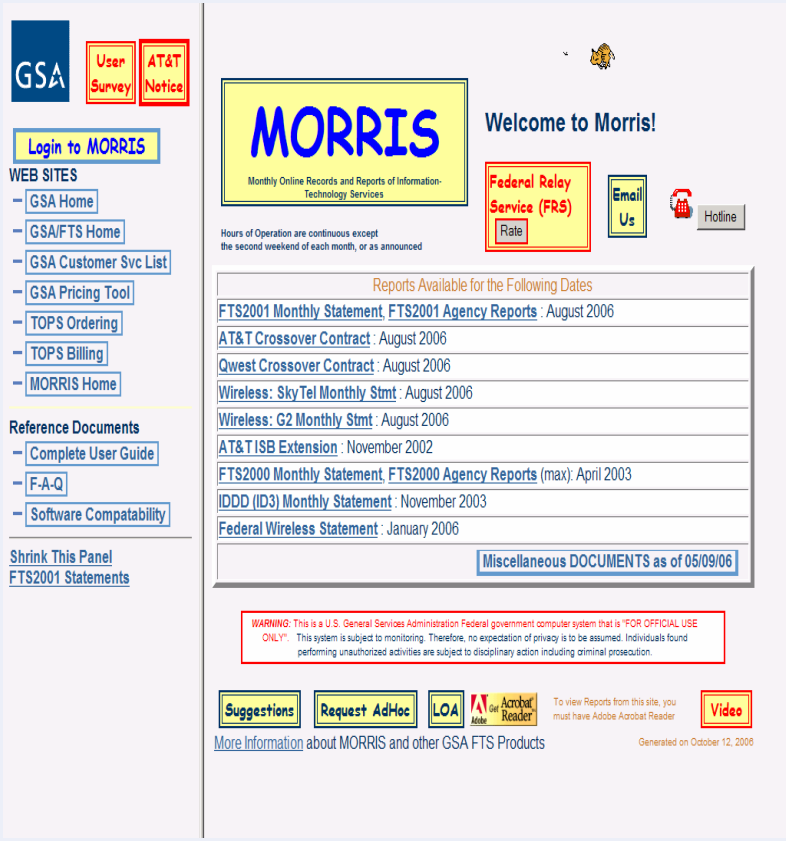
Objective 6 – Issue Resolution

- Objective: Understand the process for resolution of issues, including data accuracy issues, unknown data issues, etc., and recall or locate the contact points to get help
  - Disputes may arise as a result of the comparison
  - Users may “Unclaim” records
  - Contact the Networx PMO Help Desk, as needed



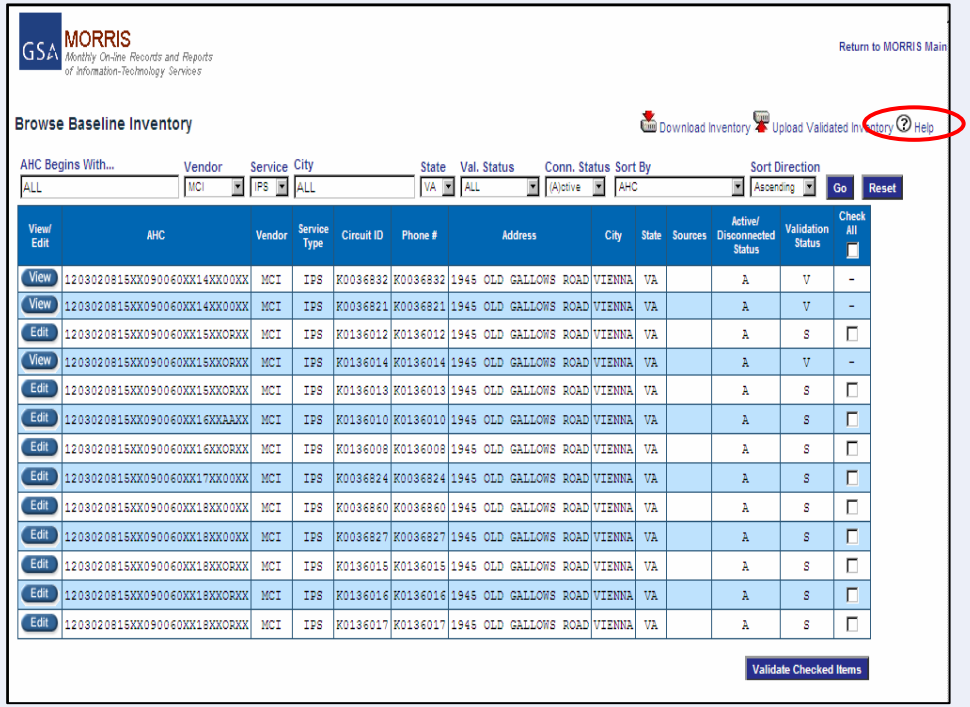
Objective 7 – MORRIS Updates

- Objective: Understand GSA schedules for updating records in the inventory and for backing up data
  - Effectively time Agency validation activities without corrupting data records
  - TBI updated monthly to maintain accurate inventory data
  - Existing data will not be changed



Objective 8 – Help Guide

- Locate helpful information from the user's guide or through the Networx PMO Help Desk on the first attempt
  - Viewed through the "Help" feature
  - "Help" feature allows users to search the TBI tool User Guide for information and/or identify relevant points of contact
  - Help Desk should be used to get tier 2 or tier 3 assistance



Next Steps

- What can Agencies do now to prepare for validation?
  - Become familiar with TBI template
  - Collect inventory data
  - Develop an approach for inventory validation
  - Identify resources to conduct validation
  - Request TBI user accounts through MORRIS
  - Be prepared to begin validation in Nov 2006

Next Steps

- Request for MORRIS Beta Testers
- Conduct MORRIS Beta Tests (3 November – 17 November)
- Release MORRIS Inventory Validation Tool
- Conduct Inventory Validation

Questions: networx.transition@gsa.gov

TBI Beta Testers

- Beta Testers should represent the following areas
  - Large, Medium and Small Agencies
  - Diversity of providers and number of providers
  - Diversity in services used
  - Centralized and Decentralized Telecom Mgt
  - Centrally billed and direct billed
  - Using TBI data and Agency loaded data

TBI Beta Testers

- Requirements
  - 5 to 9 Agencies
  - Familiarity with telecom inventory
  - Testers available to devote time to work with the TBI over a 2 week period 3-17 Nov 06
  - Willing to participate and submit written feedback
- Nomination forms due COB 31 Oct
- TWG will select on 1 Nov if needed

Planned Major Milestones (5/06)

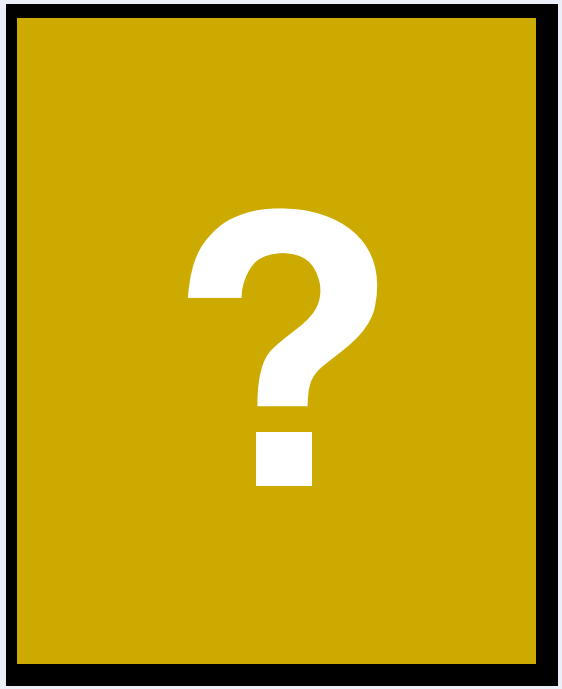
• Finalize Transition Credit Concept	Oct 2006
• Propose Transition Tracking Methodology	Oct 2006
• Begin Testing Initial Inventory Verification Tool	3-17 Nov,06
• Provide Baseline Validation Tool	Nov 2006
• Negotiate Mods For XSN Support	Dec 2006
• Transition Summit II	30-31 Jan
• TSMP	2QFY2007
• Validate Baseline	2QFY2007
• Activate TCC	2QFY2007
• Snapshot to establish 100% Baseline	NTP +30

Tentative TM Meeting Schedule for 2007

- The proposed meeting schedule for 2007 is noted below:
  - February 21 - September 19
  - March 21 - October 24
  - May 16 - November 14
  - June 13 - December 12
  - July 18
- Provide comments to networx.transition@gsa.gov
- Meetings will be held at the American Institute of Architects (AIA) building at 1735 New York Ave. (NW)
- Visit AIA's website for directions at www.aia.org and click "Contact Us/Directions"
- Meetings are scheduled from 9:30am until noon

GSA

Questions?



GSA

Thank You for Attending!

Next Transition Manager Meeting

Dec 13 2006