PROJECT PLAN AND IMPLEMENTATION SCHEDULE

DOD ELECTRONIC FORMS STANDARDIZATION INITIATIVE

Office of the Secretary of Defense
Department of the Army
Department of the Air Force
Department of the Navy
Defense Logistics Agency
Defense Information Systems Agency

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#399

I. PROJECT SUMMARY

A. The DoD Electronic Forms Standardization Initiative (DoDEFSI) is a DoD sponsored project to control and manage electronic forms, using an approach that would meet the needs of the total DoD community, be cost effective, provide for the integrity of the DoD forms, facilitate the electronic interchange of forms and information within the DoD and with its external affiliates, and enhance the productivity of DoD users of forms in the conduct of DoD functions.

B. Specifically, the DoD Electronic Forms Working Group (DoDEFWG) (composed of the DoD Components with major forms user populations) will guide and assist in the implementation of a project to coordinate an approach whereby each of the major DoD Component Forms Management Officers (FMO) will establish in his or her respective Component a standard set of electronic forms policies and procedures. These standard policies and procedures should include the use of the standard software to design, fill-in, store, and print forms on demand. This approach also includes the interchange of electronic forms and data transmitted electronically, or on diskettes between the Directorate for Information and Operations and Reports (DIOR), Washington Headquarters Services (WHS), and the other DoD Components participating in this initiative.

II. PROJECT CHARTER

A. The DoDEFWG was convened under the authority of the Director, Administration and Management, on August 23, 1990, to review the issues attendant to controlling and managing electronic forms. A standardized electronic forms approach was developed and recommended for implementation to the senior-level information management officials of the DoD Components represented by the members of the Working Group. The DoD Director of Administration and Management solicited the review and concurrence of these key officials on the recommended approach.

B. Concurrence on the recommended approach represents the Project Charter for the initial five charter DoD Components on the Working Group to begin project implementation of the DoDEFSI, as described in the document, "Summary of Agreements and Recommendations of the DoD Electronic Forms Working Group," dated August 26, 1991. DoD-wide participation is encouraged and assisted through the efforts of the DoDEFWG.

III. PROJECT CONCEPT

A. A standard set of policies and procedures and electronic forms software that can be used on standard non-proprietary hardware operating systems has been established for use by all

FMOs on a voluntary basis. Non-use of the standard will prevent a Component from participating in the benefits to be derived from the project.

B. The DoDEFWG will ensure that specific objectives, cost/benefit evaluations, and performance standards are established and serve to govern the implementation of the DoDEFSI. The DIOR, WHS, OSD will serve as the mission authority on the continuing effectiveness of the specific software and the DODEFSI in promoting the accomplishment of its missions in the DoD Forms Management Program.

1. Initial Specific Objectives:

   a. Prevent further uncontrolled proliferation of nonstandard software applications DoD and associated wasteful costs throughout DoD.

   b. Reduce storage space required for paper forms and forms distribution costs through use of electronic media.

   c. Reduce the rekeying of data from paper forms into electronic systems and existing databases.

   d. Provide a low-cost standard forms fill-in tool for easy use by a DoD user to electronically fill-in a form and print it as a completed form.

   e. Develop and implement procedures for the EDI (Electronic Data Interchange) process that require the use of POSIX (Portable Operating System for Computer Environments--FIPS Standard 151), GOSIP (Government Open Systems Interconnection Profile - FIPS Standard 146), and other applicable procedures to migrate the electronic forms initiative with the DoD EDI initiative.

2. Resources:

   a. Project costs for each Component's participation will be financed by each respective DoD Component consistent with its internal financing procedures.

   b. The DoD funds governed by the Defense Logistics Agency as Executive Agent for the EDI initiative will be pursued for assistance in DoD-wide funding of the DoDEFSI.

c. Technical resources as may be available in the DoD Components will be sought as warranted for support of the respective DoD Components implementation, and for assistance to the DoDEFWG.

d. The Chairperson of the DoDEFWG will provide overall leadership and direction for the project's management, with necessary support from the OSD and the members of the DoDEFWG.

3. Technical Standards:

a. Software Requirements with Needed Hardware:

(1) PerFORM PRO Filler software is used to fill-in the electronic forms "templates" designed under PerFORM PRO Designer.

(a) Two versions of PerFORM PRO Filler- one for 386 PCs with Windows 3.0 software, and another for other 386 PCs and 286 PCs.

i) PerFORM PRO Windows Filler provides form filler functions and is compatible with other Windows applications. One can cut and paste between word processing documents, spreadsheets, etc., and the form.

a) Hardware required is 386 PC, such as Unisys PW-800 series 16 MHz IBM AT-compatible computer, (from Desktop III Contract).

b) Minimum specifications: 16 MHz computer, VGA Color card and monochrome VGA monitor, 40 Megabyte SCSI hard drive and controller, 1.44 Megabyte 3 1/2" floppy disk drive, 4 Megabytes RAM, MICROSOFT-compatible serial mouse, 101 key keyboard, and Windows 3.0 (not Windows 386) software.

ii) PerFORM PRO GEM Filler is designed to work on 386 or 286 PCS without Windows software. This version uses the GEM user interface.

a) Hardware required is a PC (such as a Zenith ZWX-62 8 MHz IBM AT-compatible computer (Z-248 from Desktop III Contract).

b) Minimum specifications: 8 MHz AT-Compatible computer, EGA Color card and monochrome monitor, 20 Megabyte MFM hard drive and controller, 360 Kilobyte, 5 1/4" floppy disk drive, 1.1 Megabytes RAM, MICROSOFT or LOGITECH-compatible serial or bus mouse, 84 or 101 key keyboard, and DOS 3.1 or higher.

(2) PerFORM PRO Designer and Filler software is used by forms design functions to design the electronic forms that the forms filler software uses. The designer software runs under Windows 3.0, NOT Windows 386) on 386 PCs. Forms Designers working fulltime at the PC should have a 19-20" monitor instead of the regular monitor.

(a) Hardware required is a 386 PC, such as the Unisys PW-800 series 16 MHz IBM AT-compatible computer (from Desktop III Contract).

(b) Minimum specifications are listed, with the contract ordering numbers and prices, on the following page (from the Desktop III Contract or the Navy Companion Contract).

CONTRACT ORDERING INFORMATION

For purchase of new PC configuration - minimum specifications:

CLIN #		Desktop III Contract Description	Price
0002AB	Std	20 MHz computer	$ 993.00
	Std	1.44 Megabyte 3 1/2" floppy disk drive	
	Std	MICROSOFT - Compatible Serial Mouse	
	Std	101 Key Keyboard	
	Std	VGA Color Card	
	Std	4 Megabytes RAM	
	Std	Arithmetic Coprocessor	
0003AA		Monochrome VGA monitor	$ 106.00
0007AA		40 Megabyte SCSI hard drive and controller (NOTE: Current sub is 52 Meg drive same price).	$ 201.00
0023AA		DOS 4.01	$ 43.00
0033A		MS Windows 2.11 to 3.0 EXP Upgrade	$ 25.00
		Companion Contract	
0840AB		PerFORM PRO Designer & Filler - 3 1/2"	$ 139.00
0761AB		PerFORM PRO GEM Filler - 3 1/2"	$ 76.00
			$1,583.00

For upgrade of UNISYS PW-800 Series 16 MHz IBM AT-Compatible Computer - recommended configuration:

	Desktop III Contract	
0004AC	2 Megabytes RAM Added	$ 355.00
0007AA	40 Megabyte SCSI hard drive and controller (NOTE: Current sub is 52 Meg)	201.00
0023AA	DOS 4.01	43.00
0033AA	MS Windows 2.11 to 3.0 EXP Upgrade	25.00
	Companion Contract	
0840AB	PerFORM PRO Designer & Filler - 3.5" media	$ 135.00
0761AB	PerFORM PRO GEM Filler - 3.5" media	76.00
		$ 839.00

b. Printers:

(1) Laser Printer limitations are Postscript and compatible; Hewlett Packard (HP) II and compatible, HPII Plus and compatible, and dot matrix (ALPS, etc.).

4. Cost-Benefit Evaluations. To identify the acquisitions required to participate in this project, each FMO will review the hardware and software resources currently available to them and compare it to the basic configurations required. Cost conscious alternatives should be reviewed to determine the most cost-effective alternative that will meet the FMO's technology resource needs and accomplish the project objectives.

5. Acquisition Strategy:

a. Software: Navy Companion Contract (DoD-wide eligibility for use). Contract #N66032-91-D-0002, Mod: P00004 Contracting Officer: Any duly appointed DoD Contracting Officer.

b. Hardware: AirForce Desktop III (DoD-wide eligibility for use). Contract #_F0SSMX093380100 Mod:P00013 Contracting Officer: Any duly appointed DoD Contracting Officer.

C. Overall Implementation Schedule:

1. Major DODEFWG Tasks and Planned Timeframes:

a. Obtain concurrence of major DoD Components. 9/91

b. Clarify details of new system's impact on DoD 7750.7-M current procedures and responsibilities; e.g., submission of DD Forms designs in electronic format for DIOR approval. 9/91 - 6/92

c. Clarify steps involved, funding sources and implement acquisition plans for installation of initial systems in DIOR and DoD Components. 9/91 - 12/91

d. Review training and technical assistance options and implement operational systems. AF establishes interim baseline central forms library. 9/91 - 3/92

e. DIOR begins design and electronic management of new forms on new system; maintains old forms and revisions on old system. 3/92 - 9/92

f. DIOR begins moving high use forms from old system to new system for storage and integration of forms file. 6/92 - 12/92

g. DIOR begins distribution of approved forms listings on floppy disks. 1/93

h. DIOR begins integration of CD ROM Reader to basic system to permit CD Cassettes to be loaded with approved forms for distribution. 6/93

i. DIOR makes electronic forms available over the Defense Data Network (DDN) to DoD Components via a DoD on-line Electronics Forms Library. 6/93