

Workforce Inventory Tracking System (WITS) Handbook

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Purpose

The Office of Management and Budget (OMB) has developed the Workforce Inventory Tracking System (WITS) as a data repository for agencies' inherently governmental and commercial workforce inventories. This document is intended to define the system's functionality, describe data fields, and describe the process for inputting data. For policy guidance regarding information that must be loaded into WITS, please see OMB's annual guidance document, *Inventory Guidance Memorandum to Heads of Agencies*, available at:

<http://www.whitehouse.gov/omb/procurement/fair-index.html>

Fiscal Year (FY) 2007 and beyond workforce inventory data must be either uploaded in Extensible Markup Language (XML) format or manually inputted into WITS.

Access

CSTS/WITS is an online database application, accessible only through the OMB MAX Homepage. You must register and be approved for a user account and password before gaining access to the application.

The OMB MAX Homepage is located at: <https://max.omb.gov/maxportal/>

Users may log in or register for a user account at the OMB MAX Homepage. When completing the online registration form, select the “CSTS/WITS External” box under the *Please check the application(s) needed* section.

Once logged into the OMB MAX Homepage, select the link for *CSTS/WITS External (CWE)* to access the database.

Home Page

Upon entering CSTS/WITS from the OMB MAX website, users will be brought directly to the Home page. Users can always return here from anywhere in the application by clicking the “Home” button at the top of the screen.

There are may be up to two tabs on the Home page, depending on your access rights: 1) Competitive Sourcing (CSTS) and 2) FAIR Inventory (WITS). To access WITS, make sure that the *FAIR Inventory* tab is selected.

The Home page lists all agency workforce inventories that have been loaded into WITS by fiscal year. Each fiscal year (FY) inventory generally consists of multiple line items of inventory data, each of which contain data pertaining to an activity/function. The last four columns identify when an inventory was last updated and by whom, the date when the inventory was certified by the agency (submission to OMB for approval), and the date it was approved by OMB for future publication in a Federal Register notice of public availability. To view an existing FY inventory left click on the row of the FY inventory that you would like to view.

You may add a new FY inventory from the home page (see pages 8-9).

Home Page

 OFFICE OF MANAGEMENT AND BUDGET

COMPETITIVE SOURCING AND WORKFORCE INVENTORY
Tracking System

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▶ **Competitive Sourcing Tracking System and Workforce Inventory Tracking System**

Competitive Sourcing FAIR Inventory

 Add new fiscal year for

Period	Agency	Last Updated	Modified By	Certified	Approved
2005	Department of Government Services		dgsalltest		
2004	Department of Government Services				
2003	Department of Government Services				
2002	Department of Government Services				

XML Upload versus Manual Input

WITS is intended as a central repository for agency workforce inventory data. Data may be loaded into WITS in one of two ways:

XML Upload

Most agencies with many rows of data will load their inventory data into WITS in XML format. Agencies will need to convert their inventory from its original format (e.g., Excel, Access, Oracle, etc.) into the XML format (schema) provided at http://www.whitehouse.gov/omb/procurement/fair/index_csts.html in order for the data to be uploaded into WITS. Once converted into XML and saved locally, agencies will first create a blank fiscal year inventory on the WITS Home Page, and then upload the XML file using the *Upload XML* function. Next, click the *Browse* button to select the XML file for upload as you would an attachment for an e-mail. Finally, click the *Upload document* button to upload the XML file into WITS, populating the inventory data.

See pages 8-15, 21-29.

Manual Input

Many agencies with only a few rows of data may choose to manually input their inventory data into WITS.

See pages 8-9, 16-29.

Adding a New Fiscal Year Inventory

Irrespective of which method of data input you choose – either upload using an XML file or through manual input – you must first create the fiscal year template to which the inventory data will be inputted. To add a new fiscal year inventory template, select your agency from the drop-down menu at the top of the tab, and click the *Add new fiscal year for* link, just to the left of the drop-down menu. Once the inventory template is added, you may upload your inventory using XML, or manually input the inventory.

See the next page for an illustration of how to add a new fiscal year inventory template.

To read about XML inventory data upload, go to pages 10-15, 21-29.

To read about manual data input, go to pages 16-29.

Adding a New Fiscal Year Inventory



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► **Competitive Sourcing Tracking System and Workforce Inventory Tracking System**

Competitive Sourcing

FAIR Inventory

 [Add new fiscal year for](#)

▼
▲
Advisory Council on Historic Preservation

- Defense Nuclear Facilities Safety Board
- Delta Regional Authority
- Denali Commission
- Department of Agriculture
- Department of Commerce
- Department of Defense--Military
- Department of Education
- Department of Energy
- Department of Health and Human Services
- Department of Homeland Security
- Department of Housing and Urban Development
- Department of Justice
- Department of Labor
- Department of State
- Department of Transportation
- Department of Veterans Affairs
- Department of the Interior
- Department of the Treasury
- Election Assistance Commission
- Environmental Protection Agency
- Equal Employment Opportunity Commission
- Executive Office of the President
- Export-Import Bank of the United States
- Farm Credit Administration
- Farm Credit System Insurance Corporation
- Federal Communications Commission
- Federal Deposit Insurance Corporation
- Federal Election Commission
- Federal Emergency Management Agency
- Federal Financial Institutions Examination Council Appraisal

Modified By	Certified	Approved
HOMAS KAPL		
Carol Boyle		
ALEXANDER MAUMIT		
Mariane Wilhelm		
MORI BARBEE		
HOMAS KAPLAN		
ALEXANDER MAUMIT		
Carol Boyle		
RUC TRAN		

Period	Agency
2006	Department of Tra
2006	Social Security Ad
2005	Department of Hor
2005	Department of Lab
2005	Department of Sta
2005	Department of Tra
2005	General Services A
2005	Social Security Ad
2005	United States Holo
2004	Advisory Council o
2004	Appalachian Regio
2004	Architectural and T
2004	Barry Goldwater S Foundation
2004	Broadcasting Board of Governors

Step 1: Select your agency from the drop-down menu.

Step 2: Click the *Add new fiscal year for* link.

Loading Inventory Data Using Extensible Markup Language (XML)

Most agencies with many rows of data will load their inventory data into WITS in XML format. Agencies will need to convert their inventory from its original format (e.g., Excel, Access, Oracle, etc.) into the XML format (schema) provided at http://www.whitehouse.gov/omb/procurement/fair/index_csts.html in order for the data to be uploaded into WITS. Once converted to the proper XML file format, uploading inventory data is accomplished by following these three steps:

STEP 1: From the new fiscal year inventory template, select the *Upload XML* function.

STEP 2: Next, click the *Browse* button to select the XML file for upload as you would an attachment for an e-mail.

STEP 3: Finally, click the *Upload document* button to upload the XML file into WITS, populating the inventory data.

To select a workforce inventory, highlight and click on the fiscal year you would like to view or edit.



Department of Homeland Security FY2006 Inventory

- + Add New
- 📞 Edit Contact
- 👉 Certify
- ✖ Delete Agency Filing

Download		Filing	Justification	Approval
↓ XML	↓ EXCEL			
Upload				
↑ XML	↑ DOC	↑ DOC		
Upload Date				

Row #	Action	Last Updated	Sequence Number	Bureau	City, State, Country	Total FTE	Activity Code	Status / Reason Code	First Year
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STEP 1: Click the Upload XML button



► **Department of Homeland Security FY2006 Inventory - Upload XML data**

Select XML document:

Browse...

[Back to inventory](#)

Upload document

STEP 2: Click the
Browse button...

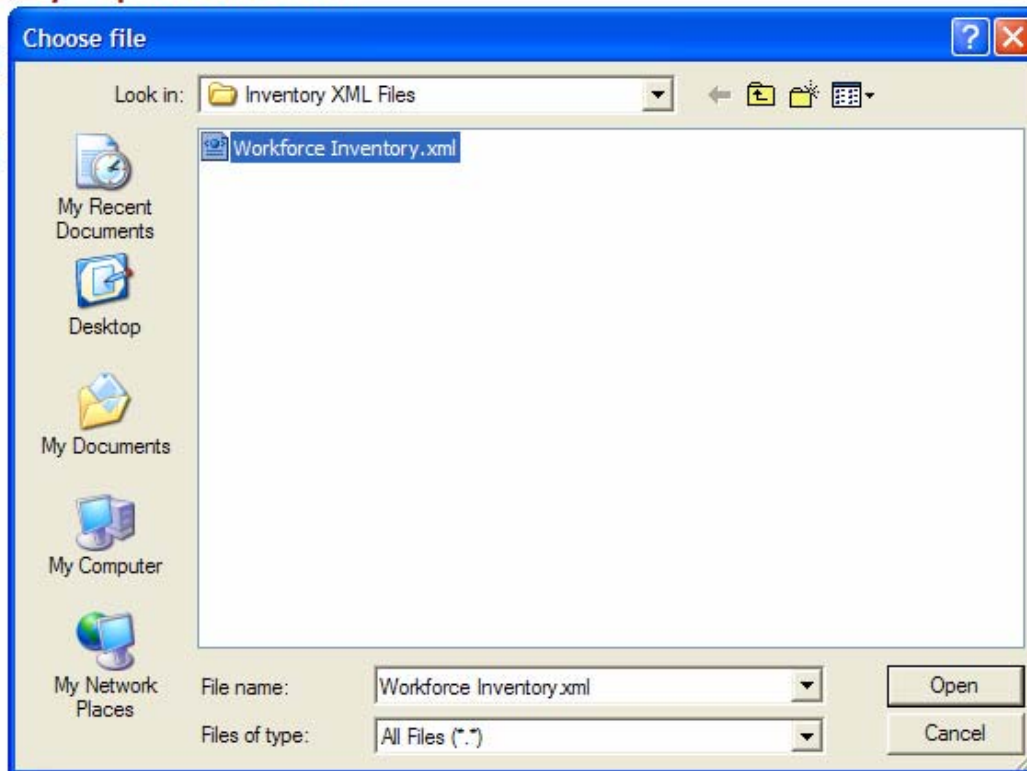


► Department of Homeland Security FY2006 Inventory - Upload XML data

Select XML document: Browse...

[Back to inventory](#)

Upload document



**STEP 2 (cont'd): ...then
select the saved XML
file for upload**



► Department of Homeland Security FY2006 Inventory - Upload XML data

Select XML document:

[Back to inventory](#)

STEP 3: Click the *Upload document* button to upload the inventory



▶ **Department of Homeland Security FY2006 Inventory - Upload XML data**

Select XML document:

[Back to inventory](#)

XML file processed - 1 inventory items total.

Following successful upload,
you will receive a message
confirming that the XML file
was processed.

Manual Input of Workforce Inventory Data

Many agencies with only a few rows of data may choose to manually input their inventory data into WITS. To enter a new inventory line item from the new fiscal year inventory template, click on the *Add new* link at the top left of the page. This will open the data entry/edit page.



COMPETITIVE SOURCING AND WORKFORCE INVENTORY Tracking System

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▶ Department of Homeland Security FY2005 Inventory

- [+ Add New](#)
- [Edit Contact](#)
- [Certify](#)
- [X Delete Agency Filing](#)

Click the *Add New* link to manually add a new inventory line item.

	Filing	Justification	Approval
Download	XML	EXCEL	
Upload	XML	DOC	DOC
Upload Date			

Row #	Action	Last Updated	Sequence Number	Bureau	City, State, Country	Total FTE	Activity Code	Status / Reason Code	First Year
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COMPETITIVE SOURCING AND WORKFORCE INVENTORY
Tracking System

▶ **Department of Homeland Security FY2005 Inventory**

Bureau: <input type="text" value="Select bureau..."/>	Unit Name: <input type="text"/>	Sequence Number: <input type="text"/>
Bureau contact		
Name: <input type="text"/>	Location	
Phone: <input type="text"/>	Country: <input type="text" value="Select country..."/>	
E-Mail: <input type="text"/>	State: <input type="text" value="Select state..."/>	
Total FTE: <input type="text"/>	City: <input type="text"/>	
Activity Code: <input type="text" value="Select activity code..."/>	Status Code: <input type="radio"/> Inherently governmental	
First Year on Inventory: <input type="text" value="2005"/>	Commercial Reason Codes: <input type="radio"/> A <input type="radio"/> B <input type="radio"/> C <input type="radio"/> D <input type="radio"/> E <input type="radio"/> F Reason code definitions	
	Activity Suffix: <input type="text"/>	

This is the WITS data entry/edit page. Fields are defined on pages 19-20.

Manual Input of Workforce Inventory Data Data Entry/Edit Page

For each inventory line item, you may enter or edit inventory data on the data entry/edit page. The data entry/edit page contains the following fields:

Bureau – Select the component of the department or agency in which the activity is located.

Unit Name – Input the name of the specific unit, office, or component in which the activity is located.

Sequence number – Sequence (identification) number of the activity from legacy inventory/inventories, where applicable.

Bureau contact – Name, phone number, and e-mail of the primary contact for the inventory line item.

Total FTE – Number of federal full-time equivalents (FTE) to be included on the inventory line item.

Activity Code – Select the activity code of the inventory line item.

First Year on Inventory – Identify the first year that the inventory line item appeared on the agency's inventory.

Location – Identify the country, state (where applicable), and city where the activity is located.

Status Code/Commercial Reason Code – Select the inherently governmental status or proper commercial reason code for the activity.

Activity Suffix – This is an open text field for agencies to use as they see fit.

Manual Input of Workforce Inventory Data

Data Entry/Edit Page (cont'd)

There are several editing buttons that may appear on the data entry/edit page, depending on whether you are entering data for an inventory line item for the first time, or if you are editing an existing inventory line item.

For first-time data entry, they are:

Cancel and Exit – Cancels the data entry and takes you back to the fiscal year inventory page. New data is not saved.

Add Inventory – Adds the new inventory line item data to the overall fiscal year inventory.

Add and Exit – Adds the new inventory line item data to the overall fiscal year inventory and returns you to the fiscal year inventory page.

When editing an existing inventory line item, they are:

Cancel and Exit – Cancels the data entry and takes you back to the fiscal year inventory page. Data edits are not saved.

Save Inventory – Saves data edits to the existing inventory line item.

Save and Exit – Saves data edits to the existing inventory line item and returns you to the fiscal year inventory page.

Contact Information Data Entry/Edit Page

There are several contacts that may be entered on the *Contact Information* data entry/edit page. Please note that all contacts are for the entire department or agency, not for any one bureau or component. Contacts may be duplicative where one person may fill two or more of the roles described below.

Chief Contact – Enter the name, e-mail, and phone number of the person that will be the chief contact for all inventory questions or comments from OMB.

Federal Register Notice Contact – Enter the name, e-mail, and phone number of the person that should be published as your agency's point of contact in the Federal Register notice, which lists your agency's inventory as publicly available. Agencies must also input the URL to which the inventory will be posted for public viewing.

Technical Contact – Enter the name, e-mail, and phone number of the person that will be the technical contact for any technical issues regarding your agency's inventory.



COMPETITIVE SOURCING AND WORKFORCE INVENTORY Tracking System

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▶ Department of Homeland Security FY2005 Inventory

- [+ Add New](#)
- [🔧 Edit Contact](#)
- [📄 Certify](#)
- [✖ Delete Agency Filing](#)

Click the *Edit Contact* link to update agency inventory contact information.

	📎 Filing	📎 Justification	📎 Approval
Download	↓ XML	↓ EXCEL	
Upload	↑ XML	↑ DOC	↑ DOC
Upload Date			

Row #	Action	Last Updated	Sequence Number	Bureau	Country	Total FTE	Activity Code	Status / Reason Code	First Year
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▶ Department of Government Services FY2005 Inventory: Contact Information

[Back to FAIR Inventory](#)

Chief contact (required)

Name:
Phone Number:
E-mail address:

Federal Register notice contact (required)

Name:
Phone Number:
E-mail address:
URL (Web address) where the inventory will be posted:

Technical contact

Name:
Phone Number:
E-mail address:

This is the contact information input page

Uploading Justification and Approval Documentation

Agencies shall upload all required justification documentation regarding their inventory in a single justification file. PMA agencies may also upload a copy of the letter/memo from OMB approving their inventory.

Justification and approval documents are uploaded on the fiscal year inventory page by following the steps outlined on the following pages. These pages show the upload of a justification document. The approval document upload process is identical.



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Department of Homeland Security FY2005 Inventory

- + Add New
- 🔧 Edit Contact
- 👉 Certify
- ✖ Delete Agency Filing

	Filing	Justification	Approval
Download	XML	EXCEL	
Upload	XML	DOC	DOC
Upload Date			

Row #	Action	Last Updated	Sequence Number	Bureau	City, State, Country	Total FTE	Activity Code	Status / Reason Code	First Year
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Click the *Upload Justification* or *Approval* button to upload your agency's justification/approval document...



► **Department of Homeland Security FY2006 Inventory - Upload justification document**

Select justification document:

[Back to inventory](#)

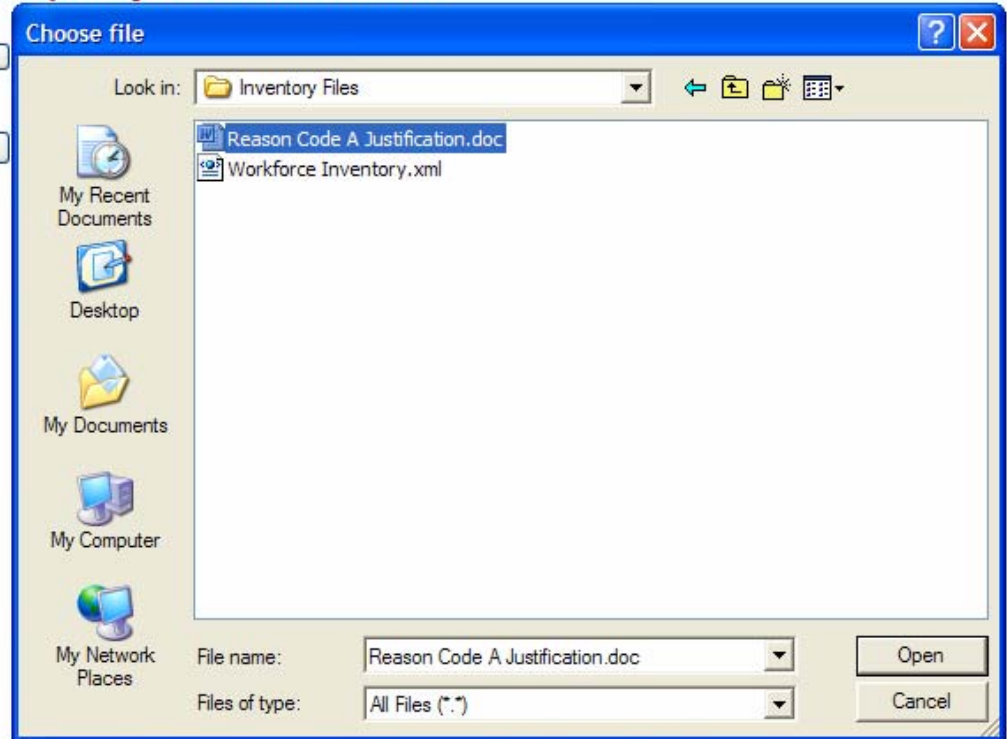
...then, click the *Browse* button...



▶ **Department of Homeland Security FY2006 Inventory - Upload justification document**

Select justification document:

[Back to inventory](#)



...then select the saved justification or approval file for upload...



► **Department of Homeland Security FY2006 Inventory - Upload justification document**

Select justification document:

[Back to inventory](#)

←

...finally, click the *Upload file* button to upload the justification or approval document into WITS.



▶ **Department of Homeland Security FY2006 Inventory - Upload justification document**

Select justification document:

[Back to inventory](#)

Reason Code A Justification.doc uploaded.

Justification document uploaded on 2007-03-23 by ALEXANDER DAUMIT. [Click here](#) to view.

Following successful upload,
you will receive a message
confirming that the document
was uploaded.