**ATRF Project**

**Project:** Application Management Services (AMS) and Application Development Services (ADS)

**Project Objectives**

ATRF is seeking to establish a strategic relationship with a Vendor that has the resource depth, maturity, and innovative capacity to design, build and provide AMS and ADS services for its new Employer Portal.

The project will deliver:

* A stable, robust, and mature software solution, either installed on premises or as a hosted solution (externally hosted solutions will be managed by ATRF);
* Thoroughly trained business and technical staff; and
* Quality system documentation and support Materials.

**Collaboratively the parties will:**

* Within the context of ATRF’s mandate, modernize ATRF’s legacy Employer Reporting Application (ATRF–CS);
* Increase ATRF’s Employer satisfaction by designing and delivering client-centric, easy-to-use, personalized services that are similar to other evolving industry experiences and expectations; and
* Deliver a flexible relationship between the parties, responsive to demands and evolving business needs while promoting a culture of innovation and collaboration.

**When complete the new Employer Portal will:**

* Provide a centralized, web-based portal for ATRF to obtain, validate and timely record all member and contribution data for use in all benefit calculations and pension administration processes;
* Address the technical and operational challenge of Employers having to install, update, back up, and secure the software application on their own computers with aged technology and user interface;
* Be a core component of one seamlessly integrated system that integrates Employer reporting, validation, reconciliation, remittance and tracking of data and contributions, including validations to ensure that data is fit-for-use at the point of submission; and
* Include additional functionalities that will enable Employers to interact with ATRF more easily, such as:
  + enable secure 2-way communication between Employers and ATRF;
  + document management and upload capabilities;
  + self-service reporting and maintenance capabilities;
  + dashboard view of reports and payments; and
  + embedded knowledgebase and process wizards, to support Employer
  + reporting and contribution remittance.

**Project Scope**

Preference will be given to solutions that allow ATRF to meet the unique and evolving needs of its stakeholders (i.e. customizable solutions which support non-proprietary software interfaces). The project will consist of the following phases / components:

**Phase 1 – Employer Portal Build (Legacy Pension Engine Integration, Release A)**

In this phase, the Vendor will be responsible for designing and implementing ATRF’s new Employer Portal. The new portal will integrate with ATRF’s legacy pension engine, PMBS. The Vendor will be required to provide an ADS Team with the appropriate, well balanced mix of skills and experience capable of delivering the specified ADS Services in an efficient and effective manner.

**The scope of work includes:**

* **Project Planning**
  + Establish common understanding of the project, objectives, stakeholders, establish information repository, confirm team, develop project charter and detailed project plan.
* **Confirm Current and Future State Design and Requirements**
  + Review and confirm functional and non-functional requirements.
  + Confirm Release A – Phase 1 vs Release B – Phase 3 scope requirements.
  + Review relevant Employer reporting current and future state business process design documents.
  + Complete up to four (4) Employer engagement workshops.
* **Design Technical Architecture**
  + Design the target technology and data architecture that enables the realization of the new business requirements and the addition of future integrations, data elements, or sources as required.
  + Assist in procurement and setup of hardware resources, systems and / or software as required.
  + Maintain non-production environments to support the application design, build, test, and deployment capabilities.
  + Assist in the setup and management of the production environment.
* **Application Design, Build and Test**
  + Create wireframes (site, functional, login) as required to demonstrate overall solution structure, functionality, interfaces and the relationships between site pages prior to design approval.
  + Design and build multiple dynamic web pages with associated web services integrated back to the existing PMBS system in support of business requirements.
  + Design and implement additional data elements and functionalities as required.
  + Build unit and integration tests.
  + Build and apply DevOps infrastructure and processes in the automated testing, compilation, and deployment of the developed solution to multiple environments. The DevOps pipeline will include automation of:
    - Unit testing
    - Static application security testing (SAST)
    - Web accessibility compliance testing (WCAG compliance)
    - Application smoke test to verify build was successful
    - Regression testing to verify critical functions operational
    - Browser testing to verify system runs on all supported browsers
  + Perform non-functional testing including performance testing, recovery testing, dynamic application security testing (DAST) and operations testing.
* **Release Planning**
  + Develop business, system and application readiness checklist
  + Develop training, user acceptance testing, and implementation/rollback plans
  + Complete designated ATRF staff training & support stakeholder training
  + Confirm / verify business, system and application readiness
* **Release**
  + 60-day Warranty Period
  + Post-implementation review and project closure

**Phase 2 Operations (Tier 2 / 3 AMS)**

After the completion of Phase 1 and before the completion of Phase 3 the Vendor will be required to provide Tier 2 and Tier 3 AMS support for the Employer Portal Application. The Vendor will be required to provide an AMS Team with the appropriate, well balanced mix of skills and experience capable of delivering AMS in an efficient and effective manner.

ATRF will provide Tier 1 Help Desk Services that provides the first point of contact for all users. The Vendor shall provide Tier 2/3 AMS support in English, on Business Days. Tier 2/3 AMS support Services can be delivered remotely but the Vendor must be available to facilitate on-site meetings to perform troubleshooting, and/or root cause analysis activities where required. Calls related to Services delivered by the Vendor will be directed to the Vendor based on prescribed processes agreed to in writing by the parties. ATRF and the Vendor will use the same software for logging and tracking calls and call status. ATRF will provide the Vendor with licenses for ATRF’s tracking software and the Vendor shall integrate with this software. ATRF and the Vendor will communicate and share information and status of the resolution of incidents and problems.

The Vendor’s personnel responding to calls must be able to understand, clarify, analyze, and clearly communicate with users about the issue. The Vendor shall record reported problems and incidents in the tracking tool, triage their severity level and assign issues to the appropriate Vendor personnel for resolution.

ATRF’s Help Desk will maintain ownership of problems and incidents from the first point of contact until the ticket is closed, including ensuring that problems are resolved within target timeframes.

**Phase 3 – Employer Portal Update (Updated Pension Engine Integration, Release B)**

In this phase, the Vendor will be responsible for completing the implementation of the employer Portal including integrating the portal with ATRF’s new Pension Engine which is being delivered under a separate initiative. The work will require updating system interfaces, addition of new data requirements and where required changes to employer Portal workflow. At the conclusion of this phase the Employer Portal will interface to ATRF’s updated Pension Administration System. The Vendor will be required to provide an ADS Team with the appropriate, well balanced mix of skills and experience capable of delivering the specified ADS Services in an efficient and effective manner.

**The scope of work includes:**

* **Project Planning**
  + Establish common understanding of the project, objectives, stakeholders, establish information repository, confirm technical team requirements, develop Project Charter, and Project Plan.

• **Application Design, Build, and Test**

* Create wireframes as required to demonstrate overall solution structure, functionality, interfaces and the relationships between site pages prior to design approval.
* Complete the design, modification, and/or build additional dynamic web pages with associated web services integrated back to the updated pension Engine in support of business requirements.
* Design and implement additional data elements and functionalities (as Required).
* Modify work flows resulting from the implementation of ATRF’s new pension Administration System (as required).
* Build and/or modify unit and integration tests.
* Maintain non-production environments to support the application design, build, test, and deployment capabilities.
* Assist in the setup and management of the production environment.
* Build and/or modify DevOps infrastructure and processes in the automated testing, compilation, and deployment of the developed solution to multiple environments.
* Enhance existing test suites (e.g., regression testing, accessibility testing, browser testing) to cover new capabilities

• **Release Planning**

* Update business, system and application readiness checklist
* Develop training, user acceptance testing, and implementation/rollback plans
* Complete designated ATRF staff training & support stakeholder training
* Confirm / verify business, system and application readiness
* **Release**
* 60-day Warranty Period.
* Post-implementation review and project closure.