



IT Collect "How To" Series

How to use Services

May, 2021

Beta v0.1

**General Services Administration
Office of Government-wide Policy**

What are IT Collect Services?

The IT Collect services endpoint is a data collection mechanism for investment level descriptive data. The services collection allows agencies to submit investments and their data on type, status, description, etc. as specified within the CPIC policy guidance. Each service in IT Collect corresponds with a given UII, and for the purposes of this documentation, a service can be considered the equivalent to an investment/UII within the legacy IT Dashboard system. A full list of services level fields is available in the IT Collect API Schema documentation. Services are at the top of the IT Collect CPIC submission service hierarchy. Agencies must add a service to IT Collect prior to adding that service's projects, activities, CIO ratings, contracts, and/or ledger items.

How do I add a Service to my agency's IT Portfolio?

Agencies must submit all new services to IT Collect through a POST operation, including all required fields outlined in the API Schema documentation. Following a successful POST, IT Collect automatically includes that service's UII in the relevant agency's current Budget Year IT Portfolio. Each service in IT Collect corresponds with a given UII, and for the purposes of this documentation, a service can be considered the equivalent to an investment/UII within the legacy IT Dashboard system. For example, a service/UII posted in September 2021 will automatically be included in the BY 2023 Pre-Decisional IT Portfolio. No further action is required by agencies to indicate a service/UII is part of a given IT Portfolio. IT Collect auto-assigns a time-period to a user's service record, no user action is required for this part.

What embedded documents am I required to submit under each Service?

IT Collect will produce metrics that track agencies progress in submitting required embedded documents (projects, CIO ratings, etc.) derived from the CPIC guidance. These primary checks will evaluate a given UII's progress in submitting embedded documents based on the investment type value (major, standard, etc.) provided in the service submission. IT Collect will then return a list of UIIs that have NOT submitted the expected embedded documents. For example, if a service/UII has investmentType = 01 Major and has not provided any CIO Rating data, IT Collect will flag that UII accordingly.

The table below shows submission expectations based on our understanding of OMB intentions.

IT COLLECT SUBMISSION EXPECTATIONS

INVESTMENT TYPE	LEDGER	CIO RATING	CONTRACTS	PROJECTS	ACTIVITIES	OPERATIONAL ANALYSIS
01: MAJOR	expected	expected	expected	expected	expected	expected
02: NON-MAJOR	expected	optional	expected	optional	optional	optional
03: IT MIGRATION	expected	optional	optional	optional	optional	optional
04: FUNDING TRANSFER	expected	optional	optional	optional	optional	optional
05: STANDARD	expected	expected	expected	optional	optional	optional

For more information on how to submit embedded documents, please reference the API Schema documentation.

How do I keep a Service active within subsequent budget submissions?

Once a service/UII is posted to IT Collect, the service/UII will remain active in your Agency's IT Portfolio until the Service is retired. Agencies are expected to update any relevant data points within the Service during each budget cycle submission. However, IT Collect does not mandate any user action to keep a service active. In the BY 2024 Pre-Decisional September submission window, agency users only need to update relevant data points for their existing stock of active services. No further action is required to carry over UII's from the BY 2023 President's Budget IT Portfolio to the BY 2024 Pre-Decisional Portfolio.

How do I remove a Service from my agency's IT Portfolio?

To retire a Service, set the "isRetired" field to "true". Additionally, the "Change In Status" must equal a value of 06, 07, 08, or 09 to successfully change the Service to Retired. IT Collect allows agencies to un-retire services can by changing "isRetired" to "false". However, agencies must include a valid rebaseline ID to un-retire a service. Agencies and vendors should plan on using the isRetired field rather than the DELETE operation.

What happens to "stale" Services data?

IT Collect will produce metrics under the statistics endpoint to ensure that agency data is not stale or outdated. The statistics endpoint will be a GET-only endpoint that agencies and vendors can leverage at any time to validate their data is complete and current with OMB expectations. This functionality is currently under development, but two known checks related to UII data staleness are as follows:

- List of UIIs not updated (including all embedded documents) in the current time period (Pre-Decisional, President's Budget etc.)
- List of UIIs not updated (including all embedded documents) in the current budget year (BY 2023, BY 2024 etc.)

Sample JSON Services Data

```
{
  "currentUii": "005-000000018",
  "agency": "005",
  "title": "MRP-AMS-Web-Based Supply Chain Management (WBSCM)",
  "description": "WBSCM provides Farm Food commodity ordering, procurement and distribution functions for the United States Department of Agriculture and Department of State food assistance programs.",
  "changeInStatus": "11",
  "changeInStatusDescription": "No change in status",
  "sharedServiceCode": "48",
  "missionSupportCategory": ["01"],
  "bureauCode": "45",
  "partOfAITPS": "01",
  "standardIdCategory": "01",
  "missionSupportArea": "07",
  "investmentType": "01",
  "nssId": "01",
  "publicUrls": ["www.usda.gov/wbscm"]
}
```

```
{
  "currentUii": "005-000000035",
  "agency": "005",
  "title": "SO-OCIO-DISC-AgLearn",
  "description": "AgLearn is an eLearning system that provides online administration of curriculum by
trainers, individualized training support, on-demand classroom registration, customized content,
collaborative tools, and integrated back-end systems.",
  "changeInStatus": "11",
  "changeInStatusDescription": "No change in status",
  "sharedServiceCode": "48",
  "missionSupportCategory": ["03"],
  "bureauCode": "12",
  "partOfAITPS": "02",
  "standardIdCategory": "01",
  "missionSupportArea": "00",
  "investmentType": "01",
  "nssId": "01",
  "publicUrls": null
}
```