BY 2024 ITPFM VENDOR MEETING 2

Technology Modernization Fund (TMF) Data

→ *Metrics Submission Location (API Path)*: `v1/services/{service}/project`

→ *Technical Implementation Questions*:

- **Do I need to indicate which TMF initiative is financing my project?** Yes, you must indicate which specific TMF initiative is financing a given ITPfM project. The IT Collect TMF field will be a single select drop-down field. ITPfM projects that are not financed by a TMF initiative must enter 'N/A' in this field.
- **Where can I find a list of TMF initiatives?** A list of valid TMF initiatives/projects can be found on the TMF site: https://tmf.cio.gov/projects/. This list is also linked within the v2 BY 2024 Submission Overview Document.
- **My non-major investment receives TMF funds for a project. Do I need to report this project?** Yes, Investments receiving TMF funds are expected to opt into Projects Data reporting. All projects (regardless of Investment type) that receive TMF funds must indicate which TMF initiative finances the project and report required project level data.
- **Can I view which investments have TMF projects?** Yes, IT Collect plans to build a query parameter at the service level to indicate which Investments contain projects with TMF funding.

System ID Data

→ *Submission Location (API Path)*: `v1/services`

→ *Technical Implementation Questions:*

- **What are the reporting expectations for Systems Data**? Per the BY 2024 Submission Overview Document, each service should enter an array of Continuous Diagnostics and Mitigation (CDM) designated High Value Asset (HVA) systems financed by the service/Investment.
- **Will IT Collect validate system ID values upon submission?** Yes, IT Collect will ensure that provided system ID values match a valid CDM High Value Asset.
- **Will the system ID field be required for all IT Collect services?** No, only services that finance CDM High Value Assets are expected to opt into reporting system ID data. Otherwise, the system ID field may either be omitted from request files or submitted as an empty array.

Feedback

→ **Feedback Point 1**: *How should IT Collect handle completed projects (projects that will not be updated in BY 2024) cost and schedule data?*

- *Feedback Description:* The IT Collect team solicited feedback on if/how to pre-populate the new planned, projected, and actual cost and schedule data points for projects. Specifically the IT Collect team wanted to focus on how to handle projects that will NOT necessitate updates during the BY 2024 submission cycle,

since those projects will not be subject to report the new planned, projected, and actual data points over the course of the upcoming submission cycle.

One vendor suggested that IT Collect set existing project start date, end date, and total cost values as the new actual start date, actual end date, and actual total cost data points respectively for completed projects (IT Collect can use the BY 2023 system generated project status field to determine which projects are classified as complete). IT Collect also received feedback from multiple vendors to NOT roll-up any data from the existing child activities to pre-populate the new Planned, Projected, and Actual cost and schedule fields.

- *IT Collect Team Thoughts:* The IT Collect Team will plan on not rolling up any activity level data to the new project planned, projected, and actual cost and schedule fields. Furthermore, the IT Collect team can facilitate the movement of the existing project start date, end date, and total cost data points to the new actual start date, actual end date, and actual total cost fields for completed projects only.

→ **Feedback Point 2:** *Will IT Collect pre-populate data for the new BY 2024 project status field?*

- *Feedback Description:* IT Collect currently generates project status values based on activity level data. In BY 2024, however, project status will be a submittable for agencies and IT Collect will cease to automatically generate project status data. One vendor suggested to NOT pre-populate the new BY 2024 project status field with existing BY 2023 system generated data, since the existing system generated data is not stored within vendor applications.
- *IT Collect Team Thoughts:* The IT Collect Team can create a new stand-alone field for project status in BY 2024 that will not be pre-populated with any system generated data from BY 2023. The IT Collect team can then archive the BY 2023 project status values, and display the archived values within the projects data feed for projects that have not submitted BY 2024 projects data points.

→ **Feedback Point 3:** *Can IT Collect remove path parameter violations from Metric Actual validate-only submissions?*

- *Feedback Description:* On validate-only submissions, IT Collect checks both the request file contents and the API path provided by agencies. If any part of the API path is invalid, including parent document identifiers, the validate only submission will trigger an error. As a result, agencies cannot process an error-free validate-only submission on an embedded document prior to the creation of the parent document. One vendor has suggested removing API path validations from validate-only submissions, which would allow vendors to process Metric and Metric Actual documents within the same validate-only batch submission process.
- *IT Collect Team Thoughts:* The IT Collect Team is currently investigating the feasibility of this request, and will update the community if it is possible to accommodate this approach.

Delivery Timetable

- ☑ *April 29th, 2022: GSA releases the BY 2024 ITPfM Draft Submission Schema to Vendors*
- ☑ *May 4th, 2022: GSA will release the BY 2024 Technical Addendum Guide to the Draft Submission Schema*
- ☑ *May 4th, 2022: GSA will host the BY 2024 ITPfM Draft Submission Schema Overview call with Vendors*

☑ ~~*May 18th, 2022*: OMB will present the BY 2024 ITPfM Policy Changes to the CIO Council~~

☑ ~~*May 18th, 2022*: BY 2024 Submission Overview document posted to the IT Dashboard~~

☑ ~~*June 1st, 2022*: GSA released the v1 BY 2024 ITPfM Submission Schema to Vendors~~

☐ *Mid June (exact date TBD), 2022*: GSA will release the BY 2024 version submission candidate to the IT Collect Staging environment

☐ *September (exact date TBD), 2022*: BY 2024 ITPfM Submissions will begin in IT Collect

Additional Changes

GSA and OMB are still working through an implementation plan for the following areas of the IT Collect API. Please note many of these areas do not have direct vendor integration impact. However, we wanted to make sure that the community was aware of functional areas where changes and approaches are still under consideration.

- Business Logic Validations (partially reflected in the v0.1 and v1 BY 2024 Draft Submission Schema, but more changes to come)
- API Query Parameters
- Data Feeds
- Longitudinal Reporting
- Data Quality Reporting
- Data Staleness Reporting
- Additional Reporting