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TYPE: Directive

SUBJECT-NO: ADP-4

TRANSMITTAL-NO: 377

SUBJECT: Standardization of Microcomputer Software

ISSUED-DATE: 09/30/87

APPROVAL: Jed D. Christensen, Director

PURPOSE: 1. Purpose.

This directive provides policy and procedural guidance for all Office of Surface Mining Reclamation and Enforcement (OSMRE) activities concerning the acquisition, utilization, and support of commercially available, off-the-shelf microcomputer software. This directive specifically designates a list of core software that will make it possible to standardize information within OSMRE, assure intra-agency exchange of information, and provide an adequate level of technical support and timely, coordinated upgrades of this software. The designation of core software serves as an integral part of OSMRE's configuration management and quality assurance process.

DEFINITIONS: 2. Definitions.

a. Core Software - Microcomputer software that will be considered the standard software to be used in the following application categories: word processing, spreadsheets, database management, communications, and any additional categories specified in Appendix A. The core designation includes both the name and the version (release) of the software - different versions (releases) of software of the same name will not be designated as core software.

b. Microcomputer - Any IBM-PC compatible computer running on a PC-DOS, MS-DOS, or a SPERRY-DOS operating system.

c. Non-core software - Any microcomputer software that is not included on the list of OSMRE core software (Appendix A).

d. Technical Support - Any assistance in the use of microcomputer software which relates to installation, training, or applications development.

e. Configuration management and quality assurance - The methodology for identifying and controlling key components of a data processing activity. Key components include hardware, software, documentation, and data.

POLICY-PROCEDURE: 3. Policy/Procedures.

a. Responsibilities

(1) The Deputy Director, Administration and Finance, has overall programmatic responsibility for the information systems management area.

(2) The Assistant Director; Information Systems Management, has responsibility for the development and implementation of policy, procedures, and activities associated with information systems management.

The Assistant Director, ISM, is further responsible for determining the software that will constitute OSMRE core software (Appendix A), and for periodic review of new technology to ensure that this software is the most effective available to satisfy OSMRE's needs. This includes designating the version of core software to be used; making decisions concerning when and how to change core software and whether to purchase manufacturers' technical support services and warranties;

and establishing procedures to upgrade existing core software, or to obtain new core software on a case-by-case basis, where necessary.

(3) The ISM Software Inventory Coordinator, under the direction of the Assistant Director, ISM, is responsible for establishing and maintaining an OSMRE inventory of all agency software to include, at a minimum, the software product name, version (release), location of user, and whether the software is protected by license or copyright.

(4) Activity Supervisors are responsible for submitting written evaluations to the ISM Software Inventory Coordinator of non-core software being used in their installation within 90 days of receipt. Activity Supervisors are considered for purposes of this directive to be Assistant Directors, Field Office Directors, and Division Chiefs.

(5) Users of all software products, both core and non-core, are responsible for complying with all license agreements, copyright provisions, and manufacturers' registration requirements and for maintaining all original diskettes, manuals, and other materials contained in the original package.

b. Policy

(1) OSMRE and its employees will adhere strictly to the license agreements and copyright provisions of all microcomputer software.

(2) Each OSMRE microcomputer will be provided with the core software required to perform its designated functions.

(3) OSMRE will fully support all core software with applications assistance, technical training, and product maintenance.

(4) All software purchases in excess of 250 dollars per copy must be coordinated through the ISM Software Inventory Coordinator to ensure that existing copies of the required software or alternative software that meets the user requirements are not available within OSMRE.

(5) Unless specifically authorized by the Assistant Director, ISM, all non-core software requested as a substitute for core software must be capable of producing a data format that is either interchangeable or compatible with the core software in the same application category (i.e., all database software must be capable of providing a data format interchangeable with the core database software, etc.)

(6) OSMRE recognizes the special requirements for software operating on a local area network (LAN) and, whenever possible, will obtain LAN versions of core software.

c. Procedures.

(1) Obtaining a copy of core software listed in Appendix A:

(a) Request a copy of the software from the ISM Software Inventory Coordinator.

(b) If the software is not available from inventory or other OSMRE sources, the ISM Software Inventory Coordinator will determine the most effective and efficient means to satisfy OSMRE requirements.

(2) Obtaining a copy or upgrade of non-core software that falls within one of the application categories listed in Appendix A:

(a) Assure compliance with section 3.b.4, if applicable.

(b) The software is procured through the requesting office's procurement agent or contracting officer. The requestor prepares a requisition in accordance with established OSMRE procurement procedures and authorities. Each purchase of software in this category must include either a statement that the software meets the requirements of 3.b.5 above, or a statement from the Assistant Director, ISM, that waives the requirements of that paragraph.

(c) Forward an informational copy of the approved requisition and required statement or waiver to the ISM Software Inventory Coordinator.

(3) Obtaining a copy or upgrade of non-core software that does not fall within one of the application categories listed in Appendix A:

(a) Assure compliance with section 3.b.4, if applicable.

(b) The software is procured through the requesting office's procurement agent or contracting officer. The requestor prepares a requisition in accordance with established OSMRE procurement procedures and authorities.

(c) Forward an informational copy of the approved requisition to the ISM Software Inventory Coordinator.

(4) Requesting changes, updates, or additions to the OSMRE core software list:

(a) Send a letter with the request to the Assistant Director, ISM, along with a brief explanation of the request.

(b) At the discretion of the Assistant Director, ISM, a user advisory group including representatives from both Headquarters and Field Offices may be formed to consider updating core software, as listed in Appendix A, based on suggestions or requests received or on any advances in technology that have occurred since the last update.

REPORTING-REQUIR: 4. Reporting Requirements.

None

REFERENCES: 5. References.

None

EFFECT-OTHER-DOC: 6. Effect on Other Documents.

None

EFFECTIVE-DATE: 7. Effective Date.

Immediately upon approval.

CONTACT: 8. Contact.

Chief, Division of Systems Development and Implementation, Information Systems Management, 1951 Constitution Avenue, NW., Washington, DC 20240.

ATTACHMENTS: APPENDIX A

Office of Surface Mining Reclamation and Enforcement Microcomputer Core Software

1. Operating System:

PC-DOS, version 3.2 or lower
MS-DOS, version 3.2 or lower
SPERRY-DOS, version 3.1 or lower

2. Word Processing:

Word Perfect, version 4.2

3. Spread Sheet:

Lotus 1-2-3, version 2.01

4. Database Management:

dBase III+, version 1.1 or lower

5. Telecommunications:

Crosstalk XVI, version 3.61 or lower