



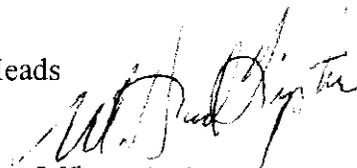
United States Department of the Interior

OFFICE OF THE SECRETARY
Washington, D.C. 20240

SEP 19 2002

MEMORANDUM

To: Bureau/Office Heads

From: W. Hord Tipton 
Chief Information Officer, Acting

Subject: Standardizing on Microsoft Desktop and Server Software

On September 13, 2002, the Assistant Secretary for Policy, Management and Budget signed the attached Findings and Determination establishing Microsoft Corporation's enterprise desktop and server software as the Department-wide standard for computer operating systems (desktop and server), office automation, and asset management software. Standardizing on these Microsoft products is consistent with our on-going IT architecture work and supports current efforts to establish a new Microsoft enterprise license agreement. Such agreements allow DOI bureaus/offices to leverage collective software requirements to drive significant quantity discounts.

Benefits of establishing this new Department-wide standard include:

- Lower Total Cost of Ownership for the desktop, including lower user training costs.
- Centralized and efficient security policy administration.
- Greater flexibility and management functionality from products that offer a broader range of management solutions and that integrate with non-Microsoft environments.
- Greater productivity and reliability attributed to less downtime.
- Extended support for a large base of software applications.

Business specific application software requirements (such as Sun/Solaris, IBM AIX, etc.) outside the established Microsoft standard may be addressed through the OCIO waiver process.

Please contact Sue Rachlin, Deputy Chief Information Officer, or myself, if you have questions. We can be reached at (202) 208-6194.

Attachment
As stated

FINDINGS AND DETERMINATION

Purpose

This document represents a DOI-wide Information Technology (IT) Standardization Decision on word processing, office automation (including operating system) and asset management software for desktop and server devices in accordance with 375 DM 12. By standardizing on these products, DOI will achieve substantial benefits in both technical and cost arenas. Some examples of the benefits are: Pricing based upon economies of scale, allowing scarce technical resources to focus training and support on a single software product in each of the areas covered by this determination, enabling centralized and efficient security administration and supporting unified enterprise management."

Background:

To date, three DOI bureaus (BLM, MMS, and NPS) have converted to the Microsoft Office package for desktop office automation and have begun to reap significant management benefits and cost efficiencies. These include centralized and efficient security policy administration, lower Total Cost of Ownership (TCO) through standardization, greater product interoperability, and premier support for numerous applications. BOR, USGS, and FWS have also procured select Microsoft Office products and have started to deploy them on some desktops.

In addition, DOI is currently in the process of designing an architecture for deploying a Department-wide Active Directory (AD) that is made available through the Microsoft operating system. Through a Department-wide AD, DOI will be able to secure its systems in a central repository and enable administrators to centrally define and manage the configuration of desktop and server systems.

Findings:

One of the key recommendations that came out of the IT Management Reform (ITMR) study completed by SAIC in June 2002, was that DOI should define and implement a standard desktop support model such as Microsoft Office. SAIC also concluded that DOI needs to better track its existing hardware and equipment resources, and should evaluate the purchase of SMS (asset management software) as part of an overall enterprise agreement package.

BLM, NPS, and MMS all note significant advantages derived from: 1) Centralized and more efficient security administration; 2) Significant management gains such as reduced down time; and 3) Substantial cost efficiency gains in overall administration. These claims are further supported by leading experts in the field, including Gartner, American Institutes for Research, Aberdeen Group, and Giga Research Inc. These experts follow the progress of the leading corporations that have made the switch to the Microsoft Office package, including Barcalys Global Investors, the Cinergy Corporation, and the City of Minneapolis. Specific benefits for adopting Microsoft as a Department-wide standard are as follows:

- **Existing Installed Base.** Of the total DOI installed desktop base of approximately 72,000, nearly 60% have switched to Microsoft products. As a Department, DOI can build on these investments already incurred by the bureaus by standardizing the desktop.
- **Existing Efforts to Deploy AD.** As part of their security administration and configuration management strategy, BLM, NPS, and MMS have all made significant investments in architecting and deploying an AD in their respective bureaus. Designing a Department-wide AD will enable DOI to leverage these existing efforts and ensure that its critical systems are secured and managed consistently across the board.
- **Centralized Security Policy Management.** The bureaus who have already switched or are in the process of switching to the Microsoft Office package note quicker, more efficient, and more comprehensive security management without multiple redundant authentication mechanisms through the use of features such as Public Key Infrastructure (PKI), Kerberos, and AD. These services protect the business processes on the local desktop over the LAN, over the Wide Area Network, and over the intra/internet.
- **Greater Flexibility & Management Functionality.** Experts like Gartner indicate that Microsoft continues to raise the bar for other Windows vendors (e.g., IBM) due to its ability to: 1) Leverage management of the desktop to its server management vision to provide end-to-end visibility; 2) Deliver products that integrate with non-Microsoft environments, including Unix and Oracle; and 3) Offer management functionality in multiple directions: Within the operating system, through core .NET application servers, on the desktop, and as a stand-alone offering. Certain organizations (e.g., Cinergy Corp.) that have highly complex and changing business requirements, have noted significant flexibility advantages.
- **Lower TCO Resulting from Microsoft Products Standardization.** Lower TCO is attributed to factors such as lower training costs for end-users and IT operations staff, added support capabilities provided by the Microsoft desktop, and reduced administration costs as a result of fewer resource domains achieved through the AD.
- **Greater Productivity and Reliability of Microsoft Products.** Significant productivity improvements were cited by the bureaus and corporations that were attributed to factors such as: 1) Reduced average task time required to complete basic word processing, Power Point presentations, and spreadsheet calculation tasks; 2) Reduced downtime that results in end-user wait for network access; and 3) Improved end-user productivity achieved by reducing the number of required logon credentials.

- **Extended Support for a Large Base of Applications.** There are a number of advantages from investing in an operating system that supports a large base of Commercial Off-The-Shelf (COTS) applications currently hosted on the Windows platform, including the elimination of third-party solutions and/or support to deploy and maintain Microsoft applications. In addition, the Department as a whole would reap the benefits of the existing premier support from numerous Microsoft-trained experts, including system administrators and maintenance staff both internal and external to DOI.

Determination:

As presented in the above findings, there are a number of significant security and management advantages from standardizing on the Microsoft operating system enterprise-wide. Coupled with DOI's already incurred investment in the Microsoft operating package, and the recommendation of the Acting CIO and ITMC members, I hereby determine that DOI will standardize on Microsoft products on a Department-wide basis for the following software: 1) Windows XP and Office XP (desktop); 2) Windows 2000 Standard Server; and 3) SMS Server License.

Requests for waivers for software not covered by this determination will need to be submitted to the Department's CIO who has the authority to grant waivers on a case-by-case basis.



P. Lynn Scarlett
Assistant Secretary
Policy, Management, & Budget

9/13/02

Date

Frequently Asked Questions Regarding Desktop Standards and the new Microsoft Enterprise Software Agreement and Related Information Technology Activities

What are Desktop Standards?

Desktop standards are guidelines that establish the specifications for desktop or notebook computers based on broad categories of user needs. These guidelines include software and hardware specifications. Users will be classified by general categories (e.g., GIS user, etc.) in order to determine which standard configuration would be appropriate. Some hardware options may be selected as necessary.

What are the Service Desktop Standards?

Hardware specifications are currently under development by the Departmental Platform Team in preparation for a consolidated buy. Our representative on the Departmental Platform Team ensures the Service's needs are met by the Departmental desktop standards. Therefore, the Service desktop standards conform to those developed by the Department.

What is the Microsoft Enterprise Software Agreement?

The Department has determined that all Bureaus will use the Microsoft (MS) XP Professional operating system and XP Professional Office Suite, except in rare instances where it is not feasible to do so and a waiver is obtained. After this decision was made, the Department entered into a written agreement with Microsoft Corporation that ensures the lowest possible prices in return for our commitment to purchase all MS software from a single contract.

Who won the Department Contract for the Microsoft Enterprise Software Agreement?

Dell Computer Corporation won the contract as the Department's sole provider of all MS software products.

How much is it going to cost and how will cost impact the resource?

The Service's total cost is currently being discussed as the Department finalizes the messaging portion of the agreement and the additional support necessary to deploy the software. However, the Department has yet to arrive at the final amount.

The Service has already purchased the Windows XP Professional operating system and the MS Professional Office Suite for 8,200 Service users.

Adding to the total cost will be replacement of those computers clocked below 700 MHz or below 10 GB in hard disk capacity plus the IT support resources to complete the migration. Planning within the Service IT community is proceeding right now with cost estimates (to be available in the March time frame).

In general, there will be immediate costs (hardware replacement, staff time diverted to migration), but these should markedly diminish with time. The added benefit is expected to be better, faster, more secure IT performance for all employees, thereby enhancing accomplishment of the FWS mission.

What does the XP Office Suite include and is it mandatory that I use the software?

The MS Office Suite includes MS Word, Excel, PowerPoint, Access, and FrontPage. It is mandatory to use these programs as soon as they become available. Word is the Department standard word processing program and all documents should be prepared in MS Word format instead of WordPerfect.

All other MS software (e.g., Visio, SQL, Project, etc.) may be acquired directly from Dell by using a Government purchase card and local funds. No other new competitive software may be purchased (e.g., WordPerfect, Filemaker Pro, Quattro Pro, Dreamweaver, etc.).

How will software renewals be handled?

The Microsoft Enterprise Software Agreement and the contract with Dell Computer Corporation include automatic renewals for a period of 3 years starting in FY 2003.

Who in my Region/organization is responsible for leading the conversion of our current software to the Microsoft standard?

The Regional Chief Technology Officers (RCTO) are responsible for planning the upgrade of desktop and notebook computers for their Regional Office and Field Stations.

Who do I call in my Region if I have questions about software/hardware issues?

You should contact your Regional Chief Technology Officer.

Who is my Regional Chief Technology Officer?

Your RCTO is the senior IT representative in your Region. This position is usually the Regional Chief, Division of Information Technology Management. Currently, the RCTOs are:

- R1 Mike Fields
- R2 Jim Dukes
- R3 Janice Whitney
- R4 Carolyn Hust
- R5 Richard Soucy
- R6 Sue Zirbes
- R7 Ben Sherburne and Stephen Hanson (Acting)
- R9 Marshall Gray

How do I determine if I need a new computer to run the new MS XP software?

All computers in the Service will be inventoried in the near future to determine whether they meet the minimum standards set by the Service Desktop Team. If a computer meets those minimum standards, it becomes a candidate for migration to Windows XP and the MS Office Suite. On the other hand, we have many computers that do not meet those standards and will need to be replaced. Your local IT support staff will be addressing your needs in their Regional migration plan.

The Service Desktop Team has determined that computers with a clock speed below 700 MHz or with a hard disk below 10 GB capacity will be targeted for replacement.

What do I do if I need to upgrade my computer now? Do I order my new computer with Microsoft XP and purchase Word, Excel, Visio, and PowerPoint from my local Best Buy?

Unless you have a new employee coming on, a computer that is broken, or a new mission requirement that your current computer does not meet, you must honor the Departmental moratorium on computer purchases.

The Department has several teams working on requirements, specifications and a consolidated computer purchase targeted for the March time frame. The consolidated purchase is aimed at saving the Department a considerable amount of money, making purchasing computers cheaper for each organization.

Once the consolidated computer purchase takes place, a new computer can be ordered, the Microsoft Enterprise License number provided, and the new computer shipped to the ordering location with Windows XP, the MS Office Suite and Lotus Notes installed.

Does an IT professional have to "touch" my machine (PC/Laptop) to install the newest Microsoft software?

At this time, it will be necessary for your IT support staff to install the newest Microsoft software on your computer for you. If your computer cannot be upgraded, you will need to purchase a new computer that will come configured with all the standard software.

Is the Service going to convert its messaging system from Lotus Notes to Microsoft Outlook?

The Department and the Service have not yet decided to move from Lotus Notes to Microsoft Outlook or any other messaging system.

Can I copy my WordPerfect and Lotus 1-2-3 files to Word and Excel files or do I have to retype them?

MS Office Products include many conversion tools that will automatically convert your documents to the new MS formats by simply opening and saving the document.

The Service Desktop Team is also researching other mass document conversion tools to speed migration and minimize impact on productivity.

Will this migration to Microsoft XP make our desktop systems more secure?

Microsoft Windows XP is an extremely stable and secure desktop environment. One way XP makes our desktop systems more secure is by reducing downtime caused by common user errors. In addition, standard policies can be enforced on each computer to ensure important system files cannot be overwritten.

Microsoft continually monitors security risks, and issues fixes and security enhancements to mitigate those risks. Windows XP provides the capability to manage and install these updates automatically, ensuring the desktop is always as secure as possible.

It is important to remember that no operating system, including Windows XP, is invulnerable. Good security awareness and sound judgment will always be the most important security tools.

How does the Service plan to deploy the Microsoft suite of products and over what time period?

Every IT professional in the Service is currently working on plans for this migration. Plans for migration of Field Stations take into account the busy season for fieldwork. Completion of the migration is targeted for the end of calendar year 2003.

Will an IT technician review what is already on my computer (hard drive) before installing duplicate software that comes with the "package?"

Your local IT Staff will conduct an automated inventory of your computer prior to installing an upgrade to your existing machine. Each computer will be evaluated so that important documents and software will be preserved. All previous versions of the MS Office Suite will be removed. Any other software will be retained on your computer provided 1) it is compatible with Windows XP, 2) there is adequate hard drive space, and 3) the software is permitted by local IT policies.

What is the "down time" for conversion?

If a computer already has the Windows XP operating system, the upgrade to MS Office Suite from previous versions will only take about 20 minutes.

Upgrading the operating system to Windows XP from previous versions will take an average of 3 hours and should only be accomplished by your local IT staff since it involves evaluation of the current configuration and preservation of documents and software, ensuring no important information is lost.

Will the conversion delete any of my existing files?

Upgrading your current computer to MS XP should not delete any files. However, backups of all information on a computer should be accomplished before any conversion.

Will I have to go to a separate folder created especially for my old files?

Work with your local IT support staff as they migrate your computer. That will ensure that you know where all your files and documents reside.

Microsoft XP Operating system and Office XP create a default user location for all documents entitled "My Documents." You are highly encouraged to use this folder for all of your files. You may create subfolders to categorize your files as necessary.

Do I need to attend training for the XP Operating System and Office Suite?

Many Service users will not need training, as the new XP software is somewhat intuitive. Of course, your local IT staff is available to assist you and answer any questions.

In addition, a computer-based training program is available from the DOI University. Training is also available via many vendors and may be made available locally, depending on your location.

Will the Executive Profile System (EPS, formerly CCM Mercury DTS), FFS, and FPPS be compatible with the new system?

All these applications are compatible with the XP operating system and MS Office Suite. Other products will be assessed by the Desktop Team prior to installing on a XP desktop.

Will the system require a whole new set of passwords for security?

You should not need to change any of your passwords when upgrading to the Windows XP operating system. However, your local IT staff may choose to reset your password as part of their local security practices.

Will this new Operating System affect access to the Internet? If so, how?

MS XP has no effect on a user's access to the Internet. The Service standard for Internet access is Microsoft Internet Explorer, which is included in the Windows XP operating system.

How does this system affect IDEAS?

Windows XP does not affect IDEAS. If you have any problems running IDEAS or any other program after upgrading to Windows XP, you should contact your local IT staff for support.

Will all Service employees have a standard (look alike) opening screen such as the Welcome page after installation of the system?

All users will have the same startup screen including a notice regarding security.