



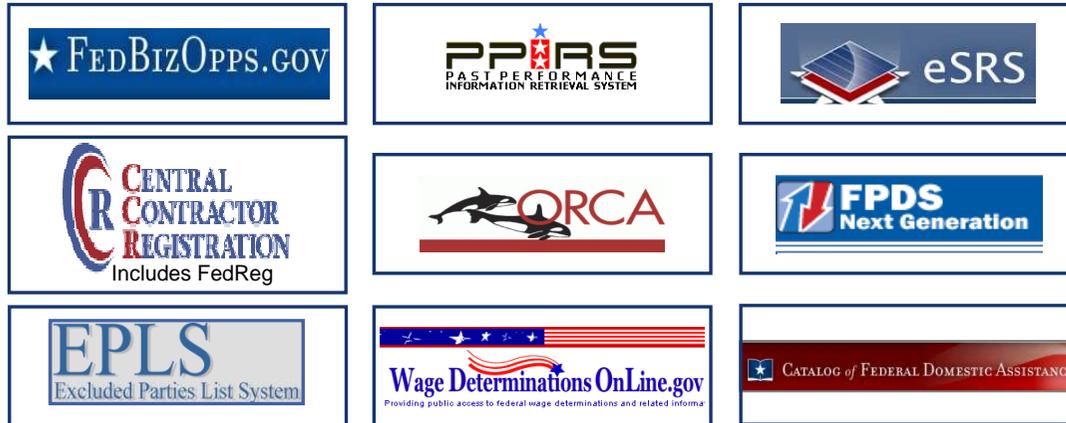
CCR/FedReg and ORCA Interfaces

▶ Upcoming Changes

February 2012

Today

- ▶ **Siloed** – Separate systems, each with a separate login
- ▶ **Redundant** – Overlapping data creates opportunity for error and complicates changes
- ▶ **Separate** – Multiple vendors at many hosting locations, managed separately with varying levels of service



Future

- ▶ **1 Login!** – Functionality accessible at one online location to streamline the process
- ▶ **1 Data Source!** – Centralized, normalized data to eliminate potential for conflicting values and improves agility to deal with future changes
- ▶ **1 Host!** – Consolidated hosting to reduce O&M costs



Existing capabilities, streamlined for efficiency.



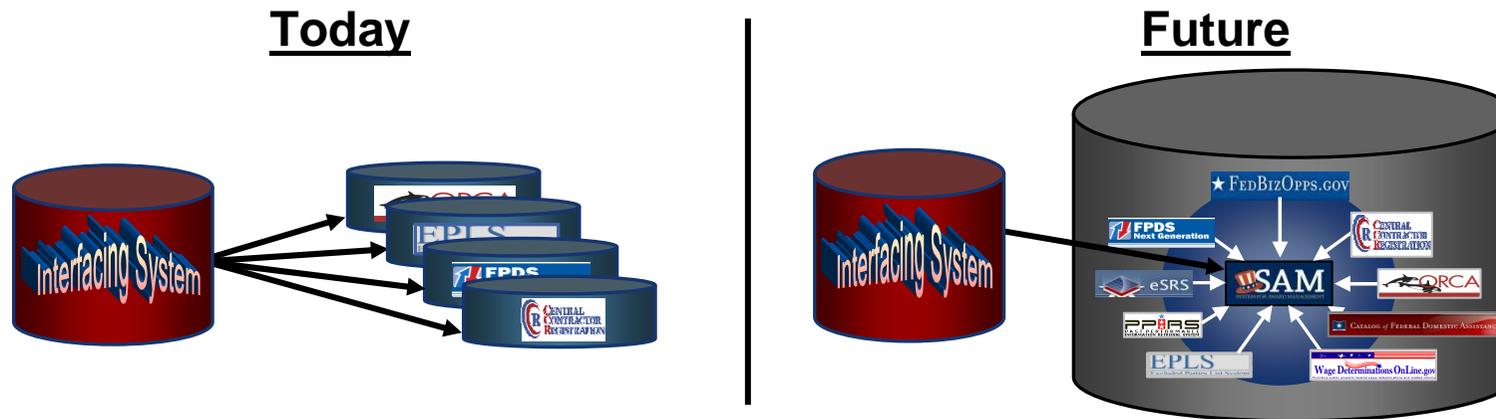
How Will SAM Be Organized?



► IAE system capabilities notionally have been organized around six key functional areas

Functional Area	Capabilities	Legacy Systems
Entity* Management	<ul style="list-style-type: none"> Manage entity data Manage certifications/representations 	<ul style="list-style-type: none"> CCR – Central Contractor Registration (will include FedReg) ORCA – Online Representations and Certifications Application
Award Management	<ul style="list-style-type: none"> Post solicitation and award data Maintain government-wide contract award data Manage government-wide subcontractor data 	<ul style="list-style-type: none"> FBO – Federal Business Opportunities FPDS-NG – Federal Procurement Data System-Next Generation eSRS – Electronic Subcontracting Reporting System (will include FSRS)
Wage Data	<ul style="list-style-type: none"> Access wage determinations 	<ul style="list-style-type: none"> WDOL – Wage Determination Online
Performance Information	<ul style="list-style-type: none"> Manage/maintain past performance information Manage exclusion list 	<ul style="list-style-type: none"> PPIRS – Past Performance Information Retrieval System EPLS – Excluded Parties List System
Assistance Program Catalog	<ul style="list-style-type: none"> Create/maintain assistance program catalog 	<ul style="list-style-type: none"> CFDA – Catalog of Federal Domestic Assistance
Support	<ul style="list-style-type: none"> Provide security/access control Provide reporting/communications support Provide internal controls 	

* For the purposes of this capability area, *Entity* refers to prime contractors, organizations or individuals applying for assistance awards, those receiving loans, sole proprietors, corporations, partnerships, and any Federal government agencies desiring to do business with the government



- ▶ **Process Improvements** – SAM process-improvement work is identifying ways to reduce the number of interfaces needed
- ▶ **1 Database** – As the legacy systems are migrated into SAM, they will be migrating into one database, further consolidating the number of interfaces needed
- ▶ **Interface Changes** – Because the data model and interface specifications will change, interfacing systems (contract writing systems, financial systems, business warehouses, grants writing systems, etc.) will need to be modified (see <http://sam.gov> section on Interfacing Systems)

Your Interfaces Will Change!

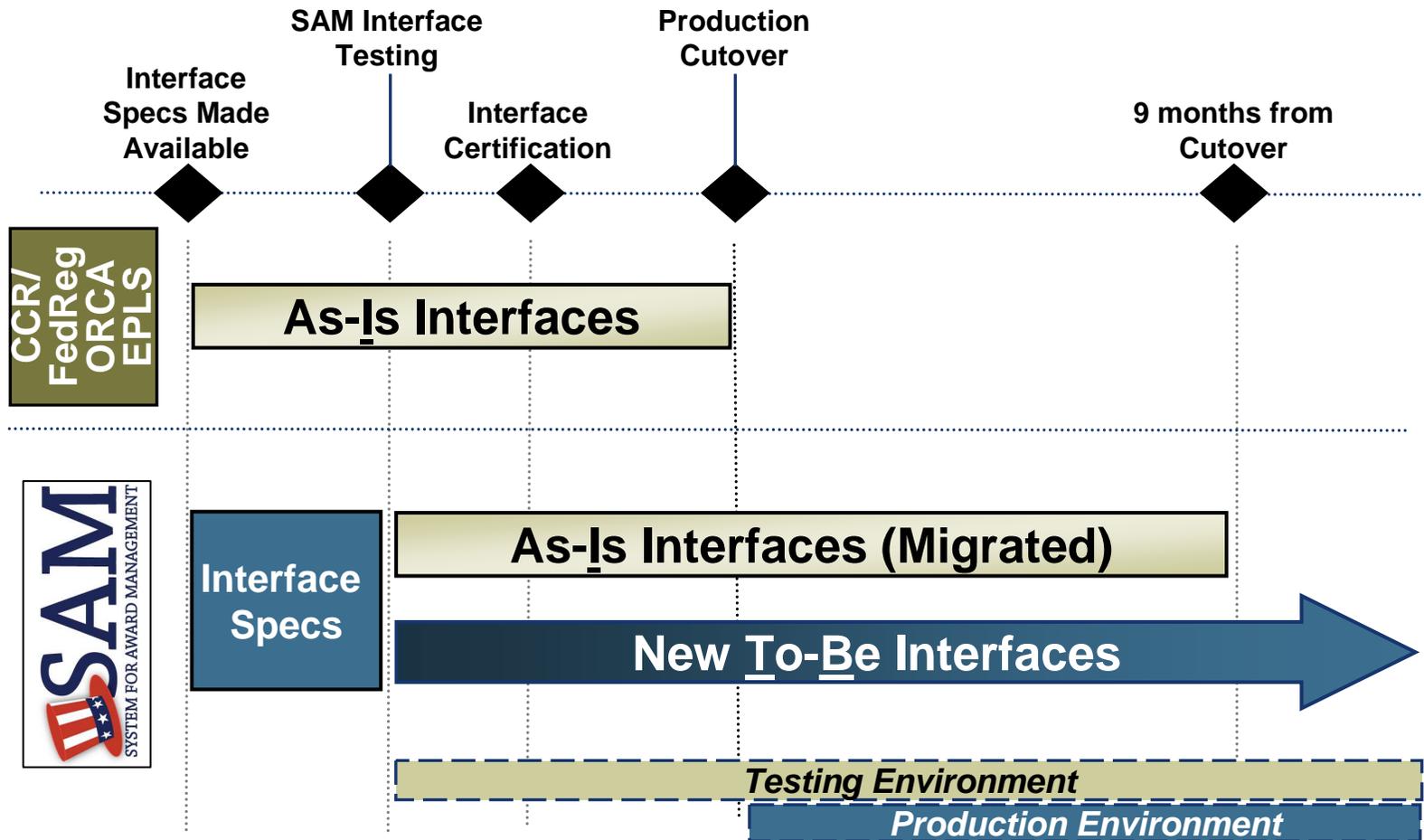


How Was Migration Planned?



- ▶ **Identified and evaluated as-is CCR/FedReg, ORCA, and EPLS interfaces**
- ▶ **Validated business purpose and technical details**
- ▶ **Eliminated redundancies and improved process efficiency where possible**
- ▶ **Analyzed and consolidated interfaces**
- ▶ **Specified interfaces to be phased-out and supported long-term**

What Are the Migration Phases?





How Will Data Be Provided?



- ▶ **To-Be interfaces/extracts will be based on functional area and data sensitivity level**
- ▶ **Each Functional Area will have a set of records available in increasing levels of sensitivity:**
 - **Public**
 - **For Official Use Only**
 - **Sensitive**
 - **System Only**
- ▶ **The existing CCR, FedReg, and ORCA extracts will be merged into the four Entity Management extracts**
- ▶ **If you have the correct permissions for that level of data, you have access to all the data at that level, through various means, including web or FTP access to a flat file and web services access to XML**



Which Extracts Will Be Migrated?



As-Is Interface Name	SAM To-Be Interface Name	Protocol	Data Format
CCR Extract - Complete	Entity Management Extract - System-only	sFTP, HTTP-website, SOAP/HTTPS	XML, CSV
CCR Extract - FOIA	Entity Management Extract - Public	sFTP, HTTP-website, SOAP/HTTPS	XML, CSV
CCR Extract - Sensitive	Entity Management Extract - Sensitive	sFTP, HTTP-website, SOAP/HTTPS	XML, CSV
CCR Extract – FOUO	Entity Management Extract – FOUO	sFTP, HTTP-website, SOAP/HTTPS	XML, CSV
CCR Extract – MPIN	Entity Management Extract – MPIN	sFTP, HTTP-website	CSV
CCR XML - Non-Proprietary	Functional CCR XML included in Entity Management Extracts		
CCR Extract – Proprietary	CCR will be merged into SAM Austin Tetra data will be provided in the Entity Management Extract – Sensitive Functional CCR XML included in Entity Management Extracts		
CCR XML - Proprietary	Functional CCR XML included in Entity Management Extracts		
CCR XML - Sensitive	Functional CCR XML included in Entity Management Extracts		
FedReg Extract	FedReg will be merged into SAM		
ORCA Extract - All	ORCA will be merged into SAM		
ORCA XML	ORCA will be merged into SAM		

Interface will be kept

Interface will be eliminated



How Many Data Elements?



Legacy Interfaces	Number of Data Elements	SAM Interface Name	Number of Data Elements
CCR Extract – Complete	243	Entity Management Extract – System-only	229
CCR Extract – FOIA	148	Entity Management Extract – Public	118
CCR Extract – Sensitive	242	Entity Management Extract – Sensitive	224
CCR Extract – FOUO	210	Entity Management Extract – FOUO	199
CCR Extract – MPIN	5	Entity Management Extract – MPIN	5



What Are the Major Changes?

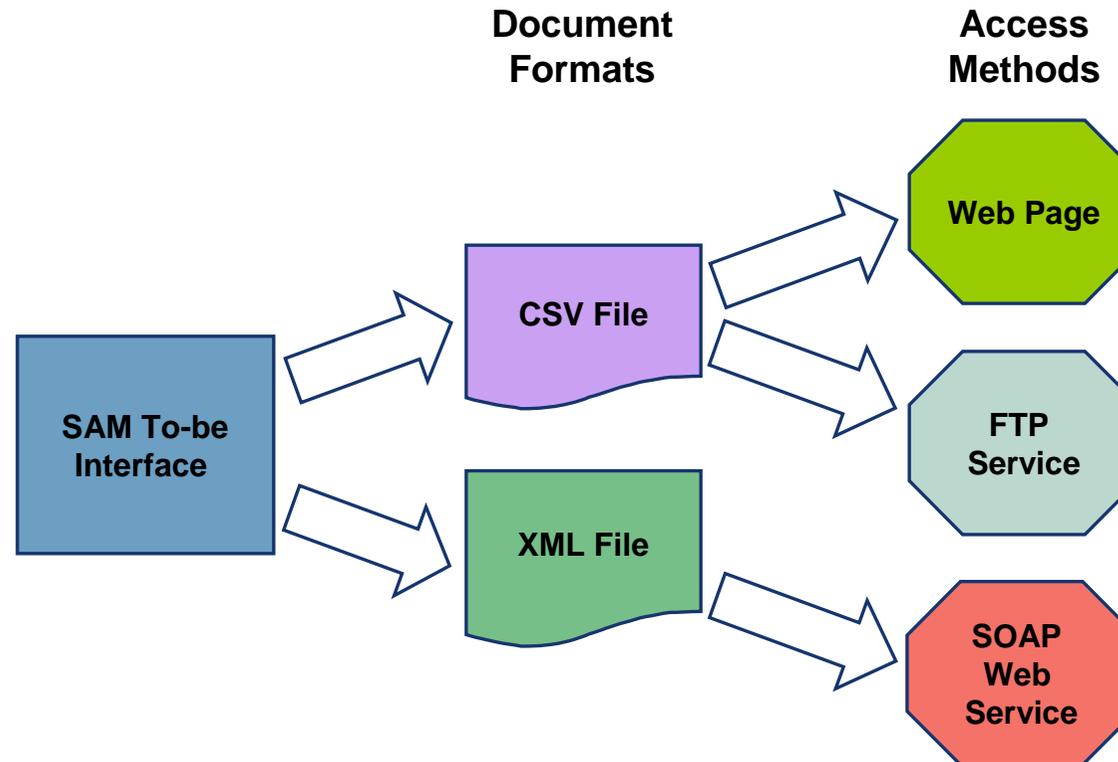


▶ POCs

- POCs will be associated with data sensitivity level
- “POC type” field will specify the type of POC
 - Public
 - 1) Electronic Business
 - 2) Government Business
 - 3) Past Performance
 - FOUO
 - 1) Accounts Receivable
 - 2) EDI
 - 3) Party Performing Certification
 - 4) Proceedings
 - 5) Sole Proprietorship
 - 6) Eliminations
 - 7) Sales
 - 8) Accounts Payable
 - Sensitive (none at this time)

▶ Elimination of Counters from To-be Interfaces

- Data will be provided in CSV/nested XML tags format
- Example
 - Product Service Codes – If there are multiple PSCs for a DUNS, they will be made available as a single string with comma separation, bound by “” in CSV file and nested XML tags in web service
 - PSC COUNTER – Eliminated from to-be interface



- ▶ **Extracts will be provided in multiple ways to meet various needs:**
 - As a flat file (https/ftp) for access to the full extract
 - Via web services (i.e., in XML)
- ▶ **Existing interfaces will be migrated as-is—for the first 9 months**



Will Certification Be Required?



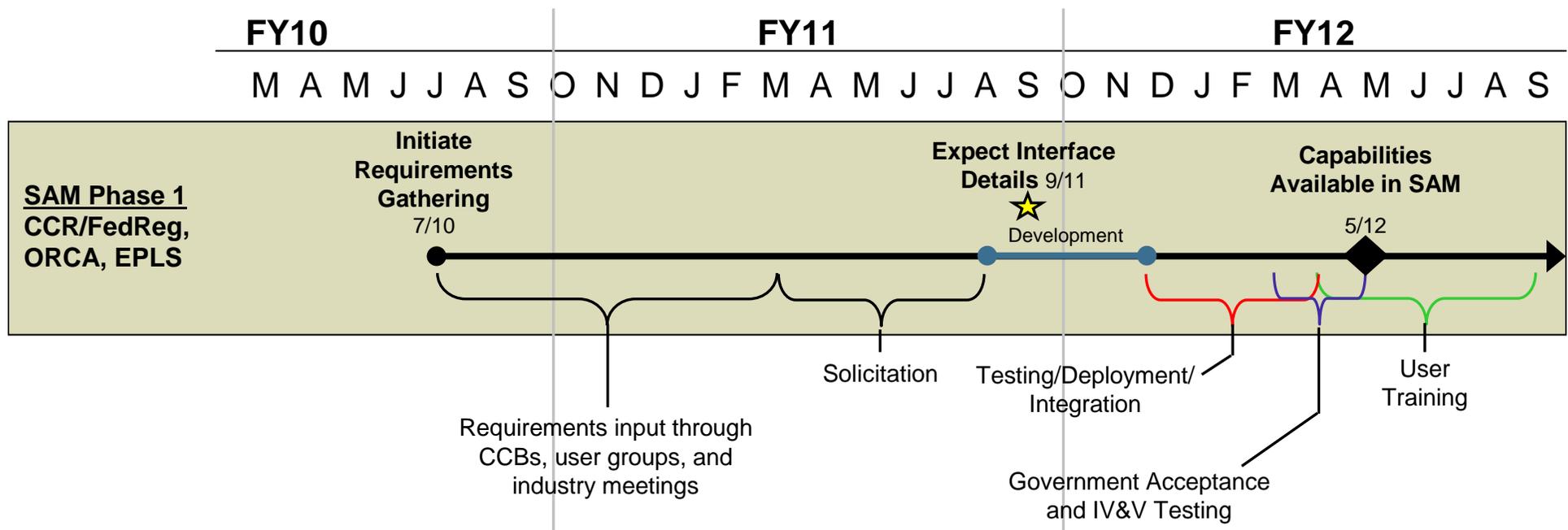
- ▶ **To submit data into SAM (which will be available in Phase 2b), interfacing systems will go through a certification process**
- ▶ **To pull data from SAM (available in SAM Phase 1), there will be a data approval process for some users/roles**
- ▶ **For phase 1 SAM has following Data Access Roles**
 - **Public Data Viewer – No approval needed**
 - **FOUO Entity Management Data Viewer – No approval needed for users with a .gov, .mil, or .si.edu email account**
 - **FOUO Exclusions Data Viewer – Approval required**
 - **Sensitive Entity Management Data Viewer – Approval required**
 - **Sensitive Exclusions Data Viewer – Approval required**
 - **System Only Entity Management Data Viewer – Approval required**
 - **MPIN Data Viewer – Approval required**
- ▶ **Users from .gov, .mil or si.edu domain, or users with a SAM U.S. Federal government role, will automatically have Entity Management – FOUO Data Access, replacing CCR Tools**
- ▶ **There will be a new process for requesting an extract**
 - **Determination of business need for the data**
 - **Will require Government POC approval**
 - **May require security officer approval**



What's Next



- ▶ Interface details (to data element level) will be provided about one month after award of the SAM Development contract



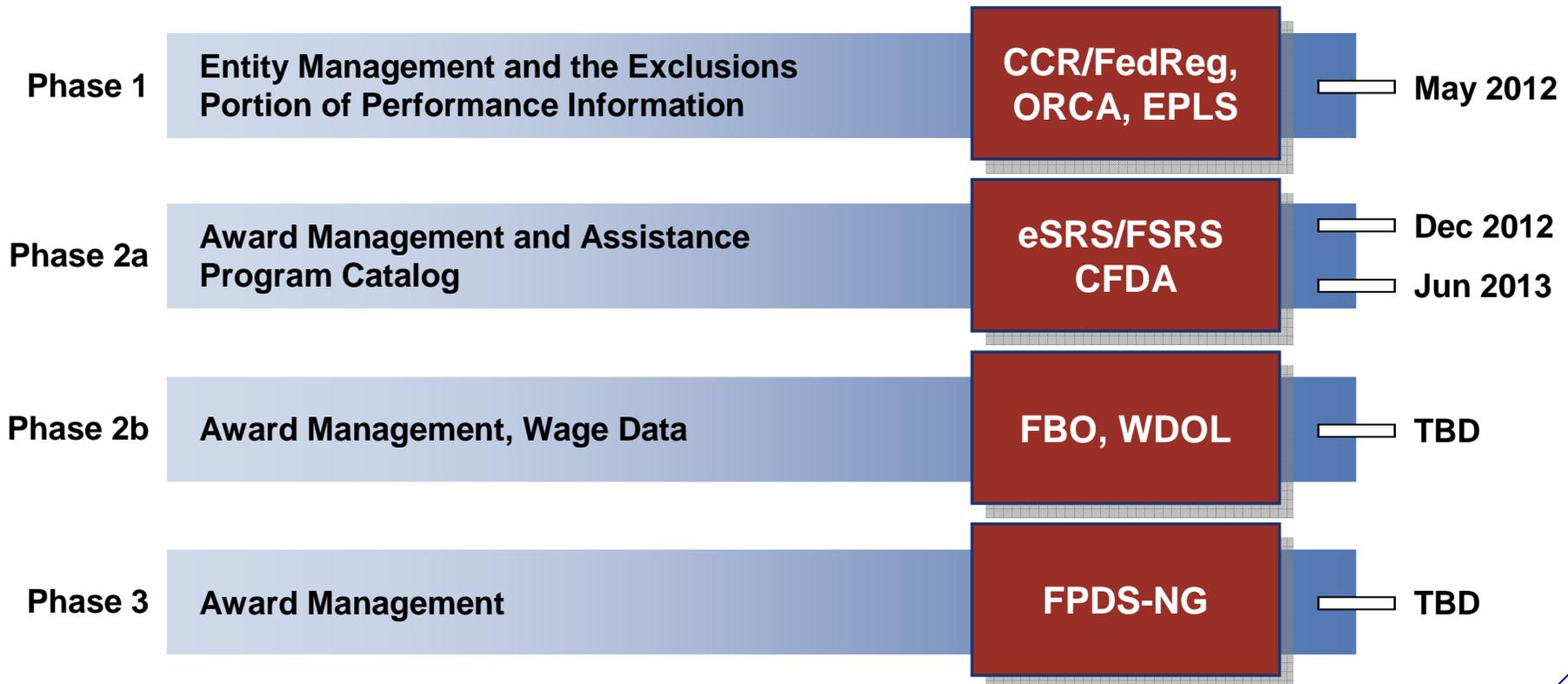
▶ Subsequent SAM phases will follow this same pattern.



When Are Future Changes?



- ▶ Legacy system capabilities will move to SAM in phases
 - Phase 1 is on track for May 2012
 - Phase 2a has two releases, planned for Dec 2012 and Jun 2013
 - Subsequent phases may change as the government determines what can be accomplished when with available funding





Next Steps for You



▶ Plan for Changes

- Estimate and budget for changes in legacy system interfaces and SAM interfaces
- Include plans for interface changes in release schedules
 - Development
 - Test
 - Certification

▶ Stay Informed

- Continue to attend these meetings

▶ Contribute

- Communicate with us about pain points (send email to askSAM@gsa.gov)
- Plan to participate in testing

▶ **Data Format**

- Describes the data type to include any single character or boolean values

SAM Extract Element List	Datatype	Data Format	Length	CSV or XML
Account Type	STRING	C or S	1	BOTH
ACH Email	STRING	STRING	80	BOTH

- Describes the date format – MMDDYYYY
- ^Separated – Refer to the worksheet “SAM To-Be STRING Clarification”

▶ **Data Length**

- Provides the length of the element



String Explanation



- ▶ **SAM Numerics Code String**
 - **Bonding Level Value + Local # Employee + Local Ann. Revenue + Total Assets + Megawatt Hours + Barrels Capacity**

- ▶ **Disaster Response String**
 - **Geographic Area Served: County + Geographic Area Served: Metropolitan Statistical Area + Geographic Area Served: State**

- ▶ **Bus Type String**
 - **Government Type + Other Business or Organization Qualifiers + Other Entity Qualifiers + AbilityOne Flag + Registration Purpose**

- ▶ **DNB Linkage String**
 - **Parent Address + HQ Parent Address + Domestic Parent Address + Global Parent Address**

- ▶ **SBA Business Types String**
 - **SBA Business Types + SBA Cert Exp Date**



^Separated Fields



► Explanation of String concatenation

- Values separated by single ^
- List Values separated by double ^^
- e.g.: "... ^^GL^123456789^555551212^123 Main
Street^NULL^NULL^NULL^Arlington^USA^VA^99999^0001^01012
011^^..."