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Performance Work Statement re: Next Generation Case Management (NxGen), January 13, 2012

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National Labor Relations Board
1015 Half Street, SE
4th Floor
Washington, D.C. 20570
Fax: (202) 273-FOIA (3642)
E-FOIA Request Form
Via email

May 11, 2016

Re: FOIA ID: LR-2016-1059

This is our final response to your electronic request under the Freedom of Information Act (FOIA), 5 U.S.C. § 552, dated and received in this Office on February 25, 2016, in which you seek a copy of “the current DevOps Plan for NxGen.” In a subsequent telephone conversation with a member of my staff, you modified your request to seek only the Performance Work Statement regarding NxGen issued in 2012 by the Agency’s Office of the Chief Information Officer. An interim reply was sent to you on March 24, 2016. We regret the delay in our final response.

I have attached the requested document, consisting of 72 pages. This document was produced by a reasonable search conducted by the Office of the Chief Information Officer.

For the purpose of assessing fees, I have placed you in Category D, the “all other requesters” category. As a requester in this category, you “will be assessed charges to recover the full reasonable direct cost of searching for and reproducing records that are responsive to the request, except that the first 100 pages of reproduction and the first 2 hours of search time shall be furnished without charge.” NLRB Rules and Regulations, 29 C.F.R. § 102.117(d)(2)(ii)(D). Accordingly, there are no charges for processing this request.

You may obtain a review of this determination under the provisions of the NLRB Rules and Regulations, 29 C.F.R. § 102.117(c)(2)(v), by filing an appeal with the Division of Legal Counsel, National Labor Relations Board, 1015 Half Street, S.E., Washington, D.C., 20570, within 28 calendar days of the date of this letter, such period beginning to run on the calendar day after the date of this letter. Thus, the appeal must be received by the close of business at 5:00 p.m. (ET) on June 8, 2016. Any appeal should contain a complete statement of the reasons upon which it is based. Should you have questions
concerning this letter, you may contact Diane Bridge, FOIA Supervisor, at (202) 273-3851, or by email at Diane.Bridge@NLRB.gov.

Sincerely,

_Deirdre MacNeil_

Deirdre MacNeil
Freedom of Information Act Officer

Attachment: 72 pages
Business Application Development 
& Support Services

Performance Work Statement

National Labor Relations Board
Office of the Chief Information Officer

January 13, 2012
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1. OVERVIEW

For this performance-based task order, the contractor shall furnish all task order management, supervisory, and technically-trained personnel to provide the necessary application development and operations and maintenance (O&M) support services required. This includes, but is not limited to, business analysts capable of understanding the NLRB’s complex business processes; object-oriented developers across multiple development disciplines; database administrators; data warehouse/extract, transform, and load (ETL) developers; data quality experts; document generation utilizing templates expertise; and a technical writer. The contractor shall provide trained employees, at all times, to perform the services described in and required by the task order. Performance measures will be detailed and monitored per task.

Within the Business Application Development & Support Services task order are eight (8) required tasks.

1. Next Generation Case Management (NxGen) – New Development
2. Next Generation Case Management (NxGen) – O&M
3. NLRB Public/Intranet Website – New Development
4. NLRB Public/Intranet Website – O&M
5. All Other Applications Support – O&M
6. Project Management
7. Application Modernization
8. Travel

The Government anticipates that Tasks 1, 3, and 7 will be managed as Labor Hours tasks.

The Government anticipates that Tasks 2, 4, 5, 6, and 8 will be managed as Firm Fixed Price (FFP) tasks.

Each task will be detailed in the requirements section of this PWS.

2. VISION

The NLRB Office of the Chief Information Officer (OCIO) has utilized two contracts for the design, development, deployment, and O&M of its case management and web-enabled applications. The purpose and vision for this solicitation is two-fold; 1) reduce program and task order management costs by having a single vendor and contracting officer representative (COR) and 2) create an environment where the development team possesses business knowledge across all systems now that they are tightly integrated.
The NLRB requires a contractor who shall provide strong consulting, act as our trusted advisor, and deliver both innovative and sound information technology solutions focused on these goals:

- An enterprise-wide case management system
- Shared data, with significantly improved reporting and data quality
- Document management
- Focus on case handling rather than data entry
- Consistent support for E-Gov initiatives
- Effective continuity of operations (COOP) support

3. BACKGROUND

The NLRB is an independent Federal Agency created by Congress in 1935 to administer the National Labor Relations Act, the primary law governing relations between and among unions, employees, and employers in the private sector. The statute guarantees the right of employees to organize and to bargain collectively with their employers or to refrain from all such activity. Generally applying to all employers involved in interstate commerce—other than airlines, railroads, agriculture, and government—the Act implements the national labor policy of assuring free choice and encouraging collective bargaining as a means of maintaining industrial peace. Through the years, Congress has amended the Act and the Board and courts have developed a body of law drawn from the statute.

In its statutory assignment, the NLRB has two principal functions: (1) to determine, through secret-ballot elections, the free democratic choice by employees whether they wish to be represented by a union in dealing with their employers and if so, by which union; and (2) to prevent and remedy unlawful acts, called unfair labor practices, by either employers or unions. The NLRB does not act on its own motion in either function. It processes only those charges of unfair labor practices and petitions for employee elections that are filed with the NLRB in one of its fifty-two Regional, Sub-regional, or Resident Offices.

The NLRB is organized into two major components: a five-member governing Board, and the Office of the General Counsel. The Board is a quasi-judicial body that decides labor issues, while the General Counsel investigates and prosecutes cases.

The term “Case” is used in this document to mean events and documents associated with the following:

- IO (Information Officer) Contacts
- ‘C’ (Unfair Labor Practice Charges)
- ‘R’ (Representation Petitions)
- Special Litigation (Subpoena enforcement, FOIA litigation)
- FOIA (Freedom of Information Act) requests
- EAJA (Equal Access to Justice Act)

Each of the above case types has a workflow within the NLRB.
3.1. **NxGEN BACKGROUND**

The Agency’s enterprise case management system, known internally as the Next Generation Case Management System (NxGen), is replacing 11 separate legacy case tracking systems. NxGen integrates into a single unified system multiple technologies, including five distinct software solutions for customer relationship management, document management, collaboration, business analytics and web-based services for external constituents. This is the most comprehensive technology project undertaken at the NLRB, and its success is essential to the Agency’s mission.

The NxGen project was launched in late 2006 with the goal of building an enterprise-wide case management system. The tools deployed to accomplish this goal are:

- Oracle’s Siebel Public Sector and Data Quality Suites for customer relationship management and Business Intelligence Suite for analytics;
- EMC’s Documentum Suite for enterprise content management, xPression for automated document assembly and eRoom for collaboration;
- Open-source solutions from Drupal and SOLR for managing external relationships and data.

The NxGen project is enabling the NLRB to replace manual paper-based processes and “stovepipe” legacy systems with a standards-based solution.

Presently, the NxGen system is in use for:

- General Counsel’s fifty-two Field Offices – whose Case Activity Tracking (CATS) legacy system has been retired,
- General Counsel’s Office of Appeals – whose Appeals Case Tracking (ACTS) legacy system has been retired,
- Integration with the Board’s collaborative Judicial Case Management System (JCMS); the Board’s Offices are in the final stages of retiring their legacy Pending Case List (PCL) system,
- Integration with the Division of Judges’ Case Tracking System (TIGER),
- All Offices for processing incoming electronically-filed documents, including hearing transcripts and exhibits,
- Electronic issuance of Board and Division of Judges Decisions,
- Driving data to the public via the public website.

In FY 2011, the Agency retired its largest legacy case tracking system – the Field Offices’ Case Activity Tracking System. The Agency’s FY 2012 efforts are focused on replacing the remaining substantial systems case tracking applications, expanding reporting, integrating office workflows, and modernizing its records management system.

There are a few basic elements that encapsulate various parts of the Agency’s case handling process. Understanding these is essential to understanding NxGen.
• Case – The case is the overall wrapper to encapsulate the work done in the Agency in handling of a case throughout its lifecycle. This includes all aspects of the case as it goes through various levels of hearings, appeals and exceptions through the process. It also includes any filings with federal courts during the life of this case. Cases can be related to other cases with a variety of relationships.
• Participants – These are the parties on a case. These are related at the Case level.
• Action – The events that occur on a case, this covers all events throughout the lifecycle of a case. Actions encompass all the work on a case, including documents, workflows, tasks, due dates, approvals and metadata regarding the Action.
• Task – A particular task that has occurred or needs to occur. Tasks are always found inside Actions. Tasks also represent all documents in the system; there is a one to one relationship between tasks and documents. The task stores all the metadata about a document, as well as allows the user to update that metadata.
• Target Date – These represent various dates within the case process that the agency measures performance against.
• Inquiry – This the pre-case stage, when a public inquiry or filing of a charge or petition is made. Inquiries may result in a case being created.

The security model is based on the relationship between various teams and the NxGen case. The following types of teams exist on the case:

• Case Team – This represents the Field Personnel assigned to the overall case. This team also identifies the Field Agent on this case, and any secondary agents, as well as the Field Supervisor on the case and any secondary supervisors.
• Action Team – This represents the agency personnel assigned to work on a particular action. This team also identifies the Agent or Attorney assigned to lead this action, as well as the Supervisor assigned to this Action.
• Task Team – This represents the agency personnel who have access to and are assigned to this task.

3.1.1. ARCHITECTURE
The NxGen infrastructure is configured to provide flexibility to our developer and business staff. There are four environments currently set up to manage NxGen; 1) development, 2) test, 3) training and 4) production. The entire infrastructure, minus the database servers, utilizes VMware ESX for managing the hardware and performance.

The development environment application and database operating systems currently use Windows 2003 and SQL Server 2005.

The test, training, and production environments currently use Windows 2003 server for the applications. The SQL Server 2008 cluster runs on Windows 2008
server on physical hardware. Refer to Appendix G for a complete architecture diagram of the NxGen environment.

NxGen users currently use Internet Explorer 8.0 to access NxGen. A Siebel 8.1.1.3 Client ActiveX control has been installed for every user to provide use of the High Interactivity version of Siebel.

3.1.2. SIEBEL
NLRB uses Oracle Siebel Public Sector Customer Relations Management (CRM) solution for its NxGen transactional and User Interface (UI) operations. The NLRB has customized many of the Siebel out-of-box components to provide for its Case Management Processing business needs. Additionally, the NLRB has created many custom components, business services, and web services to support its’ case management operations and establish integration points across other NxGen technologies. Please refer to Appendix E for further details regarding the NLRB specific Siebel customizations/extensions.

To support the NLRB’s 52 Regional, Resident and Headquarters’ offices and approximately 1800 employees’ ever-increasing data-intensive operations together with a multitude of external interfaces, the NxGen Siebel services are architected for high scalability, availability, and response time. The Siebel production environment is configured with four (4) application servers, two (2) web servers and one (1) gateway server. Each application server is configured to run all of the following components and presently is load balanced using Siebel load balancer. Only the “NLRB Workflow Monitor Agent” component is configured to run on one of the App servers to avoid workflow task monitoring conflicts.

1. Public Sector Object Manager (ENU)
2. Enterprise Application Integration(EAI) Object Manager (ENU)
3. Enterprise Integration Mgr (EIM)
4. Workflow Process Batch Manager
5. Workflow Process Manager
6. Workflow Recovery Manager

Currently, approximately 1200 users from NLRB are using NxGen nationwide. For effective user session management and response time, each Public Sector Object Manager instance is configured to run 5 “Maximum MT Servers” and 500 “Maximum Tasks”. This configuration is based on:

- The number of concurrent users
- The length of time each user spends on the system during a session
- Session timeout
- Use of scripts
- Complexity of the application
- High usage times. (80% of users are online from 11:00 to 4:00 EST)

The majority of the NxGen application technologies are integrated using SOAP/Web Services. There is a constant exchange of information across the
integrated applications; Documentum, xPression, Outlook Add-In, Portal E-Filing, and Oracle BI publisher. All of these communications happen through web services and need efficient EAI task management configuration. Based on statistics that were gathered and analyzed over 6 months, each Siebel EAI component is configured to run 2 "Maximum MT Servers" and 40 "Maximum Tasks".

In addition to the Web Services interface, Siebel data is exposed through database views for indexing and caching. One of the key elements of the NxGen architecture, Apache SOLR, is used as a middle tier caching and indexing engine. There are two primary data sources for SOLR to index from Siebel and Documentum. Siebel data is exposed in the form of database views that SOLR indexes at regular intervals. Specific Siebel table changes are captured by SOLR through Siebel audit tables and last modified timestamps.

All NxGen applications are configured for single sign-on using Windows Active Directory (AD) authentication. This provides the user seamless access to all NxGen integrated applications.

3.1.3. DOCUMENTUM/DOCUMENT MANAGEMENT

NxGen uses EMC Documentum 6.5 SP3 for content management and its document repository. A custom user interface was developed and integrated into the NxGen environment for document management, version control (check in/out) and editing. NxGen uses WebDAV to facilitate collaboration in the editing and managing of documents. The document security model, discussed in detail below, was developed based upon the agency’s bi-furcated nature and is tightly integrated based upon the Siebel business transaction data.

The production environment is configured with two (2) content servers, two (2) index servers, one (1) utility server and one (1) file server.

EMC Trusted Content Server was implemented across all documents to enable encryption of Personally Identifiable Information (PII). New documents added to Documentum are encrypted; existing case files are encrypted by migrating to the encrypted storage through the MIGRATE_CONTENT administrative job in Documentum.

NxGen case files are added to the document repository through various sources such as scanning, NxGen templates using EMC xPression, uploading, e-Filing, the Judicial Case Management System (JCMS), and migration from legacy systems. Case files are stored in a Documentum 6.5 SP3 content repository. These case files contain content formats such as PDF, Word, Excel, Rich Text, Text etc., as well as multimedia file formats such as JPEG, GIF, MP3, DVD, RM. Currently, the NLRB repository contains 1.5 million documents with a total size of approximately 715 GB. The number of documents and sizes increases at the rate of 65,000 documents and 70GB per month.
In addition to serving as the content repository, Documentum also provides document management functions such as document automation (workflow, TBO), security control, rendition generation, full-text index searching, and access auditing.

As one of the two major components of NxGen, with the One Document - One Task model, the document lifecycle and security model are driven by and integrated with Siebel business logic in the following ways:

- Case, Action and Task files display criteria are provided from Siebel case, action and task; documents created in a different case but related to the current case in action level are also visible under the current case and action.
- The document security model (Access Control List) is synced from Siebel tasks in real time. Each document has its own ACL. If a document is checked out for modification, the task is also locked.
- NxGen task information modifications are synced to Documentum in real time.
- Document creation in NxGen triggers the creation of the task.
- While Documentum users are pulled from Active Directory, groups are pulled from Siebel and user-group relationships are synced with Siebel on an hourly base.

NxGen provides the interface for document management through the document properties page. This page contains the following functionality depending on the user’s permission and document task’s status:

- Allow the user to view document metadata
- Check-out a document for Editing
- Quick-Edit a document (using WebDAV)
- Revert a document to a previous version
- Unlock an xPression document
- Publish an xPression document to .docx on demand
- To manage compliance documents and documents containing sensitive information, working copies and redacted copies can be generated or uploaded from this page.

Documentum uses Documentum Fundamental Services (DFS) to provide document access to NxGen, Intranet and Public Website.

The Documentum repository also stores files uploaded to Documentum through WebTop by the offices listed below.

- Advice Memos by Office of Advice
- OM Memos and GC Memos by Operations
These files are stored in a different location from the NxGen files and visible in the public website. A Microsoft Word file uploaded through WebTop contains the metadata information in the Word Properties. These properties are migrated to the Documentum database using workflow (Documentum Business Process). The workflow also calls Advanced Document Transformation Services to generate PDF and HTML renditions (PDF rendition is only generated for a Word document).

3.1.4. DATA QUALITY

In September 2010, the NLRB purchased the Oracle Data Quality suite to standardize, de-duplicate and clean up participant data that was migrated from legacy systems into NxGen. This toolset ensures new and existing data is validated for accuracy and format as it is entered or edited in NxGen.

Within NxGen, parties on a case are either “Contacts” or “Accounts”. Contacts are people – e.g., charging parties, legal representatives, etc. – associated with a Case, whereas Accounts are business or organizations, typically employers, law firms or unions. Contacts and Accounts can have multiple associated Addresses. Additionally Accounts can have associated contacts.

When Contacts or Accounts are associated to a Case they are called Participants, and they can have a Type and/or Role. The Participant Type represents their relationship to the Case – e.g., charged party, charging party, involved party, etc. – while the Participant Role represents the relationship of this particular Contact or Account to the Participant Type, such as primary, legal representative, etc.

Various legacy case management systems collected participant data, but not all systems were consistent in the way the participant data was gathered. Oracle Data Quality was integrated into the NxGen environment for on-line and batch processing of participant data. Data was migrated from all 51 regional and resident offices, as well as three (3) legacy systems (CATS, PCL and ACTS).

Participant Data before Oracle Data Quality

- 700,000 Contacts
- 560,000 Accounts
- 810,000 Addresses

Participant Data after Oracle Data Quality

- 250,000 Contacts
- 300,000 Accounts
- 160,000 Addresses

3.1.5. TEMPLATE GENERATION

EMC Document Science xPression is the document assembly tool used to perform the document design, generation, publishing and delivery processes in NxGen. NxGen xPression data is pulled from NxGen in real time and the data model is designed to reflect the real time Siebel data model and NxGen user
interface. Template designers build templates based on the business needs of their daily business functional areas. End users generate documents from the case and task by picking the appropriate template.

As users work with templates in xPression, the templates are updated with primary data fields from Siebel. Once the users have completed their editing of these templates, the xPression work in progress file is converted to a Microsoft Word 2007 document and stored in Documentum.

xPression was deployed to production in April, 2011 and contains three major components:

- xDesign: used by NLRB employees to build templates. Since the software is Microsoft Word based and the data model is in sync with NxGen, template design is completed with minimal assistance from developers.
- xEditor: used to generate documents from templates by all NxGen users. This software is also Microsoft Word based.
- Web Services: implements the document lifecycle from generation, updating to publishing to .docx.

There are approximately 120 templates in production today with more added each month.

3.1.6. REPORTING
The NxGen reporting solution utilizes a collection of COTS User Interface (UI) tools and applications provided by Oracle Business Intelligence Enterprise Edition (OBIEE) to allow NLRB employees to gather information from a variety of sources, analyze it, and share it with other agency staff. OBIEE is used to access the back-end Online Analytical Processing (OLAP) data warehouse and present the analytical data in NxGen.

NxGen Analytics provides reports that cover every aspect of the case management system. NLRB utilizes the data to facilitate decision making and support in order to understand operating results and to direct future actions. The key benefits of NLRB reporting solutions are to:

- Run day-to-day, weekly, monthly or annual reports from one interface,
- Customize their own reports, and deploy onto enterprise server for ad-hoc reporting, and
- Provide comprehensive report deployment options

The system consists of reports for various business divisions such as: Office of Appeals, Operations, Board, Division of Advice, Regional Management etc. Currently, NLRB reporting system includes 100 plus reports in OBIEE. These available reports shall be considered as the baseline requirements for the development of new reports.
3.1.7. NxGEN SECURITY MODEL

A significant portion of the NxGen development effort has been dedicated to identifying and building controls for information safeguarding and dissemination, pursuant to and consistent with applicable law, regulation, or Agency and Government-wide policies. As such, NxGen provides enterprise protocols for information sharing and enables consistent safeguarding and dissemination controls. The system includes a robust security model that controls access to documents based on discrete edit and visibility rights assigned by the system and managed by the user base.

The document edit rights are set by the task team:

- Edit – Document is editable by the task team
- Read-only – Documents can be viewed by the task team

Documents are always visible to the task team members. They are the only people with rights to manage the visibility of a document. The document visibility rights are:

- Task – Document is visible only to the Task team
- Office – Document is visible to the Task team AND all employees from the office of the Agent/Attorney on the Action Team
- CaseHQ – Document is visible to Task team AND all Employees from the Offices of the Agent/Attorneys on any Action on the case on the same Side (General Counsel, Board, or Administrative Law Judge) as the Agent/Attorney on the current Action
- Side – Document is visible to Task team AND the Side of the Agent/Attorney on the current Action
- NLRB – Documents are visible to all Offices within the NLRB. Certain documents can never be set to NLRB visibility

NxGen includes additional controls for sensitive and compliance-related documents and for those documents that are released to the public. These controls are established by the system and managed by the user base:

Sensitive – Documents containing Sensitive Personally Identifiable Information (SPII) are flagged as “Sensitive”. These documents are restricted to the “Task”, “Office”, and “CaseHQ” visibility rights. Additionally, these documents will be encrypted throughout their lifecycle.

SPII means that the document contains a person’s name plus one or more of the following:

- Date of birth
- Social Security Number
- Driver’s license number
- Financial account number
- Credit or debit card number
• Compliance – Documents that are part of the Board’s compliance process are flagged as “Compliance” for identification purposes.

• Public – Documents that are to be released to the public are flagged as “Public”. These documents are, by definition, uncontrolled and are required to have “NLRB” visibility rights. Additionally, NxGen provides the capability for a redacted version of a document to be made public when the release of a non-redacted version is controlled.

3.1.8. SCANNING
The NxGen Advanced Scanning Solution (NASS) is a combination hardware/software system to address the Agency’s significant scanning needs. On the Hardware side, the Agency has adopted a scanner-agnostic approach, configuring all Agency scanning devices (currently consisting of Kodak Scan Station 500 network scanners, and a variety of Xerox and OCE multi-purpose copiers) to meet pre-set NARA and Agency standards, and scan documents as multi-page TIFF files to a network attached storage (NAS) folder. From there, the software side consists of EMC’s Captiva Input Accel, configured to monitor the NAS folder, and when a document is detected, to process that document through a variety of stages, including image clean-up, blank-page removal, auto-rotation, color detection, Optical Character Recognition (OCR), and PDF generation, and then to route that document to its final destination.

The NASS utilizes a barcode cover page at the start of each document to identify key metadata about that document, including the destination, and supports multi-document batching. At this time, NASS is a totally automated process with no user involvement after the initial scanning. There are a number of enhancements and revisions planned for NASS including automatic bates-numbering and introducing a user interface for reviewing questionable OCR translations or unreadable barcodes. The NASS software runs on a Captiva Scale Server environment currently featuring 2 servers, 3 document-processing machines, and a single SQL server.

3.1.9. CONTENT INDEXING USING SOLR
Apache SOLR has become a key middle tier in the NxGen Architecture. SOLR indexes metadata, documents and other content to power the Documentum integration interfaces within NxGen, the public website (WWW), the intranet (Insider), and the NxGen outlook integration.

SOLR is broken into three core separate instances. Each instance runs separate indexes. The public instances contain only data for the public website. This index contains the following information:

• Case Details,
• Allegations,
• Elections,
• Events,
• Docket Activity,
• Doc Type,
• Doc Subtype,
• Role,
• Participant,
• Office,
• Document and Cases

The private instance includes information for the Documentum integration application, the Outlook client and other integration interfaces. The private instance contains the following information:

• Doc Subtype,
• Doc Type,
• Cases and Actions

Both of these indexes are updated via scheduled agents that pull any change data on a periodic basis. These agents utilize a variety of techniques to identify updated data including, but not limited to, analyzing the audit information in Documentum and Siebel.

The Drupal instance contains all node information, including metadata, taxonomy, content and titles for these nodes for search purposes on the public website and intranet. This index is updated live when the data is changed.

3.1.10. OUTLOOK INTEGRATION
One of the key elements of the NLRB case management process is correspondence with parties. In addition to regular mail correspondence, the NLRB relies heavily on e-mail communication during the life of a case. In order to make emails and email attached documents part of case file, OCIO developed a Microsoft Outlook add-in that directly interfaces with NxGen. This add-in allows users to upload emails and attachments directly into NxGen Case/Actions. This application is developed in C# and Microsoft Visual Studio Office .NET 3.5 Add-In Framework. It uses Siebel and Documentum web services to create tasks and upload documents, respectively, and SOLR for Security and Case/Action data.

3.1.11. PUBLIC WEBSITE INTEGRATION
A core part of the design of the public website was out to provide case information to the public. This information is pulled into Drupal Views from SOLR and displayed to the public. These views allow the public to search and sort the agencies website information.

Additionally the agency serves certain parties case documents via e-mail delivery. For this service, NLRB uses GovDelivery to provide email delivery services. This allows us to track, get confirmation of delivery and get confirmation of reading of the e-mail. In this e-mail a link to the specific document is provided. This link is then served via custom code integrated with the public website to
provide that specific document to that specific user. The entire click through information is then provided back to the case file in NxGen for users to be able to quickly verify delivery, receipt and click through of the document.

The scheduled process by which these documents are e-mailed to parties via GovDelivery is called e-Issuance. This process involves a variety of checks to make sure all the supporting documents are correctly available and notifies users if there are documents critical to delivery that are missing. Then the documents are served to the correct parties that have signed up for e-Service via e-mail through the GovDelivery service.

The agencies current e-Filing system was first put in place in 2009. The agency has had an e-filing system in place since 2004, but all prior systems have been retired and replaced with the current system. The current system is custom code that is deeply integrated with NxGen to provide end users with a wizard like interface to assist them with filing the correct documents to the correct cases. Currently, the system processes over 30,000 successful filings a year. The system is built in a fashion that even if the NxGen system is unavailable, it is possible to continue to receive e-Filings, and put those into the NxGen system when the system becomes available. This allows for maintenance on the NxGen application without having to take down the e-filing interfaces.

3.1.12. JUDICIAL CASE MANAGEMENT SYSTEM (JCMS)
In 2005, the Board’s Office of the Executive Secretary designed and implemented a web-based case management system using COTS technology to automate what previously was an inefficient, paper-based, labor intensive case handling process. This system, called the Judicial Case Management System (JCMS), has significantly improved the efficiency of the Board in delivering its mission and solved several significant and longstanding problems.

JCMS is an all-electronic environment in which cases are considered, votes are cast, and Board decisions are prepared, circulated, modified and approved – all without the need for the physical circulation of paper documents. Within JCMS, Board Members and related offices each have private collaborative spaces in which ideas can be shared with legal staff, recommendations can be made and evaluated, and Board Member views developed. In addition, JCMS has a public collaborative space in which Board Members can share their views with their colleagues, formally vote on draft decisions, and finalize the Board’s decisions in pending cases.
JCMS and NxGen have been integrated together to ensure cases are correctly updated as the Board completes their case work. For example, when an originating attorney uploads a conformed Board Decision into JCMS, the system will automatically send the document to NxGen with the correct attributes.

3.2. PUBLIC WEBSITE/INTRANET BACKGROUND

The NLRB places a high priority on offering timely and relevant information to case participants, citizens, and employees. To that end, the Agency maintains a citizen-centric website that provides access to these groups, so that they can obtain, maintain and share information. The website also provides access to FOIA-able data and documents online.

The Agency complied with President Obama’s Open Government Directive by creating an “Open Government Page” that features relevant data and documents and by supplying and regularly updating raw data sets to data.gov for researchers and interested parties.

The Agency launched its first mobile application (m.nlrb.gov) in FY 2010, delivering recent cases, decisions, news, updates, case search and other information about the NLRB to mobile devices. A key component of the mobile service is its direct link to NxGen. This “app” furthers the Agency’s commitment to transparency and makes it even easier for those interested in the Agency’s work to find the information they are looking for as efficiently as possible.

Following a Supreme Court ruling that the Board was not authorized to decide cases when it had only two members, the Agency made public a database of all contested cases that were decided by the two-member Board. The list of cases, with data from NxGen, includes links to original documents and case status updates that are
refreshed in real-time. A full data set of all the cases is also provided in XML format for download.

Lastly, the Agency successfully executed an ambitious plan to link its constituent self-service, E-Filing, and E-Issuance efforts to the NxGen program. This effort provided a solid foundation for the Agency’s unified case management vision: to provide better services, more efficient case handling, and greater transparency, while continuing to improve quality.

The Agency launched a new public website in February 2011 and released a complementary internal site in October 2011 using Drupal as its content management system. To manage the process, the Agency developed a formal web management structure to give all parts of the NLRB a voice regarding web content and infrastructure while still enabling fast and efficient decision-making.

As the Agency moves into a new era of streamlined case management, electronic filing and proactive outreach, the NLRB is modernizing its web presence in form and function. The new public website is inviting to the public as well as to labor professionals and employees of the Agency. Key design objectives included making the website easy to navigate, easy to search, and easy to update.

The intranet and public internet sites are closely integrated to eliminate prior inequities between these sites and to ensure that updated information need only be posted once. An enhanced intranet will be a key ingredient in fostering improved communication throughout the Agency.

By updating the infrastructure; establishing a strong governance process; and integrating new technologies, better tools, and robust search, the Agency continues to efficiently manage web resources and assure that valuable content is readily accessible and available online.

**NLRB Web Management Structure**

The NLRB web management structure creates a forum for all parts of the Agency to voice suggestions and recommendations regarding web content and infrastructure, allows for efficient and rapid decision-making, and provides the framework needed to facilitate the evolution of the Agency’s online presence.

The NLRB web presence is governed though two entities. The Advisory Council serves as a forum for ideas and to give the entire Agency a process for and voice in guiding the direction of the Agency’s web presence. The Management Group is responsible for making concrete decisions in infrastructure and content direction for the web presence, based on collected input, primarily through the Advisory Council.

Both the Advisory Council and the Management Group are chaired by the New Media Specialist, Office of Public Affairs. Implementation of final policy decisions is coordinated by the New Media Specialist, in close cooperation with OCIO.
**Web Advisory Council**

The Advisory Council serves as the primary forum through which suggestions, recommendations and requests are discussed to inform future improvements to the Agency’s online presence. Discussion points and recommendations are forwarded to the Policy Group for consideration.

The Advisory Council assesses the varied needs of different parts of the Agency regarding web presence, and how the current site may or may not fulfill these needs. The Advisory Council also serves as a conduit of information on web issues for their respective offices.

The Advisory Council meets regularly on a quarterly basis and additionally as needed, and members are expected to also contribute to a robust conversation away from the meetings. The Council is appointed by the Chairman and the General Counsel or their delegates, and includes an appointed representative from each of the following:

<table>
<thead>
<tr>
<th>Chairman’s Office</th>
<th>Director of Public Affairs</th>
</tr>
</thead>
<tbody>
<tr>
<td>GC’s Office</td>
<td>Division of Advice</td>
</tr>
<tr>
<td>Division of Operations-Management</td>
<td>Division of Enforcement Litigation</td>
</tr>
<tr>
<td>OCIO</td>
<td>Division of Judges</td>
</tr>
<tr>
<td>New Media Specialist</td>
<td>Solicitor</td>
</tr>
<tr>
<td>Division of Administration</td>
<td>Regional Director</td>
</tr>
<tr>
<td>Office of the Executive Secretary</td>
<td>NLRB Union</td>
</tr>
<tr>
<td>Office of Representation Appeals</td>
<td>NLRBPA</td>
</tr>
</tbody>
</table>

**Web Management Group**

The Management Group provides high-level policy decisions regarding web content and infrastructure and is responsible for the formulation of the Agency’s web policy. The Management Group solicits suggestions and recommendations from throughout the Agency, primarily through the Advisory Council, for consideration in implementation changes to the Agency’s web infrastructure. The Management Group meets monthly and additionally as needed to discuss and decide issues.

The Management Group is a subset of Advisory Council, comprised of the following five members:

- New Media Specialist
- OCIO representative
- Board representative (appointed by the Chairman)
- GC representative (appointed by the GC)
- Director of Public Affairs
4. REQUIREMENTS

4.1. TASK 1 – NxGEN – NEW DEVELOPMENT

The purpose of this Labor Hours task is to complete the deployment of NxGen to the remaining offices and retire their respective legacy case tracking applications.

Currently, NxGen has been rolled out to many offices, but there still remain quite a few offices that are not in NxGen. Each of the following offices requires development effort with specific items that need to be addressed for the deployment for these offices:

- Division of Judges
- Enforcement Litigation (Special Litigation Branch, Contempt Litigation & Compliance Branch, Appellate and Supreme Court Branch)
- Legal Research (including FOIA)
- Records Management
- Offices involved with case related payments

These have unique and specific requirements that the contractor will have to work with the office to define and implement. There are certain specific requirements for these offices that will require significant development effort. These include implementing a scheduling tool for hearings and other events, integrating litigation support tools, integration of e-discovery toolsets, integrating record management capabilities, and integrating an enterprise search solution. Additionally, to support our ongoing use of NxGen we will need to enhance our current reporting capabilities, enhance our document generation and delivery capabilities, enhance our public website integration with NxGen, and enhance our current Siebel Data Quality implementation.

4.1.1. SCHEDULING TOOL

- The contractor shall recommend and implement a hearing and event scheduling solution for the agency in NxGen. The contractor shall work with the agency to identify the various requirements for a scheduling solution. This solution will require integration with Siebel, Outlook, and Documentum to allow for all the various scheduling requirements across the agency.

4.1.2. RECORDS MANAGEMENT

- The contractor shall work to implement the Agency's record management policies in NxGen.
- The contractor shall interface with OCIO and the Records Management office to assist with the transition from a paper case file to an official electronic record.

4.1.3. LITIGATION SUPPORT TOOLS

- The agency currently uses a variety of litigation support tools, including Summation iBlaze, Clearwell, BeyondCompare and MountImagePro. The contractor shall work to enhance NxGen's litigation support capabilities, as well as integrate current tools into NxGen.
Additionally, the agency will be acquiring new litigation toolsets, and the contractor will have to integrate these into NxGen

4.1.4. eDISCOVERY TOOLS
- The agency will be acquiring new eDiscovery toolsets and capabilities. The contractor shall work with these tools and NxGen to integrate these in a seamless manner for users

4.1.5. ENTERPRISE SEARCH
- The contractor shall work on implementing an enterprise wide search solution to bring together all our content repositories (Documentum, Drupal, Siebel, JCMS and legacy archives) into a single search interface that implements security throughout.
- The system shall provide transcript retrieval via full text proximity search with hit highlighting, keywords in context extracts and page/line number referencing.

4.1.6. REPORTING
- The contractor shall work closely with the Agency to define, design and implement a new data warehouse and ETL replacing all current reporting data repositories. This warehouse shall segment data for internal and public consumption.
- The contractor shall create the public reporting interfaces based on this warehouse to allow the public to do their own reporting on these areas.
- The contractor shall convert all existing reports to use this warehouse.
- The contractor shall create new, easy to use, and well defined subject areas in Answers for this warehouse to allow Agency business users to create their own reports based on data in the warehouse.

4.1.7. DOCUMENT GENERATION/DELIVERY
- The contractor shall implement the capability for the NLRB to update secondary table data in our templates, allowing for participant data to be refreshed in templates based on data changes in NxGen.
- The contractor shall implement the capability for the NLRB to use mail merge and other functionality to quickly create mailings from templates.
- The contractor shall enhance the e-delivery and e-issuance models to allow users across the agency to e-deliver documents (Currently, the Board only has this capability within the system).

4.1.8. SIEBEL DATA QUALITY
- The contractor shall install and configure Oracle Data Quality (IDQ) and enable web service interfaces for NLRB applications access.
- The contractor shall integrate Oracle Data Quality (IDQ) with NLRB E-Filing functionality for online data cleansing and standardization.
- The contractor shall integrate Dunn &Bradstreet data and establish account hierarchy for NxGen Accounts
4.1.9. SECTION 508

- The contractor shall ensure that the system will be fully compliant with Section 508 Accessibility guidelines. Specifically, the NLRB has employees who are unable to use a keyboard or mouse so the system must be fully compatible with Dragon NaturallySpeaking software.
- The contractor shall ensure that the system will be compatible with all other CAPS provided tools for NLRB users (i.e., JAWS, ZoomText).

4.1.10. MISCELLANEOUS

- NxGen releases typically occur every 2-3 months. The contractor shall propose their process for how each deployment release will be managed.
- The system shall have the ability to track processing of case-related payments and the potential to interface with the NLRB’s financial system(s).
- The system shall provide the capability to electronically file forms and documents with other Federal agencies and vice versa send out electronic forms and documents from NLRB to Federal or State courts and other Federal agencies.

4.2. TASK 2 – NxGEN – OPERATION & MAINTENANCE

The purpose of this Firm Fixed Price (FFP) task is to provide Operations and Maintenance (O&M) of the NxGen system.

O&M activities are considered the day to day management of the NxGen system environment, providing and supporting a stable infrastructure and effectively performing operational and processing procedures to ensure services meet service level agreement targets and requirements. Key processes include proactive monitoring of operations, system administration, job scheduling and execution, and database management.

The Contractor shall adhere to all applicable federal laws, regulations and policies governing the development, operation, and maintenance of federal IT resources. The Contractor shall perform all work and provide all deliverables so as to meet all relevant federal requirements for a system with a “moderate” impact for confidentiality, integrity, and availability per FIPS 199, Standards for Security Categorization of Federal Information and Information Systems. The Contractor shall provide technical documentation and support activities pertaining to operations, maintenance, and enhancement of the NxGen system as needed to meet federal program level requirements.

The contractor shall propose a method for managing and maintaining a list of production support items, defects, change requests and enhancements which will be used as part of the NLRB’s change control process. The contractor shall also propose a recurring maintenance window for production support items.

The NxGen production environment has adequate contingency and backup plans to ensure an operational availability to the system users of 98% 24 hours per day, 365
days per year. After business-hour contractor support will be required for release management and in the event of a system failure on an as needed basis.

The contractor shall perform the following roles and responsibilities:

- Monitor system operations and notify the NxGen project manager and customer service desk of any problems or issues.
- Monitor and tune overall performance of the systems environment including the installation of tools and products, as appropriate, to improve the delivery of services. This will ensure that the NxGen system is scalable and flexible enough to support the entire NLRB organization and its approximately 1800 users.
- Monitor, identify and report Application Platform problems to include access control, file management and disk space.
- Resolve or assist in resolving application software problems ensuring operational availability.
- Maintain all system software products including: COTS software, utilities, database management systems, performance monitoring tools, and security software.
- Perform patches and hot fixes to all COTS applications at the request of the NLRB.
- Provide technical and operational support to all user testing efforts, including unit, regression and stress testing consistent with NxGen procedures.
- Schedule routine system maintenance so as not to interfere with NLRB NxGen business needs.
- Test systems, applications, validate and document all new releases of software.
- Ensure access control is maintained according to existing NxGen policies for all new releases.

4.3. TASK 3 – NLRB PUBLIC/INTRANET WEBSITE – NEW DEVELOPMENT

The purpose of this Labor Hours task is to provide enhancements to the NLRB’s public website and corporate Intranet (“Insider”) based upon the decisions of the NLRB Web Management team.

In 2011, the NLRB public website (http://www.nlrb.gov) and the NLRB Intranet were redesigned and launched using Drupal as the content management system. We are looking at a variety of enhancements to the current capabilities and infrastructure of the site.

The following tasks are identified new development that the contractor shall work on in regards to the current public website and intranet:

**4.3.1. PUBLIC WEBSITE INTEGRATION WITH NxGEN**

- The contractor shall enhance the public website to allow parties on cases before the agency to effectuate self-service, and manage their own
information on those cases. This will change their data in NxGen so that agency personnel will not have to change it on their behalf.

- The contractor shall enhance the public website and NxGen to allow all offices to use the e-Issuance and e-Services processes for their case processing needs.

4.3.2. ORACLE WEBCENTER USER INTERACTION

- The contractor shall migrate all applications developed and in use in the MyNLRB portal to the new intranet and public website infrastructure.
- The contractor shall enhance the e-filing application to meet the ongoing business requirements for e-filing on cases before the NLRB. Additionally the contractor shall enhance the e-filing application to provide the public the ability to electronically file charges and petitions with the Agency.

4.3.3. NxGEN DATA ON THE PUBLIC WEBSITE

- The contractor shall enhance the public website so that charts and graphs of various data from NxGen will be displayed and available to the public. This solution will allow agency business users to create future charts and graphs of NxGen data without developer support.

4.3.4. DATA ON THE PUBLIC WEBSITE

- The contractor shall enhance the current website such that it offers the ability for NLRB employees to put new data tables, charts and graphs on the website without the need for developer or contractor support. This feature will allow employees to update these data tables, charts and graphs without the need for developer or contractor support. Additionally this feature will allow the public to download this information in a variety of formats, including but not limited to, excel, PDF, xml and text.

4.3.5. PUBLIC WEBSITE HOSTING

- The NLRB is in the process of identifying if moving the current production public website and intranet to a hosted environment would be beneficial to the agency. The contractor shall be responsible for the migration of the current website and intranet to this hosted environment, if the government were to choose this approach.

4.3.6. WEBSITE USER INTERFACE

- The contractor shall work within the guidelines of the NLRB web management structure to identify and implement user interface enhancements to the current public website and intranet. These will include code development, style sheet development, and graphic and image design.

4.3.7. MOBILE, TABLET & ALTERNATIVE DEVICES

- The contractor shall enhance the capabilities of the current public website and intranet on tablet, mobile and other alternative devices.
4.3.8. CONTENT STREAMING

• The contractor shall enhance the existing video streaming capabilities on the public website and intranet to meet the agency needs for providing streaming to internal and external users.

4.3.9. SEARCH

• The contractor shall significantly enhance the current search user interface, functionality, data searched, and results provided on the public website and intranet. This functionality will be integrated tightly with the enterprise search capabilities outlined in Task 1.

4.4. TASK 4 – NLRB PUBLIC/INTRANET WEBSITE – OPERATIONS & MAINTENANCE

The purpose of this Firm Fixed Price (FFP) task is to provide operations and maintenance for the NLRB’s public website and corporate Intranet (“Insider”).

O&M activities are considered the day to day management of the public website and Intranet system’s environment, providing and supporting a stable infrastructure and effectively performing operational and processing procedures to ensure services meet service level agreement targets and requirements. Key processes include proactive monitoring of operations, system administration, job scheduling and execution, and database management.

The NLRB production website environment has adequate contingency and backup plans to ensure an operational availability to the system users 98% 24 hours per day, 365 days per year. After business-hour contractor support will be required during regularly scheduled maintenance windows and in the event of a system failure on an as needed basis.

In 2011, the NLRB public website (http://www.nlrb.gov) and the NLRB Intranet were redesigned and launched using Drupal as the content management system.

The Contractor shall adhere to all applicable federal laws, regulations and policies governing the development, operation, and maintenance of federal IT resources. The Contractor shall perform all work and provide all deliverables so as to meet all relevant federal requirements for a system with a “moderate” impact for confidentiality, integrity, and availability per FIPS 199, Standards for Security Categorization of Federal Information and Information Systems. The Contractor shall provide technical documentation and support activities pertaining to operations, maintenance, and enhancement of the NLRB public website and Intranet as needed to meet federal program level requirements.

The contractor shall propose a method for managing and maintaining a list of production support items, defects, change requests and enhancements for the Web Advisory Council. The contractor shall also propose a recurring maintenance window for production support items.

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The contractor shall propose O&M policies, and define an application O&M plan, and execute application O&M procedures. The contractor shall perform preventative and adaptive maintenance activities that are required to keep the public website and Intranet sites operational and in compliance with service requirements. The contractor shall recommend and implement application-specific tuning and optimization to ensure continued operations, performance and availability of the system.

The contractor shall provide operations of the NLRB public website and Intranet sites, including application-specific tasks and support for issue resolution. The contractor shall provide Tier 2 support for issues escalated from the NLRB OCIO helpdesk from 8:00AM to 5:00PM ET weekdays. The Contractor shall provide routine website content updates to include system changes and repair of broken links. Substantial changes to content or layout are handled as enhancements in Task 3.

The contractor shall maintain and update the Information Architecture (IA) plan to adapt to business changes.

The contractor shall ensure all elements of the site redesign comply with applicable Federal mandates, regulations, and those established by the NLRB including but not limited to:

1. The Open Government Directive
2. The Federal Enterprise Architecture Reference Models
3. Security and Privacy (per Office of Management and Budget circular A-130, the Privacy Act of 1974, and National Institute of Standards and Technology guidelines, including SP 800-95 and SP 800-44 v.2)
4. Rehabilitation Act, Section 508 Accessibility Requirements (http://www.section508.gov/index.cfm?FuseAction=content&ID=12)

4.5. TASK 5 – ALL OTHER APPLICATION SUPPORT
The purpose of this Firm Fixed Price (FFP) task is to provide operations and maintenance support for all applications, legacy or otherwise.

The Contractor shall adhere to all applicable federal laws, regulations and policies governing the development, operation, and maintenance of federal IT resources. The Contractor shall perform all work and provide all deliverables so as to meet all relevant federal requirements for a system with a “low” or “moderate” impact for confidentiality, integrity, and availability per FIPS 199, Standards for Security Categorization of Federal Information and Information Systems. The Contractor shall provide technical documentation and support activities pertaining to operations, maintenance, and enhancement of any NLRB applications or systems as needed to meet federal program level requirements.

Other Applications Support requirements fall into two categories; 1) applications support for electronic case management systems 2) other agency IT systems.
Applications support for electronic case management systems are classified as applications that are currently in use by offices for case tracking and are scheduled to be replaced over the next two years by the NxGen system. The NLRB anticipates few changes to these systems. It is expected that some of these applications will need to be modified to support the NxGen case number. A list of these applications is provided in Appendix A.

Other agency IT systems are systems that are currently in use by employees or based upon availability of funds, are systems that will be requested to be developed or implemented. A list of these applications to support can be found in Appendix B.

Application Support includes all administrative tasks and activities associated with application development projects such as documenting the status of a project or developing a project schedule.

Special project support in response to FOIA request tasks shall include extracting data from databases into various file formats such as excel, ASCII or other database systems. Report development may also be required.

Maintenance services are required to enable systems to operate without error. Maintenance is performed in response to received errors or defects resulting from changes to the infrastructure.

Enhancement requests for any existing systems must be approved by the NLRB OCIO prior to any development or implementation.

4.6. TASK 6 – PROGRAM/PROJECT MANAGEMENT
The purpose of this Firm Fixed Price task is to provide program and project management of NLRB OCIO information technology services. The Contractor shall implement a comprehensive project management approach to include technical management, schedule management, cost management, personnel management, and communication management.

4.6.1. CORPORATE COMMITMENT
- The contractor shall describe its organization for performing the requirements on the task order, how corporate resources will be applied to the project, and lines of communication up the management chain for problem resolution.

4.6.2. GOVERNMENT INTERFACE
- The contractor shall describe the organizational interfaces with the government and how it will ensure that the government has insight into task order activities.

4.6.3. SCHEDULE
- The contractor shall describe its processes and performance metrics and measures for ensuring that schedules utilizing Agile development methodologies are met.
4.6.4. RISK ASSESSMENT/MANAGEMENT

- The contractor shall describe the procedures and controls that will be applied for this project with regards to managing risk.

4.6.5. CONFIGURATION MANAGEMENT

- The NLRB currently uses an open source tool, Redmine, to manage its software configuration management and uses ServiceNow as the agency’s customer support service desk. The contractor shall describe how the configuration management system and customer support service desk will be utilized and adapted with respect to changing software, hardware and data requirements.
- The contractor shall describe its approach to ensuring the system documentation is updated with each sprint schedule, is thorough, accurate and communicates the updates effectively.

4.6.6. IN PROCESS REVIEWS

- The Contractor Project Manager shall produce monthly In Process Review (IPR) presentation materials documenting results achieved, risks and risk mitigation actions, and planned events for Tasks 1-5 of the task order. The reports shall include the budgeted cost of work scheduled, budgeted cost of work performed, actual cost of work performed, and variances and estimates at completion. The Contractor shall provide the IPR briefings to the PM, COR and appropriate Government personnel.

4.6.7. TRAINING

- The contractor shall provide training, as requested, in support of any initiative.

4.6.8. CHANGE MANAGEMENT

- The Contractor shall describe their process and procedures for implementing and managing changes to the functional and technical requirements of large, complex, web-based systems. The Contractor shall be responsible for documenting, tracking, managing and controlling all change requests, problem reports, report requests, etc…
- The Contractor shall provide a written analysis of each change request, estimate of the time and cost to resolve or develop the request, and an analysis of the impact to the overall system which will be used as part of the NLRB’s change control process.

4.6.9. QUALITY ASSURANCE SURVEILLANCE PLAN

- The QASP is a Government developed and applied document used to make sure the systematic quality assurance methods are used in the administration of the PWS included as part of this task order. The intent is to ensure that the contractor performs in accordance with the performance metrics and the Government receives the quality of services called for in the task order. The contractor shall submit a Quality Control Plan (QCP) to ensure the requirements of the PWS are provided as specified and will describe the
methods for identifying and preventing problems before the level of performance becomes unacceptable.

4.7. TASK 7 – APPLICATION MODERNIZATION
As funding becomes available, the NLRB may choose to implement a strategy to modernize their applications. Different enhancements may require different technical skills. The contractor should provide a responsive staffing model that is able to efficiently deliver the specific expertise needed for each enhancement for the period of time that it is needed.

4.8. TASK 8 – TRAVEL
A minimal amount of travel may be required under this task order. Reimbursement for travel expenses will be in accordance with the GSA Regulations and reimbursement rates.

5. SKILLS
The NLRB Business Application Development & Support Services task order requires contractors to demonstrate the ability to attract and retain the talent needed over the course of the task order. In order to meet the requirements of this procurement, the contractor shall provide, as needed, personnel with skills and qualifications in the following areas:

- Project Management
- IT Service Management
- SCRUM/Agile Development Methodology
- IT Systems Engineering and Architecture
- Requirements Analysis
- Web Application Development
- Web Content Management
- Systems Operations and Maintenance
- Systems Administration
- Federal IT Systems Security
- Technical Writing
- Technologies used for NxGen, the NLRB public website and Intranet
  - Oracle Siebel
  - Oracle MySQL
  - Oracle Business Intelligence EE
  - Drupal
  - Apache SOLR
  - Apache Tomcat
  - Apache Subversion
  - Informatica
  - EMC Captiva InputAccel
  - EMC Documentum & eRoom
  - EMC DocSciences xPression
  - Microsoft SQL Server & Integration Services
  - Microsoft Visual Studio Tools for Office
6. TRANSITION MANAGEMENT

The Contractor shall ensure the transition, if necessary, of all NxGen, public website and Intranet operations from the prior contractor with no disruption of service to NLRB end-users during regular business hours. The transition includes the transfer of all hardware, software, licenses, services, operational processes, development processes, and documentation. The transition also includes capturing knowledge of the system’s design, implementation and operations. The government will deliver all existing documentation on NxGen, the public website and Intranet, as well as any relevant legacy systems. It is expected that the transition will take no longer than 15 business days.

The contractor shall propose a transition plan as part of this procurement. The contractor shall ensure existing system capabilities are maintained and not compromised during the transition. The contractor shall complete a comprehensive baseline assessment of NxGen, the NLRB public website and Intranet including review and capture of processes, procedures, supporting mechanisms, software license inventory, accounts and passwords, documentation, utilization, performance, and capacity. The contractor shall assume administrative control of all support systems, as needed, including configuration management systems, source code control systems, change request systems, document repository, and monitoring systems. The contractor shall transition support for related program processes including change management processes. The contractor shall demonstrate development, operations and maintenance capability using the contractor’s own staff, processes, tools, and facilities.

The prior contractor will be tasked to support knowledge transfer and operations training for the contractor. The contractor will not be required to make enhancements to any systems during the transition.

As part of the transition, the contractor shall propose hosting a new development environment in the cloud. Costs shall be included in the price proposal as CLIN 9 – Development Environment. The development environment shall be hosted in a certified FISMA “moderate” cloud. The contractor shall provide the environment and development tools required for maintenance and enhancement of the following:

- NxGen
- Public Website & Intranet

The current development environment is outlined in the diagrams below:
**NxGen Application Environment Overview**

Diagram showing the network setup with Development Domain Controller & Active Directory connected to NLRB HQ Offices through a VLAN network. The Production Domain Controller & Active Directory is also connected to the NLRB HQ Offices.

**NxGen Development Environment Configuration**

Diagram showing the configuration of the development environment across three hosts (HOST 1, HOST 2, HOST 3). Each host contains various components like Exchange Server, xPression Server, Analytics App, Analytics DB, and more.
The development environment must have the flexibility to add additional components, as requested, for the duration of a new development effort.

Software licenses for the development environment will be provided by the Government from either the application licensing that is currently owned or from the agency’s MSDN subscription.

Government personnel must have full access to the development environment via a dedicated VPN connection.

The contractor shall propose a process for how code will be migrated from development to the test and production environments.

7. **DELIVERABLES**

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transition Plan</td>
<td>5 days after award</td>
</tr>
<tr>
<td>Transition Completion Demonstration</td>
<td>30 days after award</td>
</tr>
<tr>
<td>Development Environment Base</td>
<td>30 days after award</td>
</tr>
<tr>
<td>Configuration</td>
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<tr>
<td>Development Environment Code</td>
<td>30 days after award</td>
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<tr>
<td>Migration Plan</td>
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<td>Meeting Minutes</td>
<td>2 business days after meeting</td>
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<tr>
<td>Project Status Reports</td>
<td>Weekly</td>
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<tr>
<td>In Process Review Presentations</td>
<td>Monthly</td>
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<tr>
<td>NxGen Functional Design Document</td>
<td>Updated each release to include change or enhancements</td>
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<tr>
<td>NxGen Deployment Guide</td>
<td>Each release</td>
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<tr>
<td>NxGen Training Guides</td>
<td>As requested</td>
</tr>
<tr>
<td>Updated/Validated System Inventory</td>
<td>30 days after award / concurrent with deployed changes</td>
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<tr>
<td>Risk Assessment / Mitigation Plan</td>
<td>As requested</td>
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<tr>
<td>Security Plan</td>
<td>As requested</td>
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<tr>
<td>Disaster Recovery Plan</td>
<td>As requested</td>
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<tr>
<td>Configuration Management Plan</td>
<td>30 days after award</td>
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<tr>
<td>Resource Management Plan</td>
<td>30 days after award</td>
</tr>
<tr>
<td>Test and Acceptance Plan</td>
<td>30 days after award</td>
</tr>
<tr>
<td>Quality Control Plan</td>
<td>Shall be included with the proposal or the Quote maybe considered unresponsive.</td>
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<tr>
<td>Incident Report</td>
<td>Within 48 hours of incident occurrence</td>
</tr>
<tr>
<td>System Documentation</td>
<td>Per Task/Change Order</td>
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<tr>
<td>Financial Status Report</td>
<td>Monthly</td>
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<tr>
<td>Change Request Items List</td>
<td>Updated each release</td>
</tr>
</tbody>
</table>

Additional deliverables may be negotiated and specified in the task order award.
8. APPENDIX/EXHIBITS

8.1. APPENDIX A – CASE RELATED APPLICATIONS

Case Activity Tracking System (CATS)

The Case Activity Tracking System (CATS) was the agency-wide interactive electronic database of information on the processing of all unfair labor practice and representation cases at all stages. CATS stored case handling information on all open and closed cases in the agency. CATS was retired in 2011, but some older case information can still be retrieved upon request.

Pending Case List (PCL)

The PCL system was developed to meet the requirements of the Board’s case tracking needs. All “C” cases and “R” cases that are appealed to the Board were docketed in the PCL system by the Executive Secretary’s Docket and Order Section. From that point forward, all action on that case was recorded and tracked in PCL by the Executive Secretary’s Office. The PCL system was retired in 2011, but some older case information can still be retrieved upon request.

Regional Advice Injunction Litigation System (RAILS)

RAILS tracked current and historical data regarding approximately 700-800 ULP cases handled by the Division of Advice each year. RAILS allowed authorized Injunction Litigation Branch staff to add, retrieve, edit/update and track injunction litigation activities for unfair labor practice cases (C Cases). RAILS produced Activity, Time, and Miscellaneous reports for management decision-making. The RAILS system was retired in 2012, but some older case information can still be retrieved upon request.

Litigation Information on the Network (LION)

The LION system allows authorized Appellate Court Branch staff to add, retrieve, edit/update and track orders issued by the Board in unfair labor practice cases. In certain unfair labor practice cases, the Board’s final order rests on a related representation or “R” Cases. The LION system provides data entry for the Appellate Court Branch; a comprehensive Reports and Queries capability; a complete case lookup system; a thorough statistical reporting system; and tools to assist management personnel in the handling of caseloads.

Trial Information Gathered on Electronic Record (TIGER)

TIGER tracks a ULP or R case through the various stages within the Division of Judges. TIGER contains data related to administrative hearings of unfair labor practice cases including the scheduling of trials, preparation of Judges’ itineraries, and development of statistical data and production of workload reports.

FOIA Tracking

The FOIA case tracking system tracks current and historical information about the handling of approximately 4700 requests made under the FOIA to the NLRB’s regional offices and to the GC offices of HQ. The system collects all data necessary for
preparing and generating the NLRB’s Annual FOIA Report which the NLRB is mandated by statute to file with the Department of Justice.

**Extension of Time System (EOTS)**

The purpose of the EOTS is to provide Charging Parties with a new and convenient way to request an extension of time for their cases that have been dismissed. The EOTS will serve as an additional method to facsimile and ordinary mail when requesting an extension of time. The EOTS will allow Charging Parties to request an extension of time over the Internet. The EOTS will keep track of a database of all the dismissed cases. The EOTS will also provide canned reports displaying the activity of the system. Only specific Regions are allowed to use the Extension of Time System.

**Supreme Court Branch Case Tracking**

Case tracking of Supreme Court cases is all manual at this time. A list of cases is maintained in a Microsoft Excel document. The Division of Enforcement Litigation secretary manually maintains forms and lists showing the status of each case in the Supreme Court Branch, as well as a log showing when documents are submitted to the Division Head. A monthly report showing case intake, cases pending, dispositions by the Branch, and cases decided by the Board and the Supreme Court is also prepared.

**Contempt Litigation and Compliance Branch (CLCB)**

Case tracking of Supreme Court cases is all manual at this time. When a new case comes into CLCB, an index card is prepared noting the name of the case; the Regional case number; the CLCB case number; the date the case is received in the Branch; the nature of the recommendation and the supervisor/attorney assigned to the case. It also includes the name and address of the respondent and/or the respondent's attorney and a running typed list of the major documents generated in the case. A Monthly Case Log is also kept, which highlights the case handling activities of CLCB in each month. It is divided into the following sections: New Cases Received; Cases Closed; Petitions and Other Initiating Papers Filed; Decisions and Orders Entered; Cases in Which Board Authorized Contempt; and Backpay, Costs and Fines Collected. Each of the cases entered has appropriate identifying information, including the Regional and CLCB case number and other pertinent information. The log is used to generate the information needed to prepare the monthly report and the annual report. It is anticipated that a system will be developed to electronically capture this now manually collected data and coordinate it with other NLRB systems.

**The Electronic Judicial Filing Project**

This project supports the NLRB’s efforts to comply with requirements established by the United States Courts’ Case Management/Electronic Case Files CM/ECF project. Courts using the CM/ECF system have the discretion to permit or require that documents be filed electronically in Portable Document Format PDF. CM/ECF systems are now in use in numerous district courts, bankruptcy courts, the Court of International Trade and the Court of Federal Claims. Most of these courts are accepting electronic filings. The NLRB interacts with Federal courts on a daily basis. The NLRB has purchased Adobe Acrobat software that allows the user to convert electronic documents created using
conventional word-processing methods into PDF. Almost all documents proffered by parties as evidence and legal argument in the NLRB’s investigation of unfair labor practice and representation matters are submitted in hard copy. In order to include these hard copy documents in a complete record to the courts, the NLRB scans and converts them into digital images. All Headquarters legal offices and field offices have high speed copy machines that are network enabled for scanning as well. Currently, these offices are storing their scanned files on their network servers. However, there are ongoing records management issues with these files.

Special Litigation Branch Case Tracking

The case tracking system in the Special Litigation Branch (SLB) is as follows: When a new case comes into SLB, a paper case card is prepared noting the name of the case; the Regional case number; the SLB case number; the date the case is received and opened in the Branch; the nature of the issue, the supervisor/attorney assigned to the case, the court in which the case is pending and the court docket number. In SLB case tracking system, for each new case or assignment, the same information is entered, plus the name and address of the various parties and their attorneys, and on an "activity" screen a running typed chronological docket listing the documents generated and received in the case, and events in court or before the Board in the life of the case. In addition to the chronological docket entries, various formatted screens exist in each electronic case folder into which information is entered and stored for easy retrieval in the same screen format. For each case, these screens include: (a) basic case screen reflecting the SLB attorney and supervisor assigned, dates showing date case opened, date case assigned, plus Board, court and SLB case numbers, and final date and reason for SLB case disposition; (b) travel screen reflecting information including travel dates, attorney traveling and reason (e.g. court hearing), case name and numbers, dollar amounts obligated and spent and Budget authorization number; (c) case count screens for each possible court where a case may have been filed (bankruptcy, district and appellate courts) noting, for each screen, the case name and numbers, a recording of dates of complaint, answer, motions, responses, orders filed or received, arguments, and other events. In each case court screen there are also live links to the court’s website and an ability to retrieve official court forms; (d) screen reflecting all relevant parties, their counsel, and their addresses and telephone numbers.

Various monthly reports are generated from the data stored. These computer generated reports from the electronic case tracking system include: (a) monthly status report showing each SLB case, its opening date, attorney and supervisor assigned, relevant court, SLB & Board case numbers, significant events in the life of the SLB case handling, and the last status of the case (two reports are generated, one alphabetically and one by the age of case); (b) report listing each newly opened case with case name, appropriate court, case numbers, SLB attorney and supervisor assigned and issue presented; and (c) report listing each newly closed case with case name, appropriate court, case numbers, SLB attorney and supervisor assigned, plus reason for closing.

WIP/CITENET

The Work-In-Progress database is the CITENET database that contains Classified Index Scopes of Board Decisions, Court Decisions and Advice Memos used to produce what is known as the Blue Book Classification and the replicated Web CITENET.
## 8.2. APPENDIX B – OTHER AGENCY APPLICATIONS

### LEGEND

<table>
<thead>
<tr>
<th>Application</th>
<th>Status</th>
<th>Software</th>
<th>Purpose</th>
<th>Supported Office</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Retired Application</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Under Development</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Operational Application</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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</table>

### APPLICATIONS

<table>
<thead>
<tr>
<th>Application</th>
<th>Status</th>
<th>Software</th>
<th>Purpose</th>
<th>Supported Office</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic Case Information Search (ECIS)</td>
<td>Retired, but still available while MyNLRB portal sever still active.</td>
<td></td>
<td>The Freedom of Information Act, 5 USC 552(a)(2), requires that final agency decisions be routinely made available for public inspection and copying. The FOIA also requires that each agency maintain and make available for public inspection and copying current indexes of these decisions providing identifying information for the public. These indexes must be published at least quarterly and made available by computer telecommunications.</td>
<td>Office of Appeals Operations Management</td>
</tr>
<tr>
<td>Special Litigation Case Tracking System</td>
<td>Development</td>
<td>Windows XP, MS Access 2003</td>
<td>Tracks case processing for the Special Litigation Branch</td>
<td>Enforcement Litigation</td>
</tr>
<tr>
<td>Appellate Search Tool (ACES)</td>
<td>Operational</td>
<td></td>
<td>Appellate Court Electronic Search tool</td>
<td>Appellate</td>
</tr>
<tr>
<td>Appellate Court Case Lookup (in Access)</td>
<td>Operational</td>
<td>Web-based</td>
<td>Give regional and HQ users access to Appellate Court Data</td>
<td>Appellate Court</td>
</tr>
<tr>
<td>Applicant Tracking System</td>
<td>Operational</td>
<td>Windows XP MS Access 2003</td>
<td>Tracks job applicants.</td>
<td>Human Resources</td>
</tr>
<tr>
<td>Archivalware</td>
<td>Operational</td>
<td></td>
<td>A database of documents produced within the Board (Advice and Appeals memos, GC/OM memos, briefs, etc.) with a text based research system. This is an internal research system for headquarters and field staff; the database includes documents that are not disclosable to the public.</td>
<td>Advice</td>
</tr>
<tr>
<td>BackPay 26</td>
<td>Operational</td>
<td>Excel Spreadsheet</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Blue/Yellow Book (BlueUtil) Publication Utilities</td>
<td>Operational</td>
<td></td>
<td>Utilities for preparing the CITENET data for publication in hard copy.</td>
<td>Legal Research</td>
</tr>
<tr>
<td>APPLICATIONS</td>
<td>STATUS</td>
<td>SOFTWARE</td>
<td>PURPOSE</td>
<td>SUPPORTED OFFICE</td>
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<tr>
<td>--------------------------------------------------</td>
<td>------------</td>
<td>---------------------------</td>
<td>-------------------------------------------------------------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>Classification Position Description Tracking System</td>
<td>Operational</td>
<td>Windows XP Access 2003</td>
<td>Tracks agency position descriptions.</td>
<td>Human Resources</td>
</tr>
<tr>
<td>CMP Tools (aka Compliance Tools)</td>
<td>Operational</td>
<td>Windows XP Access 2003</td>
<td>Tracks congressional inquires</td>
<td>Finance</td>
</tr>
<tr>
<td>Congressional Tracking System</td>
<td>Operational</td>
<td></td>
<td></td>
<td>Ops. Mgmt.</td>
</tr>
<tr>
<td>EEO-NET System</td>
<td>Operational</td>
<td>EEO Complaint Tracking System</td>
<td></td>
<td>EEO</td>
</tr>
<tr>
<td>E-Filing Documents with the Agency</td>
<td>Operational</td>
<td></td>
<td>Fulfills GPEA requirements for the Agency.</td>
<td>Executive Secretary, GC, Judges</td>
</tr>
<tr>
<td>E-FOIA Application</td>
<td>Operational</td>
<td></td>
<td>An application on the Agency’s website by which members of the public can submit FOIA requests to the General Counsel and Executive Secretary. Legal Research staff docket requests for the GC into the FOIA data base and handles responses to the request. Enhancements are being planned by the GPEA Committee for a more sophisticated FOIA request system that would process the request, and provide case tracking info and permit electronic generating of the FOIA annual report.</td>
<td></td>
</tr>
<tr>
<td>Freedom of Information Act (FOIA) Tracking</td>
<td>Operational</td>
<td>Coldfusion, SQL Server 2000</td>
<td>The General Counsel’s FOIA case tracking application managed by Legal Research.</td>
<td>NLRB</td>
</tr>
<tr>
<td>HONORS</td>
<td>Operational</td>
<td>.Net 3.5, SQL Server</td>
<td>Candidates for the Honors program are able to complete and submit an application for review. Includes an administrative section for review of the applications.</td>
<td>Operations Management</td>
</tr>
<tr>
<td>iRIMS</td>
<td>Operational</td>
<td></td>
<td>Records Management System</td>
<td>LASB</td>
</tr>
<tr>
<td>IT Security Officer System</td>
<td>Operational</td>
<td>Windows XP, MS Access 2003</td>
<td>Tracks NLRB IT security weaknesses.</td>
<td>Information Security</td>
</tr>
<tr>
<td>APPLICATIONS</td>
<td>STATUS</td>
<td>SOFTWARE</td>
<td>PURPOSE</td>
<td>SUPPORTED OFFICE</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>-----------------</td>
<td>-----------------------------</td>
<td>-------------------------------------------------------------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>ITB Procurement System</td>
<td>Operational</td>
<td>Windows XP, MS Access 2003</td>
<td>Database of IT purchase requests and purchase orders.</td>
<td>Information Management</td>
</tr>
<tr>
<td>Recruitment Classification Tracking System (RCTS)</td>
<td>Operational</td>
<td>Windows XP, MS Access 2003</td>
<td>Tracks Status of Personnel Actions</td>
<td>Human Resources</td>
</tr>
<tr>
<td>Representation Case (R-Case) System</td>
<td>Operational</td>
<td></td>
<td>Database similar to WIP into which the Legal Research Branch inputs digest numbers for Regional Directors’ C-Case Dismissal letters and DD&amp;Es, respectively. There has never been any search tool analogous to CITENET available for either of these systems although in the past (most recently 1989) a hard copy publication was generated from the data. From time to time Legal Research receives FOIA requests for information in this data base. To respond, ITB has prepared an individual query of the data base.</td>
<td>Legal Research</td>
</tr>
<tr>
<td>Security &amp; Audit Staff Security Card System</td>
<td>Operational</td>
<td>Windows XP, MS Access 2003</td>
<td>Tracks contractor and agency employees through the security clearance process</td>
<td>Security</td>
</tr>
<tr>
<td>Summation LG Gold</td>
<td>Operational</td>
<td>COTS Product</td>
<td></td>
<td>Operations Management, Appellate Court</td>
</tr>
<tr>
<td>Unfair Labor Practices (ULP) Case</td>
<td>Operational</td>
<td></td>
<td>Database of classified index of dispositions of ULP charges by the General Counsel of the NLRB. (Gray Book)</td>
<td>Legal Research</td>
</tr>
</tbody>
</table>
8.3. APPENDIX C – LIST OF NLRB OFFICES

**Boston (1)**
10 Causeway Street - 6th Floor
Boston, MA 02222-1072

**New York (2)**
26 Federal Plaza, Room 3614
New York, NY 10278-0104

**Buffalo (3)**
Niagara Center Building
130 S. Elmwood Avenue
Suite 630
Buffalo, NY 14202-2387

**Albany (Resident Office, 3)**
Leo W. O'Brien Federal Building
Clinton Ave and N Pearl Street - Room 342
Albany, NY 12207-2350

**Philadelphia (4)**
615 Chestnut Street, 7th Floor
Philadelphia, PA 19106-4404

**Baltimore (5)**
The Appraisers Store Building
103 S. Gay Street - 8th Floor
Baltimore, MD 21202-4061

**Washington (Resident Office, 5)**
1099 14th Street, NW - Suite 5530
Washington, DC 20570-0001

**Pittsburgh (6)**
William S. Moorhead Federal Building
1000 Liberty Avenue
Room 904
Pittsburgh, PA 15222-4111

**Detroit (7)**
477 Michigan Avenue, Room 300
Detroit, MI 48226-2569

**Grand Rapids (Resident Office, 7)**
Gerald Ford Federal Building and U.S. Court House, Room 299
110 Michigan Street, NW
Grand Rapids, MI 49503-2363

**Cleveland (8)**
1240 East 9th Street, Room 1695
Cleveland, OH 44199-2086

**Cincinnati (9)**
John Weld Peck Federal Building
550 Main Street Room 3003
Cincinnati, OH 45202-3271

**Atlanta (10)**
233 Peachtree Street N.E.
Harris Tower, Suite 1000
Atlanta, GA 30303-1531

**Birmingham (Resident Office, 10)**
Ridge Park Place, Suite 3400
1130 South 22nd Street
Birmingham, AL 35205-2870

**Winston-Salem (11)**
Republic Square
4035 University Parkway Suite 200
Winston-Salem, NC 27106-3325

**Tampa (12)**
South Trust Plaza Suite 530
201 East Kennedy Blvd
Tampa, FL 33602-5824

**Jacksonville (Resident Office, 12)**
550 Water Street, Suite 240
Jacksonville, FL 32202-1623

**Miami (Resident Office, 12)**
Federal Building, Room 1320
51 SW 1st Avenue
Miami, FL 33130-1608

**Chicago (13)**
The Rookery Building
209 South LaSalle Street, Suite 900
Chicago, IL 60604-5208

**St. Louis (14)**
1222 Spruce Street, Room 8.302
St. Louis, MO 63103-2829

**Peoria (Subregion 33, 14)**
300 Hamilton Boulevard, Suite 200
Peoria, IL 61602-1246

**New Orleans (15)**
600 South Maestri Place, 7th Floor
New Orleans, LA 70130-3413

**San Antonio (Resident Office, 16)**
615 East Houston Street
Suite 401
San Antonio, TX 78205-1711

**Ft. Worth (16)**
819 Taylor Street, Room 8A24
Ft. Worth, TX 76102-6178

**Houston (Resident Office, 16)**
Mickey Leland Federal Building
1919 Smith Street - Suite 1545
Houston, TX 77002-

**San Diego (Resident Office, 16)**
555 West Beech Street - Suite 418
San Diego, CA 92101-2939

**Minneapolis (18)**
Suite 790
330 Second Avenue South
Minneapolis, MN 55401-2221

**Des Moines (Resident Office, 18)**
210 Walnut Street - Room 439
Des Moines, IA 50309-2103

**Seattle (19)**
915 2nd Avenue, Room 2948
Seattle, WA 98174-1078

**Anchorage (Resident Office, 19)**
Anchorage Federal Building
605 West 4th Avenue, Suite 210
Anchorage, AK 99501-1936

**Portland (Subregion 36, 19)**
601 SW 2nd Avenue, Suite 1910
Portland, OR 97204-3170

**San Francisco (20)**
901 Market Street, Suite 400
San Francisco, CA 94103-1735

**Honolulu (Subregion 37, 20)**
300 Ala Moana Boulevard - Room 7-245
Honolulu, HI 96850-4980

**Los Angeles (21)**
888 South Figueroa Street, 9th Floor
Los Angeles, CA 90017-5449

**San Diego (Resident Office, 21)**
555 West Beech Street - Suite 418
San Diego, CA 92101-2939

**Newark (22)**
20 Washington Place, 5th Floor
Newark, NJ 07102-3110

**San Juan (24)**
La Torre de Plaza Suite 1002
525 F. D. Roosevelt Avenue
San Juan, PR 00918-1002

**Indianapolis (25)**
575 N. Pennsylvania Street, Room 238
Indianapolis, IN 46204-1577

**Memphis (26)**
The Brinkley Plaza Bldg., Suite 350
80 Monroe Avenue
Memphis, TN 38103-2481

**Little Rock (Resident Office, 26)**
Metropolitan National Bank Building
425 West Capitol Ave., Suite 1615
Nashville (Resident Office, 26)
810 Broadway - Suite 302
Nashville, TN 37203-3859

Denver (27)
600 17th Street
7th Floor - North Tower
Denver, CO 80202-5433

Phoenix (28)
2600 North Central Avenue, Suite 1800
Phoenix, AZ 85004-3099

Albuquerque (Resident Office, 28)
421 Gold Avenue SW, Suite 310
P.O. Box 567
Albuquerque, NM 87103-2181

Las Vegas (Resident Office, 28)
600 Las Vegas Boulevard South - Suite 400
Las Vegas, NV 89101-6637

Brooklyn (29)
Two Metro Tech Center
100 Myrtle Avenue, 5th Floor
Brooklyn, NY 11201-4201

Milwaukee (30)
310 West Wisconsin Avenue, Suite #700
Milwaukee, WI 53203-2211

Los Angeles (31)
11150 West Olympic Blvd, Suite 700
Los Angeles, CA 90064-1824

Oakland (32)
Oakland Federal Building
1301 Clay Street, Room 300-N
Oakland, CA 94612-5211

Hartford (34)
A. A. Ribicoff Federal Building and Courthouse, 4th Floor
450 Main Street
Hartford, CT 06103-3503
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8.5. **APPENDIX E - NxGEN SIEBEL CUSTOMIZATIONS**

NLRB’s NxGen system has a significant portion of Siebel customizations, new custom components and/or extending/modifying out of the box components. The following tables provide insight into the NxGen customization.

**Applets**

<table>
<thead>
<tr>
<th>Applet Name</th>
<th>Business Component</th>
<th>Title</th>
<th>Type</th>
<th>Scripted</th>
</tr>
</thead>
<tbody>
<tr>
<td>HLS Case Assoc Applet</td>
<td>HLS Case</td>
<td>Cases</td>
<td>Association List</td>
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</tr>
<tr>
<td>HLS Case List Applet</td>
<td>HLS Case</td>
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<tr>
<td>HLS Related Case List Applet</td>
<td>HLS Related Case</td>
<td>Related Cases</td>
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<tr>
<td>NLRB Account Address Pick Applet</td>
<td>CUT Address</td>
<td>Pick Account Address</td>
<td>Pick List</td>
<td>Y</td>
</tr>
<tr>
<td>NLRB Account Case Participant List Applet</td>
<td>NLRB Participant Role</td>
<td>Case Participants</td>
<td>Standard</td>
<td>N</td>
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<tr>
<td>NLRB Account Contact Pick Applet</td>
<td>Account Contact</td>
<td>Pick Contact</td>
<td>Pick List</td>
<td>N</td>
</tr>
<tr>
<td>NLRB Account on Dupe Address List Applet</td>
<td>NLRB Account on Dupe Address</td>
<td>Accounts on Duplicate Address</td>
<td>Standard</td>
<td>N</td>
</tr>
<tr>
<td>NLRB Action Bargaining Unit Assoc Applet</td>
<td>PUB HLS Incident</td>
<td>Add Bargaining Unit</td>
<td>MVG</td>
<td>Y</td>
</tr>
<tr>
<td>NLRB Action Documentum Applet</td>
<td>PUB Lead</td>
<td>Documents</td>
<td>Standard</td>
<td>N</td>
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<tr>
<td>NLRB Action Documentum Sensitive Applet</td>
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<td>Documents</td>
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<tr>
<td>NLRB Action Election Tally Form Applet</td>
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<tr>
<td>NLRB Action Note Applet</td>
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<td>NLRB Activity Form Applet - Admin</td>
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<td>Task</td>
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<td>NLRB Activity Form Applet - Due Date</td>
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</tr>
<tr>
<td>NLRB Activity Form Applet - Due Date Admin</td>
<td>Action</td>
<td>Task</td>
<td>Standard</td>
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</tr>
<tr>
<td>NLRB Activity Form Applet - EOT</td>
<td>Action</td>
<td>Task</td>
<td>Standard</td>
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</tr>
<tr>
<td>NLRB Activity Form Applet - Extension of Time</td>
<td>NLRB EOT</td>
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<td>NLRB Activity List Applet With Navigation</td>
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<td>Tasks</td>
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<tr>
<td>NLRB Activity List Applet With Navigation - Admin</td>
<td>Action</td>
<td>Tasks</td>
<td>Standard</td>
<td>N</td>
</tr>
<tr>
<td>NLRB Address Pick Applet</td>
<td>CUT Address</td>
<td>Pick Address</td>
<td>Pick List</td>
<td>Y</td>
</tr>
<tr>
<td>NLRB All Target Date List Applet - Excuses Main</td>
<td>NLRB Target Date Excuses</td>
<td>Excuses</td>
<td>Standard</td>
<td>N</td>
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<tr>
<td>NLRB All Target Date Screen List Applet</td>
<td>NLRB Target Date</td>
<td>All Target Date Tasks</td>
<td>Standard</td>
<td>N</td>
</tr>
<tr>
<td>NLRB Allegation Assoc Applet</td>
<td>PUB HLS Incident</td>
<td>Add Allegation</td>
<td>MVG</td>
<td>Y</td>
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<td>NLRB e-Gov Appeal Action Validation Process</td>
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<td>NLRB e-Gov Board Action Validation Process</td>
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<td>NLRB e-Gov Case Action Query Process</td>
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<td>NLRB e-Gov Case Document Query Process</td>
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<tr>
<td>NLRB e-Gov Case Participant Query Process</td>
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</tr>
<tr>
<td>NLRB e-Gov Create Action Process</td>
<td>NLRB Action Integration</td>
</tr>
<tr>
<td>NLRB e-Gov Create Action and Task Process</td>
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<td>NLRB e-Gov Create Appeal Action Process</td>
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</tr>
<tr>
<td>NLRB e-Gov Create SR Process</td>
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</tr>
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<td>NLRB e-Gov Create Task Process</td>
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</tr>
<tr>
<td>NLRB e-Gov EOT Integration Main Process</td>
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</tr>
<tr>
<td>NLRB e-Gov EOT Validate Due Date Process</td>
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</tr>
<tr>
<td>NLRB e-Gov Generic Notification Process</td>
<td>NLRB Task Integration</td>
</tr>
<tr>
<td>Workflow Name</td>
<td>Business Object</td>
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<tr>
<td>NLRB e-Gov Single Case Query Process</td>
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<tr>
<td>NLRB e-Gov Subtype_Due Date Process</td>
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<tr>
<td>NLRB e-Gov Validate Due Date Process</td>
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<tr>
<td>NLRB e-Gov e-Filer Query Process</td>
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<tr>
<td>NLRB e-Gov eFile Integration Main Process</td>
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</tr>
<tr>
<td>NLRB eDelivery Service</td>
<td>Action</td>
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**Integration Objects:**

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<tr>
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<th>External Name</th>
<th>XML Tag</th>
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<td>ListOfNlrbAction</td>
</tr>
<tr>
<td>NLRB Action ADG</td>
<td>Action</td>
<td>ListOfNlrbActionAdg</td>
</tr>
<tr>
<td>NLRB Action Integration Bip Query</td>
<td>NLRB Action Integration</td>
<td>ListOfNlrbActionIntegrationBipQuery</td>
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<tr>
<td>NLRB Action Original</td>
<td>Action</td>
<td>ListOfNlrbAction</td>
</tr>
<tr>
<td>NLRB All Cases Integration IO</td>
<td>NLRB Participant Integration</td>
<td>ListOfNlrbAllCasesIntegrationIo</td>
</tr>
<tr>
<td>NLRB C Case for xPression - External</td>
<td>CASES</td>
<td></td>
</tr>
<tr>
<td>NLRB C Case for xPression Integration Object</td>
<td>NLRB xPression Integration</td>
<td>ListOfNlrbCCaseForXpressionIntegrationObject</td>
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<td>NLRB Case Action Integration IO</td>
<td>NLRB Case Integration</td>
<td>ListOfNlrbCaseActionIntegrationIo</td>
</tr>
<tr>
<td>NLRB Case Action Task Integration IO</td>
<td>NLRB Case Integration</td>
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<tr>
<td>NLRB Case CATS</td>
<td>HLS Case</td>
<td>ListOfNlrbCase</td>
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<td>NLRB Case Doc Task Integration IO</td>
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<td>ListOfNlrbCaseDocTaskIntegrationIo</td>
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<td>NLRB Case Documentum</td>
<td>HLS Case</td>
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<td>NLRB Case Integration IO</td>
<td>NLRB Case Integration</td>
<td>ListOfNlrbCaseIntegrationIo</td>
</tr>
<tr>
<td>NLRB Case JCMS</td>
<td>HLS Case</td>
<td>ListOfNlrbCase</td>
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<td>NLRB Case Participant Integration IO</td>
<td>NLRB Case Integration</td>
<td>ListOfNlrbCaseParticipantIntegrationIo</td>
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<td>NLRB Case for xPression</td>
<td>HLS Case</td>
<td>ListOfCases</td>
</tr>
<tr>
<td>NLRB Case for xPression - External</td>
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<tr>
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<td>NLRB xPression Integration</td>
<td>ListOfNlrbCCaseForXpressionIntegrationObject</td>
</tr>
<tr>
<td>Name</td>
<td>External Name</td>
<td>XML Tag</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>---------------------</td>
<td>-------------------------------------------------</td>
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<tr>
<td>NLRB Case for xPression V4 - External</td>
<td>CASES</td>
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</tr>
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<td>NLRB Cases Attachment Integration IO</td>
<td>NLRB Case Integration</td>
<td>ListOfNlrbCasesAttachmentIntegrationIo</td>
</tr>
<tr>
<td>NLRB Create Task Integration IO</td>
<td>NLRB Task Integration</td>
<td>ListOfNlrbCreateTaskIntegrationIo</td>
</tr>
<tr>
<td>NLRB Employee ADG</td>
<td>Employee</td>
<td>ListOfNlrbEmployeeAdg</td>
</tr>
<tr>
<td>NLRB Internal Division ADG</td>
<td>Internal Division</td>
<td>ListOfNlrbInternalDivisionAdg</td>
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<tr>
<td>NLRB PUB Lead IO</td>
<td>PUB Lead</td>
<td>ListOfNlrbPubLeadIo</td>
</tr>
<tr>
<td>NLRB PUB Lead JCMS</td>
<td>NLRB Action Integration</td>
<td>ListOfNlrbPubLead</td>
</tr>
<tr>
<td>NLRB Position Integration IO</td>
<td>Position</td>
<td>ListOfNlrbPositionIntegrationIo</td>
</tr>
<tr>
<td>NLRB Regional Division ADG</td>
<td>Internal Division</td>
<td>ListOfNlrbRegionalDivisionAdg</td>
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<tr>
<td>NLRB Single Case Integration IO</td>
<td>NLRB Case Integration</td>
<td>ListOfNlrbSingleCaseIntegrationIo</td>
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<td>NLRB Task Integration ADG</td>
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<td>ListOfNlrbTaskIntegrationAdg</td>
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<tr>
<td>NLRB Task Integration SD Editability</td>
<td>NLRB Task Integration</td>
<td>ListOfNlrbTaskIntegrationSds</td>
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<tr>
<td>NLRB Task Integration SDS</td>
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<td>ListOfNlrbTaskIntegrationSds</td>
</tr>
<tr>
<td>NLRB Task Integration eDelivery</td>
<td>NLRB Task Integration</td>
<td>ListOfNlrbTaskIntegrationEdelivery</td>
</tr>
<tr>
<td>NLRB e-Filer Participant Integration IO</td>
<td>NLRB Participant Integration</td>
<td>ListOfNlrbE-FilerParticipantIntegrationIo</td>
</tr>
<tr>
<td>NLRB xPression DIS Integration Object</td>
<td>Cases</td>
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</table>
## APPENDIX F – NxGEN WEB SERVICES

### Documentum Web Services:

<table>
<thead>
<tr>
<th>Interface System</th>
<th>WS Name</th>
<th>WS Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>xPression</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WebServiceProxy</td>
<td>CategoriesForUser</td>
<td>get all categories (doc types) from xpression for the given user</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CreateAdminAuthToken</td>
<td>create an xpression token for the admin user</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CreateAuthToken</td>
<td>create an xpression token for the given user</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CreateSSOAuthToken</td>
<td>create an xpression token without providing a password</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CreateDocumentItem</td>
<td>create a document from an xpression template</td>
<td></td>
</tr>
<tr>
<td></td>
<td>DocumentsForCategory</td>
<td>get all templates for the given category (doc type)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>FinalizeWip</td>
<td>publish a WIP (document created from a template) into a Word .docx, and delete the WIP from xpression</td>
<td></td>
</tr>
<tr>
<td></td>
<td>GetDocumentItemInfo</td>
<td>get information about a document created from a template, such as who has it locked</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ReassignDocumentItem</td>
<td>assign a document created from a template to a specified user (users must 'own' in order to edit)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>UnlockWip</td>
<td>forcibly unlock a WIP (does not notify user) via sql</td>
<td></td>
</tr>
<tr>
<td></td>
<td>UpdatePrimaryVariables</td>
<td>update variables in a document created from a template</td>
<td></td>
</tr>
</tbody>
</table>

<p>| Siebel           |                    |                   |                                                               |</p>
<table>
<thead>
<tr>
<th>Interface System</th>
<th>WS Name</th>
<th>WS Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>WebServiceProxy</td>
<td>CreateTask</td>
<td>primary service, create a document task in siebel</td>
<td></td>
</tr>
<tr>
<td></td>
<td>DeleteDocument</td>
<td>delete a document in documentum</td>
<td></td>
</tr>
<tr>
<td></td>
<td>GetEmployee</td>
<td>get employee information from siebel</td>
<td></td>
</tr>
<tr>
<td></td>
<td>GetXPressionCustomerData</td>
<td>get variable information for us in a template document (feeds updateprimaryvariables)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>LockDocument</td>
<td>notify siebel that a document has been checked out in documentum</td>
<td></td>
</tr>
<tr>
<td></td>
<td>UpdateALJAction</td>
<td>update details on an action in siebel (deprecated)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>UpdateCaseDocument</td>
<td>primary service, used for synchronizing task-&gt;document information between siebel and documentum</td>
<td></td>
</tr>
<tr>
<td></td>
<td>UpdateCaseDocuments</td>
<td>used when an inquiry becomes a case, moves documents from an inquiry folder in documentum to a regional folder and changes the case number</td>
<td></td>
</tr>
<tr>
<td></td>
<td>UpdateTask</td>
<td>update task information in siebel</td>
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<tr>
<td>GovDelivery</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interface System</td>
<td>WS Name</td>
<td>WS Method</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>------------------</td>
<td>--------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>WebServiceProxy</td>
<td>ScheduleGovDeliveryEmail</td>
<td>schedule an email to go out via govdelivery (this does not actually send anything)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ScheduleGovDeliveryEmails</td>
<td>like above but schedules multiple</td>
<td></td>
</tr>
<tr>
<td></td>
<td>SendScheduledEmails</td>
<td>send emails that are scheduled to go out via govdelivery (just looks for anything with a schedule date of &lt;= now)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>UpdateEmailStatus</td>
<td>update statistics for the govdelivery emails that were sent, such as opens and clicks</td>
<td></td>
</tr>
</tbody>
</table>

**Siebel Web Services:**

<table>
<thead>
<tr>
<th>Interface System</th>
<th>WS Name</th>
<th>WS Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BI Publisher</td>
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<tr>
<td></td>
<td>NLRB BIP Query</td>
<td>CaseDocketQuery</td>
<td>Get all case docket details</td>
</tr>
<tr>
<td>Documentum</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>NLRB Document State</td>
<td>DocumentLockBy</td>
<td>Get User details that locked the document</td>
</tr>
<tr>
<td></td>
<td></td>
<td>UpdateTask</td>
<td>update task information</td>
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<tr>
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<td></td>
<td>CreateTaskUpload</td>
<td>Create Task from document upload operation</td>
</tr>
<tr>
<td>E-Filing</td>
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<tr>
<td>NLRB eGov Integration Service</td>
<td>CaseDocTask</td>
<td>Lookup document task</td>
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<tr>
<td>CaseParticipant</td>
<td>Lookup participant</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CreateTaskFile</td>
<td>Create E-File task</td>
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<tr>
<td>CreateTaskEOT</td>
<td>Create Extension of Time (EOT) Task</td>
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<tr>
<td>QueryeFiler</td>
<td>Lookup eFilier informaiton</td>
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**SOLR Search Services:**

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<th>WS Name</th>
<th>WS Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Website, Insider, Siebel, Documentum, NxGen Outlook</td>
<td>ActionSearchItemFacade</td>
<td>SecureSearchActionsByCaseNumberPaged</td>
<td>Get Case Actions for a Case</td>
</tr>
<tr>
<td></td>
<td></td>
<td>SecureSearchActionsPaged</td>
<td>Get All Actions</td>
</tr>
<tr>
<td>Facade</td>
<td>Method</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------</td>
<td>--------------------------------------------------</td>
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</tr>
<tr>
<td>CaseDocketFacade</td>
<td>CaseDocketActivities</td>
<td>Get Case Activities for a Case</td>
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<tr>
<td></td>
<td>CaseDocketActivitiesPaginated</td>
<td>Get Case Activities for a Case in pages</td>
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<tr>
<td>CaseSearchItemFacade</td>
<td>ContestedCases</td>
<td>Get all contested cases</td>
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</tr>
<tr>
<td></td>
<td>RecentCases</td>
<td>Get all recently filed cases</td>
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<tr>
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<td>SearchCases</td>
<td>Search all cases</td>
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<tr>
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<td>SearchCasesByNumber</td>
<td>Search Cases by case number</td>
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</tr>
<tr>
<td></td>
<td>TenJCases</td>
<td>Search all 10(j) cases</td>
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</tr>
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<td></td>
<td>Lookup eFilier information</td>
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<td>DocumentTypeFacade</td>
<td>AllDocumentSubtypes</td>
<td>Get all document subtypes</td>
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<td>AllDocumentTypes</td>
<td>Get all document types</td>
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<td>RetrieveDocumentSubtypeByName</td>
<td>Get document subtype by name</td>
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<tr>
<td></td>
<td>RetrieveDocumentSubtypeFromSiebelID</td>
<td>Get document subtype by Siebel ID</td>
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<tr>
<td>ParticipantFacade</td>
<td>AllCaseParticipants</td>
<td>Get all participants for a case</td>
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</tr>
<tr>
<td></td>
<td>AllParticipants</td>
<td>Get all participants</td>
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</tr>
<tr>
<td></td>
<td>SearchParticipants</td>
<td>Search in all participants</td>
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</tr>
</tbody>
</table>
8.7. APPENDIX G – NxGEN HARDWARE/SOFTWARE ARCHITECTURE DIAGRAM