



Office of Personnel Management (OPM) – Microsoft Technologies Enterprise Consulting, Technical Support, and Enhanced Problem Resolution Services

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1 Technical Approach (Summary Section)

The Office of Personnel Management's (OPM), Office of the Chief Information Officer (OCIO) is seeking Microsoft Engineering and Technical Support Services that will meet the unique needs of the OPM's Program Office and seek out ways to introduce automation that improve business processes. AIS provides a tailored DevOps approach to automate business operations to increase process efficiencies and drive down costs. We ensure quality and security by adhering to best practices and standardizing configuration management. Our automation strategy produces reliable outcomes that meet or exceed expectations.

Our approach to building new solutions for OPM encompasses a dual focus on understanding the intricacies of their business processes and the complexities of the intended technologies. By combining this comprehensive understanding, we empower OPM to streamline its operations through the development of automated enterprise-level applications. This enables OPM to prioritize its mission over manual steps, fostering efficiency and effectiveness in its daily workflows. We will apply our expertise with OPM's existing processes and environments and combine that with our decades of expertise in Microsoft and Microsoft specializations. AIS' approach and experience, detailed in this volume, will ensure the seamless delivery of automated applications to drive OPM's missions.

Why AIS?

- ✓ Staff with OPM clearances available to begin immediately
- ✓ **ISO 9001:2015 certified Quality Management System**
- ✓ **CMMI Level III**
- ✓ **Microsoft Gold Certified for Cloud Platform and Cloud Productivity, Application Development, Application Integration, and DevOps**
- ✓ Proven ability transforming customers into a cloud first, software led organization
- ✓ Hundreds of personnel ready to deliver cloud innovation
- ✓ **2018 Microsoft US SI of the Year for Azure Performance**
- ✓ **2020 Microsoft Power Apps and Power Automate Partner of the Year**

1.1 Our Understanding of this Requirement

One of the key focus areas within OPM OCIO is the "*Sprint to the Cloud*." Sprinting to the cloud includes cloud-based services and processes coupled with automation. In today's OPM environments, disparate processes between various program offices have resulted in process breakdowns, or insufficient or incomplete data, as well as a lack of interconnectivity and communication between offices. Automating key business functions within the enterprise (e.g., enterprise change management or human resource management) and providing superior support for those processes will produce compounding benefits.

Our organization, and the staff we will provide to support this program, are intimately familiar with the technical landscape at OPM and the challenges OPM faces. This awareness will guide our team in delivering 'Sprint to the Cloud' solutions faster. During task execution and assignments, our staff will work closely with OPM leadership to identify strategic projects which will have the greatest impact.

We have already started our "Sprint to the Cloud" journey with OPM. As part of our most recent OPM project (SBM Application Modernization), we built seven cloud-based applications to replace the existing applications on the Mainframe server. We worked alongside OPM stakeholders to re-imagine business processes to bring the applications to life. Two of these applications were built in Dynamics 365 which allowed us to use shared tables in Dataverse. Using Dataverse reduce the amount of discrepant or duplicate data in these instances. One of the applications was built using a custom Model-driven Canvas application to support auditing activities, with a focus on scalability to be able to take this application to an enterprise-wide auditing solution. Finally, the remainder of the applications were built using a mixture of Canvas apps, Power Automate, SharePoint Online, Exchange Online, and Dataverse. The result for OPM has been increased data integrity and availability, along with increased security. These applications

spanned across multiple different program offices. Throughout execution, we worked closely with OPM's leadership to develop Dynamics and Power Platform best practices relative to provisioning and configuration.

Our experience affords our team, and the staff that will support this project, a deeper understanding of OPM's mission, a more comprehensive view of the technical challenges that they will encounter, and insight into the intersection between OPM's offices/functions.

1.2 Our Technical Expertise Meeting these Requirements

OPM is taking a more strategic approach to technical implementations across the agency. In a chain of integrated work streams, it is important to know what technologies will impact business processes. AIS will develop a tailored approach to problem resolution through process creation or re-imagining, automation, and application development. Automation will be a cornerstone of our technical strategies. As a long-tenured Microsoft Gold Partner, AIS has proven success introducing automation on the Power Platform suite and Dynamics 365 platform for other federal agencies beyond OPM (DoD, DHS, Treasury, and others). AIS has successfully supported multiple solution development projects at OPM using our in-depth understanding of OPM systems and processes. This understanding allows us to quickly ramp up and drive rapid solution development. Our experience on similar projects at OPM has led to the creation of OPM-specific resources and templates that will help accelerate project success through the following technical approach.

➤ Plan

AIS uses an Agile Scrum methodology for development projects allowing for continual delivery and improvement. We work to identify stakeholders early in the process to reduce requirements defects and improve overall impact. OPM systems or processes which are owned by a specific program office are often used by other systems and program offices, creating a network of dependencies. For example, the OPIT/PD application for background checks is owned by Facilities, Security, and Emergency Management (FSEM) but is used by programs offices including HRS. Our knowledge of these interconnections/interdependencies allows us to identify key 'ownership stakeholders as well as those who might be impacted by a change downstream. This risk avoidance will be a valuable asset for OPM.

During execution, we will use our existing knowledge of OPM to create a tailored Agile approach for each application or feature. The key to creating this approach will be in the scoping of each project. It has been our experience with OPM that you must take a wholistic look at the overall business process and supporting functions to create a solution that supports that process, but also be able to make recommendations for process improvements that can be recognized through the utilization of the Power Platform Suite. Each development project will be a fully scoped development effort to re-imagine existing business processes and develop the applications and automations to support and improve these processes.

We will use existing OPM enterprise tools to execute our approach and ensure clarity across all project stakeholders. OPM currently uses Azure DevOps (ADO) for project management activities. We have used ADO across multiple OPM projects and are familiar with the configuration and usage of the boards at OPM. Figure 1 illustrates our standard Agile process where we will engage with leadership and stakeholders throughout the process.

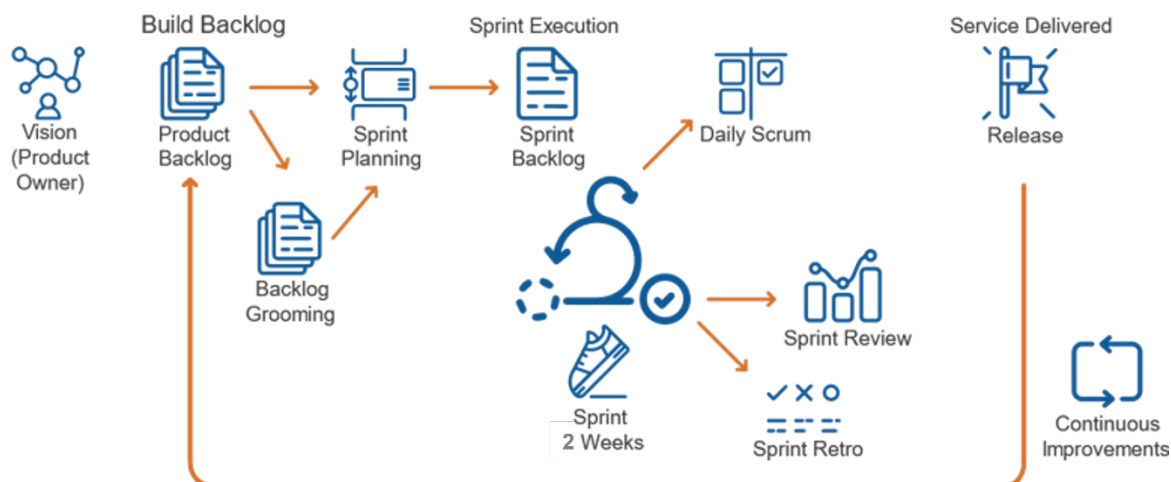


Figure 1: Agile Methodology. Using Agile processes allows us to better prioritize and re-prioritize development tasks and activities based on changing needs and requirements.

We have developed planning processes and templates to understand existing data, how it will be used or presented in the new process, documentation of migration needs, and more to ensure that not only are we viewing the process, but also keeping the data in mind. This means also understanding the permissions and roles that need to be applied and the licenses users will need.

➤ Design

When designing solutions, AIS ensures that all development is user-centric ensuring usability in conjunction with security, data integrity, access, and more. There are multiple important considerations when developing solutions for OPM that must be reviewed when engaging in a new development project.

Availability and Licensing Costs

Currently, OPM uses enterprise G5 licenses and elevated Power Platform/Dynamics licenses.

Our understanding of the existing licensing structure will allow us to develop applications and solutions at the lowest cost by ensuring our design strategy takes into account what can be done with the enterprise licenses and what would require additional funding for licenses or consumption-based products.

Due to our existing and previous work at OPM, we are very familiar with the tools available in OPM's M365 environment, licensing levels, shared resources, and configurations. Our Microsoft Power Platform licensing experts can identify development paths using current licensing structures first. This prevents additional licensing/consumption costs. If the design requires additional licenses/consumption, we present options to OPM leadership along with justifications to best support decision making.

Architecture Design

An iterative design process allows us to better understand the need of the program offices by designing an initial architecture based on requirements that we can then work to refine. A key support to the solution architecture is understanding the business process the solution will be supporting. We provide a business process diagram to help business users understand the new process, automation triggers, and pieces of the process external to the tools. These diagrams help ensure the architecture supports the desired process.

The development projects we have worked on thus far have required multiple different environments to be provisioned across the M365 platform, email addresses to be created, access and permissions to be added for the development team and stakeholders. This requires understanding of the OPM processes with their help desk while also knowing the correct people to route requests through for the various things. As different portions of the M365 environment are handled by different administrators and engineers, our knowledge of these key players will allow us to more quickly on-ramp a project.

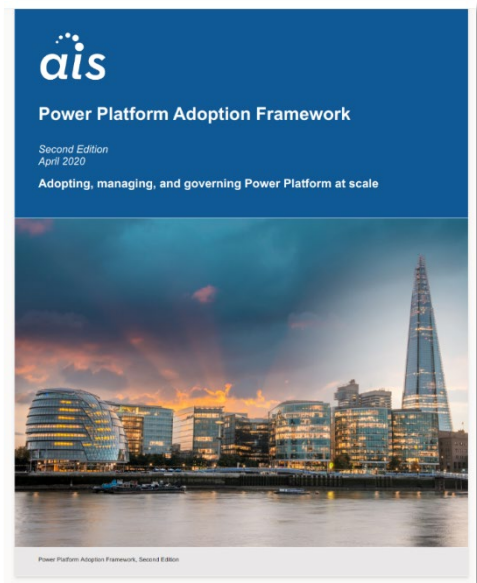
Microsoft Power Platform and Dynamics environments utilize a shared Dataverse environment, allowing for the sharing of standard data tables. AIS has been responsible for building several shared tables within the Dynamics 365 environment at OPM. We have two shared tables, Accounts and Contacts, in the Dynamics365 environment that are currently being used by CLIA (Congressional and Legislative, and Intergovernmental Affairs) and the OPIT (Office of Personnel Investigations Tracking). These shared tables increase data integrity, data consistency, and the ability to use that data for other applications or purposes if needed. We have implemented a security model to ensure that the data in these tables is only accessible by the appropriate people/groups.

➤ Development

OPM is already utilizing the Power Platform suite supporting a variety of application types such as Canvas Applications, Model-Driven Applications, and Dynamics365. The complexity of these applications can vary along with the processes the application supports. Utilizing the Power Platform Suite allows for low-code, no-code solutions which will require less effort.




Once we have an understanding of the process(es) that require automation and have designed the build, we will begin development. There are many paths that development can follow, and these will be scoped differently with differing levels of effort. For backend or simple process automation that can be completed in MS Power Automate, we will develop the appropriate logic and flows in a [DEV] environment before pushing to [TEST] environment for testing. We will continue this process of developing in [DEV] and pushing to [TEST] until we are ready for formal UAT testing if it is required, at which point we will push to a [STAGING] environment. Once the testing and validation is complete the solution will be pushed to [PRODUCTION] and will be live.

AIS has a rich history with Power Platform. We are Microsoft's Power Platform Partner for 2018, and the authors of the *Power Platform Adoption Framework*. That framework is based on Microsoft's *Success by Design* methodology for Dynamics 365 and the Microsoft North Star Architecture for Power Platform. Our approach for optimizing Power Apps and Power Automate Power Platform is driven by our Power Platform Adoption framework.



During project execution, we review solution designs and implementation plans to incorporate best practices of the Power Platform Delivery Framework. The Power Platform Delivery Framework includes key design considerations such as:

- Gathering early security accreditation measures/requirements
- Addressing Data Loss Prevention (DLP) policy needs
- Accounting for solution data model design activities in project planning
- Include the design of the security model for each solution
- User Experience (UX) is more than User Interface (UI)
- Evaluate data integration components within OPM's data ecosystem
- Planning User Acceptance Testing (UAT) in close cooperation with all project stakeholders

 <p>Enterprise Consulting Experience</p> <p>AIS supported <i>OPM Chief Information Officer's (CIO) strategic initiatives</i> in designing, implementing, optimizing, and enhancing Microsoft's enterprise products at OPM. Our team provided consulting services to Enterprise Infrastructure Services (EIS), IT Security Management (Cybersecurity), Human Resources Solutions (HRS), OPM's Human Capital Data Management and Modernization (HCDMM), Office of Procurement (OPO), and Retirement Services (RS) program offices. As a result of these services, OPM has been able to meet key initiatives for IT modernization, which leverage IT to elevate productivity and enhance collaboration while simplifying operations, enhancing cybersecurity, and reducing costs.</p>	<p>Results & Benefits</p> <ul style="list-style-type: none"> ✓ Transform with a Cloud First strategy by migrating OPM's business solutions from on-premises data centers to the cloud ✓ Lead in Supporting the Hybrid Workforce by offering OPM staff the productivity resources needed to support and empower today's hybrid workforce ✓ Improve Retirement Services experiences by modernizing platforms to create technology solutions and user interfaces that offer comprehensive access to retirement services securely and intuitively ✓ Enhance Cybersecurity by implementing—and staying current with—the latest cloud-based security tools to protect OPM systems and data ✓ Improve data access and utilization to enable and support data-driven decision making
 <p>Technical Support Experience</p> <p>For GEICO, AIS built a full encompassing solution and managed services team for a large commercial customer to meet the objective to provide technical services to support enterprise scale data engineering services. Solution scope included data ingestion pipelines and data transformation ETL processes end-to-end from disparate sources to the enterprise landing zone. Requirements included all telemetry operations, issue detection and resolution, and enhancement opportunity identification. AIS developed a scalable solution to support hundreds of pipelines and services including source onboarding. Our teams implemented automated solutions that reduced overall incidents and resolution times saving costs and maintaining confidence.</p>	<p>Results & Benefits</p> <ul style="list-style-type: none"> ✓ Reduced consumption costs through tailored source onboarding ✓ Implemented proactive automated self-healing solutions to reduce incidents by 300% ✓ Reduction in mean time to problem resolution from 30 hours to 3 hours
 <p>Enhanced Problem Resolution Services Experience</p> <p>Our teams played a critical role supporting the Online Retire Application (ORA), OPM Zero Trust, UEBA, SOAR, and HIH contract. For ORA, we corrected 200+ failed workflows delivering a Minimal Viable Product (MVP) to the Retirement Services customer. We assisted OPM with onboarding log sources, sensor data, and other data into Azure Sentinel in support of OMB 21-31 requirements. The consolidation and transfer of over thirty log sources positioned the enterprise to use Microsoft Sentinel as the organization's primary Security Information Event Management (SIEM) system. This work enabled the retirement of the costly legacy Cybersecurity & Risk Management Solution (RSA).</p>	<p>Results & Benefits</p> <ul style="list-style-type: none"> ✓ Modernized user experience using business process flow features of Dynamics ✓ Simplified cumbersome business processes ✓ Upgraded application performance ✓ Decreased page load time by eliminating long running data processes—greatly improved user satisfaction ✓ Reduced consumption costs through tailored source onboarding ✓ Implemented proactive automated self-healing solutions to reduce incidents by 300% ✓ Reduction in mean time to problem resolution from 30 hours to 3 hours