

Request for Quote (RFQ) Definitions
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Definition of Terms

- **Accuracy.** The extent to which results obtained from the program are free of error.
- **Activity.** A major unit of work to be completed in achieving the goals of the project. An activity has precise starting and ending dates, has a set of tasks that need to be done, consumes resources, and results in work products. An activity may contain other activities arranged in hierarchical order.
- **Adaptability.** The extent to which the program can be used unchanged in environments other than that for which it was originally created.
- **Application.** An application (financial or mixed system) means a group of interrelated components of financial or mixed systems which supports one or more functions and has the following characteristics: a common data base, common data element definitions, standardized processing for similar types of transactions, common version control over software.
- **Architecture.** The structure of components, their interrelationships, and the principles and guidelines governing their design and evolution over time.
- **Authentication.** The verification of the identity of a person or process.
- **Baseline.** A work product that has been formally reviewed and agreed upon and that can be changed only through formal change control procedures. A baseline work product may form the basis for further work activity(s).
- **Best Practices.** The processes, practices, and systems identified in public and private organizations that performed exceptionally well and are widely recognized as improving an organization's performance and efficiency in specific areas. Successfully identifying and applying best practices can reduce business expenses and improve organizational efficiency.
- **Best Value.** The expected outcome of an acquisition that, in the Government's estimation, provides the greatest overall benefit in response to the requirement.
- **Build.** An operational version of a software product that includes a specified subset of the capabilities provided by the final product.
- **Business Process Re-engineering (BPR).** A technique to help organizations fundamentally rethink how they do work in order to dramatically improve customer service, cut operational costs, and become world-class competitors. BPR starts with a high-level assessment of the organization's mission, strategic goals, and customer needs.

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- **Commercial Off-The-Shelf (COTS) Software.** Software that is supplied by a third-party who retains responsibility for continued development and life cycle support of the package. COTS software is used “as-is” (the version is not changed to address the needs of the user).
- **Competency.** The skills, knowledge, and personal attributes that enable effective work performance.
- **Completeness.** The Offeror’s proposal will be evaluated to ensure that the Offeror is responsive in providing all information outlined in the Instructions to Offerors.
- **Configuration Management (CM).** The ongoing process of identifying and managing changes to deliverables and other work products as they evolve through system development and maintenance. The objectives of CM are to ensure that baselines are defined, the changes proposed are necessary and appropriate, the integrity of the system is maintained, and a record of changes to the system is kept to provide traceability throughout the lifecycle.
- **Conversion.** A process that transfers or copies data from an existing system to load to a product system.
- **Correctness.** The extent to which the program solves HUD’s requirements, and conforms to what was specified and is free of defects.
- **COTS Business Process Reengineering.** The translation and mapping of HUD BPR results into a COTS package functionality.
- **COTS Extension.** Enhancements or additional capability/functionality not included with the COTS product (PeopleSoft) and is not built explicitly for the solution (IFMS), but is available to other software purchases, is directly supported by the COTS vendor, and is licensable by the COTS vendor in some form.
- **Cut Over** - The final step of the transition phase is to assure final cutover is performed following the successful completion of the integration testing and end-user training. At this point in the project, final preparation of the production environment is performed. Installation required for servers and connecting the network, set-up applications are installed, installation of conversion programs, acceptance testing is finalized, and Security Certification and Accreditation is completed and receipt of Initial Authority to Operate from the DAA. The final Cutover activities include Conversion and verification of data, verification of production readiness, sign off from Steering Committee to proceed is completed to Going-Live and discontinuing use of legacy systems is completed.

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- **Data Integrity.** The validity of data.
- **Data Migration.** The process of moving data from one storage device to another. It also refers to transferring data from one format to another if the data structures in the old system are not compatible with the ones in the new system.
- **Data Source.** An external entity that provides data to ICFS; it may be a person, organization, or computer-based information system.
- **Data Warehouse (DW).** A collection of data designed to support management decision making. The DW contains a wide variety of data that presents a coherent picture of business conditions at a single point in time.
- **Deliverable.** A predetermined tangible and verifiable work product to be delivered to the acquirer, such as a Functional Requirements Document, Project Plan, user's manual, or final product. Deliverables may be self-contained or part of a larger system's deliverables.
- **Drill Down.** To move from summary level information to detailed level data by focusing on some aspect of the data.
- **Earned Value.** A technique used to assess progress and budgetary performance using milestone completions. Actual cost and projected cost are compared to earned value to compute trends and variances.
- **Efficiency.** The extent to which minimal system resources are required by the program to perform its functions (memory consumption, speed).
- **Effort.** The number of labor units required to satisfactorily complete either a work task or activity.
- **External Entity.** A person, organization, or system that is, by definition, outside the ICFS system boundary; it may be a data source (for input) or a data sink (for output).
- **Federal Enterprise Architecture (FEA)** is a business-based framework for government-wide improvement. It describes the relationship between business functions and the technologies and information that support them. The FEA is being constructed through a collection of interrelated "reference models" designed to facilitate cross-agency analysis and the identification of duplicative investments, gaps, and opportunities for collaboration within and across federal agencies. For FY 2007, major IT investments should be aligned with each reference model within the FEA framework, except for the Data Reference Model.

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- **Financial Management Systems** are the financial systems and the financial portions of mixed systems necessary to support financial management.

- **Financial System.** A financial system is an information system, comprised of one or more applications, that is used for any of the following: collecting, processing, maintaining, transmitting, and reporting data about financial events; supporting financial planning or budgeting activities; accumulating and reporting cost information; or supporting the preparation of financial statements.

- **Fit-Gap Report (FGR).** The FGR is the name given to a Fit-Gap Template that has been “filled out”/completed by the Offeror and returned to HUD.

- **Fit-Gap Template (FGT).** The FGT provides much of the same information as provided in the Requirements Traceability Matrix (RTM) while at the same time providing the template for the majority of each Offeror’s technical response to the HUD RFQ.

- **Flexibility.** The effort required to modify the program to provide some new function, or to adapt to a changed environment.

- **Future Work** – The base period activities are directed at migrating HUDCAPS into PeopleSoft FMS & SCM for the HUD CFO. It is fully expected that the enhanced capabilities offered by the ICFS will spawn unanticipated workflow, processes, analyses, and reports. Any of these new requirements will be designated as future work, to be tasked simultaneously with or subsequent to base period tasks. These activities are designated as future tasks to be individually activated and priced separately at time of task initiation.

- **Go-Live.** Refers to when the new system becomes fully operational in the production environment. The Offeror ensures that operational support is in place and operating effectively as the new production system is brought online. Steps required are Help Desk is implemented with a process, plan and guidance. The approval to move forward into project close and ongoing support process ensuring program performance standards and targets are being measured and met. Validation that project has achieved projected benefits, capture lessons learned, and release project resources. Provide ongoing operational support to ensure system performs consistently. Monitor continued effectiveness of operations, training, and benefits realization.

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- **HUD Software Development Methodology (SDM).** The Department of Housing and Urban Development's (HUD) overall approach selected to develop software.
- **Independent Verification and Validation (IV&V).** Verification and validation of a software product by some organization that is technically, managerially, and financially independent of the Offeror.
- **Information System.** An information system is a discrete set of information technology, data, and related resources, such as personnel, hardware, software, and associated information technology services organized for the collection, processing, maintenance, use, sharing, dissemination or disposition of information.
- **Information Technology,** as defined by the Clinger-Cohen Act of 1996, sections 5002, 5141, and 5142, means any equipment or interconnected system or subsystem of equipment used in the automatic acquisition, storage, manipulation, management, movement, control, display, switching, interchange, transmission, or reception of data or information.
- **Integration.** The ability to form, coordinate, or blend into a functioning or unified whole.
- **Integrity.** The extent to which access to the program or data can be controlled.
- **Interface Agreement.** A formal document signed by representatives from both sending and receiving systems that describes the data to be exchanged; usually include a description of the file contents, sample record layouts, and varying levels of information with respect to the data being transferred. It provides the syntax for the data transfer, but may not provide the "semantics".
- **Interface Semantics.** A detailed description of the business rules involved in processing input interface data or in creating output interface data; it includes data such as the method used to create physical file names, the meaning (if any) of physical file names, the purpose of each record type in the file, the relationship between record types in the file, procedures to be followed when required record types are missing from the file, details of how each record type is processed (input interface) or created (output interface) and similar information.
- **Interface Syntax.** Describes the general rules related to physical characteristics of an input or output interface; includes details such as physical file names, number of record types, record sizes, file header and trailer records, record type identifiers, file transmission media, frequency of transfer, etc.

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- **Interface.** Any recurring, scheduled transfer of data, regardless of means or media, frequency, or volume, across a system boundary; transfers are categorized as input or output.
- **Interoperability.** The ability of programs in a system to share data with programs of other software systems.
- **Methodology.** A comprehensive, integrated series of techniques or methods creating a general systems theory of how a class of thought-intensive work ought to be performed.
- **Mixed Systems.** A mixed system is an information system that supports both financial and non-financial functions of the Federal government or any component of the Federal Government.
- **Mock Simulation** - A simulation of the activities of the go-live exercise which validates the accuracy and efficiency of all core financial processes. The IV&V Team will independently initialize some representative starting time and simulate the subsequent HUDCAPS transactions. They will then verify the ICFS results compared with the previously recorded HUDCAPS results.
- **Optional Tasks** – The base period activities are directed at implementing ICFS for the HUD CFO. The Integrated Financial Management Solution (IFMS) for HUD includes the integration of FHA, Ginnie Mae, and OFHEO into the ICFS. Additionally, the IFMS envisions a number of major system enhancements. All of these activities are identified in the RFQ. They are designated as optional tasks to be individually activated and priced separately at time of task initiation.
- **Partnering.** The creation of a Integrator Shared Service Provider relationship that promotes achievement of mutually beneficial goals to the contract.
- **Performance.** A measure of an Offeror's ability to achieve agreed-upon goals and realize forecasts
- **Performance Assessment.** A process that measures success towards achieving defined performance objectives or goals defined within the performance thresholds in the services summary or the process of assessing progress towards achieving the objectives/goals developed in a performance plan.
- **Performance Plan.** Prescribes the objectives in having the services, the goals of the multi-functional team, team members, and their roles and responsibilities.
- **Process.** The sequence of steps, actions or activities taken to bring about a desired result or achieve a goal.

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- **Product Baseline.** The approved technical documentation (including, for software, the source code) defining a configuration item during the production, operation, and maintenance support phases of its lifecycle.
- **Production System.** A system and all of its associated work products.
- **Project.** An organized undertaking which uses human and physical resources, done once, to accomplish a special goal.
- **Quality Assurance (QA).** A program that ensures that the project is following approved HUD standards and procedures and that quality is checked throughout the product lifecycle.
- **Re-engineer.** The process of examining, altering and re-implementing an existing software system to reconstitute it in a form acceptable to the users.
- **Reliability.** The extent to which the program can be expected to properly perform its intended functions without failing.
- **Report.** A formatted and organized presentation of data.
- **Requirement.** A condition or capability needed by a user to solve a problem or achieve an objective.
- **Requirements Traceability Matrix (RTM).** Provides a cross-reference between the individual requirement statements and the business process flows of which they are a part.
- **Reusable.** The ability or extent to which a software component can be reused across multiple applications. To be meaningful, the software property “reusable” must be measurable.
- **Review.** A process or meeting during which a work product, or set of work products, is presented to project personnel, managers, users, or other interested parties for examination and comment.
- **Rework.** Actions taken to bring defective or non-conforming items into compliance with requirements.
- **Scalability.** Refers to how well the system can adapt to increase in demand in regards to either hardware or software.
- **Security.** Protective measures taken to ensure availability, confidentiality, and

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integrity of HUD systems and data. Including information security early in the development process results in less expensive and more effective security measures.

- **Shared Service Center (SSC).** A shared service center is where a single entity provides financial management services for multiple organizations. Shared-service centers will enable economies of scale by centrally locating, or consolidating, solution assets and reusing subject matter expertise through common acquisitions, interface development, and application management.
- **Software Maintenance.** All patches, enhancements, updates, new software releases (new Versions). Additionally, this maintenance includes all services necessary to ensure the vendor's product is JFMIP qualified, free from defects in engineering, undocumented features, and software "bugs".
- **Software Repository.** A permanent, archival storage place for software and related items.
- **Software User Licenses.** The Software licenses necessary to provide the ICFS software capabilities and support full lifecycle implementation of the software. That is, all licenses necessary to support end users, product configuration, integration tools and connectors, server licenses etc, needed to implement the software in its multiple configurations collectively called production system (potentially includes multiple development, test, training, production etc.)
- **Subcontractor Management Plan.** An Offeror's plan for managing the efforts of a subcontractor. It identifies items such as objectives, stakeholders, Work Breakdown Structure (WBS), roles and responsibilities, schedule, budget, risks, performance measures, resources, work products, change process, and other supporting plans.
- **Sustainability.** Ongoing operational support that ensures that the system performs consistently.
- **System.** A set of interlinked units organized to accomplish one or several specific functions.
- **System Boundary.** An imaginary line drawn around a system and its components for the purpose of identifying entities that are 'internal' and those 'external' to the system.
- **System Environment.** The supporting hardware, software, and firmware used in the production of software. Typical elements of the environment include computer equipment, compilers, assemblers, debuggers, productivity tools, libraries, documentation tools, and database managers.

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- **System Recovery.** The salvaging of data stored on damaged media, such as magnetic disks and tapes.
- **System User Interface.** A set of commands or menus through which a user communicates with the computer system.
- **Task.** The smallest unit of work subject to management accountability. A task contains a well-defined work assignment to the Offeror with associated deliverables.
- **Testability.** The effort required to test a programs to ensure that performs its intended function.
- **Traceability.** The ease of establishing connections between the program's requirements, design, code, and tests.
- **Training.** The planned development of skills and abilities needed by personnel to perform their job using the ICFS.
- **Transition** - This activity includes integration testing and end-user training. Additional activities include: initial preparation of the production environment, finalization of the application components and technical components of the cutover plan, contingency plan, and User Go-Live transition plan (which may be a phased in go-live by user locations, types, etc.).
- **Understandability.** The degree to which someone unfamiliar with the system can comprehend its architecture, as well as individual programs.
- **Usability.** The effort required to learn, use, prepare input for, and interpret the output of a program.
- **Work Breakdown Structure (WBS).** A structure of well defined work efforts and work elements that organizes and defines the total scope of the project and provides for better planning, scheduling, and controlling of products, services, or tasks necessary to achieve project objectives.