

Office of the Chief Information Officer FM/EUS Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999	Project Management	Tom King 305-8999

1. BACKGROUND

The objective of this task order is to provide technical project management of the Patent and Trademark Office (PTO) Facilities Management/End-User Support (FM/EUS) contract. In conjunction with this task order the FM/EUS Contractor should expect to provide support to the Office of the Chief Information Officer (OCIO) of PTO in the following areas:

- Project Management and Administrative Support.
- Task Order Preparation and Modification Assistance.
- Contract Financial Management.
- Technical and Management Advice.
- Asset Management.

2. STATEMENT OF WORK

1. The Contractor shall provide support to the PTO in the area of Project Management and Administrative Support. This includes all activities associated with the Contractor's own day-to-day project management and administration responsibilities. Sample activities include project-wide planning, staffing, scheduling, coordination, integration, oversight, progress monitoring/reporting, subcontractor liaison, cost control, payment administration, productivity/quality control, continuous process improvement, meetings/briefings/presentations, and administrative support (including general correspondence; property, facility, and records management; contract management and administration; and administrative/clerical/secretarial support (e.g. typing, spreadsheets, project schedules, data base management etc.)).
2. In conjunction with the progress monitoring/ reporting requirement, the Contractor shall regularly prepare and submit to the PTO, by the tenth (10th) day of each month, a Monthly Progress Report. This report shall detail the Contractor's progress, problems, accomplishments, and deliverables during the subject reporting period; activities planned for the next reporting period; anticipated problems; and planned vs. actual monthly as well as cumulative staff hour and cost information. The Contractor should also expect to prepare and present to the PTO, at a time to be designated by PTO, a Monthly Program Review Briefing. The scope of this briefing shall include key activities, planned work, deliverable status, issues, and financial status for each FM/EUS task order.
3. The Contractor shall provide support to the PTO in the area of Task Order Preparation and Modification Assistance. This includes Contractor support and assistance in the preparation of new task orders (including Statement of Work preparation) as well as associated costing, modification (including the preparation of Resource Estimates), negotiation, and oversight.

4. The Contractor shall provide support to the PTO in the area of Technical and Management Advice. This includes review and comment on key PTO and other contractor documents as well as technical and programmatic issues as requested by the PTO or determined necessary by the Contractor.
5. The Contractor shall review daily reports on asset management activities (deployments, excess, moves, etc.) to ensure the proper use of the inventory system. Any discrepancies must be corrected with three (3) business days.
6. The Contractor shall notify the Contracting Officer (CO) and the Contracting Officer's Technical Representative (COTR) in writing whenever the expected costs incurred in the next sixty (60) days plus costs already incurred will exceed seventy-five percent (75%) of the total estimated cost of a task.
7. The Contractor shall prepare financial information as required by the PTO (See deliverables).

3. GOVERNMENT FURNISHED MATERIAL

None.

4. LEVEL OF EFFORT

TBD

5. PLACE OF PERFORMANCE

Work will be performed in Crystal City, VA and in the Contractor's leased facilities in Crystal City and Merrifield, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the COTR (electronic form preferred).

Deliverable	Due Date
Progress Reports	10 th day of each Month
File for Robbins-Gioia CAT Updates (PTO to provide format)	15 th day of each Month
Update PTO Actual vs. Plan Spreadsheet	3 days after receipt of invoice
Government Furnished Equipment (GFE) List	1 st day of each quarter (Oct, Jan, Apr, Jun)
Asset Discrepancy Report	Daily
Task Orders/Modifications/Resource Estimates	As Required
Cost Proposals/Invoices	As Required
Negotiations/Meetings/Briefings/Presentations	As Required
Administrative Correspondence	As Required
Review and Comment on Key Documents	As Required
Technical and Programmatic Issue Resolution	As Required
Technical Reports/Work Papers/Letters	As Required

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task order.

Office of the Chief Information Officer FM/EUS Work Plan		
COTR	Task Title	Task Manager
Tom King 305-8999	Help Desk	Randy Bender/Doris Stuck 305-8788/305-9090

1. BACKGROUND

The Help Desk is the single point of contact for reporting problems with or requesting services to OCIO supported hardware and software. The Help Desk ensures that all calls are handled promptly, courteously, and are resolved or sent to the proper service provider within the established time frame. The Help Desk staff must be knowledgeable with the PTO's customers and technical environment(s), and will be proficient in providing support for the desktop software.

2. STATEMENT OF WORK REQUIREMENTS

1. Contractor shall abide by all OCIO Task Manager Directives, Service Level Agreements (SLA), Operational Support Plans and Technical Notes.
2. Beginning October 1, 2000, contractor shall provide support from 5:30 AM to 12:00 PM (midnight) local time, Monday through Friday.
3. Beginning November 10, 2000, contractor shall provide phone and field support from 5:30 AM to 10:00 PM local time, Saturday, Sunday, and holidays (excluding Christmas Day, New Year's Day, and Thanksgiving).
4. Contractor shall maintain a minimum 95% customer satisfaction rating at all times. This translates to Contractor receiving no more than 5% "re-opened" and "unsatisfactory" ratings. Ratings will be measured through the Customer Quality Check process. The rating levels given during the quality checks are: outstanding, very good, satisfactory, unsatisfactory and re-open.
5. Contractor shall thoroughly document all work they perform in the appropriate problem/change record. Contractor shall update the record within two (2) hours of performing the work.
6. If Contractor performs a site visit, Contractor shall always leave a completed work service form with the customer. If the customer is at the site, Contractor shall notify the customer before leaving the site.
7. Contractor shall not close or resolve any records without obtaining confirmation from the customer that the service has been performed or the problem has been resolved; an exception is made if 3 attempts to contact a customer over a 3-day period do not produce a response from the customer.

8. Contractor shall perform a Root Cause Analysis (RCA), for problems that they resolve, when requested by the Task Manager.
9. Contractor shall use the mobile (Psion) units to record all hardware changes for asset management purposes and to document all field service work performed.
10. Contractor shall answer all incoming calls placed to 305-9000 or transferred to 305-9000. Contractor shall maintain a daily average answer speed of one (1) minute or less when the weekday call volume is 500 calls or less. The following average weekday answer speeds will apply to call volumes above 500:

Number of Calls	Expected Daily Answer Speed (Minutes)
501-550	1.5
551-600	2
601-650	3
651-700	4
701-800	6
801-900	9
901-1000	12
1000+	no set expectations

11. , The contractor shall return voice mail messages within thirty (30) minutes and email messages within two (2) hours. Contractor shall complete updating of records within fifteen (15) minutes of handling customer calls, voice mails and emails.
12. Contractor shall be responsible for resolving problems and providing services associated with desktop software. Contractor shall respond to problem and service requests within two (2) hours. Response is defined as speaking to the customer, leaving voice mail message for the customer, sending an email message to the customer or leaving a work service form at the customer's site. Contractor shall resolve/circumvent problems or complete service requests within four (4) hours. These commitments apply to all problems and requests assigned to the Contractor, unless otherwise stipulated in this Task Order (TO) or Service Level Agreements.
13. Any desktop hardware placed into service shall be a fully functional and performance level equivalent to equipment removed for repair. If the customer has data files, documents, or other files on the defective desktop hardware, Contractor shall ensure that such files (when not damaged) are transferred to the replacement computer.
14. By 5:30 AM, Contractor shall review all records created in the previous twenty-four (24) hours. Contractor shall ensure that the records are properly assigned and contain appropriate information. Contractor shall make appropriate corrections and take appropriate action to escalate problems which extend beyond service level commitments.

15. Contractor shall identify parts (excluding mice) for Patent and Trademark Depository Library (PTDL) workstations requiring replacement within six (6) hours.
16. Contractor shall provide a Technical Writer to support Help Desk documentation requirements. These requirements consist of Knowledge Pak documentation and written documentation for the Help Desk Web site. The Technical Writer is required for the period of July 16, 2000 to January 16, 2001.
17. Contractor shall provide Help Desk support to public customers. The support shall be for customer problems and questions regarding the USPTO Internet site, including the automated information systems (AISs) available from the site. Contractor shall provide support during all hours when the General Information Services Electronic Business System (EBS) is not staffed. EBS is staffed from 8:30 AM to 5 PM local time, Monday through Friday, excluding federal holidays. Contractor shall not be required to provide support on Christmas Day, New Year's Day, and Thanksgiving.
18. Contractor shall provide a weekly status report of work accomplished on week-ends, holidays, and during non-prime work hours. Non-prime hours are defined as the period between 6:30 PM to 5:30 AM. The report will be due on Monday of each week and will cover the previous week's accomplishments.

Office of the Chief Information Officer FM/EUS Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999	Technical Writing/ Document Development	John Queen 305-8676

1. BACKGROUND

The Customer Information Services Division (CISD) within the Office of Technical Support Services is charged with the responsibility of developing, delivering and distributing informational end user documentation pertaining to information technologies. End user documentation consists of user guides, announcements, bulletins, newsletters and other forms of printed and electronic material used to keep PTO employees and contractors informed and educated concerning office automation, network and other information technology initiatives. Additionally, the Customer Services Division (CSD) within the Office of Technical Support Services is charged with the responsibility of providing office automation support services through PTO's Help Desk. CSD requires the development of Technical Notes and the development of technical writings for the Help Desk's intranet web site to effectively support office automation initiatives at the PTO.

2. STATEMENT OF WORK

- A. *User Guides and Service Guides.*** Contractor shall prepare user and service guides consisting of 12 to 40 pages pertaining to the use of commercial off the shelf (COTS) software and government developed software applications. The target audience for many developed publications is PTO-wide, while other publications are developed for specific smaller target audiences. The Contractor shall develop user guides using PageMaker 6.5 software matching the publication specifications and technical standards established by CISD. For each user or service guide, the Contractor shall be responsible for delivering a camera ready PageMaker 6.5 document in both electronic and hard copy formats within three weeks from initial assignment. . The contractor will be required to meet with PTO management, service providers, and end users, in determining scope, content, and procedural issues contained in each guide. The development of new guides, along with existing guides requiring revision, will be required at the approximate rate of 2 or 3 per month.
- B. *CIO News:*** The Customer Information Services Division requires development assistance in preparing *CIO News*, an information technology newsletter produced quarterly from the Office of the Chief Information Officer. *CIO News* is delivered to all PTO employees. Contractor support requested includes the authoring of information technology and office automation articles; layout and design of each issue; printing and distribution of each issue. Each issue consists of 8-16 pages. The contractor will be required to meet with PTO management, service providers, and end users, in determining scope and content of each issue.

C. *Publication fulfillment and distribution services:* The Customer Information Services Division requires assistance in the fulfillment and distribution of publications.

1. **Fullfillment services:** Fulfillment services include printing, collating, folding, stapling, hole-punching, and bundling of publications developed within the PTO. Generally, publications developed with a target audience of 500 or less will require fulfillment services. Publications developed for PTO-wide distribution do not require fulfillment services (they are provided by the GPO contractor who prints the publications).
2. **Distribution services:** Distribution services include sorting, counting, packaging, labeling and delivering completed publications. All developed publications will require distribution services. The contractor will be provided with 70 to 75 PTO-wide distribution points, with quantities, contact names, and locations for each.

A. *Technical Notes:* The Customer Information Services Division requires development assistance in creating Technical Notes for use by OCIO staff personnel and OCIO Help Desk personnel. Each Technical Note must be developed in accordance with the OCIO Technical Notes Directives System, must be approved by CISD, and must be made available in both electronic and hard copy formats. Each Technical should consist of 2 to 15 pages, depending on scope and content. The contractor will be required to meet with PTO management, service providers, and end users, in determining procedural issues that are required for each Technical Note.

3. GOVERNMENT FURNISHED MATERIAL

Contractor shall provide all hardware and software required for use in production of this task order.

4. LEVEL OF EFFORT

The government's best estimate for the level of effort required to complete individual user guides and service guides is 80-120 hours each; for Technical Notes 40-60 hours each; for *CIO News* 60-80 hours each; and for fullfillment services, varies based on complexity and scope of services required. All hours are based on historical trends of producing similar publications, documents, and services performed by PTO personnel.

5. PLACE OF PERFORMANCE

Work shall be performed at PTO offices.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be hand delivered to the PTO Task Manager or, in his absence, the COTR. An electronic copy will be delivered to the COTR. Due dates are expressed as the number of business days from the task order execution date (TOED).

Deliverables		Due Date
Meeting	Introduction of staff and negotiation of work	No later than TOED + 5

	schedule	
Progress Meeting	Preliminary progress of publication delivered electronically. (Use zip format if document exceeds 1 disk capacity).	5 business days after initial meeting
Deliverable of Final Draft	Final draft delivery of any given publication, delivered electronically and in hard copy (B&W acceptable).	Within 15 business days after initial meeting

Technical reviews will be conducted as requested by the COTR, by the PTO Task Manager, or by the Contractor.

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task order.

Office of the Chief Information Officer FM/EUS Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999	Data Maintenance Support	Pola Jones 305-9429

1. BACKGROUND

The primary mission of the U.S. Patent and Trademark Office (USPTO) is to issue patents and trademarks. To that end, the timely and accurate loading to and updating of a diverse number of databases is an integral part of the day-to-day operation within the USPTO Data Center, located in Two Crystal Park, 11th floor. USPTO requires a contractor staff in order to provide the data load and data load software support that will ensure that all databases are current and available to PTO's user community.

2. STATEMENT OF WORK REQUIREMENTS

As part of the requirements of the contract, the Contractor shall provide data load software support and perform multiple Patent and Trademark data loads but is not limited to the following:

I. Data Load Support

A. Weekly Issue Patent Image Data Load

The Contractor shall load the Weekly Issue Patent Image Data onto four CSIR Image Servers. The Contractor shall operate the load five days a week, 8 hours per day. This includes but is not limited to the following:

- Load Weekly Issue Patent Image Data in TIFF onto image servers.
- Update associated indices
- Record all down time
- Update error log
- Create a back-up of all data that has been successfully loaded

B. Trademark Weekly Application and Registration Image Data Loads

The Contractor shall load both Trademark application and registration cropped images from cartridges onto the X-Search server. The Contractor shall operate the load five days a week, an hour per day. This includes but is not limited to the following:

- Mount cartridge
- Execute load command

- Dismount cartridge
- Verify load status
- Record all down time
- Update error log

C. Patent Images on the Web (POTW)

The Contractor shall load all existing Weekly Issue Patent Image Data from Tagged Image File Format (TIFF) when received and placed in local image files for subsequent display on the Internet (Web). The Contractor shall operate the load on a weekly basis. This includes but is not limited to the following:

- Create a tape copy of the existing patent image data from TIFF
- Load Weekly Issue patent image data in TIFF on EMC
- Record all down time
- Transfer daily logs from POTW1 and POTW2 UNIX servers to PTOWEB1 server

D. Global Patent Information Data Load

The Contractor shall transfer from a desktop workstation all Global Patent Information data “front page data”, from a HP server onto Symmetric devices. The Contractor shall operate the load five days a week, an hour per day. This includes but is not limited to the following:

- Execute load command from desktop workstation
- Verify load status
- Record all down time
- Update error log

E. ScienceServer/Elsevier (Non-Patent Literature) Data Load

The Contractor shall load all existing non-patent literature data from CD-ROMs onto UNIX servers. The Contractor shall operate the load five days a week, eight hours per day. This includes but is not limited to the following:

- Mount CD-ROM
- Execute load command
- Dismount CD-ROM
- Verify load status
- Record all down time
- Update error log

E. Foreign Image Data Load

The Contractor shall load all existing Foreign Patent Image Data for both the European and Japanese Patent Offices. The Foreign Image Data shall be loaded from both cartridge and CD-Rom onto Symmetric devices as tagged image file format (TIFF) images. The Contractor shall operate the load seven days a week, twenty-four hours per day. This includes but is not limited to the following:

- Mount CD-ROM/Cartridge
- Execute load command
- Dismount CD-ROM/Cartridge
- Verify load status
- Record all down time
- Update error log

G. Computer Search Support Text Data Load

The Contractor shall load Patent data (USPAT, USOCR, EPO, JPO and Derwent data), into Oracle and index into BRS/Search. The Contractor shall operate the load five days a week, eight hours per day. This includes but is not limited to the following:

- Utilize the COTS load utilities(i.e., BRS Loads, SQL Loader) to store a copy of BRS formatted documents and USPAT Green Book formatted documents in Oracle
- Verify load status
- Record all down time
- Generate load/summary reports

H. Trademark Daily BRS-Update Monitoring Process

The Contractor shall monitor the Trademark daily BRS-Update process. The Contractor shall monitor the process five days a week, three hours per day. This includes but is not limited to the following:

- Logging into the designated server (THOR)
- Verify the execution of the load
- Monitoring the load process
- Verifying the load status
- Confirming the completion of the load
- Record all down time

I. Data File Delivery Update Monitoring Process

The Contractor shall monitor the Data File Delivery (DFD) Update process. The Contractor shall monitor the process weekly to confirm the execution and completion of the load process.

II. Data Load Software Support

The Data Maintenance Branch is an integral part of the Data Center Operations Division, which is currently not staffed to perform several data support troubleshooting and corrective processes to ensure the accuracy of the US Patent Text and Image databases. Contracted assistance is required for the functions performed in assuring the validity of load process, correcting errors with the text and image data load, and ad hoc assistance when required to insure the accuracy and validity of the pertinent databases.

The Contractor shall provide the following Data Load Software Support Functions:

The contractor shall provide support in the troubleshooting of apparent software problems, investigate errors that may be causing software problems, and correct all support software problems that occur in the load processes and verify the operability of all load systems after corrections have been completed.

The contractor shall isolate and reload patent(s) that fail to process successfully through the text BRS data load process. Provide recovery of the text load due to failures.

The contractor shall isolate and reload patent(s) that fail to process successfully through the CSIR image load process. Provide recovery of image load due to failures.

The contractor shall provide support of the entire load process for both the Weekly Issue Text and Image Load.

The contractor shall investigate all loads which terminate abnormally to determine if the problem is procedural or requires a programmer to be called to solve the problem.

The contractor shall respond to ad hoc requests for analysis, special load processing, and file load support in exigent situations.

The contractor shall respond to ad hoc requests for production assistance from USPTO systems and operations personnel, Production Control, or any other USPTO office as required.

The contractor shall provide support in performing, maintaining and tracking the back-ups of all text and image data that is successfully loaded.

The contractor shall provide programming support to load/reload patent(s).

Corrections will be made in the shortest time possible in order to resume any load that is in a "Wait State" due to software problems.

This support will be provided on a 7 days per week, 24 hours per day basis.

3. GOVERNMENT FURNISHED MATERIAL

The Government will provide access to all staff, workspace, procedures, equipment, and materials needed. The equipment and space provided, does NOT include office space nor any equipment or furniture needed by the employee(s) to perform tasks other than data loads. It refers to computer room space used to house the data load equipment and the data load equipment itself.

4. LEVEL OF EFFORT

The PTO has identified the following types of labor categories of personnel needed:

IBM Mainframe Computer Operator: At least a year of experience on the IBM mainframe or equivalent. Experience with TSO, ADABAS and NATURAL and UNIX is desired.

Key Contact Designation: The Contractor's Staff Systems Programmer on this task will be the key contact person to act as a single point of contact for investigating problems, performing the problem investigation, and accomplishing problem resolution.

5. PLACE OF PERFORMANCE

Work will be performed in the space which currently houses the equipment that is used to perform the data load activities which is located in the computer room of Crystal Park II, Crystal City, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the COTR (electronic form preferred).

Deliverable:

Load Status Reports

Load Error Reports

Ad hoc and standardized reports

Schedule:

Weekly

Weekly

As required

**7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE
MANAGEMENT (AIS-LCM)**

AIS/LCM is required under this task order.

Office of the Chief Information Officer Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999	Desktop Hardware Deployment	Tung Nguyen 305-9391 Joe Vastola, 305-3650

1. BACKGROUND

The task order covers the deployment of laptops and desktop hardware, both workstations and individual peripherals, and CPU upgrades. Workstations are defined as a CPU and all its accompanying peripherals (e.g., printer, keyboard, monitor, etc.). Individual peripheral deployments and CPU upgrades may include, but not be limited to, JAZZ drives, printers, bar code readers, glare guards, and scanners.

2. STATEMENT OF WORK REQUIREMENTS

1. Contractors shall abide by all OCIO Task Manager Directives, Service Level Agreements (SLA), Operational Support Plans and Technical Notes.
2. Contractor shall provide support from 6:30 AM to 6:00 PM Monday through Friday (excluding holidays).
3. Contractor shall maintain a minimum 95% customer satisfaction rating at all times. This translates to Contractor receiving no more than 5% “re-opened” and “unsatisfactory” ratings. Ratings will be measured through the Customer Quality Check process. The rating levels given during the quality checks are: outstanding, very good, satisfactory, unsatisfactory and re-open.
4. Contractor shall thoroughly document all work they perform in the appropriate problem/change record. Contractor shall update the record within two (2) hours of performing the work.
5. If Contractor performs a site visit, Contractor shall always leave a completed work service form with the customer. If the customer is at the site, Contractor shall notify the customer before leaving the site.
6. Contractor shall not close or resolve any records without obtaining confirmation from the customer that the service has been performed or the problem has been resolved; an exception is made if 3 attempts to contact a customer over a 3-day period do not produce a response from the customer. In case customer does not have phone, be sure to contact Point of Contact.
7. Contractor shall perform a Root Cause Analysis (RCA), for problems that they resolve, when requested by the Task Manager.

8. Contractor shall use the mobile (Psion) units to record all hardware changes for asset management purposes and to document all field service work performed.
9. Contractor shall be responsible for resolving those problems that only they can resolve (i.e., problems created by the deployment process that can not be resolved by another group). Contractor shall respond to problems within two (2) hours. Response is defined as speaking to the customer, leaving voice mail message for the customer, sending an email message to the customer or leaving a work service form at the customer's site. Contractor shall resolve/circumvent problems within four (4) hours. These commitments apply to all problems assigned to the Contractor, unless otherwise stipulated in this Task Order (TO) or Service Level Agreements.
10. Contractor shall only load software and install hardware which have been approved by TEF and Contractor shall only perform this work on PTO-own hardware.
11. Contractor shall retain customer's old PC for at least (5) days in case the customer experiences problems , which require the old PC to resolve.
12. During deployments, Contractor shall perform hardware/software-related services requested by the customer that do not require in excess of 30 minutes to perform. Example: move Jazz drive from customer's old PC to new PC.
13. Workstations: Contractor shall deploy workstations Monday through Friday of each week at the following rates:
 - 57 per week from 10/02/2000 through 01/16/2001 (Patents – 35; Trademark – 10; OCIO - 10, Policy – 1, and OCFO – 1)
 - 72 Per week from 10/18/2000 through 01/16/2000 (Patents – 50, Trademark – 10, OCIO –10; Policy – 1, and OCFO –1)
 - Deploy 20 WS and 9 Hp 1100XI printers on 11/04/2000 to the OHR

Contractor shall complete approximately 25% of the weekly deployments each day. Contractor shall also remove the old workstations at the time of the deployment. If Contractor is doing fewer than the maximum number of daily deployments on a given day, Contractor shall do additional peripheral deliveries, peripheral installations, as directed by the Task Manager.

14. Peripherals: Contractor shall deliver/set-up external peripheral devices. These peripherals may or may not require set-up. Examples include monitors, printers, glare guards, and barcode readers. Delivery/set-ups shall be done in accordance to schedule created by Customer Services Division as defined in #19. CSD will schedule no more than six (6) delivery/set-ups per day unless the Contractor is doing less than the maximum number of workstation deployments. Each workstation deployment may be replaced by up to three (3) delivery/set-ups.
15. CPU Upgrades: Contractor shall deliver and perform CPU upgrades that do not require the rebaselining the CPU. This shall not exceed three (3) per day. CPU upgrades shall be done in

accordance to schedule created by Customer Services Division as defined in #19. CSD will schedule no more than three (3) CPU upgrades per day unless Contractor is doing less than the maximum number of workstation deployments. Each workstation deployment may be replaced by up to two (2) CPU upgrades.

16. If any heavy peripheral requires special equipment for delivery, CSD will schedule the delivery and installation at least 5-business days in advance. For each heavy peripheral delivery/installation, Contractor may reduce by 10% the number of peripheral delivery/set-ups and CPU upgrades that must be performed that week.
17. Contractor shall provide support for the Information Technology Testing Division (ITTD). This task shall run from October 02, 2000 through Jan 16, 2001. The contractor support shall include the services listed below:
 - Verification of current baseline/cost center[s] prior to testing.
 - Reloading of the appropriate baseline/cost center[s] prior to testing.
 - Coordination of SMS push packages to the appropriate workstations.
 - Verification and/or reissuing of test user account[s] and password[s].
 - *Verification of proper network configuration, connections and profiles for the applicable cost-center network servers[s].*
 - *Coordination with help desk [and others, as required] of ITTD hardware and/or software problem resolution[s].*
18. Contractor shall complete the services listed above within five (5) hours of receiving the request. Services to be performed on-site in the IT Test Facility [ITTF] whenever possible.
19. The Scheduler will schedule all workstations interviews and deployments, peripheral deliveries, and peripheral deliveries/installations. The Scheduler will schedule interviews for at least two (2) days prior to the workstation deployment. The Scheduler will provide the contractor with the schedule at least two (2) full business days before the planned activity. The schedule will include the following:
 - Last name
 - First name
 - Art unit, division or branch
 - Telephone number
 - Location (building, floor, and room)
 - Business area (Patents, Trademarks, IDO, OCIO, Policy, or Corporate)
 - PTO Property Custodian (first and last name); **this information MUST be included or the deployment is placed on “Hold”**
 - Service required (workstation deployment, peripheral delivery/set-up, or CPU upgrade)
 - Delivery order number
 - Type, make and model of hardware
 - Date of deployed/installation
 - Date/time of workstation deployment interview

- List of hardware to be removed
- Workstation Id if an existing workstations is being rebaselined or replaced
- Name of current account(s) to model if customer is new
- Comments

For Patents also include:

- All baselines and optional applications to be installed
- PTOnet ID and password if they already exist
- Date furniture will be ready

20. Contractor shall notify the Scheduler within one (1) hour of a customer failing to complete a workstation deployment interview.

21. During the workstation deployment interview, Contractor shall document the following as applicable:

- any special requirements that were overlooked in the interview form
- data back up and restoration requirements
- potential problems that may arise because of the end user's existing hardware (examples, insufficient RAM or hard drive capacity, unusual peripherals, etc.)
- drivers and queue names needed for local and network
- PTO server / Cost Center / Network ID / e-Mail/Schedule+ ID and passwords
- location of Schedule+ file (*.CAL)
- location of personal folders file (*.PST)
- any limited license (OPTION 2) software being requested by the customer and a signed approval form

22. Contractor shall provide the Task Manager with completed interview forms, and any attachments, by COB each day.

23. Contractor shall provide a location within a five (5) mile radius of Crystal City in Arlington, VA (the warehouse is currently located in Alexandria, VA) for use in the receipt of equipment. The PTO will be responsible for verification of receipt of the equipment by reviewing reports and documentation provided by the Contractor. The Contractor shall visually inspect all hardware for damage

24. Contractor shall support the Patent desktop hardware storage area (Crystal Park 3, 9th floor). There are currently approximately 600 items in this area. This support shall consist of the following:

- Log all hardware as it enters and leaves the storage area.
- Test all hardware as it arrives in the storage area. Label the hardware with a brief description of any problems identified during testing.
- Perform the quarterly asset certification.
- Label, box, and shelve speakers, cables, keyboards, and small peripherals.

- Serve as the point-of-contact for any storage room hardware that needs to be deployed or surplussed.
- Remove reusable parts from surplus PCs. These parts may include Matrox video cards, Adaptec SCSI cards, Creative Lab sound cards, Seagate SCSI hard drives, cables, and floppy drives. Record items on surplus report. Deliver surplus parts to the Desktop Hardware Maintenance Group. Arrange for the surplussing of the PCs..
- Sign in and out lockdown kit items (e.g., locks, cables, brackets, etc.).
- Staff the storage area Monday through Friday, from 8 AM to 5 PM.

3. GOVERNMENT FURNISHED MATERIAL

Complete installation procedures (including SOPs), all software and hardware, backup space on servers, Psion units, and PTONet connections necessary to complete the installations.

4. LEVEL OF EFFORT

No work outside the scope of this Task Order will be performed without the written direction of the COTR.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the PTO in Crystal City, VA; Franconia/Springfield, VA; and Newington, VA and in the contractor-leased facilities in Crystal City and Alexandria, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the PTO COTR and Task Manager (electronic form preferred).

Deliverable		Schedule
Daily summary activity report	Report listing all workstation deployments, removals, peripheral delivery/set-ups, and CPU upgrades performed; figures must be broken out by business area (Patents, Trademarks, IDO, OCIO, Policy, and Corporate)	By COB each day
Daily detailed activity report	Report listing all workstation deployments, removals, peripheral delivery/set-ups, and CPU upgrades performed; for each provide DO #, customer POC, location, workstation ID,	By COB each day

Deliverable		Schedule
	property custodian, business area (Patents, Trademarks, IDO, OCIO, Policy, and Corporate)	
Weekly summary activity report	Report listing all workstation deployments, removals, peripheral delivery/set-ups, and CPU upgrades performed; figures must be broken out by business area (Patents, Trademarks, IDO, OCIO, Policy, and Corporate)	By COB each Monday
Weekly detailed activity report	Report listing all workstation deployments, removals, peripheral delivery/set-ups, and CPU upgrades performed; for each provide DO #, customer POC, location, workstation ID, property custodian, business area (Patents, Trademarks, IDO, OCIO, Policy, and Corporate)	By COB each Monday
Monthly summary activity report	Report listing all workstation deployments, removals, peripheral delivery/set-ups, and CPU upgrades performed; figures must be broken out by business area (Patents, Trademarks, IDO, OCIO, Policy, and Corporate)	By 5 th of each month
Surplus Report	Report listing all reusable parts removed from PCs in the Patent storage area. Report includes the CD number of the PC, description of the part (including make/model if appropriate), the date the part was removed, and the date the part was delivered to the Desktop Hardware Maintenance Group.	By 5 th of each month

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

Office of the Chief Information Officer Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999	Warehouse Operations	Tom King/305-8999 Excess POC: Dawn Cassidy 305-4312

1. BACKGROUND

Currently, the contractor in support of the PTO operates a warehouse in Alexandria, Virginia. This warehouse is used to support a variety of different task orders. Amongst the uses of the warehouse are: single point of shipping and receiving for desktop equipment (includes CPU, monitor, printer, etc); single point of process, for property management purposes, for all delivered desktop equipment; process Return Merchandise Authorization (RMA) request for defective equipment; process excess equipment; delivery equipment to the PTO campus for installation; and remove equipment from the PTO campus for excessing. The purpose of this task order is to consolidate all those activities in to one task order.

2. STATEMENT OF WORK REQUIREMENTS

1. The contractor shall abide by all OCIO Task Manager Directives, Service Level Agreements (SLA), Operational Support Plans and Technical Notes.
2. The contractor shall provide support from 6:30 AM to 4:30 PM, Monday through Friday (excluding Thanksgiving, Christmas, and New Year's).
3. The contractor shall thoroughly document all work they perform in the appropriate problem/change record. Contractor shall update the record within two (2) hours of performing the work.
4. The contractor shall use the mobile (Psion) units to record all hardware changes for asset management purposes and to document all field service work performed.
5. The contractor shall scan all new equipment delivered to the warehouse within two (2) working days from date of receipt (ex. if delivery occurs on Monday, all assets must be scanned by COB Wednesday).
6. The contractor shall scan all assets brought to the warehouse for excess immediately to CFGS000100132 and to a CFGE skid within five (5) working days. CFGE skids will be completed with ninety-five percent (95%) accuracy or the incorrect skids will be redone at no cost to the government.
7. The contractor shall ensure the use of both the DO and CD numbers in all databases used.

8. Contractor shall send the list of recently delivered hardware to the Scheduler (currently Demita Durant) within four (4) hours of receipt of the hardware at the warehouse.

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish hand-held Psion units and all pertinent documentation.

4. LEVEL OF EFFORT

No work outside the scope of this Task Order will be performed without the written direction of the COTR.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the PTO in Crystal City, VA; Franconia/Springfield, VA; and Newington, VA and in the contractor-leased facilities in Crystal City and Alexandria, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the PTO COTR and Task Manager (electronic form preferred).

Deliverable		Due
Return Merchandise Authorization (RMA) Report	The report will have two (2) parts. Part I must include information pertaining to parts returned to the manufacturer. This includes: the DO#, the part being returned, the reason for the return, and, when applicable, the CD bar code label number. Part II must include all RMAs returned to the USPTO and their disposition (spare pool, returned to user, etc.).	COB Friday
Spare Pool Report	The report shall include change record number, customer business area (OCIO, Patents, Trademarks,	1 st working day of each month
Warehouse delivery report	Report should include: DO #, customer POC (name and phone number), type/make/model and quantity of hardware, person requesting delivery	Within four (4) hours of receipt of the hardware at the warehouse
Warehouse contents report	Report should include: DO #, customer POC (name and phone number), type/make/model and quantity of hardware, date of receipt	By COB each day
Hardware activity report	Report showing all hardware moved from the warehouse the previous week. Report should include: reason for movement (e.g., deployment, testing, staging, excess, etc.), DO #, type/make/model and quantity of hardware, date of movement from the warehouse, current location	By COB each Monday
Excess Skid Report	Report should include the skid number (i.e., CFGE), date skid is initiated (i.e., scanned), date skid is certified, location, date shipped, security seal number, and remarks.	By COB each day
Assets Boxes for Excess (<i>For those assets no longer inventoried such as mice, keyboards, modems, etc.</i>)	Report should include the skid number (i.e., CFGE), box number, description and quantity of contents, date skid is initiated (i.e., scanned), location, date shipped, security seal number, and remarks.	By COB each Monday

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

Office of the Chief Information Officer FM/EUS Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999	Network Operations	Jay Chalk 305-8970

1. BACKGROUND

The United States Patent and Trademark Office (USPTO) is located in Arlington, Virginia and is geographically dispersed across an eighteen building campus. PTONet currently provides connectivity to over eight thousand (8000) nodes.

PTONet is a Local Area Network (LAN) comprised of an Asynchronous Transfer Mode (ATM) backbone which interconnects the buildings. The core backbone resides in USPTO's computer facility located in Crystal Park II. Each building has redundant ATM switches (building switches) located in the main telecommunications closet of that building that connect to the core backbone switches. Hubs located in telecommunications closets on each floor are redundantly connected to each building switch. Individual nodes are attached to the hubs.

PTONet also provides several wide-area network (WAN) links, or external connections, supporting the following activities:

- Internet connectivity
- contractors supporting USPTO
- connectivity to commercial automated information systems (AISs)
- PTONet services to employees working at home or on travel
- PTONet services to Patent and Trademark Dissemination Libraries (PTDLs)
- connectivity to foreign Patent offices (EPO/JPO)

PTONet's physical transmission media is comprised of both fiber optic and copper twisted pair cable. Fiber is used to interconnect buildings and closets and to attach high-speed servers to PTONet. Copper twisted pair cable extends from the hubs on each floor to individual nodes.

Several Network Operating Systems (NOSs) support USPTO's workstation and application environment providing network services, file and print services, office automation applications, e-mail and software distribution services. These services are critical to the daily operation of USPTO.

Network Operations Division (NOD) is responsible for the operation and maintenance of USPTO's:

- LAN and WAN infrastructure
- network and office automation servers
- fiber optic and copper cable plant

NOD must support the rapid growth of the network while ensuring reliability. NOD must provide centralized operation, management, administration, installation, maintenance, and technology insertion of USPTO's network infrastructure, network and office automation servers, and cable plant.

2. STATEMENT OF WORK REQUIREMENTS

GENERAL

- (1) The Contractor shall provide resources with expertise in the latest network technologies employed by USPTO.
- (2) The Contractor shall not make any changes, modifications, alterations, or enhancements to USPTO's infrastructure, hardware, or software without detailed change records being approved by USPTO. In addition, the Contractor shall abide by all Service Level Agreements (SLA) and Standard Operating Procedures (SOP) established by USPTO.
- (3) The Contractor shall create a service request record in a USPTO provided maintenance tracking system for all calls received from customers or problems identified by CBSI. The tracking systems shall serve as the central repository of information used by information systems personnel in resolving calls throughout USPTO. The Contractor shall assign the call, as appropriate, for resolution and/or action. The Contractor shall inform the customer that the service request has been resolved. The Contractor shall close out all calls in USPTO's tracking system upon problem resolution.
- (4) The Contractor shall assure that all users are notified, as appropriate, of the release of system changes (e.g. software upgrades) at least five (5), and also one (1) business day, prior to installation, by, for example, placing a notice in Public Folders.
- (5) The Contractor shall provide baseline configuration, documentation, deployment strategy, and training for all enhancements and changes.
- (6) The Contractor shall develop, maintain, ensure the currency, centrally store and adhere to Technical Notes and Standard Operating Procedures (SOPs) that detail Network Operations.
- (7) Any equipment placed into service shall be a fully functional and performance level equivalent to equipment removed for repair. Replacement equipment shall have supported software loaded, configured, and peripherals attached.

- (8) The Contractor shall participate in technical evaluations of proposed new hardware, software, and networking technologies at USPTO. The Contractor shall work with USPTO to certify the serviceability and maintainability of network technologies introduced.
- (9) The Contractor shall utilize the Psion units to record all hardware changes for property management purposes and to document work performed.
- (10) The Contractor shall meet standards of customer satisfaction established by the USPTO. Customer satisfaction measurements measure Contractor staff attributes such as professionalism, courtesy, expertise, attitude, and helpfulness.

NETWORK OPERATIONS CENTER SUPPORT

- (11) The Contractor shall provide 24 hour per day, 7 day per week (24x7) Network Operations Center (NOC) monitoring and reporting (excluding Thanksgiving Day, Christmas Day and New Years Day). This includes first level network operations support (network infrastructure, network cabling, network office automation server).
- (12) The Contractor shall operate, maintain and upgrade as necessary USPTO's Network Management System (NMS). USPTO currently utilizes HP-Openview Network Node Manager operating on HP-UX operating system to perform this function. HP Openview is based upon Simple Network Management Protocol (SNMP) and Remote Monitor (RMON) protocols. The Contractor shall provide monitoring and reporting for all network devices managed by the NMS. The Contractor shall ensure maps on the NMS are accurate and up to date.
- (13) The Contractor shall perform enterprise management of USPTO automated information systems (AISs). The contractor shall use NOD's Network Management System (NMS) to perform this function. The Contractor shall work with other USPTO offices to identify events that should be monitored and modify NMS maps as necessary to successfully monitor events on those AISs. The Contractor shall respond to events and outages on those systems, contact designated individuals responsible for supporting those systems, escalate as necessary, and report on the progress of restoration. Procedures for such action are outlined in the Operational Support Plans (OSPs).
- (14) The Contractor shall perform a Root Cause Analysis (RCA) for network problems when requested by USPTO.

- (15) The Contractor shall perform periodic (hourly, per shift, daily) functional and performance testing of existing production network components, paths, networks, sub-networks, systems and software as required. Verification of all tests shall be recorded in an operations log. The contractor shall follow existing standard operating procedures (SOPs) to perform tests and will modify the SOP as required to support new tests as well as to terminate tests on systems no longer in production.

NETWORK MANAGEMENT SUPPORT

- (16) The Contractor shall provide on-site network infrastructure support Monday through Friday, from 6:30 AM to 10:00 PM (excluding Federal Holidays observed by USPTO). When on-site support is required outside of these hours, the contractor shall follow established escalation procedures to arrive within 60 minutes of notification by the NOC.
- (17) The Contractor shall provide day-to-day operation, maintenance and system administration of USPTO network infrastructure devices. This includes but is not limited to hardware and software on routers, hubs, switches, encryption devices, and security devices. The Contractor shall respond to and fix network problems. These services shall be performed twenty-four (24) hours a day, seven (7) days a week, excluding Thanksgiving Day, Christmas Day, and New Years Day. The Contractor shall gather network performance and statistical data for problem analysis. The Contractor shall troubleshoot network problems by responding to trouble calls, performing fault isolation and restoring service.
- (18) The Contractor shall find and accurately report all network infrastructure problems within ten (10) minutes of a failure. The Contractor shall arrive on site to resolve the problem within 15 minutes after first discovery of the problem. The contractor shall resolve ninety-five percent (95%) of all network infrastructure problems within one (1) hour of the failure.
- (19) The Contractor shall perform capacity management of PTOnet, to include the installation, configuration, testing, maintenance and de-installation of network infrastructure hardware and software as necessary to support increased or decreased PTOnet requirements.
- (20) The Contractor shall be responsible for placing into production all network infrastructure devices at USPTO. This includes, but is not limited to receipt, initial inventory, set up, burn-in, testing, software loading, and deployment of hardware. In performing these services, the Contractor shall adhere to policies and procedures as established by/with USPTO.

- (21) The Contractor shall perform performance management on network infrastructure devices at the USPTO as needed. Such analysis may include, but is not limited to: measurement of current traffic on existing production networks; network traffic load balancing and segmentation; determination of maximum device load for segments and servers; isolation of systems that degrade PTOnet performance; and evaluation of performance management software packages.
- (22) The Contractor shall perform configuration management of network infrastructure devices operated by Network Operations Division. This includes updating CAD drawings of the Network, fiber optic schematics/databases, IP addresses and DNS name space databases. It also includes maintaining baseline hardware and software configurations for all network infrastructure devices and network and office automation servers. The Contractor shall ensure all hardware and software adhere to the established baseline unless otherwise directed by USPTO.
- (23) The Contractor shall perform security management of network infrastructure devices, to include maintenance of accounts. The Contractor shall adhere to USPTO security policy, conduct security audits as requested by USPTO, and modify baseline configurations to eliminate potential threats.
- (24) The Contractor shall support the operation of USPTO's firewalls, to include the operating system, and the support of the Checkpoint firewall software. The Contractor shall not be responsible for the addition and deletion of accounts associated with the firewalls.
- (25) The Contractor shall be responsible for upgrading network infrastructure hardware/software/firmware as directed by the COTR or designee. The Contractor shall produce an Installation Plan for all upgrades. Upgrades approved by the USPTO shall be installed by CBSI. The USPTO shall provide hardware and software used in the upgrade.
- (26) The Contractor shall support the USPTO Office of Systems Architecture and Engineering (OSAE) as required during the implementation phase of major network engineering tasks.

NETWORK AND OFFICE AUTOMATION SERVER SUPPORT

- (27) The Contractor shall provide on-site network server administration support Monday through Friday, from 6:30 AM to 6:30 PM (excluding Federal Holidays observed by USPTO). When on-site support is required outside of these hours, the contractor shall follow established escalation procedures to arrive within 60 minutes of notification by the NOC.

- (28) The Contractor shall provide day-to-day operation, maintenance and system administration of USPTO network and office automation servers. This primarily focuses on but is not limited to Windows NT servers, Microsoft Back Office suite of products, and third party commercial off the shelf (COTS) applications that support Windows NT server. The Contractor shall respond to and fix network and office automation server problems. These services shall be performed twenty-four (24) hours a day, seven (7) days a week, excluding Thanksgiving Day, Christmas Day, and New Years Day. The Contractor shall gather server performance and statistical data for problem analysis. The Contractor shall troubleshoot server problems by responding to trouble calls, performing fault isolation and restoring service.
- (29) The Contractor shall find and accurately report all network and office automation server problems within ten (10) minutes of a failure. The contractor shall resolve ninety-five percent (95%) of all network and office automation server problems within one (1) hour of the failure.
- (30) The Contractor shall perform performance management on network and office automation server devices at the USPTO as needed. Such analysis may include, but is not limited to analysis of CPU utilization, I/O, network interfaces, and applications and services that degrade server performance. The contractor shall participate in the evaluation of performance management software packages.
- (31) The Contractor shall perform configuration management of network and office automation servers devices operated by Network Operations Division. This includes maintaining hardware and software configurations and baselines for all network and office automation servers. The Contractor shall ensure all hardware and software adhere to the established baseline unless otherwise directed by USPTO. This includes adherence to and enforcement of USPTO naming standards.
- (32) The Contractor shall perform capacity management of network and office automation servers, to include the installation, configuration, testing, maintenance and de-installation of hardware and software as necessary to support increased or decreased requirements.
- (33) The Contractor shall perform security management of network and office automation servers. The Contractor shall adhere to USPTO security policy, conduct security audits as requested by USPTO, and modify baseline configurations to eliminate potential threats.

- (34) The Contractor shall operate, maintain and upgrade as necessary USPTO's software distribution utility. USPTO currently uses Microsoft Systems Management Server (SMS) to perform this function.
- (35) The Contractor shall operate, maintain and upgrade as necessary USPTO's electronic mail system. USPTO currently uses Microsoft Exchange to perform this function.
- (36) The Contractor shall perform regularly scheduled preventative (PM) maintenance activities on USPTO network and office automation servers. This includes PM on the operating system as well as on any applications supported by NOD (e.g. Microsoft Exchange and SMS).
- (37) The Contractor shall operate, maintain and upgrade as necessary USPTO's tape back up system. The Contractor shall routinely back up USPTO Network and Office Automation servers and Network Management System (NMS) servers per established standard operating procedures. The Contractor shall coordinate the periodic shipping of tapes to an offsite storage facility.
- (38) The Contractor shall operate, maintain and upgrade as necessary hardware, software, and connectivity associated with USPTO's Public Key Infrastructure (PKI) operating environment and shall perform related system administration functions.
- (39) The Contractor shall operate, maintain and upgrade as necessary hardware, software and connectivity associated with USPTO's Enterprise-Wide Login (EWL) infrastructure and shall perform related system administration functions.
- (40) The contractor shall provide the following network and office automation server administration tasks per the time frames outlined below.

Move PTOnet logon access to a different file server	Within 3 days after receipt of request through Help Desk
Increase file server space (10 Mb or less)	Within 3 days after receipt of request through Help Desk
Create new PTOnet shared space	As negotiated between business area and NOD
Create new E-mail account	Within 1 day after receipt of request through ISSD
Provide access to shared network server space	Within 3 days after receipt by NSAB of request by Help Desk
Creation/Modification of Exchange Distribution Lists	Within 3 days after receipt of request by NSAB from Help Desk
Creation of Network Print Queues	Within 3 days after receipt of request by NSAB

- (41) The Contractor shall be responsible for upgrading network and office automation infrastructure hardware/software/firmware as directed by the COTR or designee. The Contractor shall produce an Installation Plan for all upgrades. Upgrades approved by the USPTO shall be installed by CBSI. The USPTO shall provide parts used in the upgrade.
- (42) The Contractor shall be responsible for placing into production all network and office automation devices at the USPTO. This includes, but is not limited to receipt, initial inventory, set up, burn-in, testing, software loading, and deployment of hardware. In performing these services, the Contractor shall adhere to policies and procedures as established by/with the USPTO.

NETWORK CABLING SUPPORT

- (43) The Contractor shall provide on-site network cabling support Monday through Friday, from 6:30 AM to 5:00 PM (excluding Federal Holidays observed by USPTO). When on-site support is required outside of these hours, the contractor shall follow established escalation procedures to arrive within 60 minutes of notification by the NOC.
- (44) The Contractor shall provide day-to-day operation, maintenance of USPTO's fiber optic and copper cable plant. The Contractor shall respond to and fix PTOnet cabling problems. These services shall be performed twenty-four (24) hours a day, seven (7) days a week, excluding Thanksgiving Day, Christmas Day, and New Years Day. The Contractor shall gather network performance and statistical data for problem analysis. The Contractor shall troubleshoot cabling problems by responding to trouble calls, performing fault isolation and restoring service.
- (45) The Contractor shall perform configuration management of USPTO's cable plant. This includes maintaining fiber optic and copper cabling hardware and software configurations and baselines for all network and office automation servers. The Contractor shall ensure all hardware and software adhere to the established baseline unless otherwise directed by USPTO. This includes adherence to and enforcement of USPTO naming standards.
- (46) The Contractor shall perform capacity management of the PTOnet fiber optic and copper cable plant, to include the installation, configuration, testing, maintenance and de-installation of cabling and hardware as necessary to support increased or decreased requirements. It is anticipated 6000 installations and/or activations will occur.

- (47) The Contractor shall provide cable and infrastructure installation and maintenance for the network cable plant per the time frames outlined below.

Installations of network drops (regular)	Within 15 days after receipt of request through Cable Management Branch.
Installations of network drops (priority)	As negotiated with Cable Management Branch and approved by OCIO.
Activation of network drops (5 or less)	Within 1 day after receipt of request through Cable Management Branch.
Activation of network drops (greater than 5)	Within 5 days after receipt of request through Cable Management Branch.
Activation of network drops (priority)	As negotiated with Cable Management Branch and approved by OCIO.
Deactivation of existing network drops	Within 3 days after receipt of request through Cable Management Branch.

- (48) The Contractor shall install, and test network cabling in accordance with policies and procedures as set by the USPTO.
- (49) The Contractor shall arrive on-site to resolve all fiber optic cable outages within two (2) hours of first discovery of the problem. The contractor shall resolve ninety-five percent (95%) of all fiber optic cable problems within four (4) hours of first discovery of the problem.
- (50) The Contractor shall arrive on-site to resolve all user network cable outages within two (2) hours of first discovery of the problem. The contractor shall resolve 95% of all user network cable outages within four (4) hours of discovery of the problem.

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish office space, change and problem tracking system(s), all pertinent SLAs, SOPs, Psion units and necessary hardware and software for the performance of this task.

4. LEVEL OF EFFORT

No work shall be performed under this Task Order without the written direction of the COTR.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various building occupied by the USPTO in Crystal City, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the COTR (electronic form preferred).

Deliverable		Due
Report	Monthly Activity Report (details accomplishments)	Monthly
Report	Monthly Task Expenditure Report (details hours billed per individual on Network Operations Support Task)	Monthly

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

Proposed Task for CBSI

Office of the Chief Information Officer IEB Support Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999	IEB Support	Mark Nucker

IEB Support

Background: The United States Patent and Trademark Office (USPTO), Office of Chief Information Officer (OCIO), maintains a service to test and evaluate any hardware and/or enterprise COTS software that is to be deployed to the desktop either connected to USPTOnet or free standing. The office that performs this duty is currently known as Infrastructure Engineering Branch (IEB). Prior to this effort IEB support was handled as part of CLIN 002, TEF Support. Because of the reduction of the effort IEB requires less staff.

Task: It has been estimated that IEB requires two CBSI staff.

1. STATEMENT OF WORK

1. The Contractor shall not make any changes, modifications, alterations, or enhancements to the USPTO's hardware or enterprise level COTS software without detailed change records being approved by the USPTO. In addition, the Contractor must abide by all Service Level Agreements (SLA) and Standard Operating Procedures (SOP).
2. The Contractor shall provide support daily.
3. The Contractor shall receive all assignments from the USPTO Task Manager or designee verbally, electronically via e-mail and/or the USPTO Tracking System(s).
4. In addition to meeting service call response and resolution times, the Contractor shall be required to meet standards of customer satisfaction established by the USPTO. Customer satisfaction measurements shall measure Contractor staff attributes such as professionalism, courtesy, expertise, attitude, and helpfulness.
5. The USPTO will provide all space and equipment required to successfully execute the terms of this task.

6. All documentation, software manuals, diagnostic routines, and any other aids (hereinafter-called documentation) necessary to perform this task shall be provided by the office requesting service, either USPTO or other contractor.
7. The Contractor shall participate in technical evaluations of proposed new desktop or portable hardware and enterprise COTS software for use at the USPTO. The Contractor shall work with the USPTO to certify the serviceability and maintainability of the desktop automation technologies introduced for use at the USPTO.
8. The Contractor shall perform configuration management services utilizing USPTO supplied software, currently PVCS, for all associated documentation as needed to support the configuration identification and management of the desktop hardware and for all enterprise COTS software packages selected for deployment by IEB.
9. The Contractor shall perform a Root Cause Analysis (RCA) for desktop or portable hardware and/or software problems when requested by the USPTO for services covered by IEB, in accordance with applicable USPTO Technical Notes.
10. The Contractor shall provide baseline configuration, documentation, and deployment strategy for all enterprise COTS desktop enhancements and changes. The Contractor shall ensure the currency of all operational documentation.
11. The USPTO shall provide the Contractor access to maintenance tracking systems. Currently, the tracking system used by the USPTO is EAMS. In opening, tracking and closing service calls, the Contractor shall adhere to policies and procedures as set by the USPTO.
12. The Contractor shall create a service request record if necessary in a USPTO provided maintenance tracking system for all calls received from customers via the USPTO Task Manager or problems identified by the Contractor. The Contractor shall close out all calls assigned to IEB in the USPTO's tracking system upon problem resolution.
13. The Contractor shall track all calls assigned to the IEB and recorded in the USPTO's maintenance tracking systems and provide status of such calls as requested. If, within twenty-four (24) hours of the service rendered, the customer reports continued or recurring problems or reports incomplete service, the Contractor shall reopen the service. The Contractor shall retain records of all follow-up calls, including the date, time, and results

14. The contractor shall ensure that notification of pending deployments is provided to the Product Support Services Branch so that the notification(s) and coordination can be made with the customer as appropriate.
15. The Contractor shall be responsible for portable microcomputer evaluation including laptop, notebook, and palm top machines. Includes pre-purchase evaluation and software evaluation. Hardware support for laptops is NOT covered in this section.

2. GOVERNMENT FURNISHED MATERIAL

All necessary hardware and software necessary to perform any testing will be provided to the contractor. The contractor will provide a suitable machine for each person on this task for use as a daily workstation.

3. LEVEL OF EFFORT

No work will be performed under this Task Order without the written direction of the COTR.

4. PLACE OF PERFORMANCE

Work might be performed throughout the various buildings occupied by the USPTO in Crystal City, VA but will be primarily accomplished in the IEB.

5. SCHEDULE OF DELIVERABLES

All update deliverables shall be electronically entered in the appropriate USPTO tracking system. The report shall be delivered electronically as an attachment to an e-mail message.

Deliverable		Due
Update	Update of Appropriate Tracking System(s)	As events warrant but no later than 24 hours after completion.
Report	Monthly Status of all projects including completed tasks, works in progress, and potential problems and/or concerns.	2 workdays prior to the 10 th of each month

6. APPLICATION OF LIFE CYCLE MANAGEMENT FOR AUTOMATED INFORMATION SYSTEMS (LCM-AIS)

The Contractor shall adhere to the principles, goals, and applicable procedures of Life Cycle Management for Automated Information Systems. Specifically, the Contractor shall provide information that USPTO will use to maintain the USPTO Technical Reference Model. The Contractor may draft sections of Operational Support Plans, Production Installation Plans, or Detailed Designs for desktop hardware and enterprise baseline software.

Computer Based Systems, Inc. CIO FM/EUS Work Plan		
COTR	Task Title	Task Manager
Tom King 305-8999	UNIX Operating Systems Support	Dave Przech 305-9208

1. BACKGROUND

The Systems Software Division (SSD), provides support to the operations staff and application programmers by maintaining the UNIX operating system. This involves ongoing activity in the areas of UNIX system software, UNIX systems administration, TCP/IP, high availability software, hardware configuration upgrades, and automated monitoring and operations. Operating system support involves the maintenance/upgrades to products from HP, Sun, and other vendors. The objective of this task is to augment current staff by providing operating system and telecommunication software support to SSD.

The Contractor shall provide UNIX systems programming and telecommunications support to augment the current staff of the Systems Software Division. The requirements, identified in Section 2, Statement of Work Requirements, will be met by the resources identified in Section 6A. CBSI Proposed Resources. This Work Plan covers planned activities and resources through January 16, 2001.

2. STATEMENT OF WORK REQUIREMENTS

- (1) The Contractor shall provide technical services to maintain the production environment for the HP and Sun servers. This will include periodic software upgrades to UNIX, review of existing available patches, installation of patches, and to all other vendor supporting system software.
- (2) The Contractor shall provide technical services to develop, program, test and implement system software utilities for the UNIX based platforms. All new programs and processes will operate in an "unattended operations" central computer environment.
- (3) The Contractor shall provide technical support and troubleshooting assistance for the application development community by answering questions on application interfaces to the operating system, and identifying production anomalies to developers for their corrective action. This task will be a continuous effort.
- (4) The Contractor shall provide technical services required for any necessary hardware upgrades and maintenance, including monitoring the performance of existing hardware. This task will be a continuous effort.

- (5) The Contractor shall provide support for day to day operational support, troubleshooting problem records assigned, and taking proper corrective actions. This may involve complete reloading of servers, and intricate system administration troubleshooting and proper corrective actions.
- (6) The Contractor shall assist the PTO personnel in the installation of system software during non-production hours. The Contractor shall provide off hour on-call support following the installation of any system software processes or hardware. Non-production and off hour support is defined as outside principal period of performance hours. The Contractor shall periodically provide 24-hour on-call support as assigned.
- (7) The Contractor shall analyze assigned tasks and provide estimated time frames to complete to the Task Manager or designated representative. The Task Manager will do an independent time assessment and the deadline will be negotiated. Contractor will be expected to keep the USPTO Task Order Manager informed of all activities.
- (8) The Contractor shall use the production Problem/Change Management system to track all problems and changes. Work will be documented in problem and/or change records and appropriate OCIO approval will be acquired for all changes made.

3. GOVERNMENT FURNISHED MATERIAL

The PTO will provide work space, equipment, tools, and supplies required to perform the task assigned to the System Software Programmer while on-site at the PTO.

4. LEVEL OF EFFORT

The amount of work required to perform this task may vary from day to day. However, the Contractor is responsible for ensuring all work is performed within the time frame established by the PTO Task Manager at time of assignment.

5. PLACE OF PERFORMANCE

Work will be performed at the PTO facility.

6. SCHEDULE OF DELIVERABLES

Deliverables		Due Date
Status Report	Weekly Status Report for this task	Weekly
Problem /Change	Problem and change records fully documenting work done on problems, changes, and projects.	Ongoing

Records		
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**7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE
MANAGEMENT (AIS-LCM)**

AIS-LCM is required under this task order.

Computer Based Systems, Inc. CIO FM/EUS Work Plan		
COTR	Task Title	Task Manager
Tom King 305-8999	NT Operating Systems Support	Dave Przech 305-9208

1. BACKGROUND

The Systems Software Division (SSD), provides support to the operations staff and application programmers by maintaining the Windows NT operating system, specifically NT Server. This involves ongoing activity in the areas of the Windows NT system software, NT systems administration, TCP/IP, Internet services, hardware configuration upgrades, and automated operations. Operating system support involves the maintenance/upgrades to products from Microsoft, Input Accel, Wang, and Kodak. The objective of this task is to augment current staff by providing operating system and telecommunication software support to SSD.

The Contractor shall provide Windows NT systems programming for NT Server and telecommunications support to augment the current staff of the Systems Software Division. The requirements, identified in Section 2, Statement of Work Requirements, will be met by the resources identified in Section 6A CBSI Proposed Resources. This Work Plan covers planned activities and resources through January 16, 2001.

2. STATEMENT OF WORK REQUIREMENTS

- (1) The Contractor shall provide technical services to maintain the production environment for the HP AIS Application servers running on the Windows NT Operating System. This will include periodic software upgrades to Windows NT Servers, and to all other vendor supporting system software.
- (2) The Contractor shall provide technical services to develop, program, test and implement system software utilities for the Windows NT based application platforms. All new programs and processes will operate in an "unattended operations" central computer environment.
- (3) The Contractor shall provide technical support and troubleshooting assistance for the application development community by answering questions on application interfaces to the operating system, and identifying production anomalies to developers for their corrective action. This task will be a continuous effort.
- (4) The Contractor shall provide technical services required for any necessary hardware upgrades and maintenance, including monitoring the performance of existing hardware. This task will be a continuous effort.

- (5) The Contractor shall provide support day to day operational support, troubleshooting problem records assigned, and taking proper corrective actions. This may involve complete reloading of servers.
- (6) The Contractor shall assist the PTO personnel in the installation of system software during non-production hours. The Contractor shall provide off-hour on-call support following the installation of any system software processes or hardware. Non-production and off hour support is defined as outside principal period of performance hours. The Contractor shall periodically provide 24-hour on-call support as assigned.
- (7) The Contractor shall analyze assigned tasks and provide estimated time frames to complete to the Task Manager or designated representative. The Task Manager will do an independent time assessment and the deadline will be negotiated.
- (8) The Contractor shall use the production Problem/Change Management system to track all problems and changes. Work will be documented in problem and/or change records and appropriate OCIO approval will be acquired for all changes made.

3. GOVERNMENT FURNISHED MATERIAL

The PTO will provide work space, equipment, tools, and supplies required to perform the task assigned to the System Software Programmer while on-site at the PTO.

4. LEVEL OF EFFORT

The amount of work required to perform this task may vary from day to day. However, the Contractor is responsible for ensuring all work is performed within the time frame established by the PTO Task Manager at time of assignment.

5. PLACE OF PERFORMANCE

Work will be performed at the PTO facility.

6. SCHEDULE OF DELIVERABLES

Deliverables		Due Date
Status Report	Weekly Status Report for this task	Weekly
Problem /Change Records	Problem and change records fully documenting work done on problems, changes, and projects.	Ongoing

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task order.

Office of the Chief Information Officer FM/EUS Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999	Advanced Problem Resolution Support (TO-16)	Randy Bender 305-8788 Darline Tongue 305-4278

1. BACKGROUND

The US Patent and Trademark Office (PTO) is currently making many changes to the information system infrastructure. These changes include the introduction of new, more complex technology. At the same time, PTO has to continue to operate and maintain some old and temperamental technology.

The purpose of this task is to allow the Office of the Chief Information Officer (OCIO) to more quickly resolve any problems that occur with either the new or the old technology assets.

2. STATEMENT OF WORK REQUIREMENTS

1. Contractors shall abide by all OCIO Task Manager Directives, Service Level Agreements (SLA), Operational Support Plans and Technical Notes.
2. Contractor shall provide support Monday through Friday, 6:30 AM to 6 PM (excluding federal holidays).
3. Contractor shall maintain a minimum 95% customer satisfaction rating at all times. This translates to Contractor receiving no more than 5% “re-opened” and “unsatisfactory” ratings. Ratings will be measured through the Customer Quality Check process. The rating levels given during the quality checks are: outstanding, very good, satisfactory, unsatisfactory and re-open.
4. Contractor shall thoroughly document all work they perform in the appropriate problem/change record. Contractor shall update the record within two (2) hours of performing the work.
5. If Contractor performs a site visit, Contractor shall always leave a completed work service form with the customer. If the customer is at the site, Contractor shall notify the customer before leaving the site.
6. Contractor shall not close or resolve any records without obtaining confirmation from the customer that the service has been performed or the problem has been resolved; an exception is made if three (3) attempts to contact a customer over a 3-day period do not produce a response from the customer.
7. Contractor shall perform a Root Cause Analysis (RCA), for problems that they resolve, when requested by the Task Manager.

8. Contractor staff shall be Microsoft Certified Systems Engineers. They shall also possess a background in either systems programming, network engineering, or security administration
9. The Contractor shall follow-up on any problems where OCIO has failed to meet its service level commitments by (one) 1 day or more. This follow-up shall include, but not necessarily be limited to, the following:
 - contacting the problem assignee to confirm that the assignee is aware of the problem
 - contacting other groups or individuals, as called for in the Operational Support Plans, to work on aspects of the problem
 - providing trouble-shooting assistance, including at the customer site, when directed to do so by the Task Managers
 - notifying the Task Managers when a service level commitment has been missed
 - assisting in problem recovery when directed to do so by the Task Managers
 - updating the Task Managers, as new information becomes available, on the status of the problems
 - ensuring that the Help Desk or the problem assignee is notifying the customer of any progress in resolving the problem
 - ensuring that within one (1) hour of the problem being resolved, either the Help Desk or the problem assignee has notified the customer
 - notifying the Task Managers, within two (2) hours, of any problems that will require a Root Cause Analysis
 - notifying the Task Managers, within one (1) day of problem resolution or circumvention, of problems that may be application system deficiencies
 - documenting trouble-shooting procedures that the Help Desk should follow if similar problems occur in the future
10. The Contractor shall review all draft Operational Support Plans for accuracy and completeness. The Contractor shall provide their written comments to the Task Managers within six (6) working days of receiving a plan.
11. The Contractor shall verify the continued accuracy and completeness of all existing Operational Support Plans at least once every nine (9) months. The Contractor shall provide their written comments to the Task Managers on all recently reviewed plans by the fifth of each month.
12. The Contractor shall be responsible for those problems and changes recorded in the OCIO automated problem and change management systems.
13. The Contractor shall analyze new problem records for possible trends. The types of trends may include unanticipated problems caused by the implementation of a change and problems that are reported by individual customers but actually impact multiple customers (examples: line outage, router failure). The Contractor shall provide the

Task Managers with written notice of these trends within one (1) hour of identification.

14. The Contractor shall verify successful implementation of changes. The Contractor shall provide the Task Manager, by noon each day, with a list of any changes that weren't successfully implemented the previous day.
15. The Contractor shall assist USPTO in acquisition of expertise in the Knowledge Pak software; guide the development of standards and naming conventions for PTO Knowledge Paks and document the same. The contractor shall mentor and guide the Knowledge Team in developing and deploying additional new Knowledge Paks. The Contractor shall work on the concurrent development of up to six (6) new Knowledge Paks. The Contractor shall ensure that new Knowledge Paks are ready for deployments within two (2) months of beginning development. The Contractor shall update existing Knowledge Paks in accordance with USPTO procedures.
16. Contractor shall provide on-site support to 60 (sixty) Trademark Work at Home participants. Contractor shall provide the support in accordance to the terms of the Trademark Work at Home Service Level Agreement.
17. From August 8, 2000 through August 25, 2000, the Contractor shall configure and deploy Trademark Work at Home hardware to up to 22 (twenty-two) participants. The deployments which take place from August 8, 2000 through August 11, 2000 shall be scheduled for the rate of up to 2 (two) per day. The deployments which take place from August 14, 2000 through August 25, 2000 shall be scheduled for the rate of up to 4 (four) per day. The participants reside, on average, within 30 (thirty) miles of USPTO's campus. When deployments are made to multiple participants on a single day, those participants will reside, on average, within 10 miles of one another. The Contractor has been provided with a deployment schedule, including the customers' names, addresses, and travel directions.
18. From September 5, 2000 through September 15, 2000, the Contractor shall configure and deploy Trademark Work at Home hardware to up to 25 (twenty-five) participants. The deployments shall be scheduled for the rate of up to 4 (four) per day. The participants reside, on average, within 30 (thirty) miles of USPTO's campus. When deployments are made to multiple participants on a single day, those participants will reside, on average, within 10 miles of one another. The Contractor will be provided with a deployment schedule, including the customers' names, addresses, and travel directions. The Contractor shall also provide on-site support as needed to all Trademark Work at Home participants.
19. From December 4, 2000 through December 15, 2000, the Contractor shall configure and deploy Trademark Work at Home hardware to up to 30 (thirty) participants. The deployments shall be scheduled for the rate of up to 4 (four) per day. The participants reside, on average, within 30 (thirty) miles of USPTO's campus. When deployments are made to multiple participants on a single day, those participants will reside, on average, within 10 miles of one another. The Contractor will be provided with a

deployment schedule, including the customers' names, addresses, and travel directions. The Contractor shall also provide on-site support as needed to all Trademark Work at Home participants.

20. The Contractor shall provide technical support for the Patents Software Baseline.

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish workspace, telephone systems, and all pertinent documentation.

4. LEVEL OF EFFORT

No work will be performed under this Task Order without the written direction of the COTR.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the PTO in Crystal City, VA and in the contractor-leased facilities in Crystal City, VA and Alexandria, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the PTO COTR and Task Managers (electronic form required).

Deliverable	Schedule
Synopsis of all work performed during a week	by close of business each Monday
Comments on new Operational Support Plans	within six (6) working days of plan receipt
Comments on review of existing Operational Support Plans	by 5 th of each month (9-month cycle for each plan)

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

Office of the Chief Information Officer Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999	Desktop Hardware Maintenance Group	Long Kim Ung 305-9005 Joe Vastola 305-3650

1. BACKGROUND

Desktop Hardware Maintenance Group maintains OCIO supported desktop hardware, group printers and walk-up workstations. This contract will support the PTO's total office automation business needs.

The Group Printers consist of PROMARK printers with Windows NT Server 4.0 as the Operating System. The software and hardware of the printers are provided by PROMARK.

The Walk-Up workstations consist of the PTO approved Pentium 180s or better, loaded with Patents baseline with additional local account (DSS) and NT Policy applied.

2. STATEMENT OF WORK REQUIREMENTS

1. Contractors shall abide by all OCIO Task Manager Directives, Service Level Agreements (SLA), Operational Support Plans and Technical Notes.
2. Contractor shall provide support from 5:30 AM to 12:00 PM (Midnight) local time, Monday through Friday, and from 5:30 AM to 10:00 PM local time, Saturday, Sunday and Holidays (excluding Christmas Day, New Year's Day and Thanksgiving).
3. Contractor shall maintain a minimum 95% customer satisfaction rating at all times. This translates to Contractor receiving no more than 5% "re-opened" and "unsatisfactory" ratings. Ratings will be measured through the Customer Quality Check process. The rating levels given during the quality checks are: outstanding, very good, satisfactory, unsatisfactory and re-open.
4. Contractor shall thoroughly document all work they perform in the appropriate problem/change record. Contractor shall update the record within two (2) hours of performing the work.
5. If Contractor performs a site visit, Contractor shall always leave a completed work service form with the customer. If the customer is at the site, Contractor shall notify the customer before leaving the site.
6. Contractor shall not close or resolve any records without obtaining confirmation from the customer that the service has been performed or the problem has been resolved; an exception is made if 3 attempts to contact a customer over a 3-day period do not produce a response from the customer.

7. Contractor shall perform a Root Cause Analysis (RCA), for problems that they resolve, when requested by the Task Manager.
8. Contractor shall use the mobile (Psion) units to record all hardware changes for asset management purposes and to document all field service work performed.
9. Contractor shall be responsible for resolving problems and providing services associated with desktop hardware. Contractor shall respond to problem and service requests within two (2) hours. Response is defined as speaking to the customer, leaving voice mail message for the customer, sending an email message to the customer or leaving a work service form at the customer's site. Contractor shall telephone the customer before arriving at the customer's site if a time for the visit has not already been arranged with the customer. Contractor shall resolve/circumvent problems or complete service requests within four (4) hours. These commitments apply to all problems and requests assigned to the Contractor, unless otherwise stipulated in this Task Order (TO) or Service Level Agreements.
10. Any desktop hardware placed into service shall be a fully functional and performance level equivalent to equipment removed for repair. If the customer has data files, documents, or other files on the defective desktop hardware, Contractor shall ensure that such files (when not damaged) are transferred to the replacement computer.
11. During the Saturday, Sunday and Holidays (excluding Christmas Day, New Year's Day and Thanksgiving) shifts, the contractor shall abide by all Service Level Agreements including (but not limited to) those indicated in item nine (9). During less active periods of these shifts, the contractor will take non-functional PC's, printers and other desktop peripherals and fix them so they are added to the functional loaner/replacement pool of PC's, printers and other desktop peripherals. This desktop equipment will be tested to ensure full functionality and preparation to be used as a loaner/replacement. The progress of this requirement will be documented in a deliverable (see "6. Schedule of Deliverables")
12. Contractor shall be responsible for the receipt and tracking of all hardware shipped to the Contractor's facility on behalf of the PTO. Contractor shall notify Task Manager within two (2) hour of receipt.
13. All hardware and supplies provided under this task order must be of the same or better quality than that which it is replacing. In addition, all hardware must adhere to the OCIO Technical Reference Model (TRM).
14. Contractor shall identify hardware (excluding mice) for Patent and Trademark Depository Library (PTDL) workstations requiring replacement within six (6) hours. Contractor shall pack and ship replacement hardware to the PTDL so that it will arrive within five (5) working days of the initial call. Contractor shall include any necessary information regarding replacement hardware and instructions for the PTDL to pack and ship back the broken hardware. Contractor shall be responsible for packing, shipping (including charges) and tracking the equipment.

15. Contractor shall perform a total of 6 daily checks of individual group printers. These 6 checks must be at least two (2) hours apart. The morning check shall take place no earlier than 6:30 AM and the afternoon check shall take place no later than 6:00 PM. On weekends and holidays, the Contractor checks each printer once between the hours of 8 AM and 2 PM.
16. During the month of September, four additional daily checks are required for these group printers during weekdays. One of these additional checks should be done after 4:00PM and the other after 6:00PM. On weekends and holidays during this month, these printers shall be checked twice, the first check shall be no earlier than 6:30 AM and the afternoon check shall take place no later than 4 PM.
17. Contractor shall add paper, add toner, and clear paper jams for group printers as appropriate. Contractor shall obtain paper and toner from central repositories. Contractor shall notify a designated PTO official when paper or toner supplies need to be replenished. Contractor shall dispatch a technician to service the printer when notified of a printer problem.
18. Contractor shall check each group printer within one (1) hour of being notified of a possible problem. The notification may be issued by the Help Desk or by an automated printer monitoring system.
19. Contractor shall maintain the spares desktop hardware at levels that ensure problems may be circumvented/resolved within 4 hours.
20. Contractor shall provide off-site support to the two warehouses listed below:

Franconia Warehouse 6808 Loisdale Road Springfield, VA	Fullerton Center <i>(also known as the Newington Warehouse)</i> 7401 Fullerton Road Springfield, VA
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This off-site support shall include all of the Personal Computers and peripherals (connected to PTONet and to the Federal Records Center via modems) and PALM/TRAM equipment (connected to the A16 via modems) at these locations. Support shall be for both the hardware and software.

21. Contractor shall also provide remote support to the following locations:

1. RTIS Contractor
 275 Gibraltar Road
 Horsham, PA 19055

Telephone: 215-441-6360
POC: Brett Yeagley

2. 125 Rock Road
Horsham, PA 19044
Telephone: 215 441-6475
POC: Tom Callison

This remote support shall include all of the Personal Computers and peripherals, and PALM equipment. Contractor shall provide support Monday through Friday, from 7:30 AM to 11:30 PM and weekends from 7:30 AM to 5 PM. Contractor shall notify SIRA of any problems at the Pennsylvania sites that can't be resolved remotely.

22. Contractor shall provide on site support for the following location:

RTIS Contractor
3443 Carlyn Springs Road
Bailey's Crossroad, VA 22041
Telephone: 703 750-9580
POC: Bill Docca

The support shall be provided Monday through Friday, excluding federal holidays. Contractor shall provide hardware support for 3 network printers, 12 legacy PALM BCRs and CRTs, and 5 PALM printers. Contractor shall provide both hardware and software support, primarily Pre-Exam and PALM BCR, for approximately 24 workstations.

23. Whenever working on electronic equipment, contractor shall use a grounding strap to protect the equipment from Electrostatic Discharge (ESD) damage. The grounding strap should conform to the American National Standards Institute (ANSI) standards in regard to EOS/ESD Grounding. The strap should be tested for functionality on a regular basis (daily testing is recommended). In addition to the strap, all electronic components should always be stored in enclosed anti-static bags when not being handled.
24. Contractor shall perform periodic preventive maintenance for Trademarks Image Capture & Retrieval System (TICRS) high speed scanners (a total of 5 Fujitsu 3099). Contractor shall also respond to problem and service requests of these scanners within four (4) hours. Contractor shall provide support from Monday – Friday, from 8:30 AM to 5:00 PM.
25. Contractor shall have a thorough understanding of the Group Printer System and all related applications.

26. Whenever working on group printers and/or walk-up workstations, the Contractor shall notify the CBSI Group Printer Supervisor before leaving the site, with an updated status of the problem. Contractor shall not close any records without confirmation from the CBSI Group Printer Supervisor that the service has been performed or the problem has been resolved. If the supervisor cannot be contacted after three attempts within a two (2) hour period, confirmation shall then be obtained from the Office of Automation Services.
27. Contractor shall be responsible for monitoring, troubleshooting, and resolving all operational and software problems associated with NT Group Printers and walk-up workstations. Contractor shall respond to problem and service requests associated with group printers and walk-up workstations within half (1/2) hour.
28. Contractor shall be responsible for NT Group Printer System Administration functions, which will include, but not be limited to, the following:
- Coordinating with NOD to re-start services
 - Re-starting Drivers
 - Upgrading to New Service Packs on request
 - Maintaining local contractor user account
29. Contractor shall assist PROMARK with new installation of Group Printers.

GOVERNMENT FURNISHED MATERIAL

The Government shall furnish a problem management tracking system(s), all pertinent documents, and hand held Psion mobile radio units.

4. LEVEL OF EFFORT

No work outside the scope of this task order will be performed under this Task Order without the written direction of the COTR.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the buildings occupied by the PTO in Arlington, VA and in the two warehouses located in Springfield, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the COTR (electronic form preferred).

Deliverable		Due
Report of Hardware Replacement	Report identifying all ODCs dollars spent during previous week; include, problem record number, make and model of device replaced/serviced, make and model of replacement	COB Monday

	device, statement as to whether the replaced hardware was under warranty	
Return Merchandise Authorization Pending	List of all hardware currently pending RMA; include, delivery order number, make and model, quantity, date RMA request was sent	By fifth of each month
Return Merchandise Authorization Approved	List of all hardware approved for RMA during previous month; include, delivery order number, make and model, quantity, date RMA request was sent, date RMA approval was received, date replacement was received or is to be received	By fifth of each month
RCAs	Root Cause Analysis reports	Within two days of assignment
Weekend / Holiday Progress Status Report	List all PC's, printers and desktop peripherals that are fixed, tested and added to the functional loaner/replacement equipment pool. This list should be documented for each day of progress (e.g. every Saturday, Sunday and working Holiday) and will be provided as directed by the task manager and with the monthly report	By the fifth of each month and as directed by the task manager.
Problem and Change Records	Contractor shall fully document all customer support related activities in the appropriate problem and change records	Records updates must be made within one hour after the completion of an activity

7. AUTOMATED INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

Office of the Chief Information Officer Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999	Desktop Hardware Move Group	Carol Thornton 305-9494

1. BACKGROUND

The Desktop Hardware Move Group is responsible for moving and surplusing all OCIO supported desktop hardware and some small, miscellaneous hardware at PTO. This hardware may include, but is not limited to, personal computers, desktop printers, bar code readers, glare-guards, scanners, modems, scanners, LAN probes, routers, hubs, stand-alone servers, DVD towers, jukeboxes, and laptop-docking station.

2. STATEMENT OF WORK REQUIREMENTS

1. Contractor shall abide by all OCIO Task Manager Directives, Service Level Agreements (SLA), Operational Support Plans and Technical Notes.
2. Contractor shall provide support from 6:30 AM to 6:00 PM, Monday through Friday (excluding holidays).
3. Contractor shall maintain a minimum 95% customer satisfaction rating at all times. This translates to Contractor receiving no more than 5% "re-opened" and "unsatisfactory" ratings. Ratings will be measured through the Customer Quality Check process. The rating levels given during the quality checks are: outstanding, very good, satisfactory, unsatisfactory and re-open.
4. Contractor shall thoroughly document all work they perform in the appropriate problem/change record. Contractor shall update the record within two (2) hours of performing the work.
5. If Contractor performs a site visit, Contractor shall always leave a completed work service form with the customer. If the customer is at the site, Contractor shall notify the customer before leaving the site.
6. Contractor shall not close or resolve any records without obtaining confirmation from the customer that the service has been performed or the problem has been resolved; an exception is made if 3 attempts to contact a customer over a 3-day period do not produce a response from the customer.
7. Contractor shall perform a Root Cause Analysis (RCA), for problems that they resolve, when requested by the Task Manager.
8. Contractor shall use the mobile (Psion) units to record all hardware changes for asset management purposes and to document all field service work performed.

9. Contractor shall be responsible for resolving problems associated with desktop hardware moves. Contractor shall respond to problems within two (2) hours. Response is defined as speaking to the customer, leaving voice mail message for the customer, sending an email message to the customer or leaving a work service form at the customer's site. Contractor shall resolve/circumvent problems within four (4) hours. These commitments apply to all problems and requests assigned to the Contractor, unless otherwise stipulated in this Task Order (TO) or Service Level Agreements.
10. Contractor shall be responsible for all PTO desktop hardware moves.
11. Contractor shall, on average, move/surplus up to fifteen (15) desktop hardware units per day. A unit may be a CPU and all its peripheral or a single stand-alone device, such as a network printer.
12. Contractor shall complete requests to move/surplus ten (10) or fewer desktop hardware units within one (1) day of receipt of request. Exceptions may be made if customer requests a later, specific move/surplus date or if the move/surplus schedule is already fully booked. If a unit can't be moved/surplused within one (1) day because the schedule is booked, Contractor shall notify the task manager within two (2) hours. Notification shall be by electronic mail.
13. Contractor shall complete requests to move/surplus more than ten (10) desktop hardware units within five (5) days of receipt of the request. Exceptions may be made if customer requests a later, specific move/surplus date or if the move/surplus schedule is already fully booked. If units can't be moved/surplused within five (5) days because the schedule is booked, Contractor shall notify the task manager within two (2) hours. Notification shall be by electronic mail.
14. Contractor shall notify the customer of the time at which the move will begin. Contractor shall arrive within thirty (30) minutes of this time.
15. Contractor shall ensure that hardware is locked down and fully functional at the conclusion of the move.
16. Contractor shall be responsible for service requests to lockdown PTO desktop hardware.

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish hand-held Psion units and all pertinent documentation.

4. LEVEL OF EFFORT

No work outside the scope of this Task Order will be performed without the written direction of the COTR.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the PTO in Crystal City, VA and in the contractor leased facilities in Crystal City, VA and Alexandria, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the PTO COTR and Task Manager (electronic form preferred).

Deliverable		Due
Completed Moves Report	The report should include change record number, customer business area (OCIO, Patents, Trademarks, Executive, customer name, move location (from and to), type of equipment, quantity, property custodian, move date, reinstall date, temporary storage location (if applicable)	COB Monday
Scheduled Moves Report	The report should include change record number, customer business area (OCIO, Patents, Trademarks, Executive, customer name, move location (from and to), type of equipment, quantity, property custodian, move date, reinstall date, temporary storage location (if applicable)	COB Monday
Problem and Change Records	Contractor shall fully document all customer support related activities in the appropriate problem and change records	Records updates must be made within one hour after the completion of an activity
RCAs	Root Cause Analysis reports	Within two days of assignment

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

Office of the Chief Information Officer FM/EUS Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999	User ID and Password Administration	Joseph Johnston 305-4215

1. BACKGROUND

The United States Patent and Trademark Office (USPTO) is located in Arlington, Virginia and is geographically dispersed across an eighteen building campus. The PTO Information Systems Security Program ensures that PTO's data and information technology assets are adequately safeguarded. The Program is multifaceted and entails the administration of data access through the use of security software, assignment of access rules, and provision of user identifiers and passwords. The Program is guided by United States Laws, Rules, and Regulations regarding Information Systems Security and the Department of Commerce's and PTO's security policies and Rules of the Road.

The Office of Information Systems Security (OISS) is responsible for the administration of all user ID's and Passwords to PTOnet Systems.

2. STATEMENT OF WORK REQUIREMENTS

- (1) The Contractor shall provide resources with expertise in the latest network technologies employed by USPTO.
- (2) Contractor Personnel assigned to this task shall have completed a security background investigation. This background check will be performed by an external agent at the contractor's cost. The results of this background investigation will be formally presented (in writing) to the Task Manager. The Task Manager will review the results of the Background Investigation and make the final determination as to the suitability of any personnel proposed for this Task.
- (3) The Contractor shall not make any changes, modifications, alterations, or enhancements to USPTO's infrastructure, hardware, or software without detailed change records being approved by USPTO. In addition, the Contractor shall abide by all Service Level Agreements (SLA) and Standard Operating Procedures (SOP) established by USPTO.
- (4) The Contractor shall create a service request record in a USPTO provided maintenance tracking system for all access account request received from customers. The tracking systems shall serve as the central repository of information used by information systems personnel in fulfilling requests throughout USPTO. The Contractor shall assign the call, as appropriate and when necessary, for action. The Contractor shall inform the customer that the account request has been resolved. The Contractor shall close out all calls in USPTO's tracking system upon fulfilling the request.

- (5) The Contractor shall adhere to applicable security policy and rules, Technical Notes and Standard Operating Procedures (SOPs) that pertain to Information Systems Security at the PTO.
- (6) The Contractor shall meet standards of customer satisfaction established by the USPTO. Customer satisfaction measurements measure Contractor staff attributes such as professionalism, courtesy, expertise, attitude, and helpfulness.
- (7) The Contractor shall provide on-site 5:30 AM to 10:00 PM, 16.5 hour per day, 5 day per week (15.5x5) Login and Password administration support to OISS (PM (excluding Federal Holidays observed by USPTO)).
- (8) The Contractor shall perform enterprise management of USPTO automated information systems (AISs) Login ID's and Passwords using the Enterprise Wide Login system (EWL). The Contractor shall respond to events and outages on EWL ,contact designated individuals responsible for supporting those systems, escalate as necessary, and report on the progress of restoration. Procedures for such action are outlined in the EWL Operational Support Plan (OSP).
- (9) The Contractor shall perform a Root Cause Analysis (RCA) for EWL problems when requested by USPTO.
- (10) The Contractor shall conduct security audits as requested by USPTO.
- (11) The contractor shall fulfill ninety-five percent (95%) of the following request per the time frames outlined below.

Create new PTOnet Login ID and Password	Within 1 day after receipt of approved request by OISS
Create Mail@Home ID and have materials ready for user	Within 3 days after receipt of approved request by OISS
Create new E-mail account	Within 1 day after receipt of approved request by OISS
Create new firewall ID	Within 1 day after receipt of approved request by OISS
After verifying the identify of a users, create a new PKI certificate or renew an existing certificate and provide user with an identification number and authorization code.	Within 1 day after receipt of approved request by OISS
Move PTOnet logon access to a different file server	Within 3 days after receipt of request by OISS
Delete PTOnet ID, firewall ID, E-mail ID, and Mail@Home ID	Within 1 day after receipt of request by OISS
Revoke PKI certificates and recover PKI keys.	Within 3 days after receipt of request by OISS

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish change and problem tracking system(s), Enterprise Wide Login System (EWL), Exchange e-mail system, PKI Certificate system, all pertinent SLAs, SOPs, and software for the performance of this task. The acquisition of office space and equipment (compatible with PTOnet) for contractor personnel, beyond the single space provided in section 5 below, is the responsibility of the contractor.

4. LEVEL OF EFFORT

No work shall be performed under this Task Order without the written direction of the COTR.

5. PLACE OF PERFORMANCE

Work shall be performed at a location specified by the Government. This location will have provisions (both equipment and office space) for two contractors. Due to the coverage requirements of this task, the contractor shall rotate personnel into and out of this location to support this task.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the COTR (MS-Word electronic form preferred).

Deliverable		Due
Report	Monthly Activity Report (details accomplishments)	Monthly
Report	Monthly Task Expenditure Report (details hours billed per individual on Network Operations Support Task)	Monthly

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

Office of the Chief Information Officer FM/EUS Work Plan		
COTR	Task Title	Task Manager
Tom King 305-8999	Patent Academy AV Technician support	Long Kim Ung 305-9005

1. BACKGROUND

The services covered under this task order provide comprehensive support of all hardware and software used for training purposes by the Patent Academy, including any new technology that may be deployed.

2. STATEMENT OF WORK REQUIREMENTS

2.1. OPERATION AND MAINTENANCE OF VIDEO-TELECONFERENCING SYSTEM:

- 2.1.1. The contractor shall ensure that all equipment related to the operation is working properly. This equipment is comprised of all devices that are utilized as part of any video teleconferencing sessions including both interviews and training sessions. The contractor shall log onto the system(s) daily to ensure that connections are working properly to all PTDL sites.
- 2.1.2. The contractor shall perform necessary steps to prepare for all video teleconferencing sessions including the move of equipment to different rooms within the Academy or the PTO campus.
- 2.1.3. The contractor shall advise PTO staff or others as appropriate, of any technical problems with the video teleconferencing system. The contractor shall be present during any maintenance or repairs on the system.
- 2.1.4. The contractor shall assist presenters in learning the basic operation of the video teleconferencing system.

2.2. OPERATION AND MAINTENANCE OF PATENT ACADEMY AUDIO/VISUAL AND AUTOMATED INFRASTRUCTURE

- 2.2.1. The technician must become familiar with the operation and function of all equipment, devices and software currently used in the Patent Academy for training and presentations.

- 2.2.2. The contractor shall ensure all equipment is in working condition and when necessary will perform routine operational maintenance, e.g. replace lamps and bulbs. The contractor shall be able to determine whether any malfunctioning equipment should be submitted to the appropriate service provider for maintenance. This is done through the initial troubleshooting process, which the Patent Academy will train the technician to perform.
- 2.2.3. The contractor shall work with other technical or support personnel on an as needed basis to assist other organizations in utilizing the Patent Academy training rooms (e.g., CIO technical personnel who is currently using training room for Y2K Compliance).
- 2.2.4. The contractor shall ensure that all connections to video equipment are properly connected in the computer training rooms (e.g., TECH Commander -- which allows the instructor's system to take control of one or all of the student screens).
- 2.2.5. The contractor shall ensure that Training Rooms with built-in projection devices such as Rooms 1 and 6 (which house **Electrohome** video projectors **Starsound** portable microphones, computers and television monitors) are working properly before training sessions begin.
- 2.2.6. The contractor shall maintain the Academy security cameras and VCR including replacing and storing surveillance camera videotapes for 30 days. In the event any of the surveillance cameras are not functioning properly, The contractor shall perform basic troubleshooting and if necessary report the malfunction to the appropriate Academy staff.
- 2.2.7. The contractor shall be responsible for determining whether additional computer or audio-visual supplies need to be procured. This information will be reported to appropriate Academy personnel for processing.
- 2.2.8. The contractor shall be knowledgeable in the use of audio-visual equipment for recording both sound and video. The contractor shall become familiar with devices for mixing and altering video presentations.
- 2.2.9. The contractor shall ensure that any A/V or computer equipment needed for use in any room is set up and functioning properly no later than 30 minutes prior to the start of the session..
- 2.2.10. The contractor shall be knowledgeable in installing and troubleshooting Microsoft PowerPoint and Astound presentations.

2.3. MAINTAIN COMPUTER TRAINING ROOMS INCLUDING HARDWARE, SOFTWARE, AND NETWORK FUNCTIONALITY

- 2.3.1. The contractor shall ensure that the computers in the computer training rooms are working properly before training sessions begin. Any problems with systems that need attention will be promptly called into the PTO Help Desk and reported to the appropriate Academy staff.
- 2.3.2. The contractor shall maintain the Academy online database where all computer problems will be logged in. Quarterly reports may be required summarizing all system discrepancies.
- 2.3.3. The contractor shall serve as the primary point-of-contact with the Help Desk for all computer hardware, software and network problems.
- 2.3.4. The contractor shall ensure that all necessary PTONet network drops are activated and connecting to PTONet before training sessions begin. The technician should have basic knowledge of network topology.
- 2.3.5. The contractor shall make all requests for additional PTONet drops or network activations on an as needed basis.
- 2.3.6. The technician must be familiar with Office 97 software and the Windows NT operating system.. The technician must become knowledgeable about the basic operation of the Patent Examination Toolkit software taught at the Academy and become familiar with any new software or systems deployed to the Academy.
- 2.3.7. The contractor shall maintain the Patent Academy training ID and passwords including APS, Internet, NT and PTONet.

2.4. ASSIST PTO PROPERTY CUSTODIAN IN PERFORMING DUTIES:

- 2.4.1. The contractor shall assist the Academy Property Custodian (PC) in the performance of all PC duties

2.5. ORDER COMPUTER TRAINING-RELATED SUPPLIES:

- 2.5.1. The contractor shall be responsible for assessing the supply situation for all computer-training supplies to ensure that all equipment has what's needed to function properly. The contractor shall not order supplies but will forward the request to appropriate Academy staff.

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish space for the technician.

4. LEVEL OF EFFORT

No work outside the scope of this task order will be performed under this Task Order without the written direction of the COTR.

5. PLACE OF PERFORMANCE

The majority of the Work shall be performed throughout the Patent Academy, Crystal Square 4, Suite 700 occupied by the PTO in Arlington , VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the COTR (electronic form preferred).

Deliverable		Due
Activity Report	Contractor shall provide brief descriptions of all support activities performed previous week and planned activities for upcoming periods.	By COB each Monday

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS/LCM is required under this task order.

Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999	Freedom Of Information Act (FOIA)	Ronald Lyon 308-5179

1. BACKGROUND

The Office of the Solicitor processes FOIA requests for the Patent & Trademark Office (PTO). FOIA provides access to records of agencies of the Executive Branch of the Federal Government. It also provides determination of certain exceptions to the release of records, known as FOIA exemptions. In the last five years, FOIA requests to the PTO have doubled in number. The majority of the requests are for copies of the PTO contracts or other documents related to the administration of the contracts.

In 1996, Congress amended the FOIA statute to require agencies to create an electronic reading room for records that “have become or are likely to become the subject of subsequent requests for substantially the same record” (5 U.S.C. § 552(a)(2)(D), as amended by Electronic Freedom of Information Act Amendments of 1996, 5 U.S.C.A. § 552(a)(2)(D)(West Sup. 1997)). The statutory purpose of placing such records in electronic reading rooms is to divert some potential FOIA requests for previously - released records (H.R. Rep No. 104-795, at 21 (1996)).

The Amendment also requires making all final agency decisions entered after November 1996 available in the electronic reading room (5 U.S.C. § 552(a)(2) effective November 1, 1997). For the PTO these final decisions include Attorney and Agent enrollment and discipline decisions from the Commissioner and the Office of Enrollment and Discipline, decisions regarding patents, trademarks, and petitions to the PTO.

2. STATEMENT OF WORK

Several offices within the PTO produce these documents. They are written decisions in cases that have appeared before official PTO boards. Each of the documents has multiple pages and some have graphical designs associated with them. Current FOIA requirements stipulate that these decisions and graphical designs must be posted to the PTO’s Internet site. Offices of origin include the Office of the Assistant Commissioner for Patents, the Office of the Assistant Commissioner for Trademarks, the Board of Patent Appeals and Interferences, the Trademark Trial and Appeal Board, the Office of Enrollment and Discipline, and the Office of the Solicitor. The following steps illustrate the relative complexity of this task.

1. All documents in the paper backlog are to be scanned, either as paper copies or as images taken from Microsoft Word documents.

2. The documents that are posted must be indexed so that they can be retrieved by someone properly identifying them by prompted address or by engaging a URL. The indexing process already exists and is in use at the PTO.
3. The scanned or electronic documents must be converted to PDF format using a licensed Adobe Acrobat commercial software package.
4. An index document must be created with HTML links to the documents listed in the index. This inventory of indices dates to November 1996. This document will be created using a licensed software package called Front Page.
5. The finished documents with the index links are then transferred into an appropriate directory on the WEBMIRR1 server.
6. The PTO Web personnel are notified by E-mail so that the documents can be posted on the Internet as FOIA disclosures.

3. GOVERNMENT FURNISHED MATERIAL

The PTO will provide access to software, hardware, office space, and PTOnet connections required to perform this task. The government shall also provide the specific direction regarding documents to be posted, indexing scheme, and index data for each document to the contractor employee assigned to carry out this task.

4. LEVEL OF EFFORT

The contractor shall be on site four (4) consecutive hours of each working day. A time sheet shall be maintained whereby the FOIA contractor will record the time spent on the job by signing in and out of the office. If there is more than one arrival and departure during the course of one day, all arrivals and departures shall be recorded on the time sheet. The PTO will be billed according to the hours worked as recorded on this time sheet and validated by the signature of the FOIA contractor and the Task Order Manager. Work will be in response to the volume of new documents that must be posted to the web site and specific quality control steps performed at each of the scanning, indexing and posting phases. The Contractor is responsible to the PTO task manager for ensuring all work is performed within three working days of the time each decision is made available for scanning. Special exceptions may be made for particular decisions and especially large batches or batches that become large when combined with other batches in the work queue. The PTO task manager will provide such direction and oversight as is necessary to ensure that the task is properly accomplished.

5. PLACE OF PERFORMANCE

Work will be performed at the PTO facility.

6. SCHEDULE OF DELIVERABLES

The person assigned to perform these tasks will provide a report each Friday to the PTO task manager and COTR regarding the number of documents collect, the number of

documents scanned and the number of new documents made available to the public by means of the USPTO Web site. This weekly accounting must be submitted electronically.

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is inappropriate for this task. This task is strictly an operating business function to achieve compliance to the Electronic Freedom of Information Act Amendments of 1996.

Office of the Chief Information Officer FM/EUS Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999	Technical Writing/ Document Development	Joan Axilbund 305-8929

1. BACKGROUND

The Trademark Systems Division (TSD) of the Office of Chief Information Officer (OCIO) develops and supports the automated systems used by the Office of Trademarks. As part of the development effort, documentation meeting the standards of the OCIO must be prepared. The assistance of a technical writer is required to accomplish this task.

2. STATEMENT OF WORK

Project Documentation - Contractor shall prepare documentation in support of projects which consist of both commercial off the shelf (COTS) software and government developed software. The target audience for most of the documents will be technical personnel employed by PTO. The Contractor shall develop this documentation using software approved by the Office and shall follow the format specified by the Technical Standard Guidelines issued by the OCIO. The documentation will be reviewed by the OCIO Technical Review Board (TRB) members at scheduled meetings.

3. GOVERNMENT FURNISHED MATERIAL

Contractor shall provide all hardware and software required for use in production of this task order.

4. LEVEL OF EFFORT

The government's best estimate for the level of effort required to complete or assist in the completion of the documentation is approximately 40 hours per document. This estimate can vary based on complexity and scope of the document. All hours are based on historical trends of producing similar publications, documents, and services performed by PTO personnel.

Every project developed under the OCIO's Life Cycle Methodology (LCM) requires documentation throughout the process. Under this task order the technical writer will assist the developers in preparing the documentation and products for presentation, such as Power Point slides, before the Technical Review Board.. The technical writer will be responsible for the final format of the document; however, the development staff (TSD personnel) will be responsible for the final content of the documents.

5. PLACE OF PERFORMANCE

Work shall be performed at the contractor's office.

6. SCHEDULE OF DELIVERABLES

All paper deliverables shall be hand delivered to the PTO Task Manager or, in her absence, the COTR. An electronic copy of all deliverables will be delivered to the COTR and PTO Task Manager. Due dates are expressed as the number of business days from the task order execution date (TOED) or number of days prior to Technical Review Board meeting.

Deliverables		Due Date
Meeting	Introduction of staff and negotiation of work schedule	No later than TOED + 5
Progress Meeting	Preliminary progress of document delivered electronically	5 business days before distribution to TRB members
Deliverable of Final Draft	Final draft delivery of any given publication, delivered electronically and in hard copy (B&W acceptable).	1 business day prior to TRB meetings

Technical reviews will be conducted as requested by the COTR, by the PTO Task Manager, or by the Contractor.

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM guidelines shall be followed under this task order. The projects being developed are following these guidelines. Documentation will conform as much as possible to these guidelines.

Office of the Chief Information Officer FM/EUS		
COTR	Task Title	Task Manager
Tom King 305-8999	Patent Workstation upgrades and relock/lock of hardware, Preventative Maintenance and Optimization	Tung Nguyen 305-9391

1. BACKGROUND

The USPTO is constantly deploying applications that require additional resources and the latest hardware and software. This task is to provide an upgrade of the existing workstations with the latest tools by visiting each workstations and upgrade on-site. The deployment requires that each workstation receive an upgrade in memory to a level of 128 MB, preventative maintenance and optimization of each system and replacing or placing new locks on each workstation configuration or stand-alone piece of hardware. The number of workstations required to be upgraded and supported will be limited to users in the patent examining corps totaling 3200. Approximately 4500 workstations and /or stand-alone system will require new locks.

2. STATEMENT OF WORK

Part I (Patent Examiners):

Provide hardware and software support for 3200 patent examining corps users as specified throughout the patent organization. **Requirement is to support at a minimum of 100 patent customers daily.** Support may include deployment of new software, hardware, and preventative maintenance. There are a total of 3200 workstations that will receive an optimization and preventive maintenance and at least 2200 of these workstations will also need to receive a memory upgrade to 128 MB.

- Complete all necessary documentation to insure the deployment of memory and locks are completed in accordance with installation instructions.
- Upgrade the current examiners desktop workstations to meet the requirement specified by TEF, both hardware and software.
- Optimize each workstation to include; check each workstation and configure to the NT Enterprise Baseline, Patent Cost Center version, Update examiner tools, defrag hard drives (page file defrag) and upgrade memory to 128 MB when required.
- Perform preventative maintenance on workstations and components to include; clean monitors, vacuum and wipe keyboards, vacuum and clean printers and clean optical lens in CD ROM Drives. Preventative maintenance will only be performed on workstations and components that are specified by the task manager.

Part II (Patent Support Personnel):

Provide hardware and software support for approximately 1000 patent examining corps users as specified throughout the Patent organization. Support may include deployment of new software, hardware, and preventative maintenance and a memory upgrade to 128 MB.

- Upgrade the current desktop workstations to meet the requirement specified by TEF, both hardware and software.
- Optimize each workstation to include the following: update any workstations that aren't running the current baseline and have the current Service Pack, defrag hard drives (page file defrag), replace any non-CAT5 patch cables, ensure that Diskkeeper is set-up to run daily during non-production hours, record the customer name/location/workstation ID of any workstations with modems, and upgrade memory to 128 MB when required.
- Perform preventative maintenance on workstations and components to include; clean monitors, vacuum and wipe keyboards, vacuum and clean printers and clean optical lens in CD ROM Drives. Preventative maintenance will only be performed on workstations and components that are specified by the task manager.
- Begin task on or about April 20, 2000 or immediately after awarded. Complete task no later than July 30, 2000. Perform task during the hours of 6:30 AM and 7:00 PM), Monday through Friday.
- Upgrade a minimum of 20 workstations per day. The schedule of workstations to be done each day will be provided by the task manager no later than noon of the prior day. The schedule shall include the customer's name (where appropriate) and location. Work will mainly be scheduled by area (e.g., all PCs in PK2, 7C16). SIRA will ensure that customers are notified that work is to be performed in their area at least one day in advance.
- Contractors shall be available from 6:30 AM to 11:30 AM each morning to follow up on problems that may have resulted from the work performed the previous day.
- This task may be halted at the direction of the task manager for any reason.

Part III (RAM Upgrade):

Provide memory upgrade to 128 MB to approximate 300 Workstations. The task will be completed either one weekend (perform on Saturday and Sunday) or two weekend (perform two Saturdays). The task should start from April 29, 2000 and should be completed on May 7, 2000.

3. GOVERNMENT FURNISHED MATERIAL

- All software applications and hardware components (this includes memory and locks) will be furnished by USPTO.

4. LEVEL OF EFFORT

- The level of effort is based on a best estimate of the number and types of support required.

5. PLACE OF PERFORMANCE

- The work will be required in all of the buildings occupied by the Patent Organization. (CP2, CP3, CP4, CP6, PK1, PK2, PK3, PK5, CM1, & CQ4).

6. SCHEDULE OF DELIVERABLES

- Part I:
 - Task to begin NLT November 22,, 1999 or immediately after award to be completed NLT January 16, 2000
 - This task may be halted at the direction of the task manager for any reason.
 - Daily status report on location and number of systems upgraded.
 - This task will be performed after hours (after 6:00 PM and before 6:30 AM), Monday through Friday.
 - Contractors shall be available from 6:30 AM to 11:30 AM each morning to follow up on problems that may have resulted from the work performed the previous night.
- Part II:
 - By noon each day, provide a status report, in Excel format, of any workstations optimized the previous day. The report shall include the following: customer name (where appropriate), workstation ID, CFG and CD numbers of all workstation components, description of work performed, note as to whether or not workstations contains a modem, and any work that had to be deferred (along with the reason for deferment). The contractor shall also note any workstations that were on the schedule but could not be optimized for some reason (e.g., customer location incorrect, customer refused service, etc.).

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

Office of the Chief Information Officer FM/EUS Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999	DBA Support	Tai-Lin Mu 305-7993

1. BACKGROUND

The Data Base Administration Division (DBAD) provides maintenance to the Oracle and BRS database environments. This involves ongoing activity in the areas of Oracle and BRS system software maintenance, Oracle database administration, and automation of database services within the Oracle Enterprise Manager (OEM) for Oracle databases as well as writing scripts to automate maintenance of the BRS file system. The objective of this task is to augment current staff by providing Oracle and BRS support to DBAD with a 12x5 Monday through Friday and 24x2 on Saturday and Sunday.

2. STATEMENT OF WORK

1. The Contractor shall provide technical services to monitor and maintain in a 12x5 Monday through Friday and 24x2 on Saturday and Sunday environment, the Oracle and BRS production and test databases running on HP-UX and HP-NT servers. This shall include periodic software upgrades to the Oracle and BRS software.
2. The Contractor shall participate with PTO in the current effort to standardize the implementation of Oracle databases and improve the management and maintenance for the Oracle production and test environments at the PTO. The Contractor must be familiar with the Oracle Enterprise Manger (OEM) version 2.0.4 and must incorporate all Oracle maintenance and management programs, scripts or actions to resolve alerts in Oracle Enterprise Manager. This is a continuous effort.
3. The Contractor shall provide technical support and troubleshooting assistance for the application developers. This support may involve answering questions on Oracle interfaces, and or identifying production anomalies to developers for their corrective actions. This task is a continuous effort.
4. The Contractor shall be responsible for coding, testing and implementing any new program products, processes and scripts used to automate operational activities such as file reorganization, space management and resolutions to system alarms. The Task Manager or DBAD Manager will approve test procedures, and new and revised documentation. The programming services shall include, but not be limited to, the following:
 - Analysis of the requirements,
 - Development of the coding specification and detailed design,
 - Development of programs, libraries, and/or scripts
 - Development of test scripts and data, (A PTO DBA shall assist in this parallel testing.)
 - Development of the installation plan and implementation of all processes and procedures and,
 - Development of documentation of the procedures and methodology applicable to the proper maintenance of the program(s)

5. The Contractor shall document operational procedures to completely describe any new processes and procedures. The Contractor shall log, schedule and track all changes in the Change Management System, Remedy. The Contractor or a member of the computer operations staff shall log all problems resulting from any new processes and procedures in the Problem Management System, Expert Advisor. The Contractor shall be responsible for all corrections to that code and for repairs to the system or database.
6. The Contractor shall receive written and verbal assigned tasks from the Task Manager, COTR or his designated representative.
7. The Contractor shall analyze assigned tasks and provide estimate time frames to complete to the COTR or Task Manager. The Contractor shall provide justification for extending completion time frames by more than two workdays.
8. The COTR or designated representative will monitor and verify the completed services on a weekly basis.

3. GOVERNMENT FURNISHED MATERIAL

PTO shall provide the following:

1. Access to PTO's development and test systems and any required system, application, and data files,
2. Access to appropriate PTO personnel and program documentation as required.
3. Access to escalation procedures and other DBAD procedures.

The above items shall be available to the Contractor no later than the day after the effective date of this task order.

The Contractor shall provide the following:

1. Work space, equipment, tools, and supplies required to perform the task assigned to the DBA while on site at PTO,
2. a PC

Scripts and utilities developed for the PTO during the execution of this contract shall become the property of the PTO.

4. LEVEL OF EFFORT

The amount of work required to perform this task may vary from day to day. However, the Contractor is responsible for ensuring all work is performed within the time frame established by the PTO Task Manager at time of assignment.

5. PLACE OF PERFORMANCE

The Contractor shall accomplish all work performed for this task order at the PTO facility in Arlington, Virginia.

6. SCHEDULE OF DELIVERABLES

BRS database reorganizations will typically be performed nightly.

Oracle services will vary from day to day. However, the Contractor is responsible for ensuring that all production databases are available as scheduled and that all work is monitored daily and completed as scheduled.

All other assigned work must be completed as agreed.

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task order.