



**EXECUTIVE OFFICE OF THE PRESIDENT
ROUTING AND REMARKS TRANSMITTAL**

NAME OF ORIGINATOR [REDACTED]			OFFICE EOP/OA/CIO/CR&SE	PHONE [REDACTED]	DATE 4/29/2003	
CODES A - Action C - Concurrence O - Other R - Review S - Signature			Subject Phase II - EOP Electronic Communications Records Mgt System			
			Deadline Date			
Concur. No.	TO	CODE	DATE IN	DATE OUT	INITIALS	REMARKS (Use back of form for continuation)
1	[REDACTED]	C	4/30/2003	4/30/2003	[REDACTED]	
2	[REDACTED]	C	4/30/03	5/2/03	[REDACTED]	TASK # 59 CIP 03 FUNDS AVAILABLE
3	[REDACTED]	C	5/2/03	5/2/03	[REDACTED]	
4	[REDACTED]	C	5/5/2003	5/2/2003	[REDACTED]	
5	[REDACTED]	C	5/5/03	5/5/03	[REDACTED]	
6	[REDACTED]	C	5/7	5/8/03	[REDACTED]	
7	[REDACTED]	S		5/6	[REDACTED]	
8	[REDACTED]	A				
9		Select				
10		Select				



EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF ADMINISTRATION
WASHINGTON, D.C. 20503

April 29, 2003

MEMORANDUM FOR [REDACTED]
SPECIAL ASSISTANT TO THE PRESIDENT AND
DIRECTOR, OFFICE OF ADMINISTRATION

FROM: [REDACTED] *MS*
CHIEF INFORMATION OFFICER

SUBJECT: APPROVAL FOR THE OBLIGATION OF FUNDS FOR PHASE II
OF THE IMPLEMENTATION OF THE EOP ELECTRONIC
COMMUNICATIONS RECORDS MANAGEMENT SYSTEM

Purpose: To obtain approval for Phase II, the implementation phase, of the EOP Electronic Communications Records Management System.

Background: The purpose of this project is to replace the existing Automated Records Management System (ARMS) system with a new system that significantly improves the functionality, performance and capacity and reduces operational overhead.

The ARMS system was implemented in 1994 to meet an urgent requirement for the capture and management of E-mail records within the EOP. The system was never intended to be the long-term strategic solution. Because of the changes in technology, the increasing use of E-mail and other forms of electronic communication and other operational risk factors, it is becoming increasingly necessary to replace the system.

The EOP Electronic Communications Records Management System (ECRMS) project is divided into two phases.

- Phase I - Analysis and requirements specification, an analysis of Commercial-Off-The-Shelf (COTS) products to identify existing products and solutions that can satisfy the requirements and constraints, a build-verses-buy analysis, and a recommendation and high level design on the selected solution.
- Phase II - Detailed system design, system engineering and development, system testing and deployment and user and operator training.

The contractor for Phase II of this project will be selected with a limited competition negotiated procurement process where at least three but not more than six vendors are selected to participate. The participating vendors will be selected based on their known capabilities in implementing electronic records management systems. The basis of selection will be vendor experience, past performance and price. The participating vendor decisions for Phase II may be dependent on the decisions and high-level design of Phase I. These decisions will determine whether or not the implementation is a COTS integration effort or a custom development effort. The procurement for Phase II will be adjusted appropriately.

Related Acquisitions/Projects: There are a number of projects related to Phase II of the implementation of the EOP Electronic Communications Records Management System. These projects include:

- Phase I of the EOP Electronic Communications Records Management System, which includes the analysis and requirements specification, analysis of Commercial-Off-The-Shelf (COTS) products to identify existing products and solutions that can satisfy the requirements and constraints, a build-verses-buy analysis, and a recommendation and high level design on the selected solution.
- Exchange - ARMS Interface Project (#95), which provides an interface between the Microsoft Exchange E-mail environment and the current ARMS system. This solution is necessary to ensure that all E-mail records are being managed in ARMS. This interface may no longer be necessary when the EOP Electronic Communications Records Management System is implemented.

Recommendation: I recommend your approval for the obligation of \$1,140,000 in FY03 CIP for the Phase II of the implementation of the EOP Electronic Communications Records Management System.

Approved _____ Disapproved _____ Date 5/6/03

Comments: