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

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

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.

STEP 2: Click the
Browse button…

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

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

OFFICE OF MANAGEMENT AND BUDGET

COMPETITIVE SOURCING AND WORKFORCE INVENTORY
· **Tracking System**

Home   Admin   Help   Log Out

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

Select XML document: [   ] Browse...

Back to inventory   Upload document

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.

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COMPETITIVE SOURCING AND WORKFORCE INVENTORY · · · · · · · · · · · · · · · · Tracking System

Home | Admin | Help | Log Out

▸ **Department of Homeland Security FY2005 Inventory**

➕ Add New

🖋 Edit Contact

➤ Certify

✖ 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

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.

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COMPETITIVE SOURCING AND **WORKFORCE INVENTORY**
· Tracking System

🌐 Home   👤 Admin   ❓ Help   ⬅ Log Out

▸ **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

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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COMPETITIVE SOURCING AND WORKFORCE INVENTORY — Tracking System

Home · Admin · Help · Log Out

▶ **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

Click the *Upload Justification* or *Approval* button to upload your agency's justification/approval document…

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COMPETITIVE SOURCING AND **WORKFORCE INVENTORY**
········· Tracking System

Home   Admin   ? Help   Log Out

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

Select justification document: [   ] [Browse...]

Back to inventory   [Upload file]

…then, click the *Browse* button…

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

▶ Department of Homeland Security FY2006 Inventory – Upload justification document

Select justification document: | F:\CSTS-WITS\Inventory Files\Reason | Browse... |

Back to inventory | Upload file | ◀

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

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COMPETITIVE SOURCING AND WORKFORCE INVENTORY · Tracking System

🏠 Home   👤 Admin   ? Help   ➡ Log Out
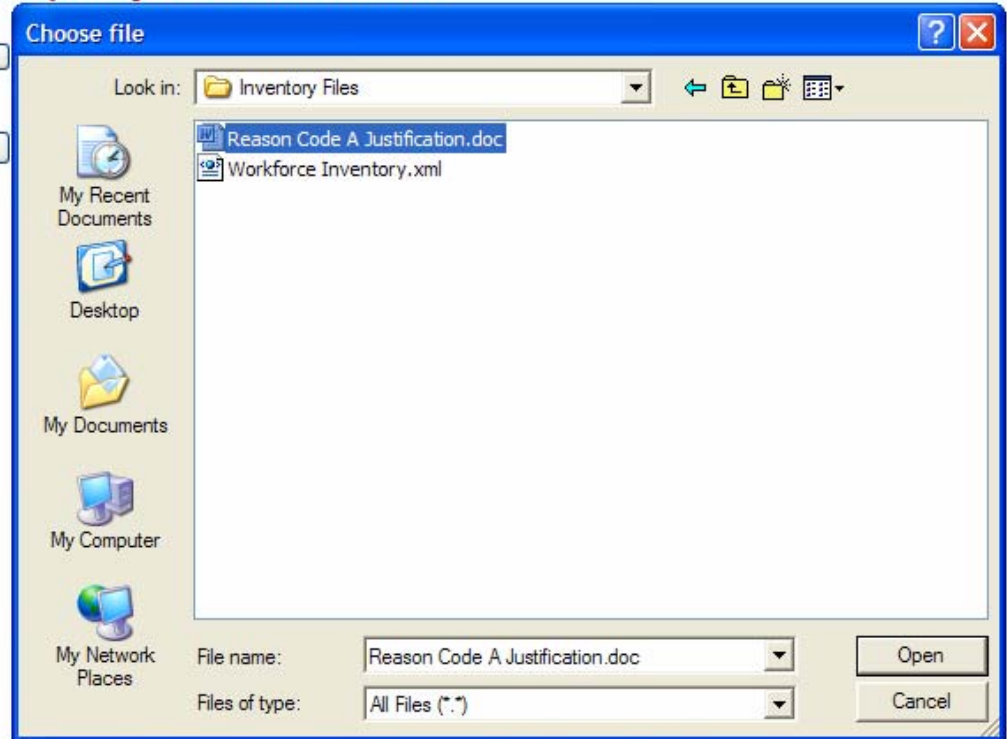
▸ **Department of Homeland Security FY2006 Inventory – Upload justification document**

Select justification document: [   ] [Browse...]

[Back to inventory]   [Upload file]

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.