



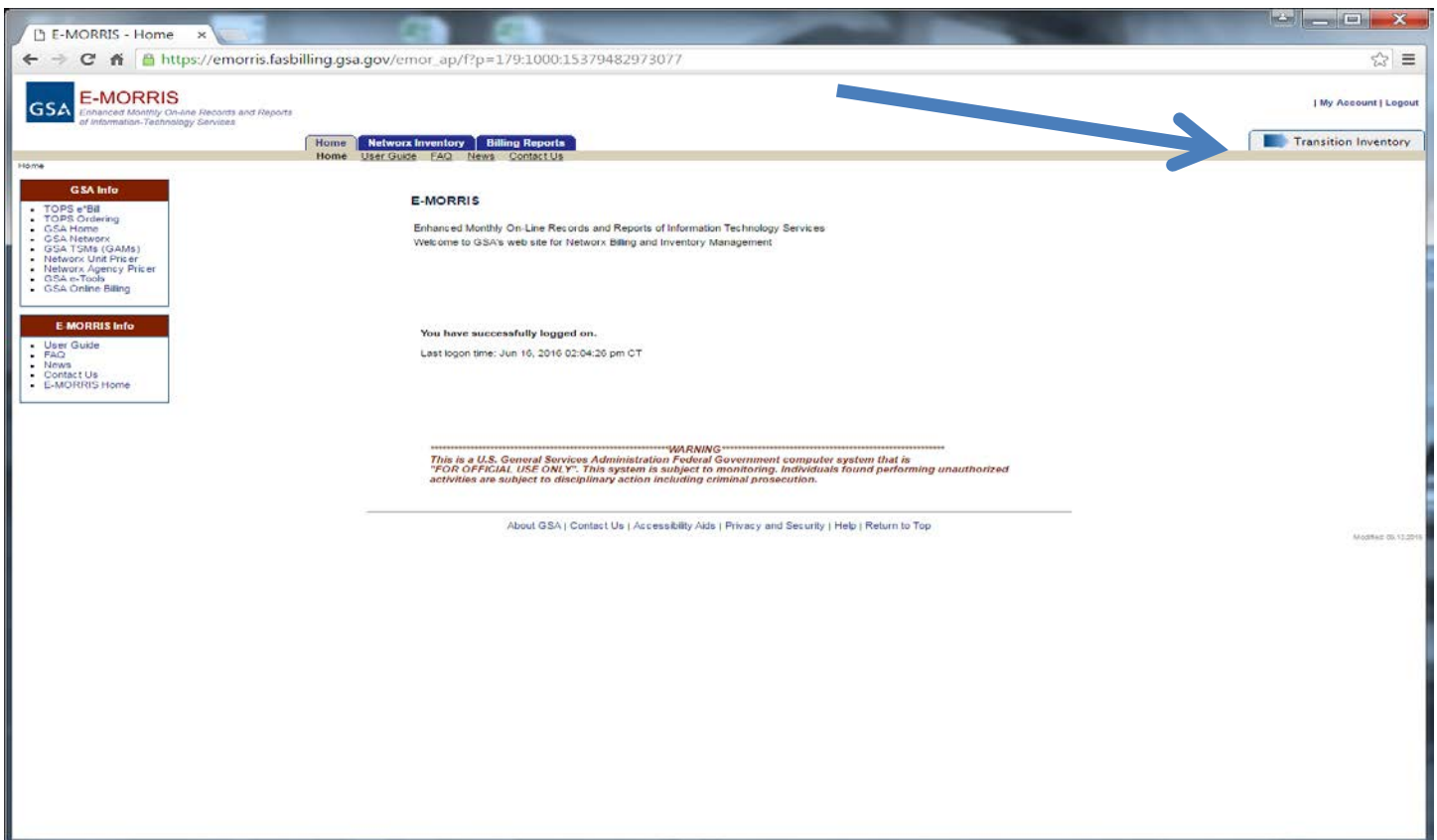
Transition Inventory Frequently Asked Questions

Background

The General Services Administration's (GSA's) strategy for the next generation of telecommunications and information technology (IT) is Network Services 2020 (NS2020). NS2020 provides a roadmap for the future of GSA's Office of Telecommunications Services (OTS). The Enterprise Infrastructure Solutions (EIS) contracts are the follow on to the Networx, WITS3, and Regional local service contracts.

Transition Inventory Confirmation

GSA has created a Transition Inventory (TI) of all *service instances* to assist agencies in transitioning their telecommunication services from expiring contracts. GSA performs a monthly refresh to reflect service changes and disconnects. The TI can be accessed via the Networx E-MORRIS application at <https://emorris.fasbilling.gsa.gov>.



Transition Inventory was validated in January, 2016. Each agency is required to review and confirm their transition inventory no later than **October 31, 2016**. Agency inventory *confirmation* will be communicated as part of the Agency Transition Plan (ATP). Going forward, agencies should continue to monitor TI for accuracy as it will be the basis for tracking and reporting transition progress.

GSA is using the existing E-MORRIS online application to provide secure, authorized access to agency TI data. Instructions on how to access and maneuver through E-MORRIS are available in the TI User Guide located on the EIS Transition webpage, www.gsa.gov/eistransition.



Transition Inventory Frequently Asked Questions

Transition Inventory (TI) Frequently Asked Questions

1. Where did TI data come from?

GSA gathered Networkx, WITS3, and Regional local service inventory data from multiple sources, identified in the table below.

Contract(s)	Data Source
Networkx	Contractor /Service provider Inventory Snapshot Source Telecommunications Ordering and Pricing System (TOPS) Networkx Inventory Management (NIM) E-MORRIS Billing Reports
WITS3	Service@Once Prime Biller Extended Edition (PBEE) Level 3 Portal
Regional local services	TOPS Contractor/service provider invoices and billing data Customer Service Records (CSRs) Local Service Agreements

Contractors and service providers have varying terminology and definitions for available services. GSA’s first step to provide the inventory was to normalize the inventory data across the various contracts and providers. Once normalized, business rules were defined to establish a commonly defined inventory at a service instance level.

2. What does my TI represent?

If a service instance record was found in a source, it was added to the TI. Once an inventory record was verified across more than one source, it was considered validated and marked in TI with a “Y” in the Validation data field. If a record was NOT found across sources, or if the GSA team questioned its validity, it was considered NOT validated and marked in the Validation data field with an “N.” Validated records are used for transition progress statistics and reporting. GSA will continue to investigate all non-validated records to ascertain their correct status and make appropriate updates in TI.

GSA is providing sub-service instance records, identified with a “Y” in the Sub-Service Instance data field. A sub-service record is a record that is transitioned with a primary service record and cannot be considered a stand-alone service. These non-primary transition service records cannot be transitioned to another contract without the primary source. Examples of sub-service instance records are Direct Inward Dial (DID) numbers. DID records may appear as stand-alone inventory, but are part of a Primary Rate Interface (PRI) and will be transitioned with the PRI.



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3. What is a service instance?

The service instance transition inventory is a set of inventory records reflecting active services that must be transitioned from the expiring Networkx, WITS3, and Regional local service contracts. Service instances are:

- *Active* services that must be transitioned off of the expiring Networkx, WITS3, and Regional local service contracts
- A summarized or “grouped” roll-up of active service records (features, components, attributes)
- A single record representing each ordered service.

Service instance level inventory data provides GSA and agencies a consistent measure to track transition progress. Throughout transition, GSA shall update the service instance inventory to reflect services as they are disconnected from the expiring contracts and as new services are added to the existing contracts.

4. Can I use TI data to place orders?

No. Service instance level data is not sufficient in detail to prepare transition orders as it is summarized rolled up data and does not contain all the attributes and/or components needed to place orders. Agencies may need to obtain detailed TI data from their current providers or other sources to support statement of work and/or transition orders.

5. How do we validate inventory since we can't validate using E-MORRIS?

GSA already has validated the Transition Inventory (TI) data. Agencies should review their TI data and confirm that it is accurate and sufficient for transition planning and for tracking transition progress. Agencies will not have to flag an inventory record unless there is an issue with a record. In the Agency Transition Plan due to GSA by October 2016, the agency must include a statement that it has reviewed and confirmed the TI. Instructions for reviewing and confirming TI data can be found in the Transition Inventory User Guide.

6. What do the agencies need to do to confirm their inventory?

Each agency shall confirm their TI no later than October 31, 2016. Steps include:

1. Identify agency points of contact to retrieve their TI
2. Gain access to TI through the E-MORRIS registration process
3. Review TI data
4. Identify exceptions and/or missing records
5. Work with GSA and/or service providers to have sources updated (this will result in TI updates). For example: a service is showing active, but it has been disconnected; an AHC or AB code is incorrect; or services are shown as active but no longer needed.
6. Work with their designated GSA AM to address questions about the data or to coordinate a discussion with the GSA TCC inventory team
7. Retrieve and review the data to validate ongoing updates and changes
8. Provide a statement in the Agency Transition Plan that the agency has confirmed the TI data.



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7. How do I access my agency's TI data?

Agency data is available via the Transition Inventory module in GSA's E-MORRIS application.

GSA's E-MORRIS website <https://emorris.fasbilling.gsa.gov> provides the instructions to:

- Register a new user account or add access to TI
- Reset a password
- Request assistance.

User accounts require access to the TI module (select Network Inventory under module access on the registration form) and authorized agency bureau and/or hierarchy codes. New user requests will be routed to the agency DAR Administrator for approval before the accounts are created. The E-MORRIS site includes a TI User Guide and Frequently Asked Questions to help users through the registration process.

Once the authorized user is logged into E-MORRIS:

1. Select the "Transition Inventory" tab in the top right corner of the E-MORRIS main page to access, review, and/or download agency transition inventory data. Then from the main TI page, select one of the menu items to browse, view, search, filter, and download TI data. An additional menu item allows the user to submit missing records.
2. The default TI will view displays 16 data fields and the first 15 lines of inventory data at the bottom of the page and filtering options at the top of the page. Users can view additional field columns either by choosing the "All Available Columns Report" or clicking the "Actions" button to create a custom report. View additional records either by changing the number of rows to be displayed or by scrolling through the pages using the selector in the bottom left corner of the page. The total set of inventory records that can be accessed is based on the user's credentials. Some users may see a warning notice in the middle of the page that indicates not all records are being displayed due to the large number of records available. This situation is easily resolved by entering filtering criteria to reduce the dataset being viewed.
3. Filtering choices are shown in the top portion of the page. Use one or more of the dropdown or text boxes to enter filter criteria, and then click the "Go" button. The module will re-query the database and return the results.
4. Users may mark an individual record with an exception flag when they believe an issue exists. Flag a record by selecting the checkbox in the left column and then clicking the "Flag as Exception" button to select the reason for the flag. Once the flag is applied, click the "Send to GSA Now" button; the TCC will receive a notification and then begin to investigate the issue(s). Related buttons are available to filter based on these flags.
5. Users may mark a single record, group of records, or all records associated with current search criteria with the **optional** "Reviewed" flag. Flag a record "Reviewed" or batch of records "Reviewed" by selecting the checkbox in the left column and then clicking the "Mark as Reviewed" button. Users can also select "Mark All Reviewed" if they wish to mark all records that are part of the dataset of the search criteria; not just the records displayed on the screen. Users cannot flag "Disconnected" records as "Reviewed." Additionally, users cannot flag a record as "Reviewed" if it is already flagged as an exception. Flagged exceptions that have been sent to GSA are locked and only can be unlocked by GSA.



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6. Records may be reviewed and analyzed offline by clicking the “Download” button. E-MORRIS will generate a CSV format file containing the first 100,000 records resulting from the current filters set and the Report view selected. Users should submit a request to schedule a download job greater than 100K records, which will become available the next morning.
7. Select the “Missing Inventory” page from the top menu and then follow the procedures on the page to submit missing records. An MS Excel template can be downloaded from the page to upload the missing data.

8. Where can I find more details on a service instance?

In the TI module within E-MORRIS, click on the paper icon on the far left of the record. This will provide additional order level details about the specific service instance.

9. Why am I only seeing my Networx data in the E-MORRIS TI module?

The Networx Inventory tab provides access to only Networx inventory. To view the TI, select the “Transition Inventory” indicator on the far right side of the display screen.

10. What are the reporting column headings that I can choose from?

Available column headings can be viewed by selecting “All Available Columns” from the Reports dropdown menu and “Select columns” from the Actions dropdown. Functionality allows for the selection and de-selection of columns as well as adjustments to the order in which the columns appear. Selectable columns include:

AB Code	Contract ID	NSC	State
Address	Contractor	Order Type	Status
Agency Name	Country	Orig NIC	Sub-Agency Name
AHC	Customer ID	Phone Number	Subcategory Code
ASRN	Customer Number	Product Code	Sub Service Instance
ASRN2	DAR	Product Description	System ID
BAC	Disconnect Date	Region	Term NIC
BAN	Full Service	Service	UBI
BAN LG	GSA Tracking Id	Service Description	Validation Status
Category	Identifier 1	Service Instance Identifier	Work Site ID
Circuit ID	Identifier 2	Service Instance Status	Zip
City	Install Date	Service Order	
Contract	Line/Service Type	Shared Tenant	



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11. Why do some of the data look like scientific notation or have some leading zeroes missing?

TI data is exported in the comma separated value (CSV) text format. Some tools (MS Excel or MS Access) may 'reformat' some of the data after importing it. The two most common "translation" issues are 1) that leading zeroes get lost; and 2) that large numbers are sometimes converted to scientific notation.

To avoid these problems when using MS Excel, use the following import procedure:

1. Open MS Excel
2. Click on the "Data" menu and choose "From Text"
3. Select the file from the file location and click on "Import"
4. The Text Import wizard will appear
5. Choose the file type to be "Delimited" and click Next
6. Choose the Delimiter to be "Comma" and the "Text Qualifier" to be double quote (") and choose Next
7. Click on the "AHC" column in the Data preview section of the wizard and update the "Column data format" to Text
8. Perform the same prior to for any other column that needs to be treated as a text not a number (AB_Code, Phone No, BAC, BAN, BAN_LG, etc.)
9. Click Finish
10. When the data loads, choose File, Save As, and Save As Excel format

To avoid these problems when using MS Access:

1. Open MS Access
2. Select import Text File from the "External Data" menu
3. Navigate to and select the CSV file to be imported, then OK
4. In the next window of the Text Import wizard, choose "First Row Contains Field Names" near the top of the dialog window and select the "Advanced..." button at the bottom left
5. At the bottom of the Server apps Import Specification window, select all the fields in the "Field Information" table and set the "Data Type" to "Short Text"
6. At the top of the Server apps Import Specification window, choose "Delimited", make the "Field Delimiter" a comma (,), and enter a double quote (") is in the "Text Qualifier" box, then click OK
7. Choose Next in the next two Import Test Wizard windows
8. In the last Import Test Wizard window, give a name to the imported data in the "Import to Table" field, and then click Finished

12. Is the inventory in TI a current snapshot or will it change?

TI data is updated monthly to reflect services as they are disconnected, added, or changed from the expiring Network, WITS3, or Regional local service contracts. The "What's Changed" tab allows an agency to view a summary of counts and/or the actual records for new records and changed records since the last refresh, refresh - 30 days, refresh - 60 days, and refresh - 90 days. Additionally, a cumulative total is provided for disconnects and exceptions.

GSA is continuing to investigate non-validated records, exceptions, and anomalies. As the correct disposition of these records is determined, the records will become validated or archived (removed from view). GSA will continue to work with the providers, as necessary, to address records requiring source updates. GSA will



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update and maintain TI data at the service instance record level, using the most current and accurate data available. Newly installed records will be added, changes accounted for, and disconnects tracked to provide transition progress statistics and reporting.

13. Has the TI been compared against billing?

GSA *validates* TI records with other data sources, including billing. However, GSA only uses billing data as a validation source for Regional records at this time. Validated TI records have "Y" in the Validation data field.

14. Where is the functionality to mark reviewed inventory records within the TI module?

The TI module provides functionality that allows the user to mark inventory items that have been reviewed. However, since confirmation is an exception based process, the agency only needs to report exceptions where applicable. The use of the review flag is provided solely for the use by the agency and has no effect on GSA's reporting or confirmation activities.

15. How should discrepancies be identified to GSA?

The TI module has functionality that allows users to mark one or more records as *exceptions*, where the agency believes there is a discrepancy. The user can provide supporting comments within the module and view the status of actions being taken to resolve the exceptions. Additionally, agencies should send exception records to eistcc.inventory@gsa.gov for GSA review and response.

16. Should I mark all of my exceptions at once or do you want them identified as I find them?

The user can both mark and send individual exceptions as they are found or mark several exceptions and send them all at once, depending on the method that best suits their agency's process. However, it may be more manageable to identify and send exceptions in similar groups or timeframes. The TI module also allows a user to load a batch file of exceptions.

17. How do I inform the TCC of records that are missing from my agency inventory?

The user can load batch files of missing records in the TI module. A template is provided for the file layout. The TCC will analyze, investigate, and provide resolution to the agency for all missing inventory.

18. Why am I seeing some of my TI inventory service records as two service instances?

TI includes local service inventory procured through the GSA regions and long distance service inventory procured through Networx. GSA-procured local service requiring long distance service requires the service number to be sent to a Networx service provider selected through the agency fair opportunity process. As a result, **the service appears twice in TI** because it is under two separate contracts. TI allows agencies to view the local and long distance service together. While the expectation is that the services will be transitioned together as a combined service to EIS, an agency may need to transition the two services separately.

TI utilizes three key fields for almost all service instances in order to make each TI record unique: UBI (for Networx only), circuit id, and telephone number -- or any combination thereof. One or more of these fields must be populated for each service instance. If the same identifier is repeated across more than one record intentionally, then the record will have at least one more field populated that differentiates that record from the other. The additional field generally ties to the reason for duplication. For example, if the same telephone number appears as two records in TI due to that service being present on two different contracts, then the



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contract field will be used as the differentiator. Common fields that may be repeated across multiple service instances include contract, service type, and other field distinctions.

19. How do I locate corresponding Local and Long Distance service instances in TI?

Sort the TI dataset on Phone No or Service Instance Identifier, and then filter out all services except VS (Voice) and Service Descriptions that are not either Voice or Voice Service. The long distance service inventory will have Networx as the contract and the local service inventory will have Regional or WITS as the contract.

20. If I tell the GSA TCC that my record should be disconnected, will they communicate that to the provider?

No. It is the agency’s responsibility to submit all service change orders to their provider.

21. What are the stakeholder roles and responsibilities?

Stakeholder	Role	Responsibilities
GSA Transition Coordination Center (TCC)	<p>Provide guidance through the transition process and help agencies develop and execute their transition plans</p> <p>Monitor all agencies’ transitions to provide a Government-wide view of transition status and progress</p>	<ul style="list-style-type: none"> • Implement the transition program • Manage inventory data validation and refresh • Manage tracking and reporting of transition status and progress • Manage Tier 2 and Tier 3 Help Desk support • Manage customer outreach and assistance activities • Collaborate with agency partners and telecommunication suppliers to effectively plan and execute the transition program



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Lead Transition Manager (LTM)	Leads agency's transition	<ul style="list-style-type: none">• Lead the planning, management, and implementation of the agency's transition• Develop the Agency Transition Plan (ATP)• Serve as the agency's central point of contact to the TCC• Designate Supporting Transition Managers (TMs)
Area Telecommunications Managers (ATM) and WITS3 PMO	Coordination of transition for regional and local services	<ul style="list-style-type: none">• Coordinate transition activities with Network, EIS, and TCC PMOs<ul style="list-style-type: none">○ <i>Specific to WITS</i> - prepares and provides to the GSA TCC the monthly combined WITS Telephone Number file containing records from Verizon and Level 3○ <i>Specific to other regional services</i> - updates TOPS and communicates with local service providers for changes required to regional inventory• Implement orders for full service customers and GSA assisted transition• Liaise with local telecommunications suppliers• Liaise with agency regional representatives
Service Provider	Support the implementation of the agencies' transition plans	<ul style="list-style-type: none">• Modify existing infrastructure, hardware, or software platforms to integrate with EIS services• Work with GSA and agencies to address <i>inventory</i> discrepancies
GSA Agency Manager (AM)	Primary liaison between GSA and agency for pre-award activities	<ul style="list-style-type: none">• Support agencies throughout the transition planning process• Manage business relationships between GSA's Office of Telecommunications Services (OTS) and the agencies and act as the voice of the agency within (OTS)



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22. What GSA resources are available to help with this process?

Area	Source	Email	Phone Number
Transition Inventory (TI) module access in E-MORRIS	FAS Billing Systems Help Desk	fasbilling.help@gsa.gov	877-944-8677 (toll-free)
Transition Inventory Questions	National Customer Service Center (NCSC)	ITCSC@gsa.gov	855-482-4348 (ITaid4U)
Transition Inventory Data - Detailed	Transition Coordination Center (TCC)	eistcc.inventory@gsa.gov	
General	Agency Manager	See Office of Telecommunications Services Customer Support listing	See Office of Telecommunications Services Customer Support listing

A Transition Inventory User Guide is available on the EIS Transition webpage, www.gsa.gov/eistransition.