



GSA Services Catalog

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Training Services

SIN: 132-50
Part #: 150-001

Description/Specifications:

PowerSteering administrator training is targeted towards new system administrators who have access to the administration panel in PowerSteering. This class will cover design and configuration options which are available through PowerSteering's administrator panel.

Training Agenda Overview:

- Administrative Role and Function
- System Organization/Work Tree Management
- Performing configurations
- Create Process Templates
- Creating Metric Templates
- Creating User Groups
- Creating Reports and Projects
- Creating Tags and Custom Fields
- Managing Costs
- Managing Projects
- User Management
- Permission configuration and settings
- Project Portfolio Management
- Dashboard Setup
- Recording Metrics
- Navigation Techniques
- Understanding Permissions

Pre-requisites:

- Pre-Requisites: Familiar with Internet Explorer (Netscape, Mozilla), MS Office. Some familiarity with PowerSteering preferred (not required).

Class size:

- Maximum of 10

Class Length:

- 2 days (2 Eight-hour classes)

Instructors:



- 1 PowerSteering instructor per class

Delivery Method: Classroom/On-Line/Hybrid/Other

- Classroom preferred material can be delivered remotely through WebEx or similar technology
- Travel and out of pocket expenses not included (if required)

Introductory Training - WebEx

SIN: 132-50
Part #: 150-002

Description/Specifications:

PowerSteering provides introductory training sessions for Project Leaders to understand the fundamental capabilities and enabling capabilities including: organization of the PowerSteering System architecture, workflow and knowledge management, access and navigation techniques, its capabilities for reports and project portfolio tracking. Project Leads are typically helping to execute individual projects through their complete lifecycle.

Training Agenda Overview:

- Basic Introduction
- Navigation / Search
- Program/Organization management
- Creating a Project
- Financial Metrics Overview
- Managing Projects
- Portfolios, Dashboards
- Reporting

Pre-requisites:

- Pre-Requisites: Familiar with Internet Explorer (Netscape, Mozilla), MS Office. Some familiarity with PowerSteering preferred (not required)

Class size:

- Maximum of 15

Class Length:

- 3 hours

Instructors:

- 1 PowerSteering instructor per class

Delivery Method: On-Line

- Remote through WebEx or similar technology

Level 1 Help Desk (Annual)

SIN: 132-34
Part #: 134-008

Description/Specifications:

Level 1 Help Desk provides phone and email support for the customer's end users. We also:

- Assist client end users in day-to-day inquiries.
- Handle login issues and inquires (forgotten passwords).
- Respond to functional/system /inquiries around application capabilities.
- Respond to documentation/training questions.
- Note: L1 Help Desk support is limited to (1000) users and does not include system configuration, updates and inviting new users.

Tasks – PowerSteering will address end-user issues that fall into the following categories:

- Login issues and requests for modification of existing user passwords – PowerSteering will work with Licensee to enforce realistic security validation prior to modifying a user's password and log-in information.
- Software Defects (Bugs) – PowerSteering will document bugs and provide proactive updates on the path to resolution.
- Functionality Inquiries/System Capabilities (“What does this feature do?”) – PowerSteering will address simple questions with customized responses and will address complex questions with existing documentation that summarizes current system capabilities and PowerSteering features.
- Training Questions (“How do I load a project?”) – For simple questions, PowerSteering will describe basic steps via email responses. For training questions that are more complex, PowerSteering will refer to existing training documentation or refer to an upcoming training event. If PowerSteering determines that a user requires immediate end-user training, PowerSteering will notify the Primary Customer Liaison to address critical training needs.
- Business Process Inquiries (“Who is my financial rep?”) – PowerSteering will utilize the established Site Governance Process to answer questions from end-users.
- Services Requests – System modification requests will be required to obey policies defined in the change management process outlined above section 2.2.
- Documentation Inquiries (“Where can I find a specific documentation?”) – PowerSteering will assist end-users with questions related to the location of existing supporting training documents.

Deliverables – PowerSteering will provide monthly reports on the following Helpdesk metrics:

- Number of Helpdesk inquiries
- Source of inquiries (email/ phone, also location or business unit/segment, where applicable)
- Categories of inquiries (Login Issue, Functionality, Bug, Enhancement Request, etc)
- Specific Date of initial inquiry and PowerSteering response and resolution
- Based on analytical data, PowerSteering will make recommendations for areas that need a focus in training.

Enhanced Support/Level 1 Help Desk Package (Annual)

SIN: 132-34
Part #: 134-007

Description/Specifications:

PowerSteering's Enhanced Support Program enables the customer to outsource much of the ongoing program management activities that are required to ensure a successful deployment. PowerSteering has created an offering that allows customers to lower costs and improve the effectiveness of key roles in managing PowerSteering. The offering includes:

- Deployment Governance Process
- Configuration Management Support
- Upgrade Preparation
- Reporting Strategy
- Online Software Training

Deployment Governance Process

A comprehensive governance process will ensure that you have a well-defined strategy and process for managing your PowerSteering site. This activity will ensure that your site is configured to an agreed-upon configuration baseline that is aligned with your business objectives.

Tasks:

- Create PowerSteering Charter that defines the goals and addresses the following:
 1. Determine required methodologies
 2. Target audience of end-users
 3. Identify stakeholders and success criteria
- Define program metrics that align with success criteria:
 4. User adoption
 5. Training results
 6. Benefit metrics
 7. Project cycle time
- Summarize program metrics in a Monthly Program Dashboard to measure program health
- Facilitate ongoing Steering Committee Meetings to measure health of program and progress toward achieving business objectives.
- Create and maintain Functionality Roadmap that continuously aligns program goals with PowerSteering capabilities

Deliverables:

- PowerSteering Charter

- Functionality Roadmap
- Monthly Program Dashboard
- Meeting Minutes from Steering Committee Meetings

Support

Ongoing support of PowerSteering requires a thoughtful approach to two key areas: Change Control and Configuration Management

Create and Maintain Change Control Process

A comprehensive change control process will ensure that you have a well-defined strategy and process for managing your PowerSteering site. This activity will ensure that your site is configured to an agreed-upon configuration baseline and that major changes to that baseline are managed in a controlled environment to ensure that the site is aligned with your business objectives.

Tasks:

- Create a site configuration baseline to capture the current state of the site
- Create a change management plan to capture and track site configuration changes going forward
- Create a project charter or review the existing charter to ensure alignment to business objectives
- Collect current Customer documentation of business processes to support PowerSteering (financial reporting, user group management, work tree management)
- Leverage knowledge of industry best practices and lessons learned to provide recommendations for opportunities to revise or establish business processes

Deliverables:

- Project charter
- Process summary (Document summarizes customer business processes covering the scope of tasks listed above)
- Site Configuration workbook (Discovery Guide)

Configuration Management

Focusing on Configuration Management allows customers to streamline the User Interface contributing to increased User Adoption. PowerSteering will collect customer requirements and manage the entire process of site management.

Tasks:

- Invite and setup new users in PowerSteering
- Delete or inactivate users if they no longer require access to the PowerSteering application
- Notify project end users if projects appear to be mis-parented in the work tree
- Maintain existing permissions and security configuration. In the event that a change is required ensure it goes through the proper change control process

- Capture voice of customer application feedback and relay these requests to PowerSteering's product management team

Deliverables:

- Periodic change control activity reports
- Issue and action item tracking reports
- Enhancements tracking reports
- Ongoing recommendations regarding use of features and opportunities presented by the availability of new features

Upgrade Preparation

With each new software release, PowerSteering focuses on building new features and enhancing existing features that meet the business goals of customers. To maximize the value from new PowerSteering capabilities, while maintaining a focus on aspects of change management, PowerSteering will assist in customer preparation for each new release. This includes building consensus around which features the client wants to utilize as part of the upgrade. PowerSteering will also lead the communication process to end users. Training documentation will include updates to existing, out-of-the-box PowerSteering training materials as a result of new product functionality.

Tasks:

- Demonstrate new features/capabilities of each new release, driving the decision process around which features to activate
- Revise existing training documentation that will include updates to existing, out-of-the-box PowerSteering training materials as a result of new product functionality

Deliverables:

- Revised Functionality Roadmap
- Updated training materials
- Communication plan for each new release

Reporting Strategy

One of the most critical business goals of PowerSteering customers is to provide visibility for Leaders and Managers that contribute to proactive management and automated reporting. PowerSteering will help create and maintain a strategy that delivers visibility in the form of Reports (out of the box and custom), Dashboards, Executive Reviews and Financial Summaries. PowerSteering will also engage with the customer to design, build, test and deploy new reports on an ongoing basis.

Tasks:

- Create and maintain a Reporting Strategy
- Execute Reporting Strategy by focusing on Reports (out of the box and custom), Dashboards, Executive Reviews and Financial Summaries.
- Aid client in designing two custom reports per year

Deliverables:

- Develop, test and deploy the two custom reports which have been mutually agreed upon

Software Training

Ongoing software training will include scheduled sessions to train new and existing users as the site configurations change as a result of new functionality or changes in business process. Generally, this training is provided via the Web, but may be provided on-site if required. Travel expenses are NOT included and would be billed separately.

Tasks:

- Schedule training sessions on a mutually-agreed-upon schedule for new and existing PowerSteering users. Session content will include training for the various roles in PowerSteering and selected functional areas (i.e., reporting or financial management)

Deliverables:

- Training Session presentation materials

Single Sign On: Annual Fee

SIN: 132-34
Part #: 134-009

Description/Specifications:

The Annual Maintenance Fee associated with ANY Single Sign-On (SSO) implementation (i.e. Standard or Non-Standard).

Deliverables:

- Ongoing support of a Single Sign-On implementation includes:
 - Testing to ensure compatibility with product updates & new releases.
 - Maintenance of all current & future enhancements as every SSO implementation is unique.
 - Payment of royalties for middleware product included as part of the overall solution.

Annual Hosting

SIN: 132-52

Part #	133-008	133-009	133-010	133-011	133-012	133-013	133-014
# of Users	1,000	1,500	2,000	3,000	4,000	5,000	5,000+ (per user)

Description/Specifications:

The PowerSteering Hosting option provides organizations with their own unique instance of the PowerSteering application accessible via the World Wide Web. Client organizations receive space for their data on a PowerSteering Database Server, as well as connectivity to the application itself.

Deliverables:

- Connectivity to application via the Internet
- Data Storage
- Data Backup/Restoration
- Disaster Recovery
- Hardware/Network Support
- Ongoing resource monitoring, trending
- Maintenance of Operating System (Patches)
- Maintenance of database server instance
- Maintenance of application support tools
- Maintenance of application server software
- Maintenance of PowerSteering
- Apply patches and ongoing tuning where required for server software
- Upgrade services where required (Maintenance Builds, Releases)