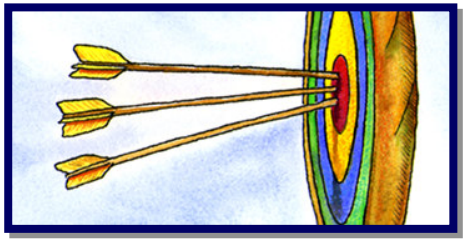
Welcome to…

Budget Formulation: Workforce/Travel Planning

Course Objectives

- **At the end of this course, you will have received:**
  - An overview of the workforce planning process
  - An overview of the travel planning process
  - An overview of the system
  - Information on activities that you (or your resource analyst) will perform with your assigned system roles



- **At the end of this course, you should be familiar with how the the Budget Formulation System is used to:**
  - Enter FTEs and calculate either labor rates or labor dollars
  - Enter Annual Travel Dollars
  - Distribute FTEs/Travel Dollars from the Center to the Organizations
  - Distribute from the Organizations to the Project Definitions, the 6 service pools, the Center G&A pool, and the Corporate G&A pool
  - Access and manipulate the workforce/travel reports

Overview:
Budget Formulation Implementation

Budget Formulation Scope

There will be two functional releases for Budget Formulation. The functionality in each release and the release schedule coincides with the budget cycle.

Release 0.5 will "go live" on October 27, 2003 and is focused on Center functionality. This release will be used to:

- Develop POP 06 on Full Cost basis
- Project Budget Planning
- Perform Workforce, FS-41 Planning
- Develop Service Pool Planning
- Develop Center & Corporate G&A Planning

!! Budget Formulation is being used as a data entry tool. All negotiations will occur outside of the system.

Release 1.0 will "go live" in February, 2004. This release will focus on delivering Agency functionality.

Major Processes Affected
FTE Planning
Travel Planning
Service Pool Planning
Procurement Planning
Contractor Planning
G & A Planning
Phasing Plans

Primary Groups Affected
Resource Analysts
CFO Budget Staff
IT Support (BISS Help Desk, Networks, ODIN)

Why are you in this class?

Based on the system roles to which you have been assigned, you will be performing Workforce and Travel Planning activities in the Budget Formulation system.

The Galactic Overlord

- Has all roles in the Budget Formulation system and can perform all activities.

Workforce Planning roles

The Center FTE (FS-41) Authorizer:

- Distributes the Center's FTE authorizations to organizations.
- Has access to the Center Control Planning (FTEs/R&PM) Folder.

The Center Organizational FTE Authorizer:

- Performs the primary distribution of annual FTE authorizations from an organization to each of the Project Definitions, Service Pools, Center G&A, and Corporate G&A.
- Has access to the Primary Resource Distribution (FTEs) Folder.

Travel Planning roles

The Center Travel (FS-42) Authorizer:

- Assigns the Center's travel authorizations to organizations.
- Has access to the Center Control Planning (Travel $) Folder.

The Center Organizational Travel Authorizer:

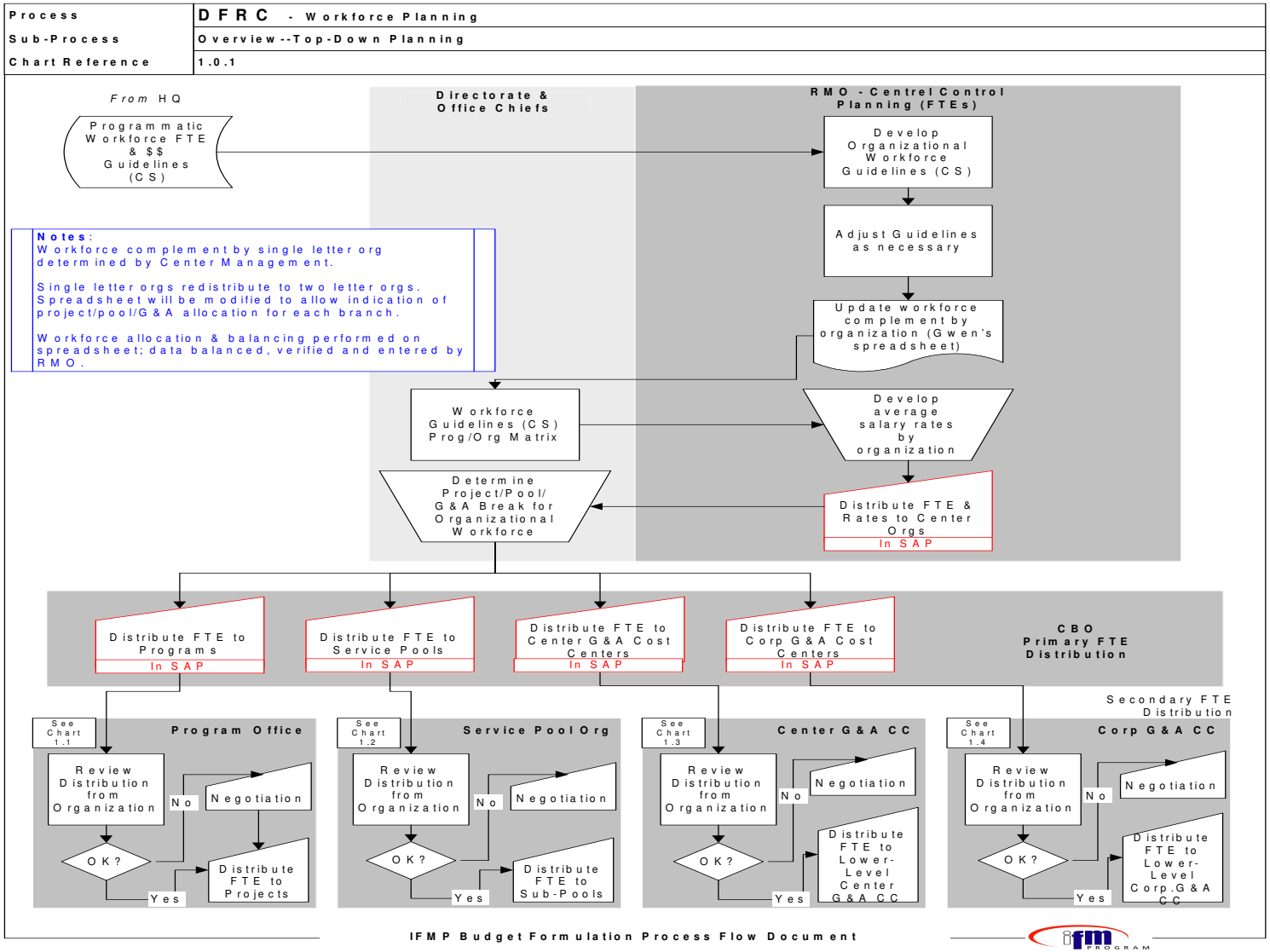
- Performs the primary distribution of annual travel authorizations from an organization to each of the project definitions, Service Pools, Center G&A, and Corporate G&A.
- Has access to the Primary Resource Distribution (Travel $) Folder.

Topic 1
Workforce/Travel Planning
Role and Process Overview

Workforce Planning – Key Points

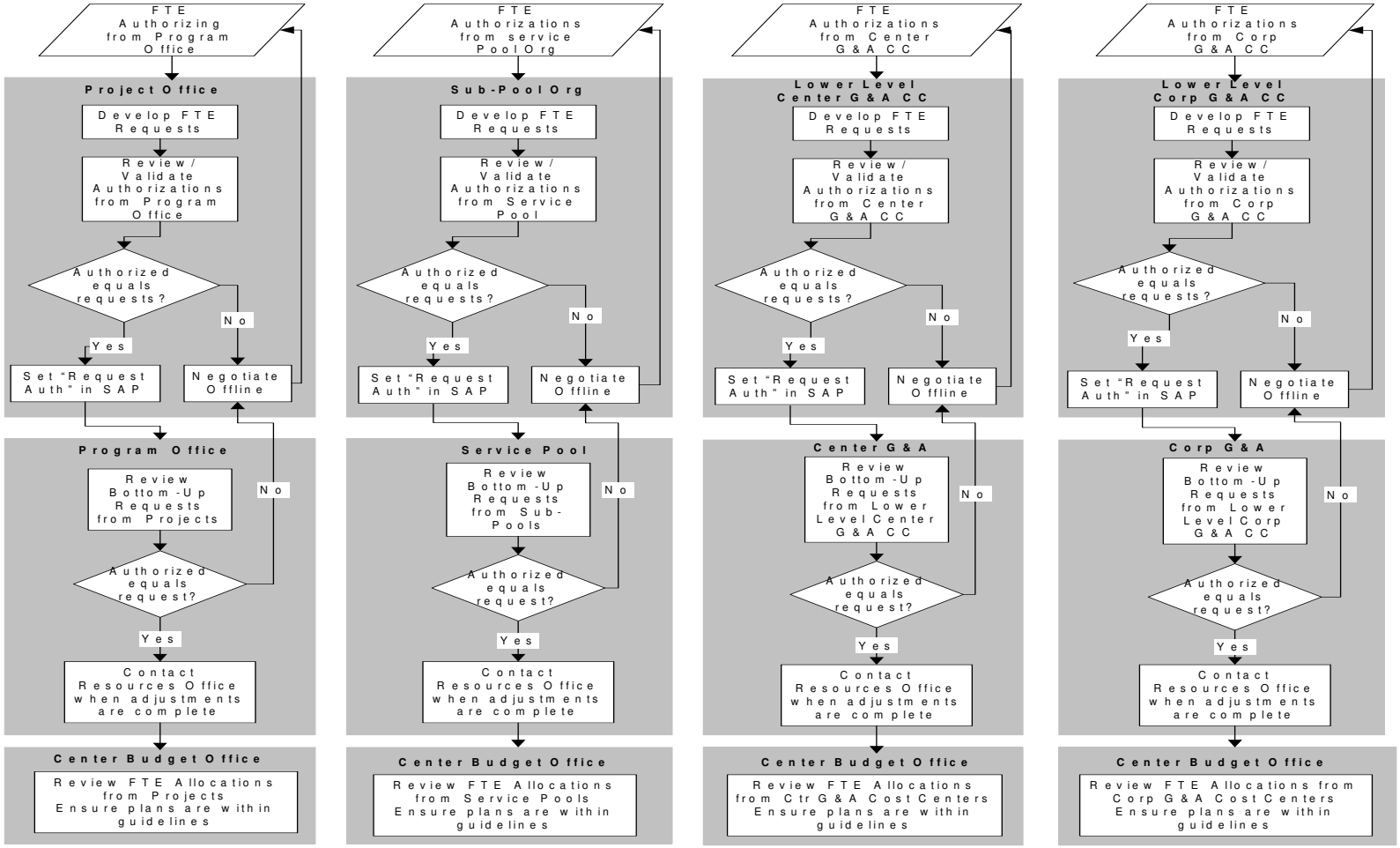
- Workforce planners will enter and distribute FTE quantities
- Negotiations of FTE quantities between the Center and the Organizational groups will be conducted offline via Excel spreadsheets.
- As in prior years, the Office of the Center Director determines organizational FTE complements in coordination with Directorates and Office Chiefs. This process results in FTE distribution to 2-letter organizations. This data will be input into SAP Strategic Enterprise Management (SEM) to record the Authorized FTE quantities available throughout the planning stages (i.e. Pre-POP and POP).
- This distribution is based on the Center's Civil Service FTE planning process. This process allows the Center FTE planner to enter FTE data into the system for both the annual planning horizon and the monthly phasing plan for the operating year (both the initial plan and the mid-year update).

Workforce – Top-Down Planning



Workforce – Bottom-Up Planning

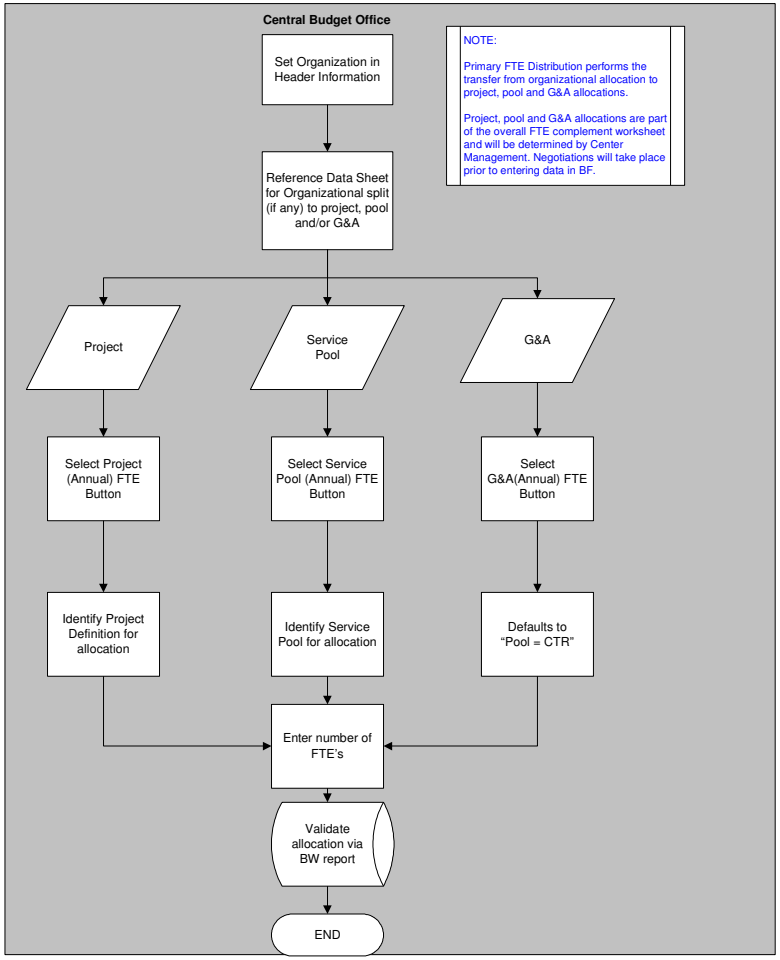
Process	TO-BE - Workforce Planning
Sub-Process	Bottom-Up Planning
Chart Reference	1.0.2



IFMP Budget Formulation Process Flow Document

Workforce – Primary Distribution of FTEs

Process	TO-BE - Workforce Planning
Sub-Process	Primary Distribution of FTE's
Chart Reference	1.1



DFRC IFMP Budget Formulation Process Flow Document

- ✓ Primary FTE distribution will allocate organizational FTE's to the proper project, pool or G&A cost center.
- ✓ Secondary FTE distribution involves distributing FTE's assigned to high-level project definitions, service pools and G&A cost centers to lower-level project elements, sub-pools and cost centers.
- ✓ If no lower lever distribution is required, it merely passes the previously negotiated FTE's to the lower level folder.
- ✓ Negotiations on FTE quantities between the higher levels and the lower levels will be conducted offline prior to entering data.

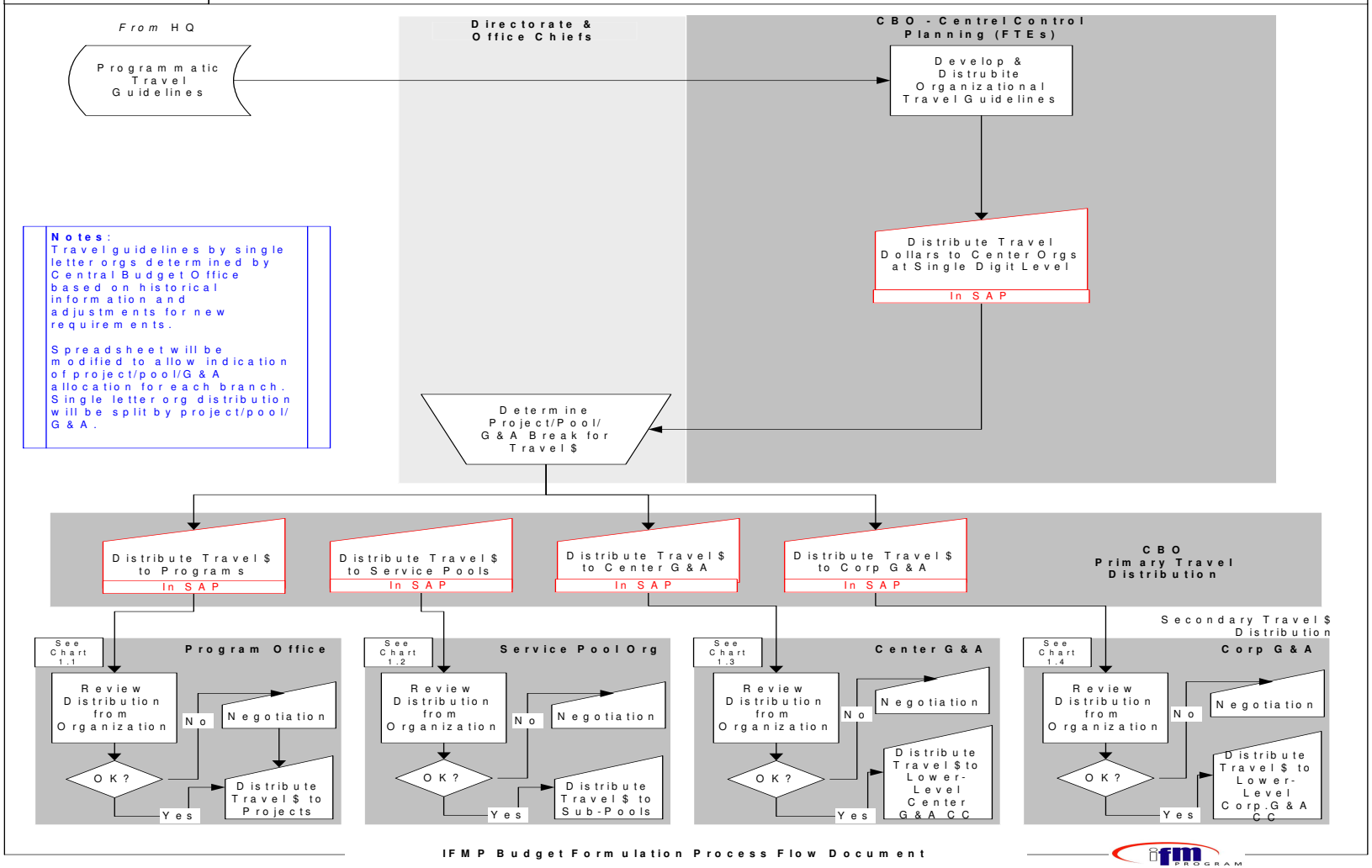
Overview:
Travel Planning Process

Travel Planning – Key Points

- Travel (FS-42) planners will estimate the travel budget and distribute the travel dollars by organization to the required Center Organizations (top-down approach).
- This process will facilitate distribution from Center Organizations to Project Definitions, Service Pools, and Center and Corporate G&A. This process will allow for the entry and balancing build-up of travel dollar requirements from the lower levels of a Project, Service Pool, and Center and Corporate G&A.
- Negotiations on travel dollars between the Center, Center Organizations, and the three groups (Projects, Service pools, and Center and Corporate G&A) will be conducted off-line, and this module will serve to record the requested dollars (by Project, Service Pool, Center and Corporate G&A Pool. Travel dollars for the operating year and the 6 out years will be distributed, and a Budget-to-Complete will be estimated where needed.
- As with the FTE distribution, the Primary Distribution (Travel $) moves the travel budgets from the organization to projects, pools and G&A. Secondary Distribution (Travel $) moves the travel funding to lower level projects, sub-pools and G&A cost centers when required.

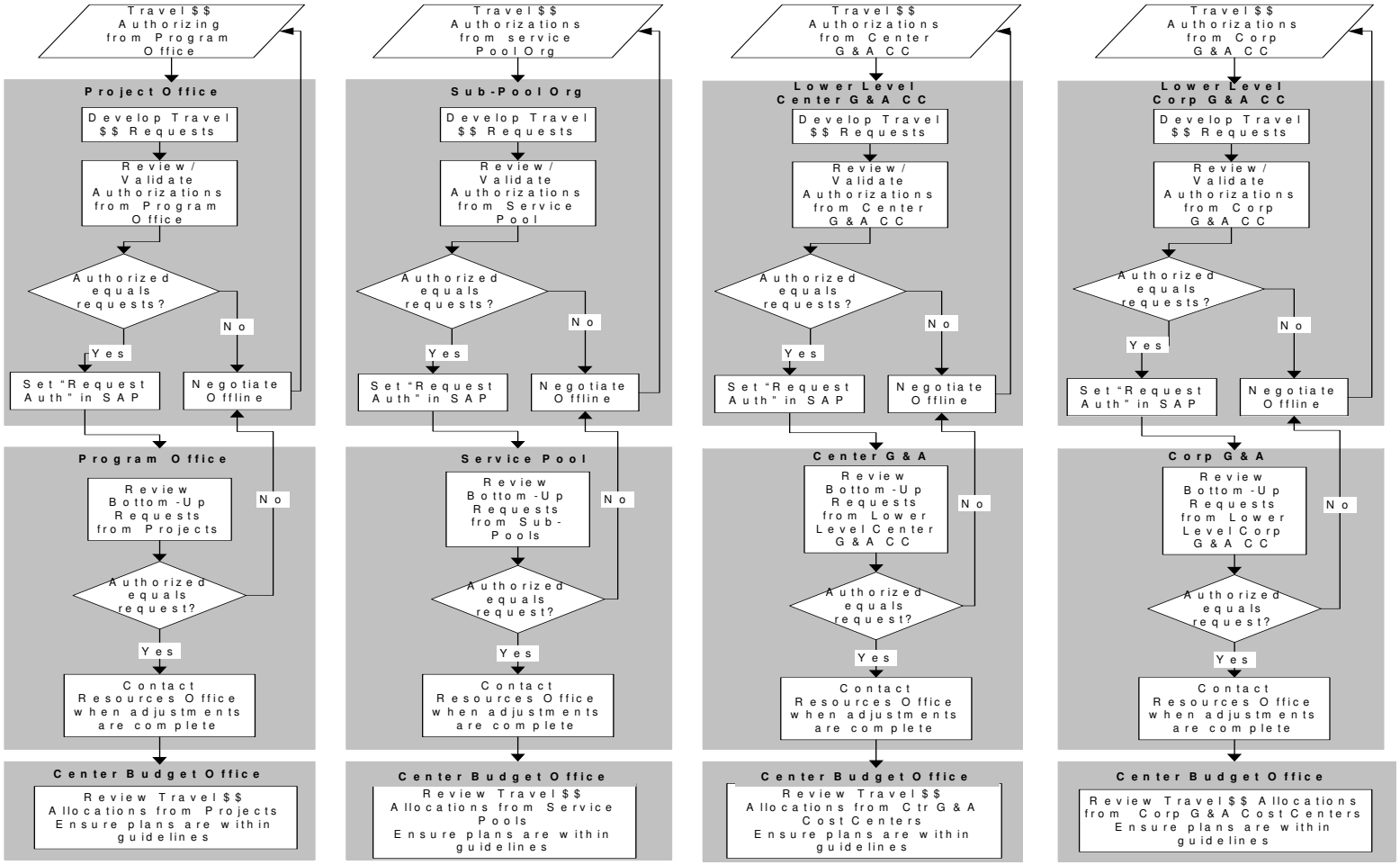
Travel – Top-Down Planning

Process	DFRC - Travel Planning
Sub-Process	Overview--Top-Down Planning
Chart Reference	2.0.1



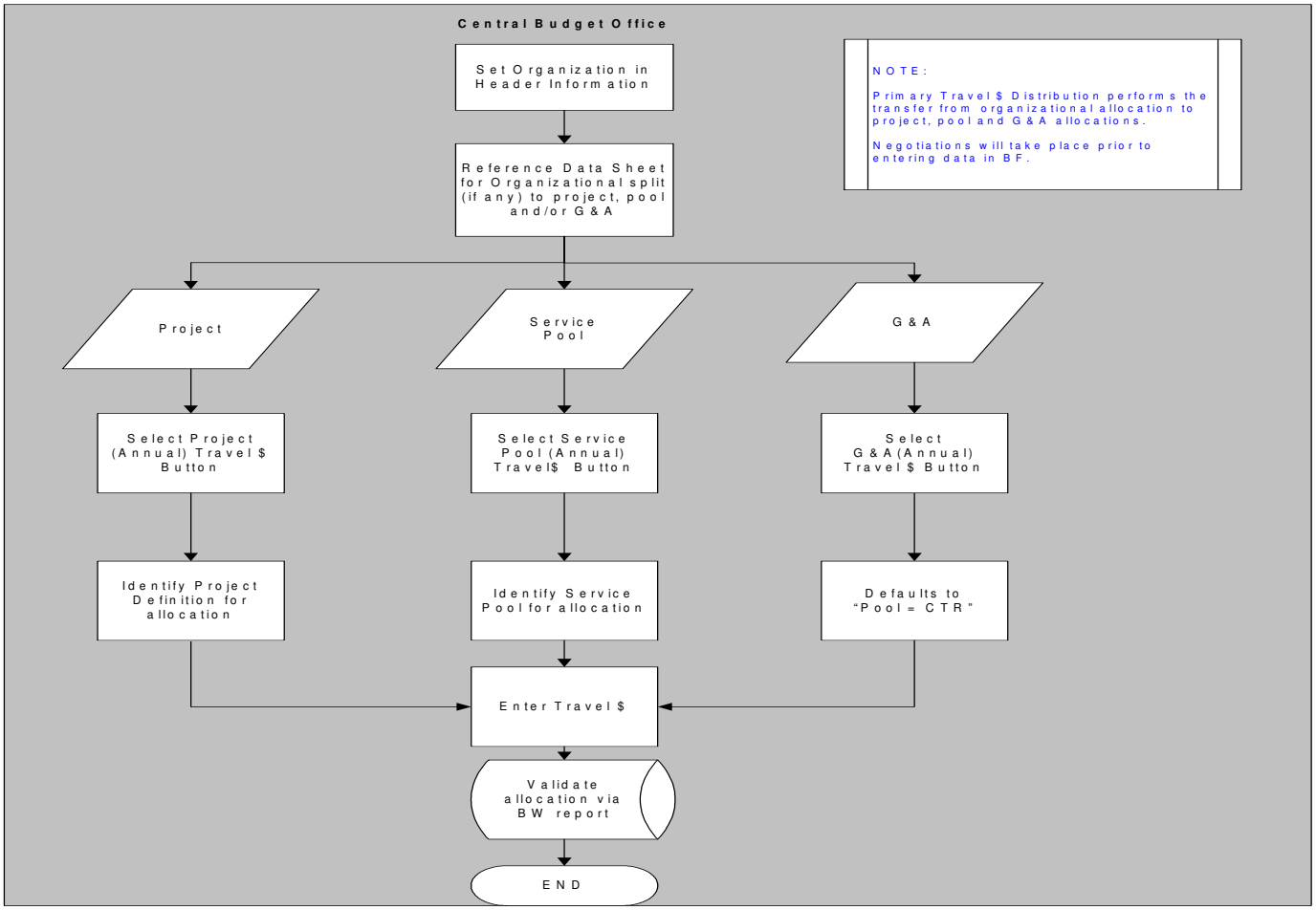
Travel – Bottom-Up Planning

Process	TO-BE - Travel Planning
Sub-Process	Bottom-Up Planning
Chart Reference	2.0.2



Travel – Primary Distribution of Travel $

Process	TO-BE - Travel Planning
Sub-Process	Primary Distribution (Travel $)
Chart Reference	2.1



Differences Between Workforce & Travel for Center Control Planning

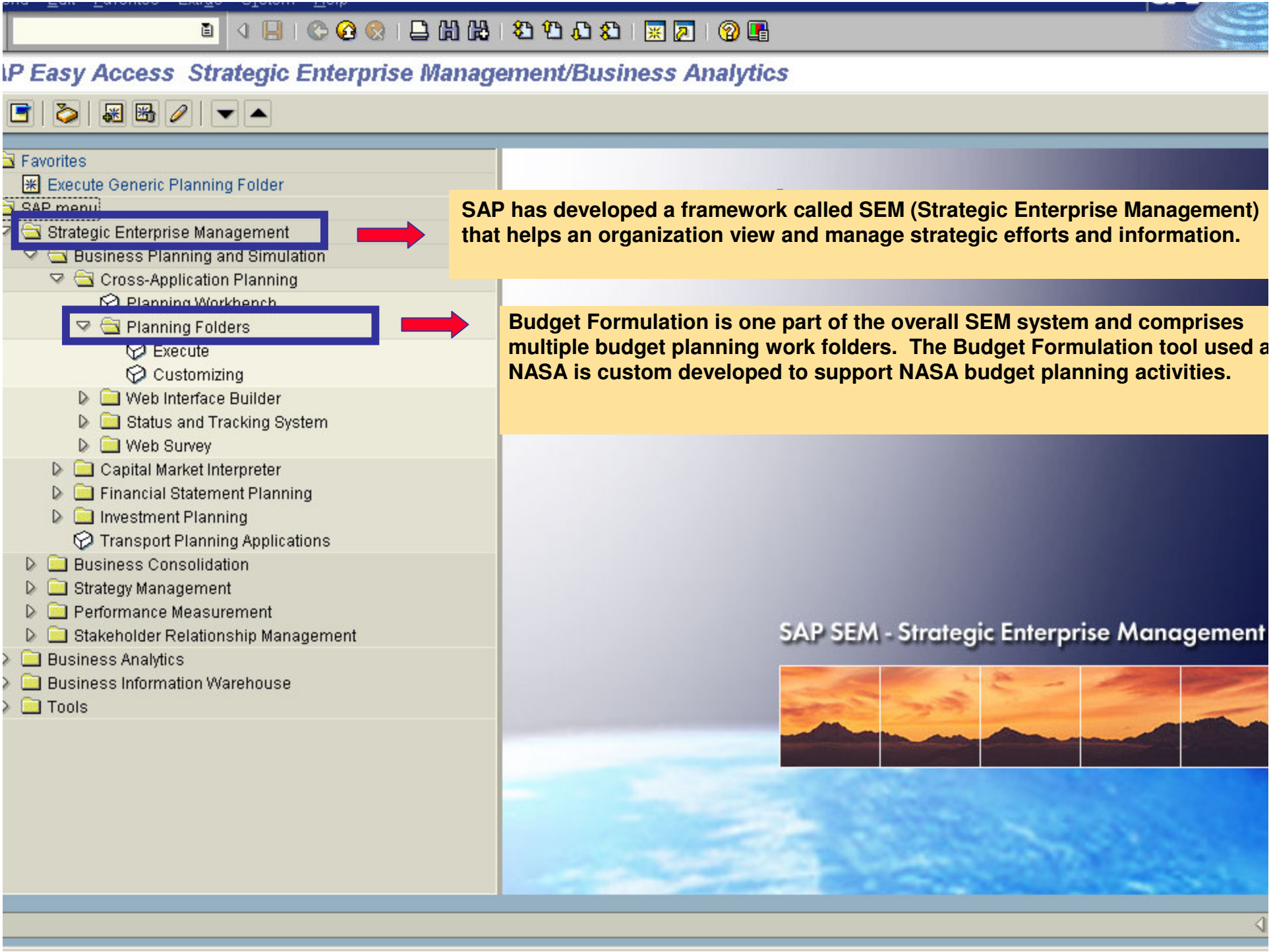
- Utilize the Center Control Planning (Travel) Folder
- Deal with Travel Dollars only, no rates or calculations are necessary
- Incremental and cumulative phasing views are available, but read-only
- Delta screens for Travel dollars are Annual only; there are no phasing (monthly) delta screens

Differences between Workforce and Travel at Primary Distribution

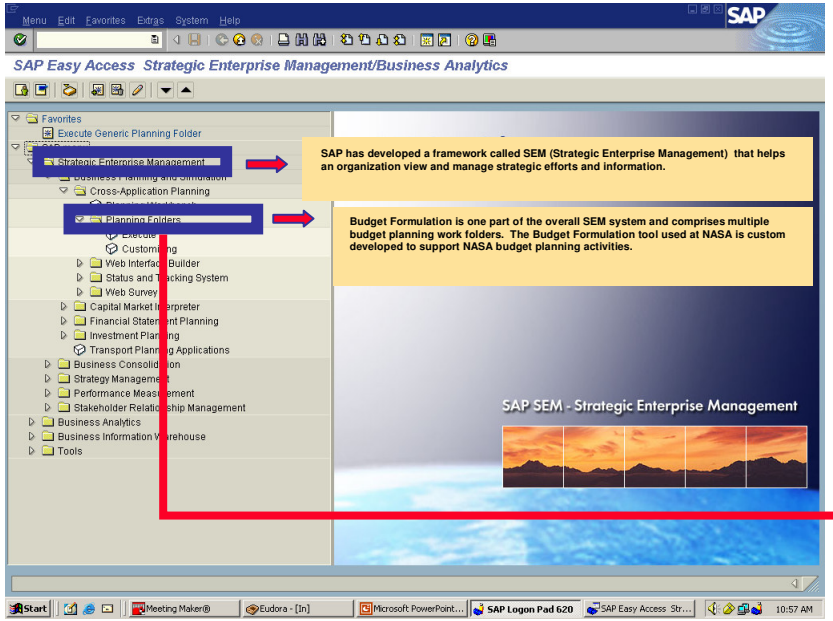
- Access the Primary Resource Distribution (Travel) Folder
- No phasing of Travel Dollars
- Views of phased requests for Travel Dollars from lower levels are available in the output area
- Incremental and cumulative phasing views are available, but read-only
- Delta screens for Travel Dollars and Annual only; there are no phasing (monthly) delta screens

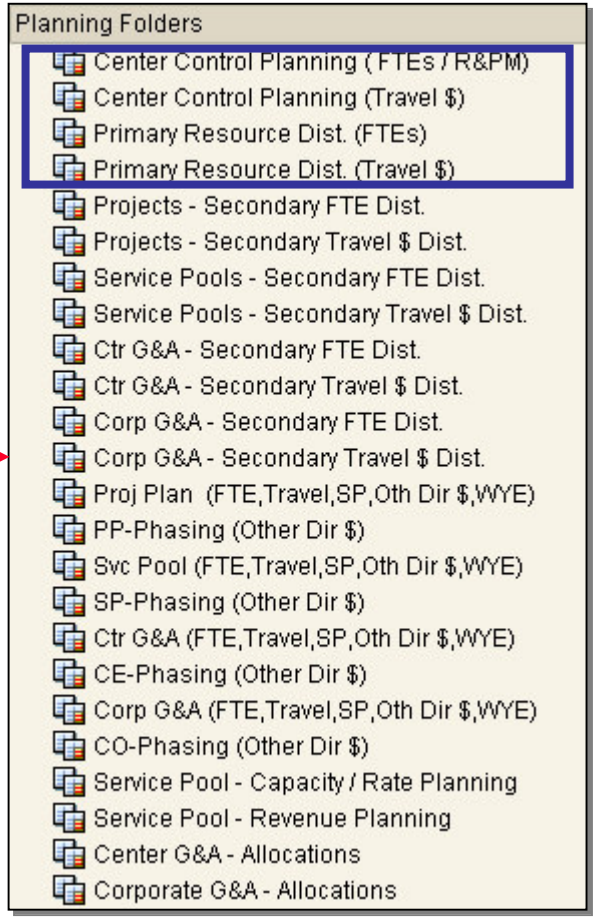
Topic 1

Workforce/Travel Planning – Performing Business Processes in the System Overview


P Easy Access Strategic Enterprise Management/Business Analytics
Favorites
Execute Generic Planning Folder
SAP menu
Strategic Enterprise Management
Business Planning and Simulation
Cross-Application Planning
Planning Workbench
Planning Folders
Execute
Customizing
Web Interface Builder
Status and Tracking System
Web Survey
Capital Market Interpreter
Financial Statement Planning
Investment Planning
Transport Planning Applications
Business Consolidation
Strategy Management
Performance Measurement
Stakeholder Relationship Management
Business Analytics
Business Information Warehouse
Tools
SAP has developed a framework called SEM (Strategic Enterprise Management) that helps an organization view and manage strategic efforts and information.
Budget Formulation is one part of the overall SEM system and comprises multiple budget planning work folders. The Budget Formulation tool used a NASA is custom developed to support NASA budget planning activities.
SAP SEM - Strategic Enterprise Management

Where will you be doing your work?





After budget planning activities occur and data is established, it will be handed off to Resource Analysts to enter into the Budget Formulation System. They will be entering the budget data into the appropriate planning folders for their budget planning activity.

Workforce/Travel Planning Business Process Overview: Center Control Planning Activities

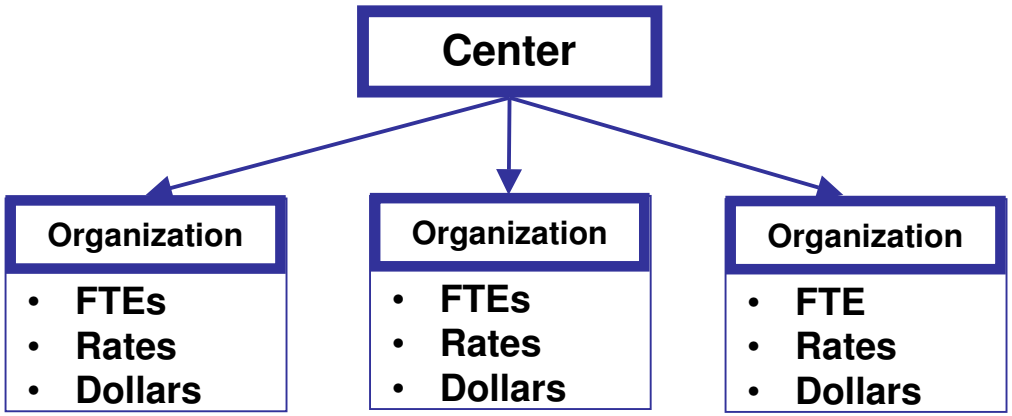
- **During Pre-POP:**
  - Center FTE/Travel Authorizers receive guidance from the Center management that defines the Center's FTE/Travel Dollar ceiling
  - Iterations of negotiations take place to assign the FTEs/Travel Dollars to Organizations within the Center
  - Rates and dollars associated with the FTEs are calculated (by Organization) for further distribution throughout the Center

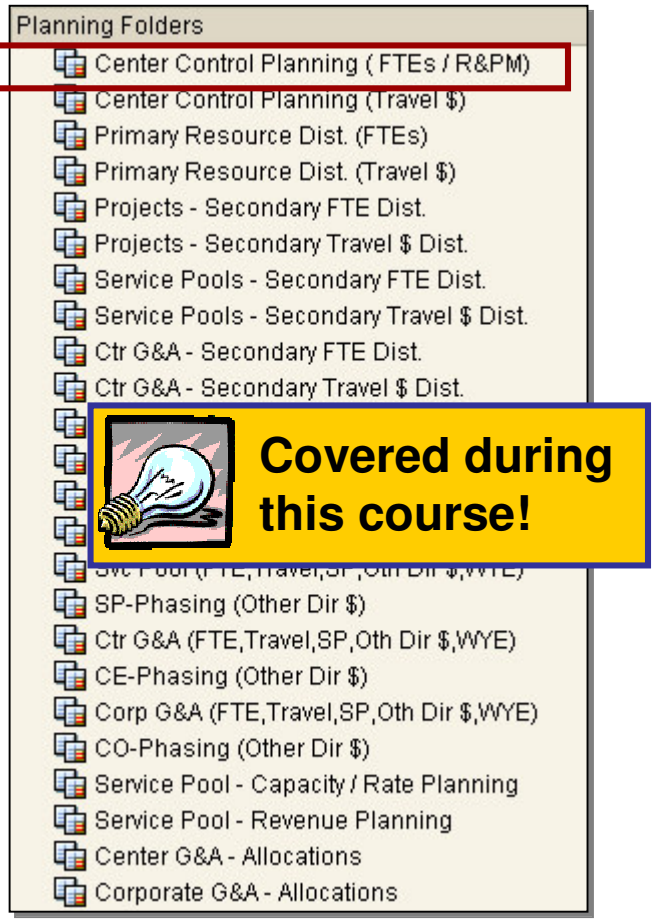
- **During POP:**
  - FTE/Travel Dollar requirements are further defined
  - Authorizers can refine the rate, dollars, and FTEs/Travel Dollars

- **During Initial Phasing Plan and Mid-year update:**
  - Authorizers can input monthly FTEs, rates, and dollars
  - Authorizers can view monthly Travel Dollars from the lower level planners.

Workforce Planning Business Process Overview: Center Control Planning Activities

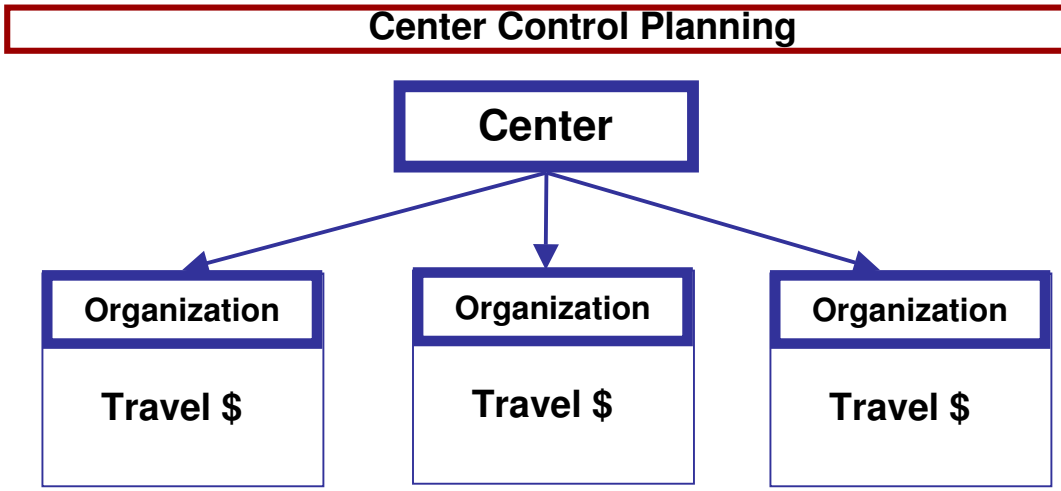
Center Control Planning

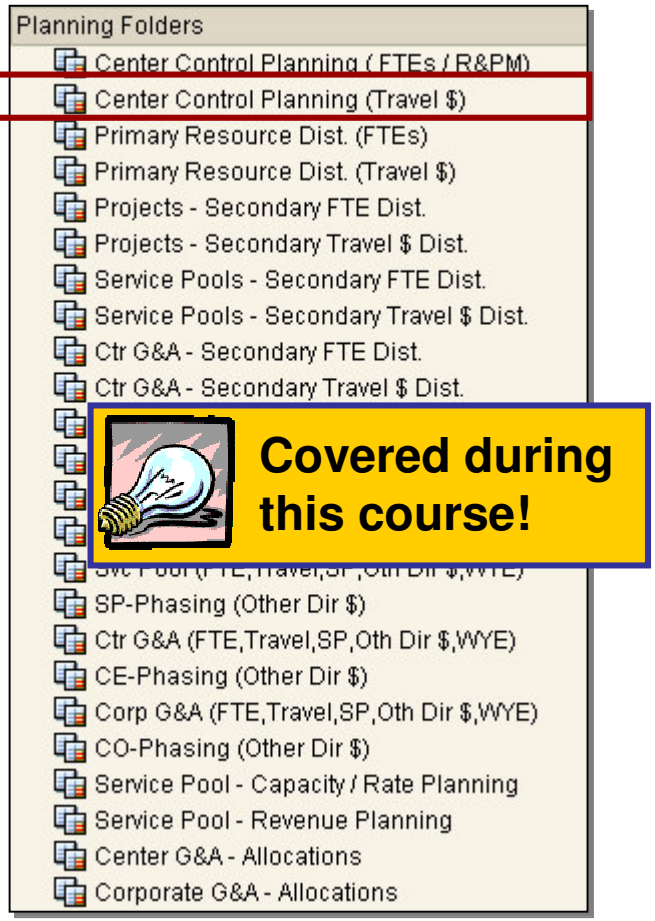




- This folder is used by the Center FTE Authorizers to set FTE allocations to the Organizations.

Travel Planning Business Process Overview: Center Control Planning Activities





- This folder is used by the Center Travel Authorizers to set Travel dollar allocations to the Organizations.

Workforce/Travel Planning Business Process Overview: Center Control Planning Activities

Activities in the System

- The Authorizer selects the Center Control Planning folder.
- The Authorizer selects or enters the appropriate Header characteristics for Business Area, Budget Year, Agency Version, and Center Version.
- The Authorizer distributes FTE/Travel Dollars quantities to Organizations.

- The Authorizer can enter labor rates (developed separately and outside of this system) and the system computes labor costs or the Authorizer can enter labor costs and the system computes labor rates.
- After the rates and/or FTE dollars are calculated and after the Travel Dollars are entered the Authorizer can pull reports.
- The Authorizer can phase rates, dollars, and FTEs.
- The Authorizer can view phased Travel Dollars from the Organizations.

Workforce/Travel Planning Business Process Overview: Primary Distribution Activities

Primary Distribution Activities

- **During Pre-POP:**
  - Center FTE/Travel Authorizers distribute FTEs/Travel Dollars to Organizations in the Center.
  - Center Organizational FTE/Travel Authorizers further distribute the FTEs/Travel Dollars to Project Definitions, Service Pools, Center G&A, and Corporate G&A within the Organizations. This is the Primary Distribution.
  - Iterations of negotiations take place between Organizations and Projects, Service Pools, Center G&A, and Corporate G&A.

- **During POP:**
  - FTE/Travel Dollar requirements are further defined.
  - Authorizers can request additional FTEs/Travel Dollars through an overguide request.

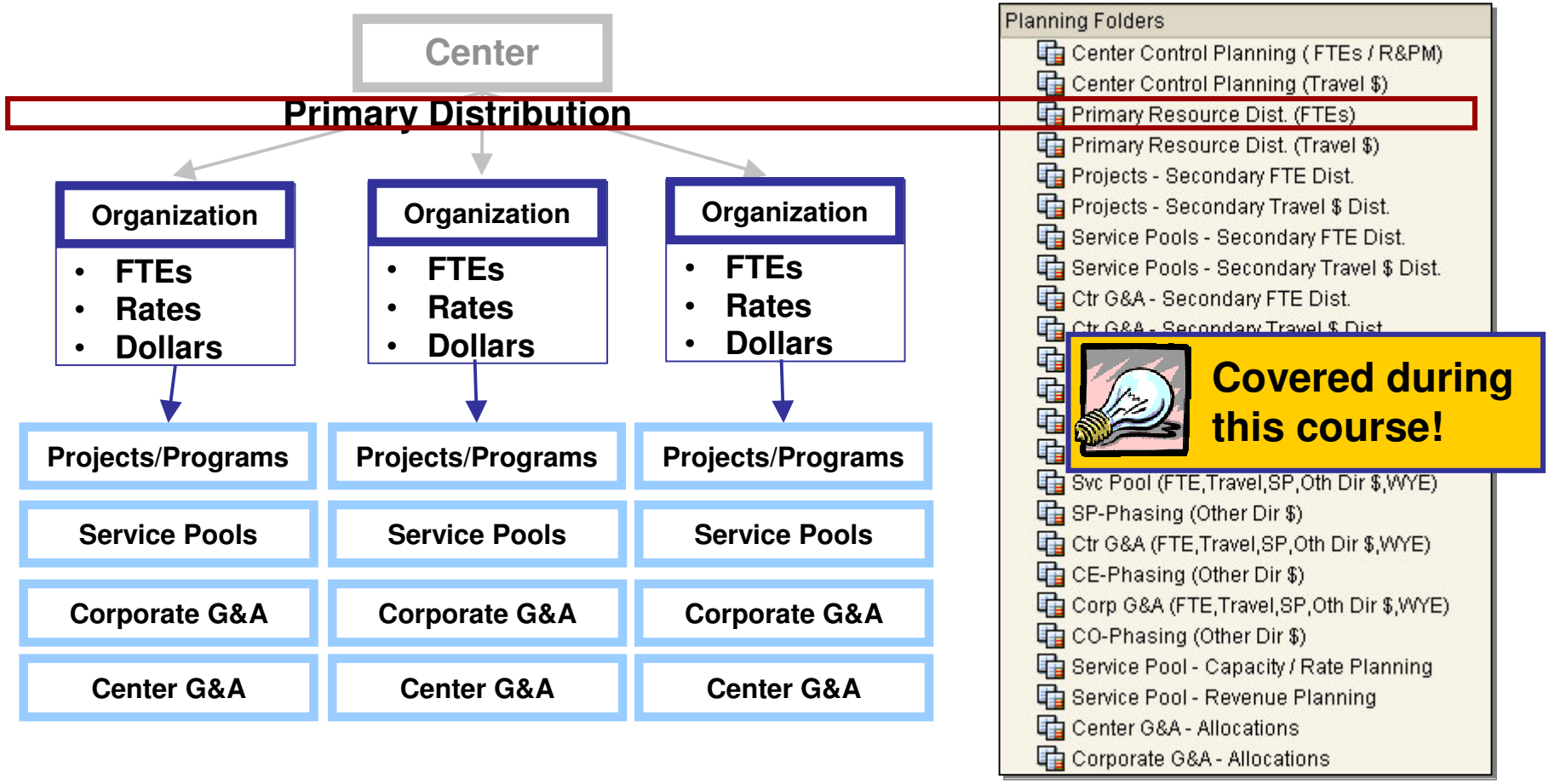
- **During Initial Phasing Plan and Mid-year update:**
  - Authorizers can input monthly FTEs by Project Definition, Service Pool, center G&A, and Corporate G&A.

Workforce/Travel Planning Business Process Overview: Primary Distribution Activities

Activities in the System

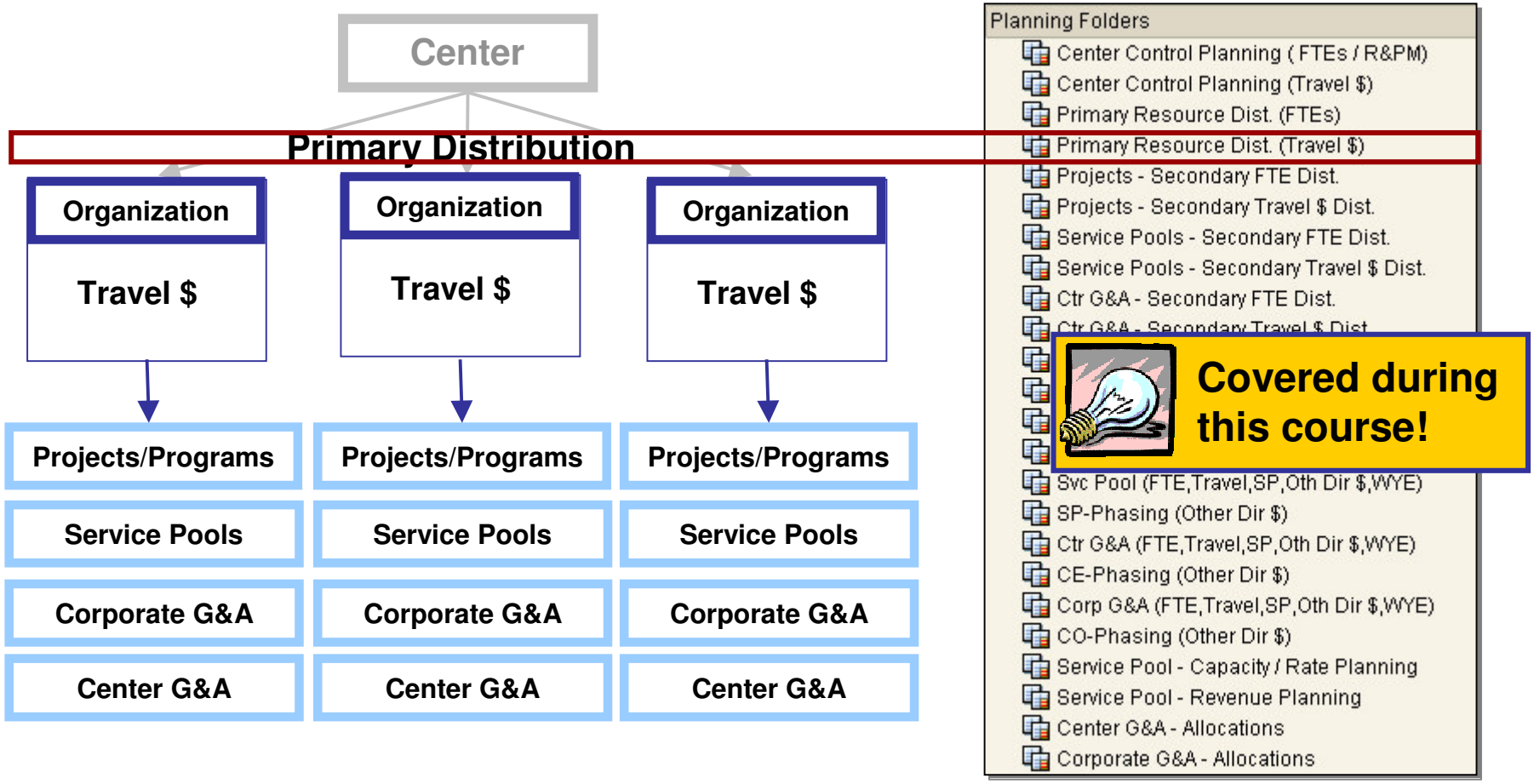
- The Authorizer selects the Primary Distribution (FTE/Travel) Planning Folder.
- The Authorizer selects or enters the appropriate Header data for Business Area, Budget Year, Agency Version, Center Version, NASA Organization, Labor Category, and Fiscal Year.
- The Authorizer distributes FTEs/Travel Dollars to Project Definitions, Service Pools, Center G&A, and/or Corporate G&A within the selected Organization.
- After the distributions have been made, the Authorizer can view reports.
- The Authorizer can phase the FTEs/Travel Dollars during the initial and mid-year phasing plan period.

Center Control Planning and Primary Distribution



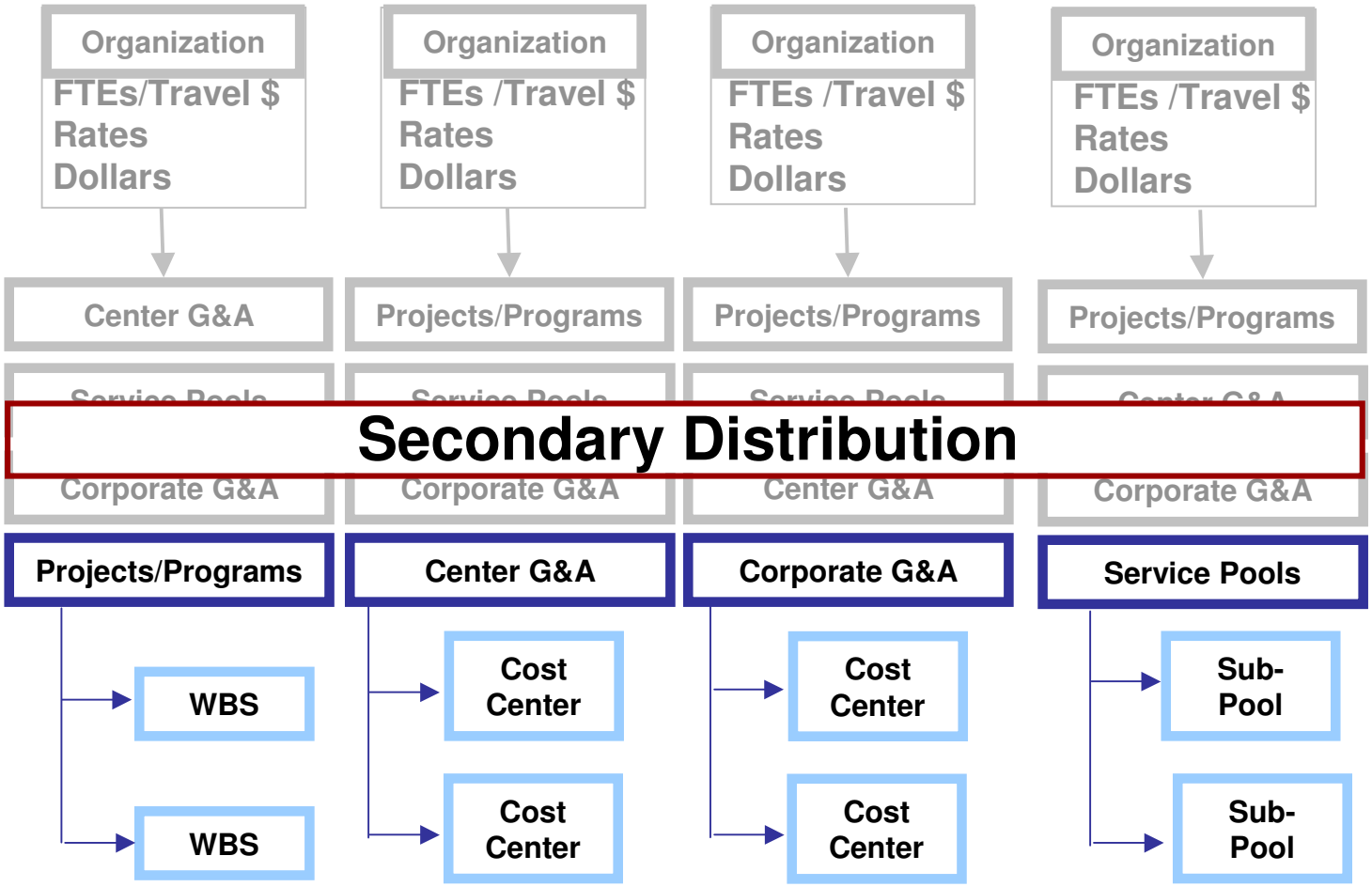
- This folder is used by the Center Organizational FTE Authorizers in the primary resource distribution to allocate FTEs throughout the organization by the full cost components of Projects/Programs, Center G&A, Corp. G&A, and Service Pools

Center Control Planning and Primary Distribution



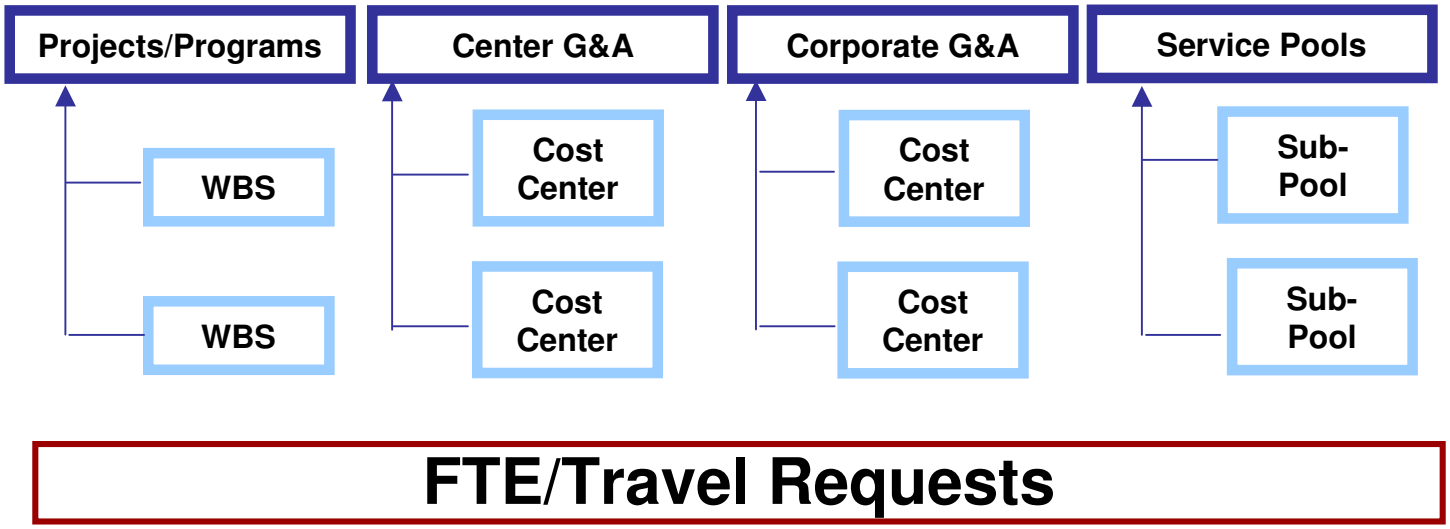
- This folder is used by the Center Organizational Travel Authorizers to allocate travel dollars throughout the organization by the full cost components of Projects/Programs, Center G&A, Corporate G&A, and Service Pools.

Secondary FTE/Travel Distribution



- Secondary Authorizers do the secondary distribution of FTEs/Travel $ from the four full cost elements to the lower levels. This is covered in other Budget Formulation classes.

FTE/Travel Requests



- Requesters request FTEs/Travel Dollars. This is covered in other Budget Formulation classes.

Topic 1: Workforce/Travel Planning Business Process Overview: Debrief

- This section provided an overview of Center Control Planning and Primary Distribution activities for Civil Service FTEs/Travel Dollars.

Navigation Overview

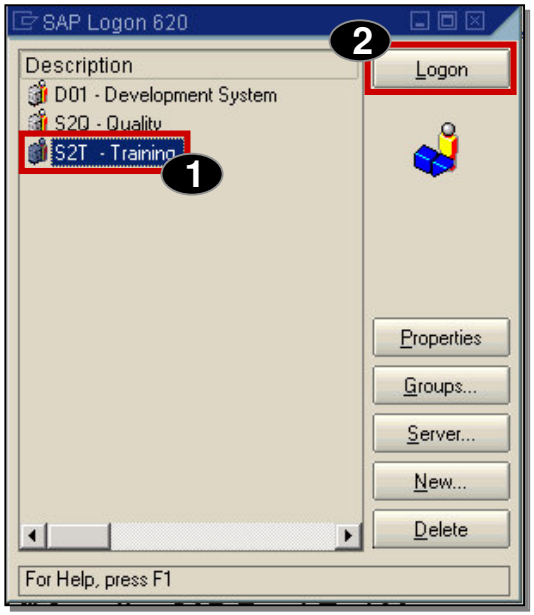
How Do I Log In to the BF Application?

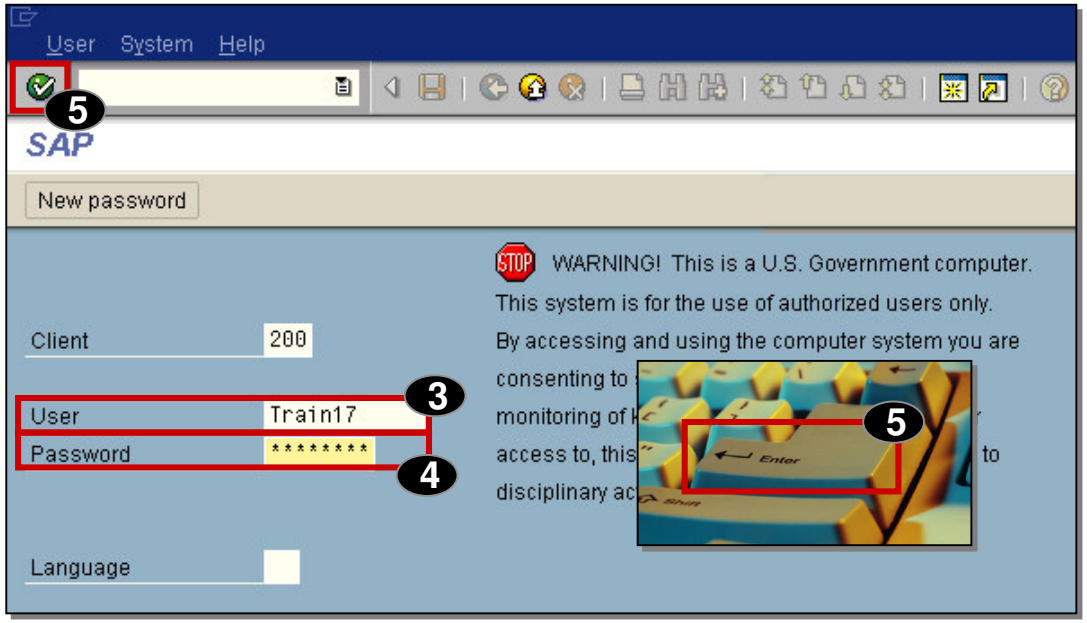
1. Select the ***Start*** button from the lower left-hand corner of your computer.
2. Select ***Programs*** from the Start menu.
3. Select ***SAP Front End*** from the extended menu.
4. Select ***SEM*** from the extended menu.
5. Select ***SAPLogon*** to log on to the BF Application.

Or, if available, you can:

1b. Double-click the ***SAPLogon*** icon of your computer's desktop.

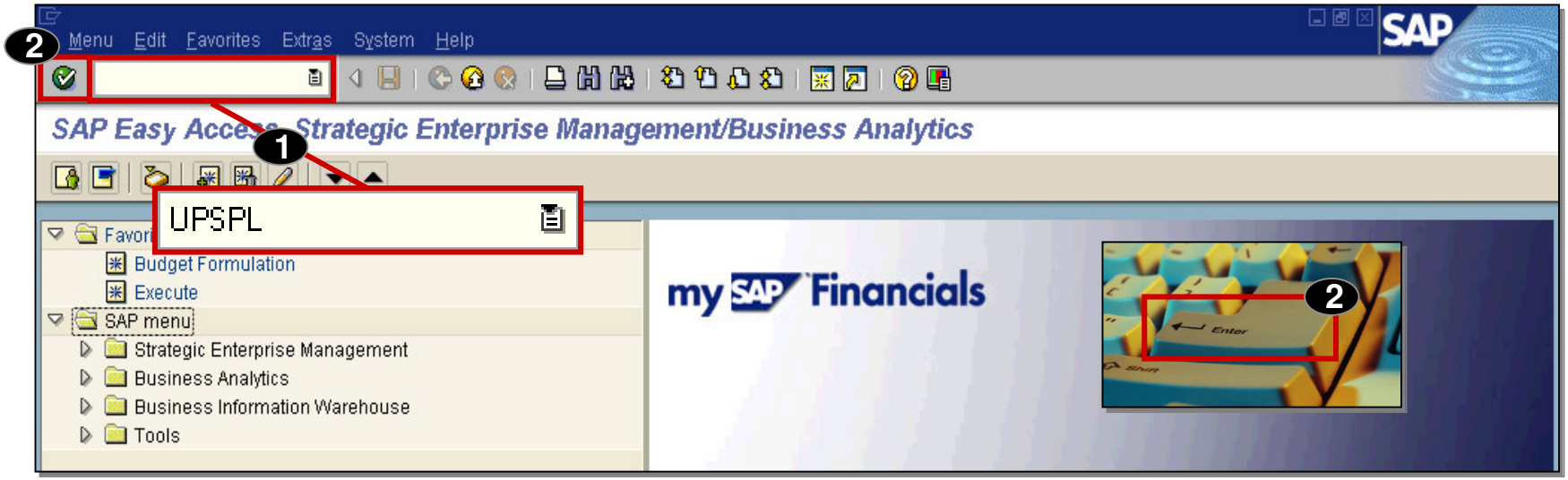
How Do I Log In to the BF Application?





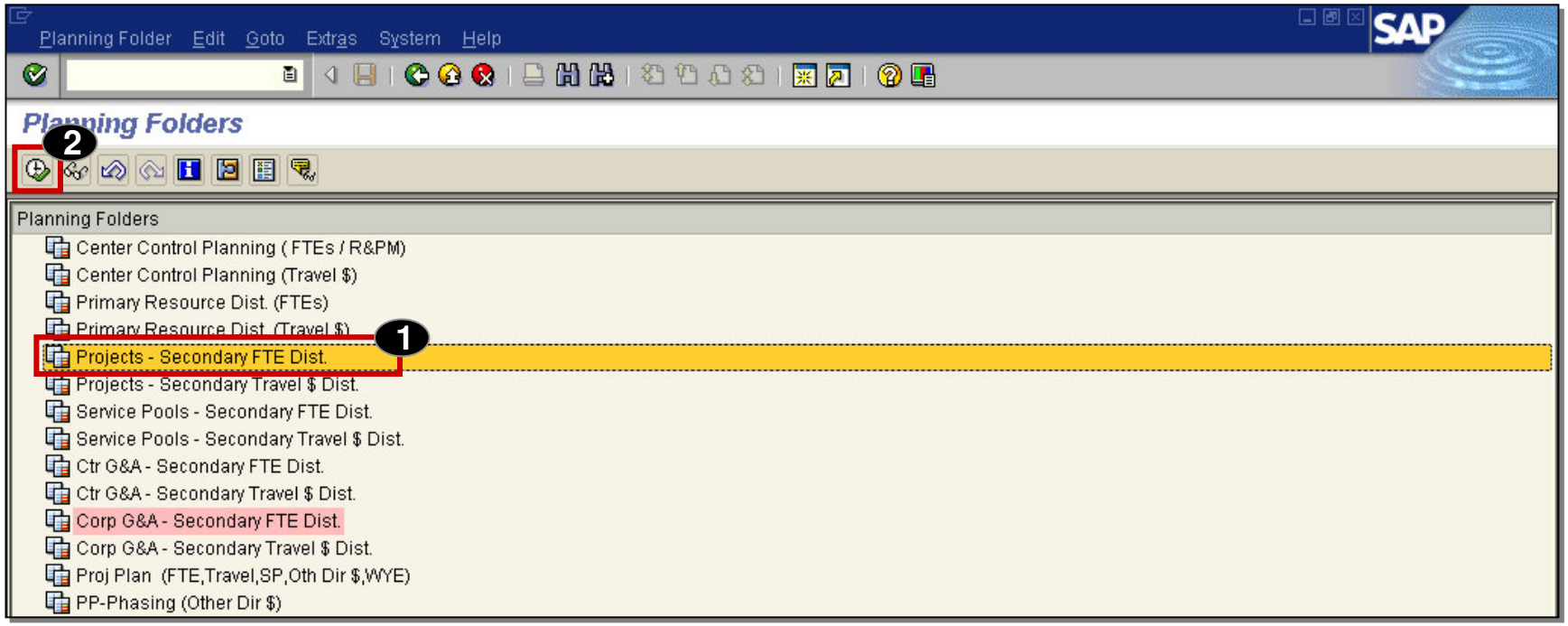
1. Select ***S2T – Training.***
2. Click the ***Logon*** button to obtain your logon screen.
3. Enter your User name.
4. Enter your Password.
   - The asterisks cannot be erased.
   - If your password is less than 8 characters, do not fill in the asterisks.
5. Click the ***Enter*** button or press the ***Enter key*** on your keyboard.

How do I Get to the Planning Folder Menu Page?



1. Type the ***upspl*** in the blank field under the menu bar to go to a list of planning folders.
2. Click the ***Enter*** button or press the ***Enter key*** on your keyboard.

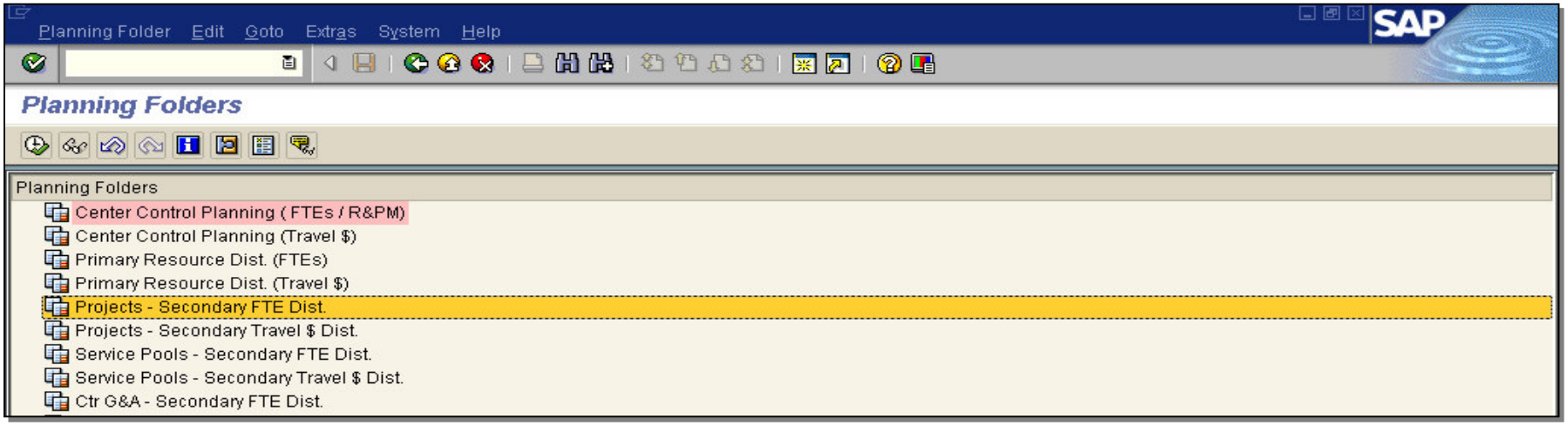
How Do I Access a Planning Folder?



1. From the Planning Folder Menu page, select the folder you would like to enter (the folder will become highlighted in yellow.)
2. Click the ***Execute*** button.

NOTE: Users can also double-click on the desired Planning Folder to enter.

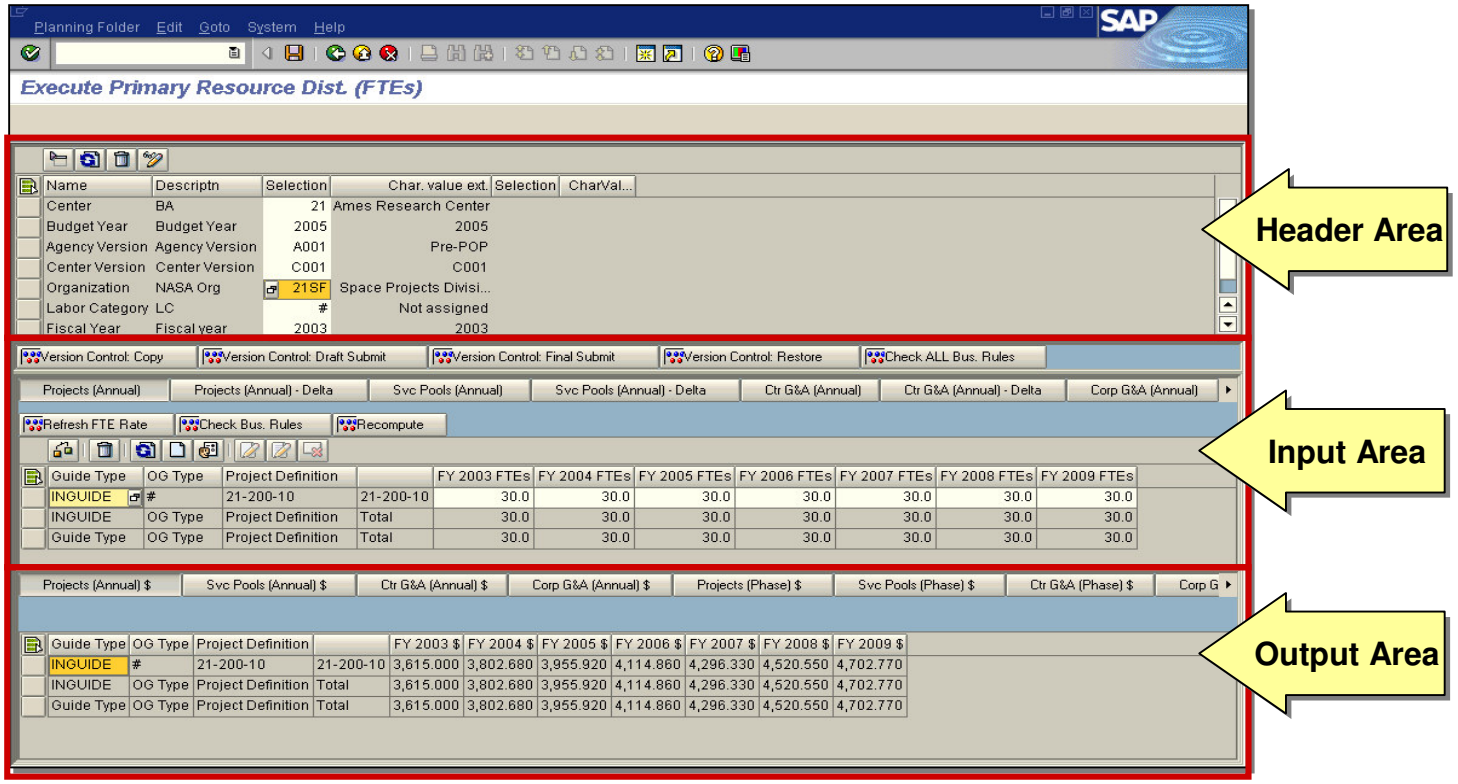
What Do the Planning Folder Colors Mean?



- **From the Planning Folder Menu page:**
  - A planning folder highlighted in **PINK** indicates the previous folder a user entered.

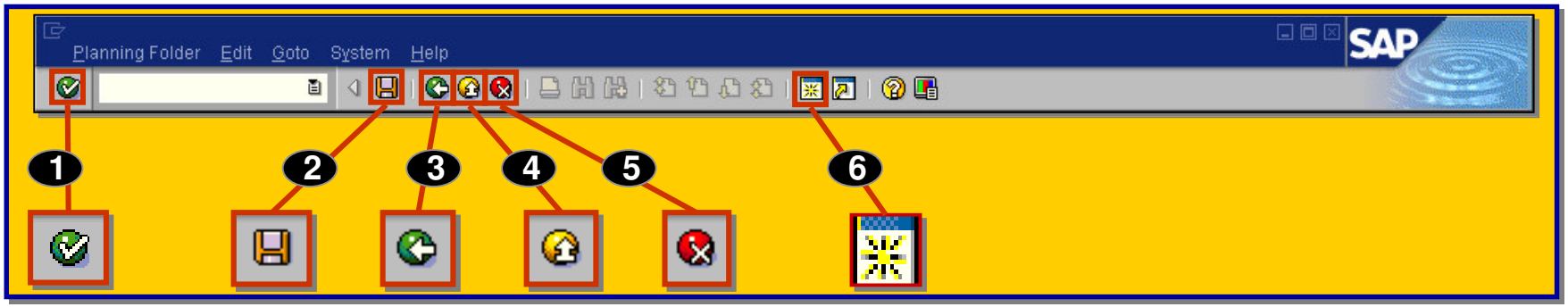
  - A planning folder highlighted in **YELLOW** indicates the folder the user has selected.

What Are the Primary Sections of a Typical Screen?



- **Screens have three primary areas:**
  - Header area
  - Input Area
  - Output Area

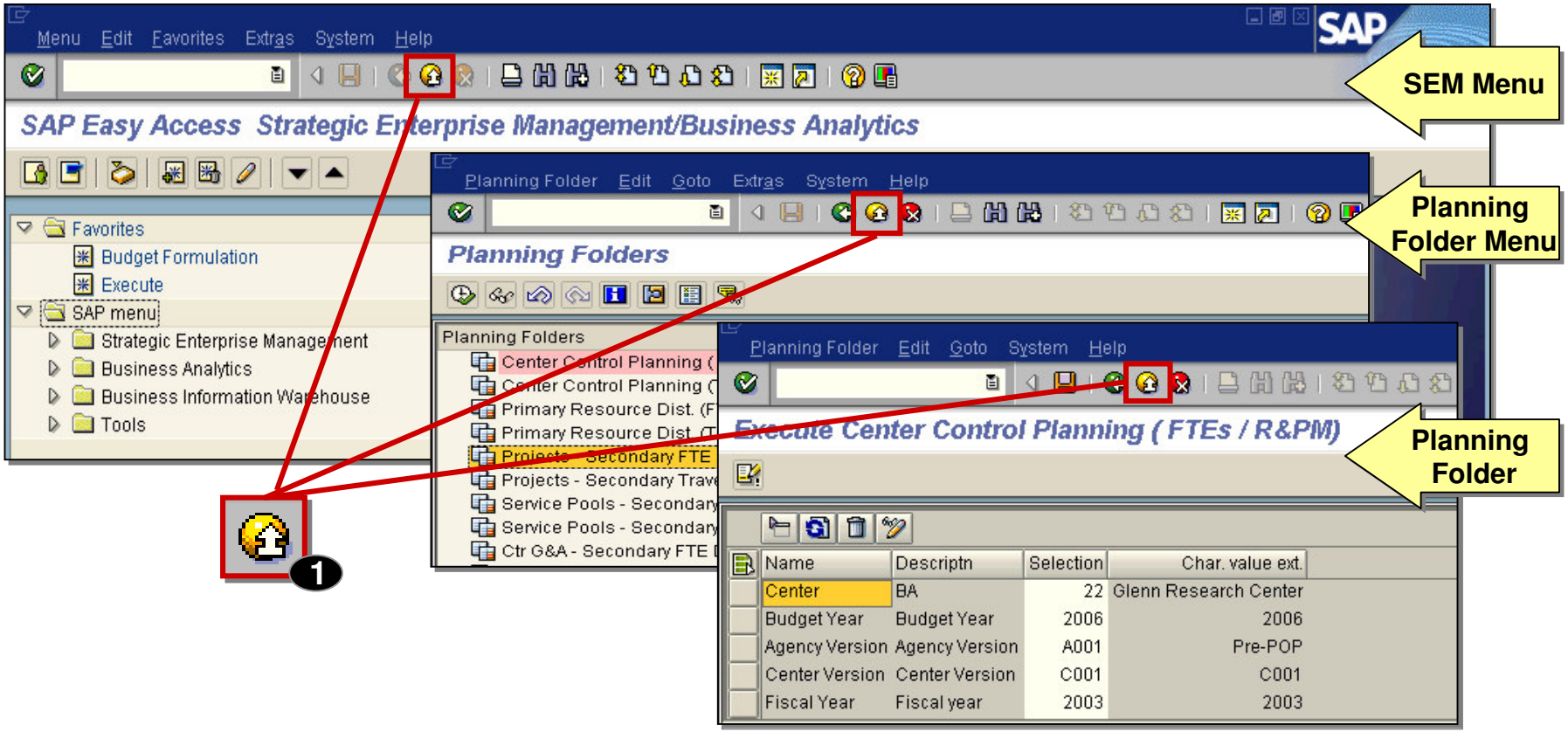
What Are the Menu Buttons?



Menu Buttons

1. **Checked/OK** – Enters your data
2. **Save** – Saves your work
3. **Back** – Takes you back one screen
4. **Exit** – Exits you out of the system
5. **Cancel** – Cancels your data
6. **Create New Session** – Opens another session

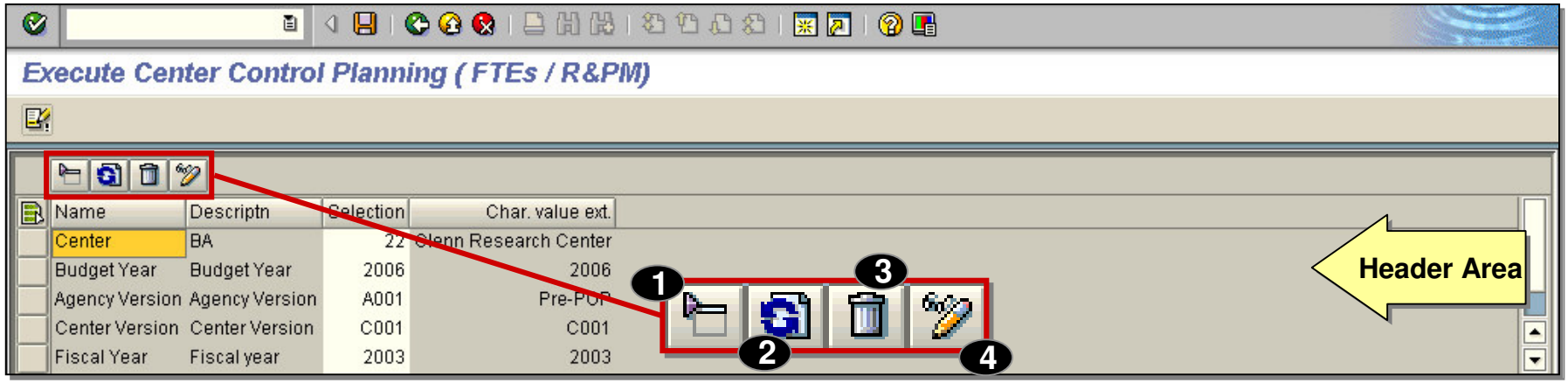
How Do I Log Out?



Regardless of where you are in the system, to log out:

1. Click the ***Exit*** button.

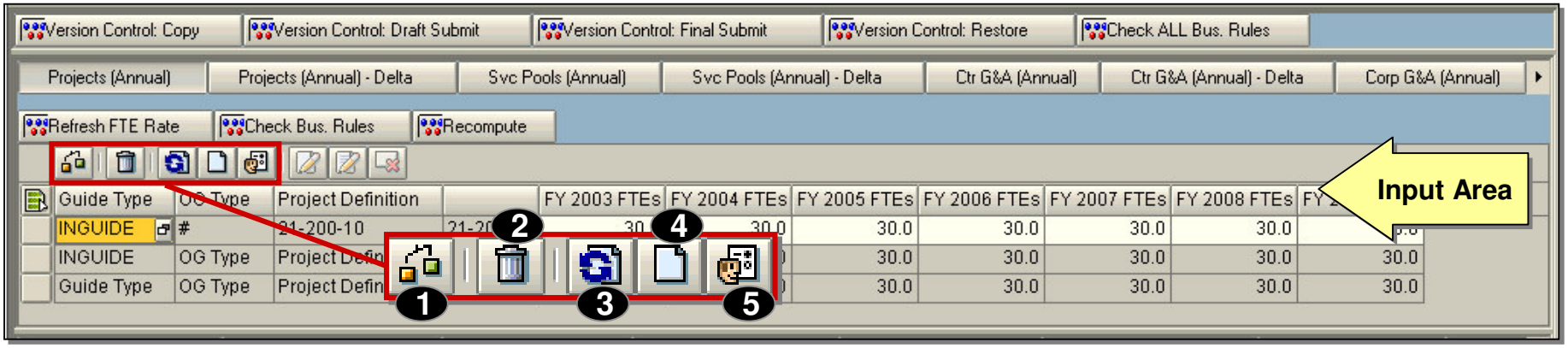
What Are the Header Area Buttons?



Header Menu Buttons

1. **Hide Variable Values** – Hides the header characteristics leaving the Input and Output Areas.
2. **Transfer Variables** – Sends the header variables to the database. A user can retrieve data for the corresponding header variables or plan based upon the header data.
3. **Delete** – Deletes an entire row of Header Characteristics. This functionality should **NOT** be used.
4. **Display/Change** – Removes ability to edit the Header Characteristics.

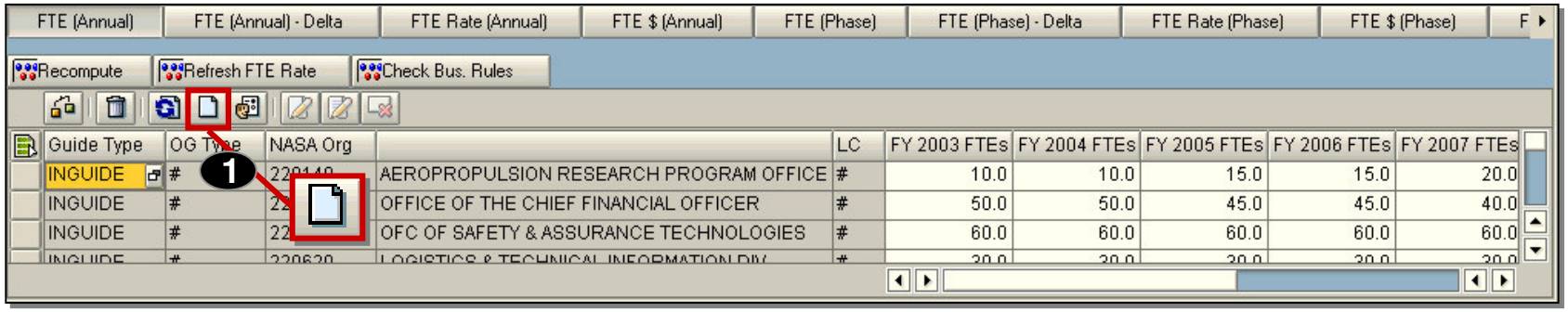
What Are the Input Area Buttons?

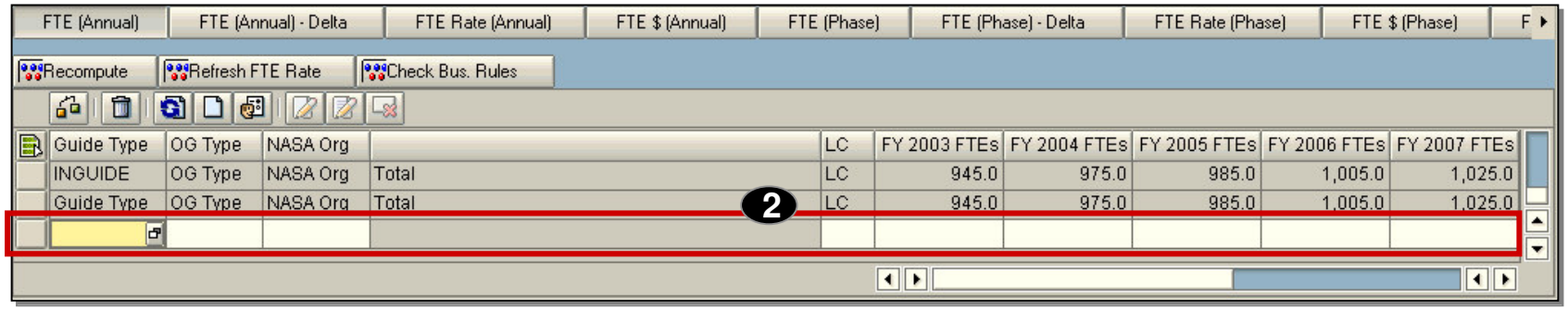


Input Area Menu Buttons

1. **Check** – Checks all of the fields in your planning area.
2. **Delete** – Deletes a row of data.
3. **Sort** – Sends data to the database and creates a total by row in the input area.
4. **Append Row** – Inserts a blank row in the input area for planning.
5. **Lead Column Settings** – Allows the user to indicate what lead columns should be totaled and subtotaled. Preferences can also be set to modify the way data is sorted in the Lead Column.

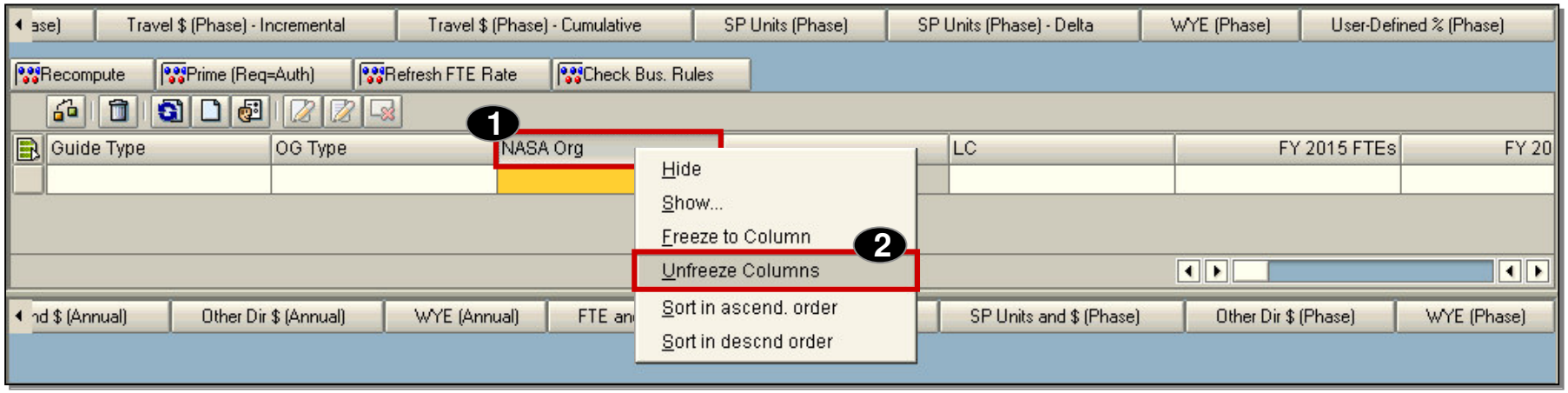
How Do I Add a Row of Data?





1. Click the ***Append Row*** button. A blank row will be added. If data already exists in the input area, the row will the be inserted at the end of the data.
2. Enter data into the row.

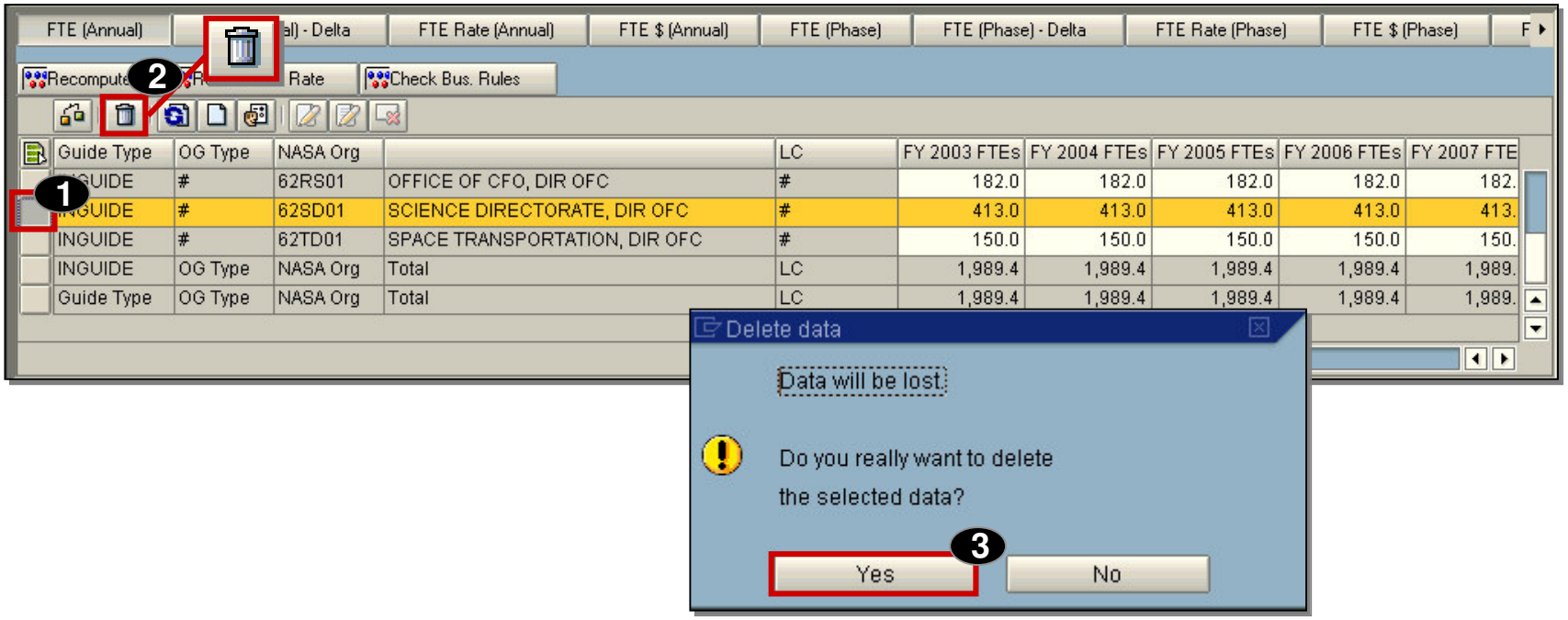
How Do I Scroll Right To See/Enter My Data?



1. Right-click on any column header.
2. Select Unfreeze Columns.

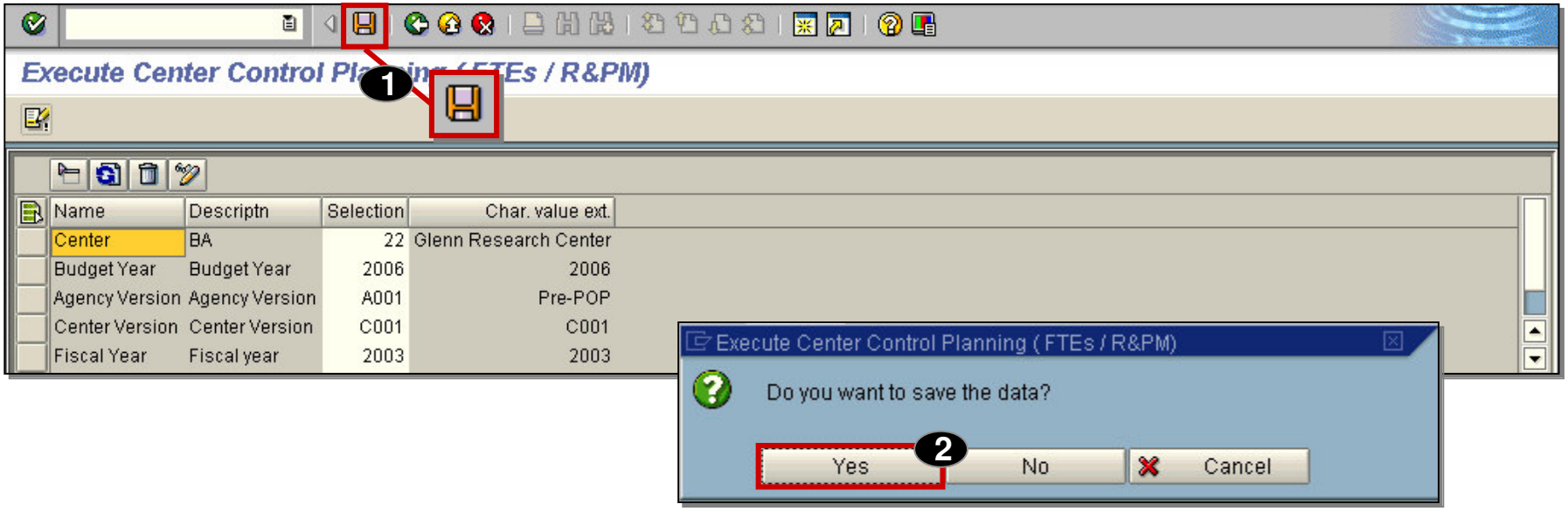
NOTE: Upon entering a row, you need to unfreeze columns. This will allow you to scroll through data to the right of the visible screen.

How Do I Delete a Row of Data?



1. Highlight the row of data by clicking the ***empty box*** to the left of the row.
2. Click the ***Delete Row*** button. A message box will confirm that you want to delete the data.
3. Click the ***Yes*** button.

How Do I Save Data?



1. Click the ***Save*** button. A message box will confirm that you want to save the data.
2. Click the ***Yes*** button.

How Do I Obtain a Full List of Values in a Dropdown Box?

Value Help for InfoObject YORG (personal value list)

Controlling area NASA

NASA Org	Short Description	Medium Description	BA	Company Co	Srce Sys.	Object cur	Profit cen	Person responsible
51150	Office of CFO	Office of the Chief Financial Officer	51	NASA	SAPBW1200	USD		N. Abell
51150	Office of CFO	Office of the Chief Financial Officer	51	NASA	SAPBW1200	USD		N. Abell
220600	ACQUISITION	OFFICE OF ACQUISITION	22	NASA	SAPT01311	USD		D.B. Walker
220600	ACQUISITION	OFFICE OF ACQUISITION	22	NASA	SAPT01311	USD		D.B. Walker
225500	INSTRUMENT & CONTROL	INSTRUMENTATION AND CONTROLS DIVISION	22	NASA	SAPT01311	USD		D.B. Walker
225500	INSTRUMENT & CONTROL	INSTRUMENTATION AND CONTROLS DIVISION	22	NASA	SAPT01311	USD		D.B. Walker
227100	COMPUTER SERVICES	COMPUTER SERVICES DIVISION	22	NASA	SAPT01311	USD		D.B. Walker
10AAA00	OFFICE OF THE ADMIN.	OFFICE OF THE ADMINISTRATOR	10	NASA	SAPT01831	USD		Timothy Kelly
2201SR0026	SRF-FRAC TOUGHNESS	SRF-T						

Value Help for InfoObject YORG

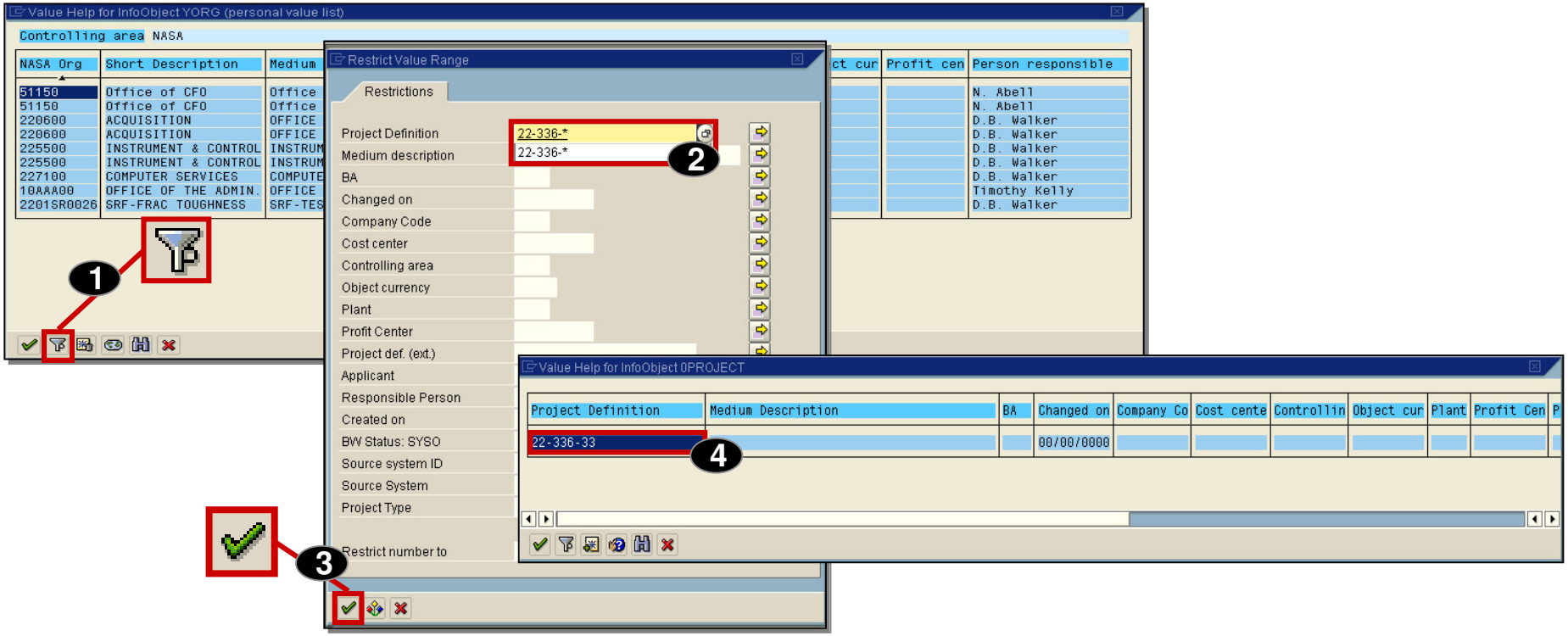
Controlling area NASA

NASA Org	Short Description	Medium Description	BA	Company Co	Srce Sys.	Object cur	Profit cen	Person responsible
#								
21	Ames	DELETE THIS COST CENTER	21	NASA	SAPBW1200	USD		C. Smith
62	DELETE	Structural Dynamics & Load Group	62	NASA	SAPBW1200	USD		J. Bunty
2202	OFFICE OF CFO	OFFICE OF CFO	22	NASA				
2205	SAFETY & ASSURANCE	SAFETY & ASSURANCE	22	NASA				
2206	OFFICE AQUISITION	OFFICE AQUISITION	22	NASA				
51100	Director	Office of the Director	51	NASA	SAPBW1200	USD		A. Diaz
51110	Human Resources	Office of Human Resources	51	NASA	SAPBW1200	USD		A. Hubbard
51112	Workforce Planning	Workforce Planning Office	51	NASA	SAPBW1200	USD		D. Parsons
51113	HR Resources Oper.	Human Resources Development Office	51	NASA	SAPBW1200	USD		S. Buffalano
51114	Human Resources Dev.	Human Resources Development Office	51	NASA	SAPBW1200	USD		S. Johnson
51120	Equal Oppt. Prog	Equal Opportunity Program Office	51	NASA	SAPBW1200	USD		D. Menchan
51130	Public Affairs	Office of Public Affairs	51	NASA	SAPBW1200	USD		J. Ruff
51140	Chief Counsel	Office of Chief Counsel	51	NASA	SAPBW1200	USD		L. Watson
51150	Office of CFO	Office of the Chief Financial Officer	51	NASA	SAPBW1200	USD		N. Abell
51151	Reg. Finance Office	Regional Finance Office	51	NASA	SAPBW1200	USD		P. Gal-Edd
51153	Program Anal. Office	Program Analysis Office	51	NASA	SAPBW1200	USD		J. Baker
51155	Cost and Commericial	Cost and Commercial Accounts Department	51	NASA	SAPBW1200	USD		S. Brown
51156	IFMP Implementation	IFMP Implementation and Operations Off.	51	NASA	SAPBW1200	USD		J. Sprunk
51157	General Accounting	General Accounting Department	51	NASA	SAPBW1200	USD		M. Mitchell
51159	Financial Services	Financial Services Department	51	NASA	SAPBW1200	USD		G. Flemming
51160	University Programs	Office of University Programs	51	NASA	SAPBW1200	USD		G. Soffen
51190	Inspector General	NASA Office of Inspector General	51	NASA	SAPBW1200	USD		K. Carson
51200	Management Operation	Management Operations Directorate	51	NASA	SAPBW1200	USD		A. McNally
51201	Institutional Supp.	Institutional Support Office	51	NASA	SAPBW1200	USD		T. Paprocki
51205	Safety, Environ.	Safety, Environmental and Security Off.	51	NASA	SAPBW1200	USD		P. Sinha
51211	Center ADP Procure.	Center ADP Procurement Office	51	NASA	SAPBW1200	USD		P. Logan
51212	Management Op. Proc.	Management Operations Procurement Off.	51	NASA	SAPBW1200	USD		C. Tart
51213	Procurement Supp.	Procurement Support Office	51	NASA	SAPBW1200	USD		R. Acevedo
51215	AETD/STAAC Direct.	AETD/STAAC Directorates	51	NASA	SAPBW1200	USD		E. Austin
51216	Space Sciences Dir.	Space Sciences Directorate	51	NASA	SAPBW1200	USD		L. Giraldi
51218	Wallops Procurement	Wallops Procurement Office	51	NASA	SAPBW1200	USD		B. Pagliaro

1

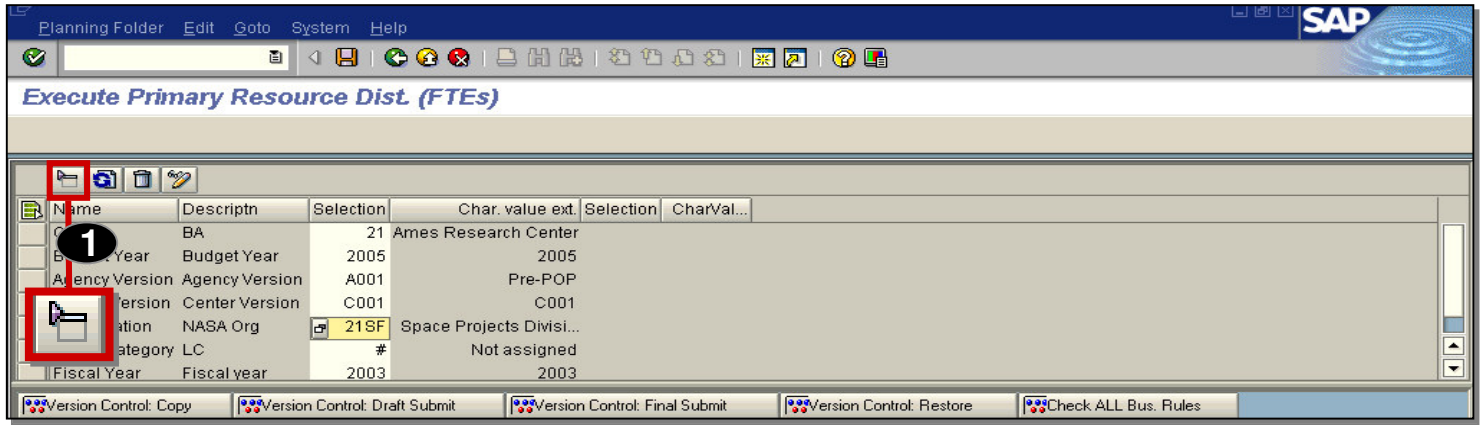
1 In the dropdown box, click the ***All Values*** button. This will expand the list of available information.

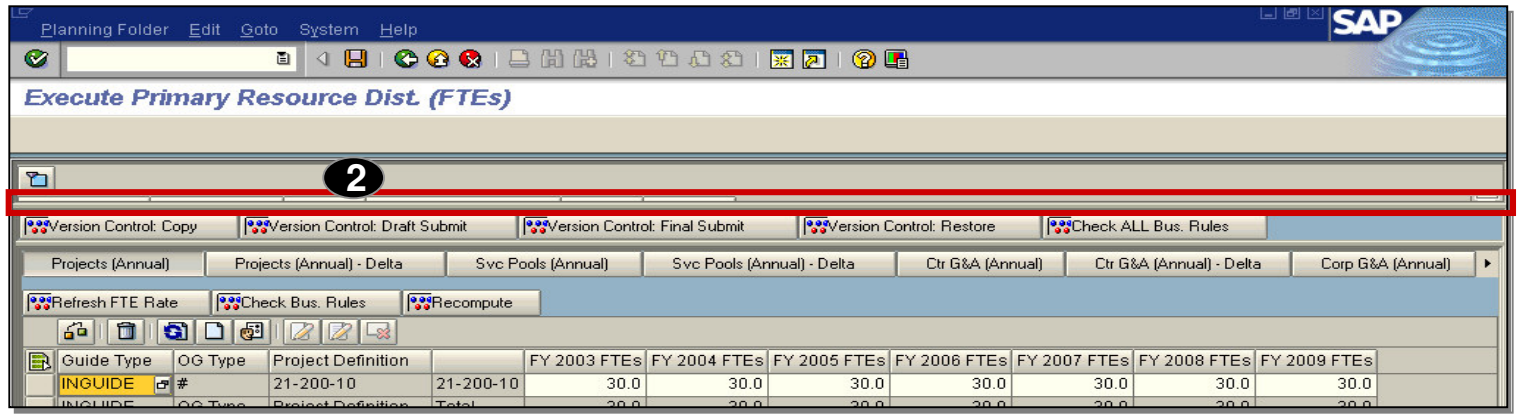
How Do I Filter Information In a Dropdown Box?



1. In the dropdown box, click the ***Filter*** button. A message box will prompt you to enter your filter criteria.
2. Enter your filter criteria.
3. Click the ***Enter*** button.
4. The dropdown box will display the data that meets the criteria you entered.

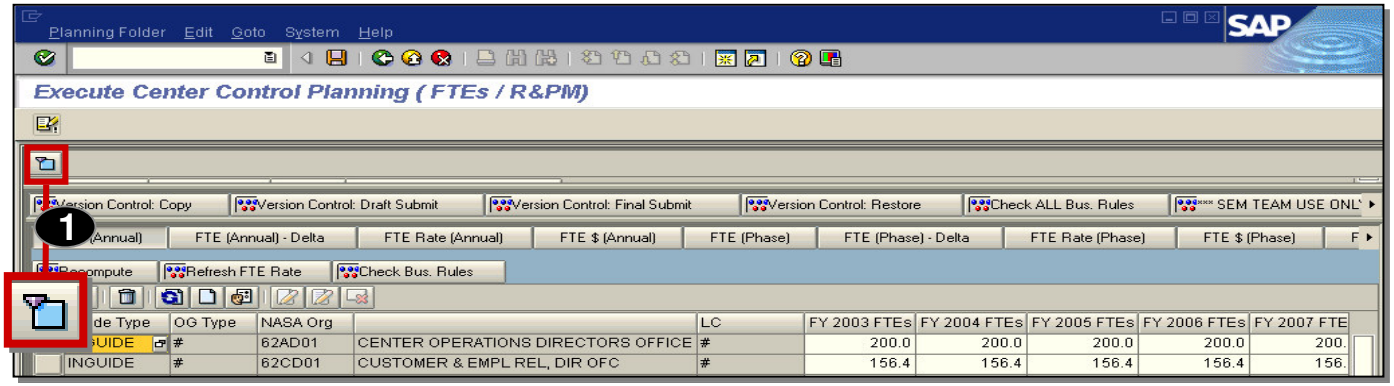
How Do I Hide the Header?

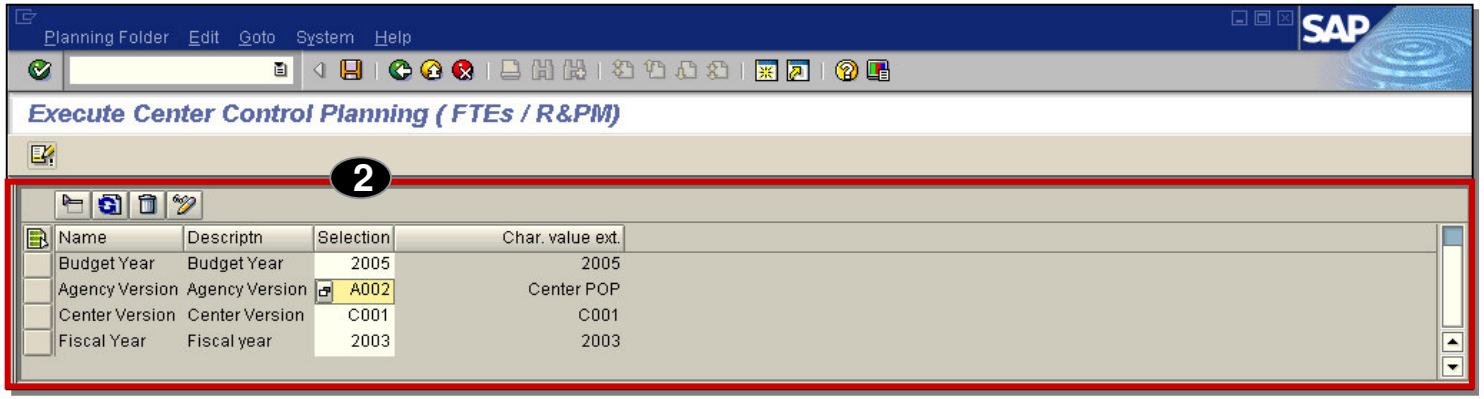




1. Click the ***Hide Variable Values*** button.
2. The Header will be hidden, leaving only the Input and Output Areas.

How Do I Display the Header?





1. Click the ***Display Variable Values*** button.
2. The Header will appear, along with the Input and Output Areas.

Topic 2

Center Control Planning System Demonstration and Exercises

Topic 2: Overview

- Entering Header Data
- Distributing Annual FTEs/Travel Dollars to Organizations
- Entering Annual Rates and Calculating Dollars
- Entering Annual Dollars and Calculating Rates
- Phasing FTEs
- Phasing Rates
- Phasing Dollars
- Reviewing and Authorizing FTE/Travel Dollars Requests

Center Control Planning Overview

Center Control Planning Folder

Execute Center Control Planning (FTEs / R&PM)

Name	Descriptn	Selection	Char. value ext.
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2020	2020
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Fiscal Year	Fiscal year	2018	2018

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules | *** SEM TEAM USE ONLY

FTE (Annual) | FTE (Annual) - Delta | FTE Rate (Annual) | FTE $ (Annual) | FTE (Phase) | FTE (Phase) - Delta | FTE Rate (Phase) | FTE $ (Phase) | F

Recompute | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	FY 2018 FTEs	FY 2019 FTEs	FY 2020 FTEs	FY 2021 FTEs	FY 2022 FTEs	F
INGUIDE	#	21CF	Financial Management Division	#	36.0	36.0	36.0	36.0	36.0	
INGUIDE	#	21CR	Resources Management Office	#	30.0	30.0	30.0	30.0	30.0	
INGUIDE	#	21DG	Fundamental Biology	#	35.0	35.0	35.0	35.0	35.0	
INGUIDE	#	21DW	Biomolecular Physics & Chem Program	#	30.0	30.0	30.0	30.0	30.0	

FTE and $ (Annual) | FTE and $ (Phase)

Guide Type	OG Type	NASA Org		LC	FY 2018 FTEs	FY 2018 $	FY 2019 FTEs	FY 2019 $	FY 2020 FTEs	FY 20
INGUIDE	#	21CF	Financial Management Division	#	36.0	2,826.000	36.0	2,977.020	36.0	3,096.
INGUIDE	#	21CR	Resources Management Office	#	30.0	2,745.000	30.0	2,886.330	30.0	3,002.
INGUIDE	#	21DG	Fundamental Biology	#	35.0	4,252.500	35.0	4,478.355	35.0	4,658.
INGUIDE	#	21DW	Biomolecular Physics & Chem Program	#	30.0	3,945.000	30.0	4,151.700	30.0	4,310.

Center Control Planning Overview

Center Control Planning (Travel $) Folder

Execute Center Control Planning (Travel $)

Name	Descriptn	Selection	Char. value ext.
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2020	2020
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Fiscal Year	Fiscal year	2018	2018

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules | *** SEM TEAM USE ONLY

Annual | Annual - Delta

Refresh Travel $ | Check Bus. Rules

Guide Type	OG Type	NASA Org		FY 2018 $	FY 2019 $	FY

Travel $ (Phase) | Travel $ (Phase) - Incremental | Travel $ (Phase) - Cumulative

Guide Type	OG Type	NASA Org		OCT - $	NOV - $	

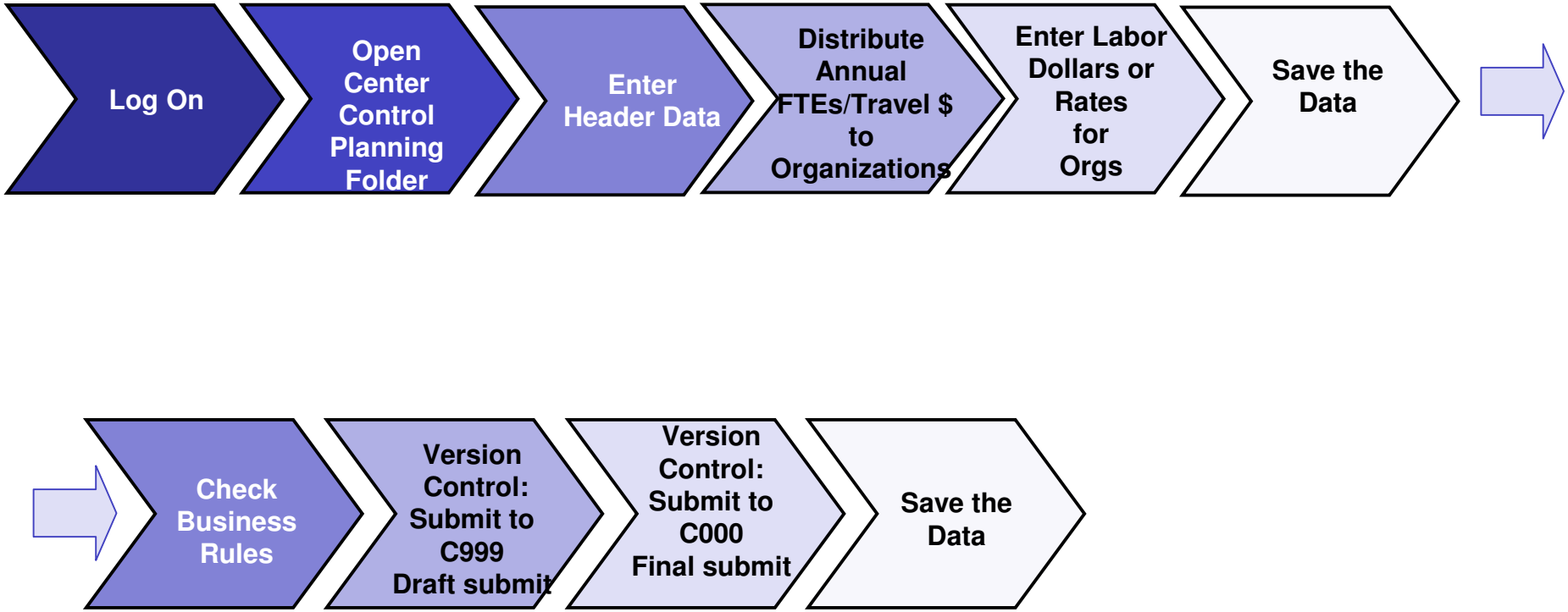
Center Control Planning Overview

- **Annual Planning Input Layouts:**
  - FTE/Travel (Annual)
  - FTE/Travel (Annual) – Delta
  - FTE Rate (Annual)
  - FTE $ (Annual)

- **Phasing Plan Input Layouts:**
  - FTE (Phase)
  - FTE (Phase) – Delta
  - FTE Rate (Phase)
  - FTE $ (Phase)
  - FTE $ (Phase) – Incremental
  - FTE $ (Phase) – Cumulative
  - FTE (Phase) – User Defined
  - FTE Rate (Phase) – User Defined
  - FTE $ (Phase) – User Defined

- **Output Layouts:**
  - FTE and $ (Annual)
  - FTE and $ (Phase)
  - Travel $ (Phase)
  - Travel $ (Phase) – Incremental
  - Travel $ (Phase) - Cumulative

Center Control Planning Overview Process Flow – Annual Planning



Topic 2: Entering Header Data

Center Control Planning

Topic 2: – Entering Header Data

- **Goal**: Enter the appropriate characteristics in the Header Area, to define the data that you want to plan.

- **Entering header data:**
  1. Log On
  2. Open Center Control Planning Folder

Center Control Planning Folder

FTE Annual Input Layout

Execute Center Control Planning (FTEs / R&PM)

Name	Descriptn	Selection	Char. value ext.
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2020	2020
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Fiscal Year	Fiscal year	2018	2018

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules | *** SEM TEAM USE ONLY

FTE (Annual) | FTE $ (Phase)

Recompute

Header Data

FTE and $ (Annual)

Guide Type	OG Type	NASA Org		LC	FY 2018 FTEs	FY 2018 $	FY 2019 FTEs	FY 2019 $	FY 2020 FTEs	FY 20
INGUIDE	#	21CF	Financial Management Division	#	36.0	2,826.000	36.0	2,977.020	36.0	3,096.
INGUIDE	#	21CR	Resources Management Office	#	30.0	2,745.000	30.0	2,886.330	30.0	3,002.
INGUIDE	#	21DG	Fundamental Biology	#	35.0	4,252.500	35.0	4,478.355	35.0	4,658.

Entering Data in the Header Area

Header data is the data that you want to pull from the database and plan. In the Center Control Planning Folder, the data that you specify is the following:

Header Area

Name	Descriptn	Selection	Char. value ext.
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2020	2020
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Fiscal Year	Fiscal year	2018	2018

1) **Enter the following in the Header Area to define the data that you want to plan:**

Center	**The two-digit Center number.**
Budget Year	**The budget year you are planning.**
Agency Version	**The Agency Version in which you are working A001=PrePOP, A002=POP.**
Center Version	**The Center Version in which you are working (C001-C005).**
Fiscal Year	**The fiscal year you are updating.**

2) **Click the Transfer Variables button to set the data you want to plan.**

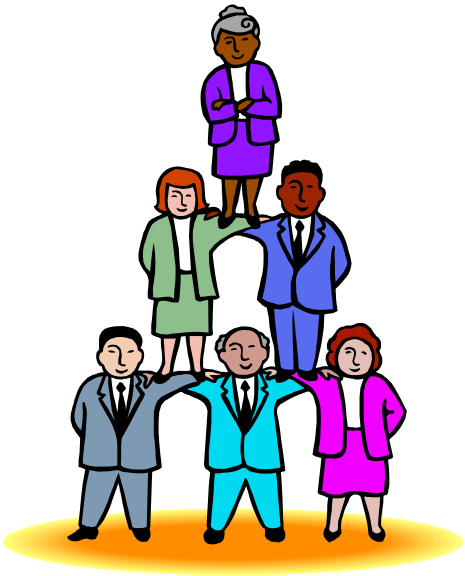
Topic 2: Distributing Annual FTEs/Travel Dollars to Organizations

Center Control Planning

Topic 2: Distributing Annual FTEs/Travel Dollars to Organizations

- **Goal**: Take the annual Center FTE/Travel Dollar Control Total and distribute it to the Organizations within the Center.

- **Entering header data:**
  1. Log On
  2. Open Center Control Planning Folder
  3. Click on Annual Button Layout
  4. Enter Header Data



What goes in the Input Layout?

FTE Annual Input Layout - Input Area

Recompute | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	FY 2018 FTEs	FY 2019 FTEs	FY 2020 FTEs	FY 2021 FTEs	FY 2022 FTEs	F
INGUIDE	#	21CF	Financial Management Division	#	36.0	36.0	36.0	36.0	36.0	
INGUIDE	#	21CR	Resources Management Office	#	30.0	30.0	30.0	30.0	30.0	
INGUIDE	#	21DG	Fundamental Biology	#	35.0	35.0	35.0	35.0	35.0	
INGUIDE	#	21DW	Biomolecular Physics & Chem Program	#	30.0	30.0	30.0	30.0	30.0	
INGUIDE	#	21DX	Public Affairs Office	#	10.0	10.0	10.0	10.0	10.0	

1) **Click the append row button to add a row.**
2) **Enter the following:**

Guide Type	Inguide or Overguide
OG Type	Overguide type: New Initiative, Augment, Price or (#) unassigned. You must enter the unassigned type if you selected inguide.
NASA Org	The directorate or division that you are distributing FTEs/Travel $ to.
LC	The labor category assigned to the FTEs. You must enter the unassigned category (#) if you are not using Labor Categories.
FY 20XX	Enter FTEs/Travel Dollars for two previous years, the budget year and four outyears.

What goes in the Input Layout?

FTE Annual Input Layout - Input Area

Recompute | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	FY 2018 FTEs	FY 2019 FTEs	FY 2020 FTEs	FY 2021 FTEs	FY 2022 FTEs	F
INGUIDE	#	21CF	Financial Management Division	#	36.0	36.0	36.0	36.0	36.0	
INGUIDE	#	21CR	Resources Management Office	#	30.0	30.0	30.0	30.0	30.0	
INGUIDE	#	21DG	Fundamental Biology	#	35.0	35.0	35.0	35.0	35.0	
INGUIDE	#	21DW	Biomolecular Physics & Chem Program	#	30.0	30.0	30.0	30.0	30.0	
INGUIDE	#	21DX	Public Affairs Office	#	10.0	10.0	10.0	10.0	10.0	

3) Click the Transfer Variables button to sort the row of data that you entered.
4) Click the Recompute button to calculate the output
5) Repeat for all of the organizations within your responsibility.
6) Click on the Save button when complete.

Where can I see the output?

FTE and $ (Annual) Output Layout

FTE and $ (Annual) | FTE and $ (Phase)

Guide Type	OG Type	NASA Org		LC	FY 2018 FTEs	FY 2018 $	FY 2019 FTEs	FY 2019 $	FY 2020 FTEs	FY 20
INGUIDE	#	21CF	Financial Management Division	#	36.0	2,826.000	36.0	2,977.020	36.0	3,096.
INGUIDE	#	21CR	Resources Management Office	#	30.0	2,745.000	30.0	2,886.330	30.0	3,002.
INGUIDE	#	21DG	Fundamental Biology	#	35.0	4,252.500	35.0	4,478.355	35.0	4,658.
INGUIDE	#	21DW	Biomolecular Physics & Chem Program	#	30.0	3,945.000	30.0	4,151.700	30.0	4,319.

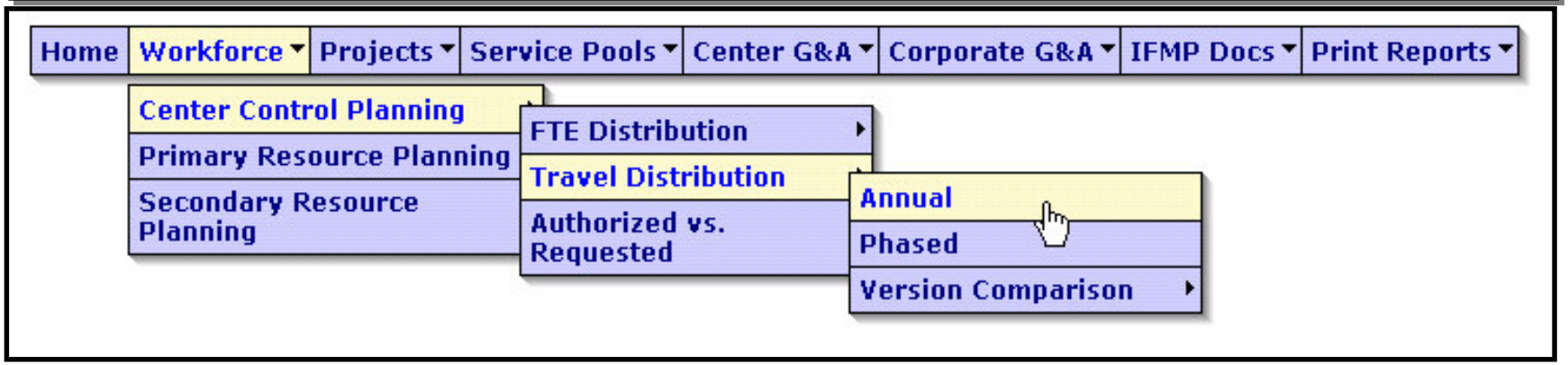
7) **Click the FTE and $ (Annual) output button to view data in the output area.**

8) **The following information is shown:**

Guide Type	**Inguide or Overguide**
OG Type	**The type of Overguide: New Initiative, Augment, Price, and (#) unassigned.**
NASA Org	**The directorate or division.**
Labor Category	**The labor category assigned to the FTEs.**
FY 20XX FTEs	**FTEs for two previous years, the budget year, and four outyears**
FY 20XX $	**The dollars associated with the FTEs. (equal to FTEs X Rate)**
Totals	**The totals for all organizations listed.**

Where can I see the output?

Budget Formulation Report Website Menu



1) Open the Budget Formulation BW report website.
2) Enter your BF user name and password.
3) Click on the menus shown above.
4) Enter the header data for the data you want in the report.
5) The report shown on the next page will open.

Travel Dollar Distribution Annual Report

Center Control Planning, Travel Distribution: Annual Report

Zoom In | 50 % | Zoom Out | Email Comments

Navigation block:

Business area			Fiscal year			Guide Type	
NASA Org			OG Type			AR: ANN - Travel Amt	

Variable Values

Most Current Data	<= 293
Center	Ames Research Center
Budget Year	2020
Agency Version	Pre-POP
Center Version	ARC Pre POP
NASA Org	Financial Mgmt Div

Center Control Dist - Travel $

			Fiscal year	2018	2019	2020	2021	2022	2023	2024	**Overall Result**
Guide Type	OG Type	NASA Org		Travel $K	Travel $K	Travel $K	Travel $K	Travel $K	Travel $K	Travel $K	**Travel $K**
In Guide	Not assigned	21CF	Financial Mgmt Div	$ 25.000	$ 25.000	$ 25.000	$ 25.000	$ 25.000	$ 25.000	$ 25.000	**$ 175.000**

Topic 2: Entering Annual Rates and Calculating Dollars

Center Control Planning

Topic 2: Entering Annual Rates and Calculating Dollars

- **Goal**: Assign a labor rate that is developed outside the system to Organizations (Directorates or Divisions) and derive the resulting annual dollars. (Number of FTEs x Rate = Dollars)

- **Entering Rates and Calculating Dollars**
  1. Logon
  2. Open Center Control Planning Folder
  3. Click on the FTE Rate (Annual) button in the input area
  4. Enter Header Data

Center Control Planning Folder

FTE Rate (Annual) Input Layout

Name	Descriptn	Selection	Char. value ext.
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2020	2020
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Fiscal Year	Fiscal year	2018	2018

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules | *** SEM TEAM USE ONLY

FTE (Annual) | FTE (Annual) - Delta | FTE Rate (Annual) | FTE $ (Annual) | FTE (Phase) | FTE (Phase) - Delta | FTE Rate (Phase) | FTE $ (Phase) | F

Calc Dollars | Check Bus. Rules

NASA Org		LC	FY 2018 Rate	FY 2019 Rate	FY 2020 Rate	FY 2021 Rate	FY 2022 Rate	FY 2023 Rate	FY 2024
21CF	Financial Management Division	#	78.500	82.695	86.027	89.484	93.430	98.306	[illegible]
21CR	Resources Management Office	#	91.500	96.211	100.089	104.110	108.702	114.375	118.9[illegible]
21DG	Fundamental Biology	#	121.500	127.953	133.109	138.458	144.564	152.108	158.239
21DW	Biomolecular Physics & Chem Program	#	131.500	138.390	143.967	149.752	156.356	164.516	171.147

Input Area

FTE and $ (Annual) | FTE and $ (Phase)

Guide Type	OG Type	NASA Org		LC	FY 2018 FTEs	FY 2018 $	FY 2019 FTEs	FY 2019 $	FY 2020 FTEs	FY 20
INGUIDE	#	21CF	Financial Management Division	#	36.0	2,826.000	36.0	2,977.020	36.0	3,096.
INGUIDE	#	21CR	Resources Management Office	#	30.0	2,745.000	30.0	2,886.330	30.0	3,002.
INGUIDE	#	21DG	Fundamental Biology	#	35.0	4,252.500	35.0	4,478.355	35.0	4,658.
INGUIDE	#	21DW	Biomolecular Physics & Chem Program	#	30.0	3,945.000	30.0	4,151.700	30.0	4,319.
INGUIDE	#	21DX	Public Affairs Office	#	10.0	1,055.000	10.0	1,097.540	10.0	1,141.
INGUIDE	#	21EE	Systems Engineering Division	#	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

What goes in the input area?

FTE Rate (Annual) Input Layout: Input Area

Calc Dollars | Check Bus. Rules

NASA Org		LC	FY 2018 Rate	FY 2019 Rate	FY 2020 Rate	FY 2021 Rate	FY 2022 Rate	FY 2023 Rate	FY 2024 Rate
21CF	Financial Management Division	#	78.500	82.695	86.027	89.484	93.430	98.306	102.268
21CR	Resources Management Office	#	91.500	96.211	100.089	104.110	108.702	114.375	118.984
21DG	Fundamental Biology	#	121.500	127.953	133.109	138.458	144.564	152.108	158.239
21DW	Biomolecular Physics & Chem Program	#	131.500	138.390	143.967	149.752	156.356	164.516	171.147
21DX	Public Affairs Office	#	105.500	109.754	114.177	118.765	124.002	130.474	135.733
21EE	Systems Engineering Division	#	102.500	107.824	112.169	116.676	121.822	128.179	133.345

1) **Click the append row button to add a row.**
2) **Enter the following:**

NASA Org	**The directorate or division the rate applies to.**
LC	**The labor category assigned to the FTEs. You must enter the unassigned category (#) if you are not using Labor Categories.**
FY20XX Rate	**Enter rates for two previous years, the budget year and four outyears.**

3) **Click the Transfer Variables button to sort the row of data that you entered.**

What goes in the input area?

FTE Rate (Annual) Input Layout: Input Area

Calc Dollars | Check Bus. Rules

NASA Org		LC	FY 2018 Rate	FY 2019 Rate	FY 2020 Rate	FY 2021 Rate	FY 2022 Rate	FY 2023 Rate	FY 2024 Rate
21CF	Financial Management Division	#	78.500	82.695	86.027	89.484	93.430	98.306	102.268
21CR	Resources Management Office	#	91.500	96.211	100.089	104.110	108.702	114.375	118.984
21DG	Fundamental Biology	#	121.500	127.953	133.109	138.458	144.564	152.108	158.239
21DW	Biomolecular Physics & Chem Program	#	131.500	138.390	143.967	149.752	156.356	164.516	171.147
21DX	Public Affairs Office	#	105.500	109.754	114.177	118.765	124.002	130.474	135.733
21EE	Systems Engineering Division	#	102.500	107.824	112.169	116.676	121.822	128.179	133.345

4) **Click the Calc Dollars button to calculate the dollars (rate X FTEs).**

5) **Repeat for all of the organizations within your responsibility.**

6) **Click the Save button when complete.**

Where can I see the output?

FTE and $ (Annual) Output Layout

FTE and $ (Annual) | FTE and $ (Phase)

Guide Type	OG Type	NASA Org		LC	FY 2018 FTEs	FY 2018 $	FY 2019 FTEs	FY 2019 $	FY 2020 FTEs	FY 2020 $	FY
INGUIDE	#	21CF	Financial Management Division	#	36.0	2,826.000	36.0	2,977.020	36.0	3,096.972	
INGUIDE	#	21CR	Resources Management Office	#	30.0	2,745.000	30.0	2,886.330	30.0	3,002.670	
INGUIDE	#	21DG	Fundamental Biology	#	35.0	4,252.500	35.0	4,478.355	35.0	4,658.815	
INGUIDE	#	21DW	Biomolecular Physics & Chem Program	#	30.0	3,945.000	30.0	4,151.700	30.0	4,319.010	

7) **Click the FTE and $ (Annual) output button to view the output area.**
8) **The following information is shown:**

Guide Type	**Inguide or Overguide**
OG Type	**The type of Overguide: New Initiative, Augment, Price, and (#) unassigned.**
NASA Org	**The directorate or division.**
LC	**The labor category assigned to the FTEs.**
FY 20XX FTEs	**FTEs for two previous years, the budget year, and four outyears.**
FY 20XX $	**The dollars associated with the FTEs. (equal to FTEs X Rate)**
Totals	**The totals for all organizations listed.**

Topic 2: Entering Annual Dollars and Calculating Rates

Center Control Planning

Topic 2: Entering Annual Dollars and Calculating Rates

- **Goal**: Assign an annual dollar amount to Organizations (Directorates or Divisions) and calculate the resulting annual rate. (Dollars / number of FTEs = Rate)

- **Entering Dollars and Calculating Rates:**
  1. Logon
  2. Open Center Control Planning Folder
  3. Click on the FTE $ (Annual) button in the input area
  4. Enter Header Data

Center Control Planning Folder

FTE $ (Annual) Input Layout

Name	Descriptn	Selection	Char. value ext.
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2020	2020
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C002	C002
Fiscal Year	Fiscal year	2018	2018

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules | *** SEM TEAM USE ONLY

FTE (Annual) | FTE (Annual) - Delta | FTE Rate (Annual) | FTE $ (Annual) | FTE (Phase) | FTE (Phase) - Delta | FTE Rate (Phase) | FTE $ (Phase) | F

Calc Rate | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	FY 2018 $	FY 2019 $	FY 2020 $	FY 2021 $	FY 2022 $	FY 2023 $	F
INGUIDE	#	21CF	Financial Management Division	#	2,826.000	2,977.020	3,096.972	3,221.424	3,363.480	3,539.0	
INGUIDE	#	21CR	Resources Management Office	#	2,745.000	2,886.330	3,002.670	3,123.300	3,261.060	3,4	
INGUIDE	#	21DG	Fundamental Biology	#	4,252.500	4,478.355	4,658.815	4,846.030	5,059.740	5,323.	
INGUIDE	#	21DW	Biomolecular Physics & Chem Program	#	3,945.000	4,151.700	4,319.010	4,492.560	4,690.680	4,935.480	5,

Input Area

FTE and $ (Annual) | FTE and $ (Phase)

Guide Type	OG Type	NASA Org		LC	FY 2018 FTEs	FY 2018 $	FY 2019 FTEs	FY 2019 $	FY 2020 FTEs	FY 2020 $	FY
INGUIDE	#	21CF	Financial Management Division	#	36.0	2,826.000	36.0	2,977.020	36.0	3,096.972	
INGUIDE	#	21CR	Resources Management Office	#	30.0	2,745.000	30.0	2,886.330	30.0	3,002.670	
INGUIDE	#	21DG	Fundamental Biology	#	35.0	4,252.500	35.0	4,478.355	35.0	4,658.815	
INGUIDE	#	21DW	Biomolecular Physics & Chem Program	#	30.0	3,945.000	30.0	4,151.700	30.0	4,319.010	

What goes in the input area?

FTE $ (Annual) Input Layout: Input Area

Calc Rate | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	FY 2018 $	FY 2019 $	FY 2020 $	FY 2021 $	FY 2022 $	FY 2023 $	FY
INGUIDE	#	21CF	Financial Management Division	#	2,826.000	2,977.020	3,096.972	3,221.424	3,363.480	3,539.016	3,
INGUIDE	#	21CR	Resources Management Office	#	2,745.000	2,886.330	3,002.670	3,123.300	3,261.060	3,431.250	3,
INGUIDE	#	21DG	Fundamental Biology	#	4,252.500	4,478.355	4,658.815	4,846.030	5,059.740	5,323.780	5,
INGUIDE	#	21DW	Biomolecular Physics & Chem Program	#	3,945.000	4,151.700	4,319.010	4,492.560	4,690.680	4,935.480	5,

1) **Click the append a row button to add a row.**
2) **Enter the following:**

Guide Type	Inguide or Overguide
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) unassigned. You must enter the unassigned type if you selected inguide.
NASA Org	The directorate or division the dollars apply to.
Labor Category	The labor category assigned to the FTEs. You must enter the unassigned category (#) if you are not using Labor Categories.
FY20XX $	Enter dollars for two previous years, the budget year and four outyears.

What goes in the input area?

FTE $ (Annual) Input Layout: Input Area

Calc Rate | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	FY 2018 $	FY 2019 $	FY 2020 $	FY 2021 $	FY 2022 $	FY 2023 $	F
INGUIDE	#	21CF	Financial Management Division	#	2,826.000	2,977.020	3,096.972	3,221.424	3,363.480	3,539.016	3,
INGUIDE	#	21CR	Resources Management Office	#	2,745.000	2,886.330	3,002.670	3,123.300	3,261.060	3,431.250	3,
INGUIDE	#	21DG	Fundamental Biology	#	4,252.500	4,478.355	4,658.815	4,846.030	5,059.740	5,323.780	5,
INGUIDE	#	21DW	Biomolecular Physics & Chem Program	#	3,945.000	4,151.700	4,319.010	4,492.560	4,690.680	4,935.480	5,

3) Click the Transfer Variables button to sort the row of data that you entered.
4) Click the Calc Rate button to calculate the rate (dollars/ FTEs).
5) View the output of dollars in the output area, view the rate in the rate input area.
6) Repeat for all of the organizations within your responsibility.
7) Click the Save button when complete.

Where can I see the output?

FTE $ (Annual) Input Area and FTE and $ (Annual) Output Area

FTE (Annual) | FTE (Annual) - Delta | FTE Rate (Annual) | FTE $ (Annual) | FTE (Phase) | FTE (Phase) - Delta | FTE Rate (Phase) | FTE $ (Phase)

Calc Rate | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	FY 2018 $	FY 2019 $	FY 2020 $	FY 2021 $	FY 2022 $	FY 2023 $	FY
INGUIDE	#	21CF	Financial Management Division	#	2,826.000	2,977.020	3,096.972	3,221.424	3,363.480	3,539.016	
INGUIDE	#	21CR	Resources Management Office	#	2,745.000	2,886.330	3,002.670	3,123.300	3,261.060	3,431.250	3,
INGUIDE	#	21DG	Fundamental Biology	#	4,252.500	4,478.355	4,658.815	4,846.030	5,059.740	5,323.780	5,
INGUIDE	#	21DW	Biomolecular Physics & Chem Program	#	3,945.000	4,151.700	4,319.010	4,492.560	4,690.680	4,935.480	5,

FTE and $ (Annual) | FTE and $ (Phase)

Guide Type	OG Type	NASA Org		LC	FY 2018 FTEs	FY 2018 $	FY 2019 FTEs	FY 2019 $	FY 2020 FTEs	FY 2020 $	FY
INGUIDE	#	21CF	Financial Management Division	#	36.0	2,826.000	36.0	2,977.020	36.0	3,096.972	
INGUIDE	#	21CR	Resources Management Office	#	30.0	2,745.000	30.0	2,886.330	30.0	3,002.670	
INGUIDE	#	21DG	Fundamental Biology	#	35.0	4,252.500	35.0	4,478.355	35.0	4,658.815	
INGUIDE	#	21DW	Biomolecular Physics & Chem Program	#	30.0	3,945.000	30.0	4,151.700	30.0	4,319.010	

As you enter the dollars in the input area, you can see the output in the output area, once you have clicked the Transfer Variables button.

Where can I see the output?

FTE Rate (Annual) Input Layout: Input Area and FTE and $ Output Area

FTE (Annual) | FTE (Annual) - Delta | FTE Rate (Annual) | FTE $ (Annual) | FTE (Phase) | FTE (Phase) - Delta | FTE Rate (Phase) | FTE $ (Phase) | F

Calc Dollars | Check Bus. Rules

NASA Org		LC	FY 2018 Rate	FY 2019 Rate	FY 2020 Rate	FY 2021 Rate	FY 2022 Rate	FY 2023 Rate	FY 2024 Rate
21CF	Financial Management Division	#	78.500	82.695	86.027	89.484	93.430	98.306	102.268
21CR	Resources Management Office	#	91.500	96.211	100.089	104.110	108.702	114.375	118.984
21DG	Fundamental Biology	#	121.500	127.953	133.109	138.458	144.564	152.108	158.239
21DW	Biomolecular Physics & Chem Program	#	131.500	138.390	143.967	149.752	156.356	164.516	171.147

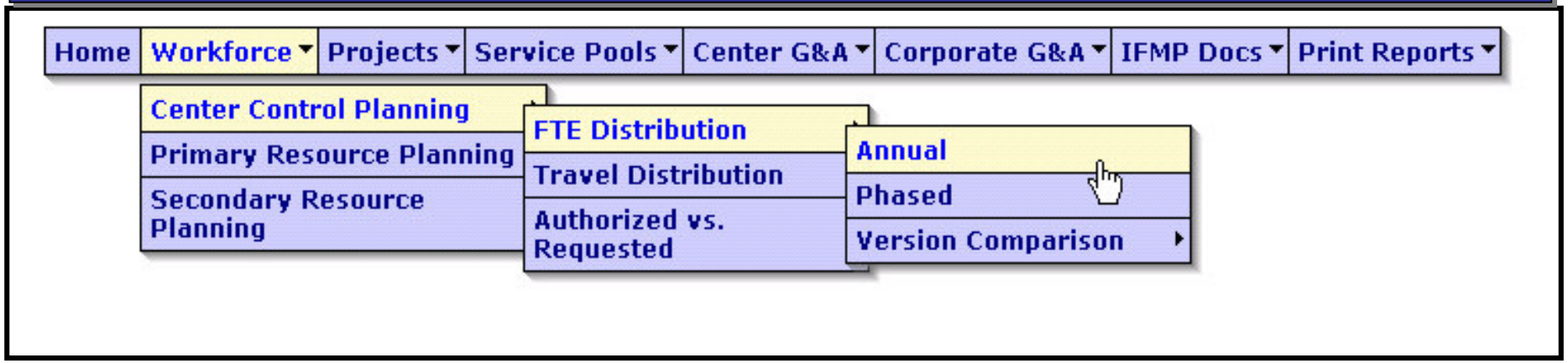
FTE and $ (Annual) | FTE and $ (Phase)

Guide Type	OG Type	NASA Org		LC	FY 2018 FTEs	FY 2018 $	FY 2019 FTEs	FY 2019 $	FY 2020 FTEs	FY 20
INGUIDE	#	21CF	Financial Management Division	#	36.0	2,826.000	36.0	2,977.020	36.0	3,096.
INGUIDE	#	21CR	Resources Management Office	#	30.0	2,745.000	30.0	2,886.330	30.0	3,002.
INGUIDE	#	21DG	Fundamental Biology	#	35.0	4,252.500	35.0	4,478.355	35.0	4,658.
INGUIDE	#	21DW	Biomolecular Physics & Chem Program	#	30.0	3,945.000	30.0	4,151.700	30.0	4,319.
INGUIDE	#	21DX	Public Affairs Office	#	10.0	1,055.000	10.0	1,097.540	10.0	1,141.
INGUIDE	#	21EE	Systems Engineering Division	#	10.0	1,025.000	10.0	1,079.240	10.0	1,121.

After you have entered the dollars in the FTE $ (Annual) input area and clicked on the Calc Rate button, you can see the resulting rate in the FTE Rate (Annual) input area. This is the only place you can see the rate. The output area shows FTEs and dollars.

Workforce FTE Distribution Annual Report

Budget Formulation Report Website Menu



1) Open the Budget Formulation BW report website.
2) Enter your BF user name and password.
3) Click on the menus shown above.
4) Enter the header data for the data you want in the report.
5) The report shown on the next page will open.

Workforce FTE Distribution Annual Report

Center Control Planning, FTE Distribution: Annual Report

BW Web Application

Home | Workforce | Projects | Service Pools | Center G&A | Corporate G&A | IFMP Docs | Print Reports

Zoom In | 50 % | Zoom Out | Email Comments

Navigation block:

Business area		Fiscal year		Guide Type	
Labor Category		NASA Org		OG Type	
AR: ANN - FTE Rate, Qty, Amt					

Variable Values

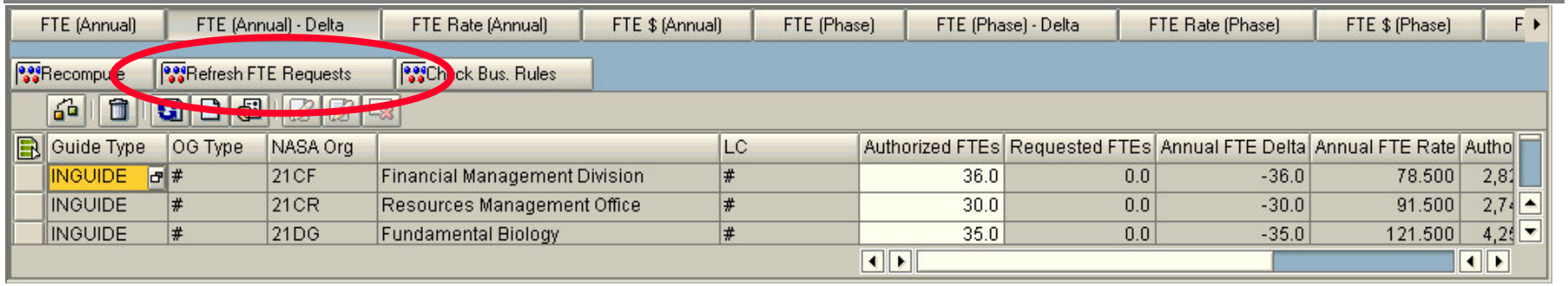
Most Current Data	<= 293
Center	Ames Research Center
Budget Year	2020
Agency Version	Pre-POP
Center Version	ARC Pre POP
NASA Org	Empty Demarcation
Labor Category	Empty Demarcation

Center Control FTE Distribution

				Fiscal year	2018			2019			2020		
NASA Org		Labor Category	Guide Type	OG Type	FTE Rate $K	FTE QTY	FTE $K	FTE Rate $K	FTE QTY	FTE $K	FTE Rate $K	FTE QTY	FTE $K
21CF	Financial Mgmt Div	Not assigned	In Guide	Not assigned	$ 78.50000	36.0 FTE	$ 2,826.000	$ 82.69500	36.0 FTE	$ 2,977.020	$ 86.02700	36.0 FTE	$ 3,096
21CR	Resources Mgmt Off	Not assigned	In Guide	Not assigned	$ 91.50000	30.0 FTE	$ 2,745.000	$ 96.21100	30.0 FTE	$ 2,886.330	$ 100.08900	30.0 FTE	$ 3,002
21DG	Fundamental Biology	Not assigned	In Guide	Not assigned	$ 121.50000	35.0 FTE	$ 4,252.500	$ 127.95300	35.0 FTE	$ 4,478.355	$ 133.10900	35.0 FTE	$ 4,658
21DW	Biomolecular Phy/Ch	Not assigned	In Guide	Not assigned	$ 131.50000	30.0 FTE	$ 3,945.000	$ 138.39000	30.0 FTE	$ 4,151.700	$ 143.96700	30.0 FTE	$ 4,319
21DX	Public Affairs	Not assigned	In Guide	Not assigned	$ 105.50000	10.0 FTE	$ 1,055.000	$ 109.75400	10.0 FTE	$ 1,097.540	$ 114.17700	10.0 FTE	$ 1,141
21FE	Systems Engineering	Not assigned	In Guide	Not assigned	$ 102.50000	10.0 FTE	$ 1,025.000	$ 107.82400	10.0 FTE	$ 1,078.240	$ 112.16900	10.0 FTE	$ 1,121
21FM	Fabrication Dev	Not assigned	In Guide	Not assigned	$ 100.50000	75.0 FTE	$ 7,537.500	$ 106.34400	75.0 FTE	$ 7,975.800	$ 110.63000	75.0 FTE	$ 8,297
21JF	Fac & Maint Mgt Div	Not assigned	In Guide	Not assigned	$ 99.50000	33.0 FTE	$ 3,283.500	$ 105.06100	33.0 FTE	$ 3,467.013	$ 109.29500	33.0 FTE	$ 3,606
21JI	Documentation Devl	Not assigned	In Guide	Not assigned	$ 88.50000	20.0 FTE	$ 1,770.000	$ 92.73200	20.0 FTE	$ 1,854.640	$ 96.46900	20.0 FTE	$ 1,929

Other Buttons

FTE (Annual) – Delta Input Layout: Input Area



- The Refresh FTE Requests button pulls in all of the latest requests from the lower level planning folders.

Exercises - Entering Annual FTEs/Travel Dollars

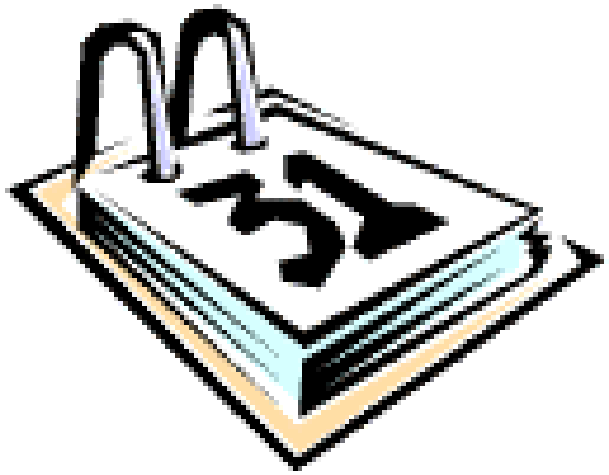
Now you will have an opportunity to practice what you have just seen in the Budget Formulation System Training Environment

Topic 2: Phasing

Center Control Planning

Topic 2: Phasing

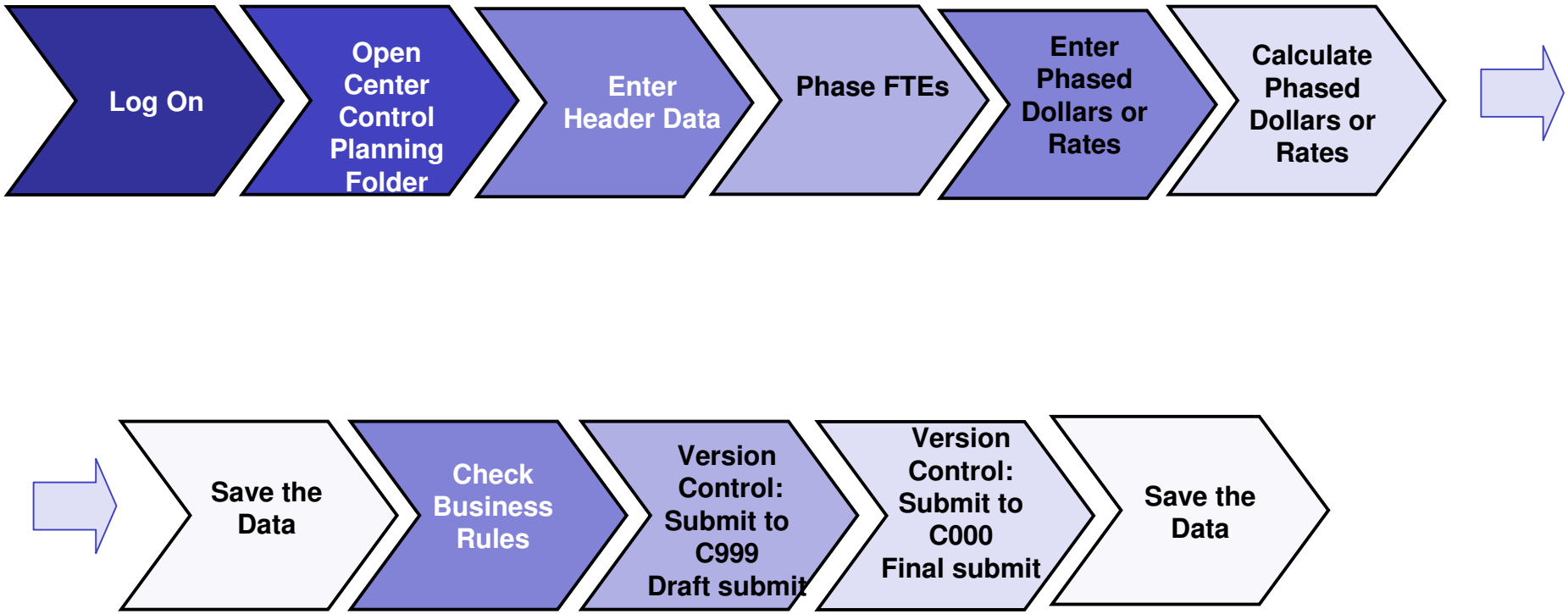
- **Goal**: During initial and mid-year phasing plan activities, the user will phase FTEs, dollars, and/or rates using manual entry or algorithms built into the system.



- **Phasing**:
  1. How to phase
  2. Phasing algorithms
  3. Incremental and cumulative phasing

- **Phasing Steps**:
  1. Logon
  2. Open Center Control Planning Folder
  3. Click on the appropriate Phasing Input Layout Button
  4. Enter Header data (ensure budget year and fiscal year are correct)
  5. Use algorithm buttons or manually enter phasing data
  6. Save the data when complete

Center Control Planning Overview
Process Flow – Phasing



Entering Data in the Header Area

Header Area

Name	Descriptn	Selection	Char. value ext.
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2020	2020
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Fiscal Year	Fiscal year	2018	2018

1) **To obtain the appropriate data to phase, enter the following in the Header Area:**

Center	**The two-digit Center number.**
Budget Year	**The budget year you are planning.**
Agency Version	**The Agency Version you are working in.**
Center Version	**The Center Version you are working in (C001-C005).**
Fiscal Year	**The fiscal year you are PHASING.**

2) **Click the Transfer Variables button to set the data you want to plan.**

Center Control Planning Folder

FTE (Phase) Input Layout: Input Area

Name	Descriptn	Selection	Char. value ext.
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2020	2020
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Fiscal Year	Fiscal year	2018	2018

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules | *** SEM TEAM USE ONLY

FTE (Annual) | FTE (Annual) - Delta | FTE Rate (Annual) | FTE $ (Annual) | FTE (Phase) | FTE (Phase) - Delta | FTE Rate (Phase) | FTE $ (Phase) | F

Recompute | Straight-Line (FTEs) | User-Defined | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	OCT - FTEs	NOV - FTEs	DEC - FTEs	JAN - FTEs	FEB - FTEs	MA
INGUIDE	#	21CF	Financial Management Division	#	36.0	36.0	36.0	36.0	36.0	
INGUIDE	#	21CR	Resources Management Office	#	30.0	30.0	30.0	30.0	30.0	30.0
INGUIDE	#	21DG	Fundamental Biology	#	35.0	35.0	35.0	35.0	35.0	35.0

Input Area

FTE and $ (Annual) | FTE and $ (Phase)

Guide Type	OG Type	NASA Org		LC	FY 2018 FTEs	FY 2018 $	FY 2019 FTEs	FY 2019 $	FY 2020 FTEs	FY 20
INGUIDE	#	21CF	Financial Management Division	#	36.0	2,826.000	36.0	2,977.020	36.0	3,096.
INGUIDE	#	21CR	Resources Management Office	#	30.0	2,745.000	30.0	2,886.330	30.0	3,002.
INGUIDE	#	21DG	Fundamental Biology	#	35.0	4,252.500	35.0	4,478.355	35.0	4,658.
INGUIDE	#	21DW	Biomolecular Physics & Chem Program	#	30.0	3,945.000	30.0	4,151.700	30.0	4,319.
INGUIDE	#	21DX	Public Affairs Office	#	10.0	1,055.000	10.0	1,097.540	10.0	1,141.

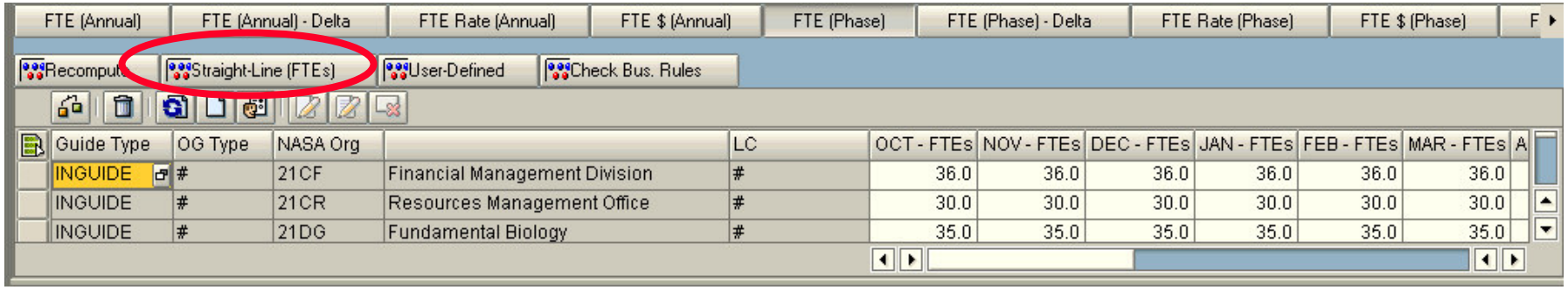
Phasing Algorithms

- **Each Phasing screen has two algorithm buttons:**
  - Straight-Line (one each for FTEs, Rates, and Dollars)
  - User-Defined (one each for FTEs, Rates, and Dollars)
- **Each button, if used, applies the same algorithm to all of the planning data (organizations) that were planned in the annual input area.**

- **Straight-Line**:
  - Phases the FTEs, dollars, or rates using the same amount in each month.
- **User-Defined**:
  - Allows you to define a series of percentages to apply to the amounts for each month.
- **Instead of buttons, you can manually enter the FTEs for each organization.**

To use the Straight-Line Algorithm Button

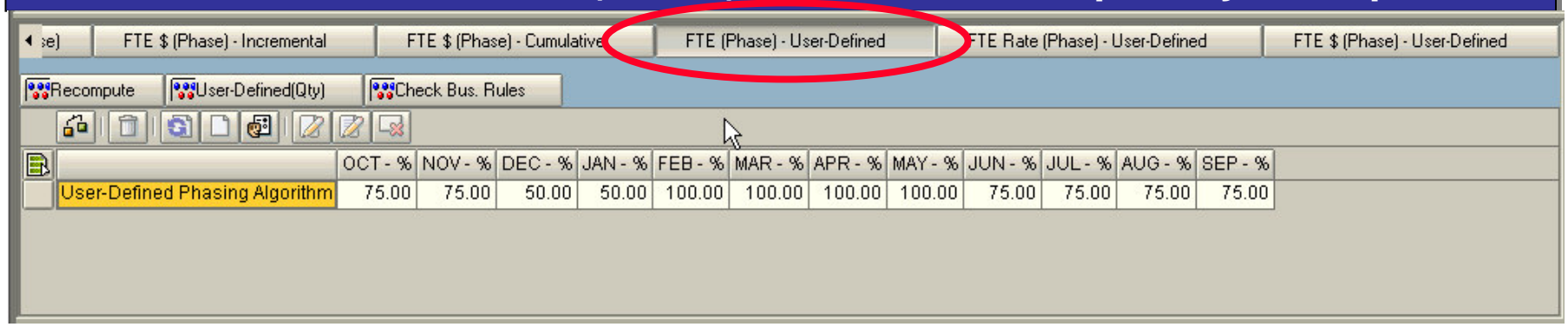
FTE (Phase) Input Layout: Input Area



1) In the Header Area, ensure the fiscal year is set to the fiscal year you want to phase.
2) Select the appropriate Phasing input layout (FTEs, Rate, or Dollars).
3) Click the Straight-Line button. All of the organizations where you have planned annual numbers will appear in each month for the fiscal year.
4) Make any adjustments to the numbers.
5) Click the Transfer Variables button to sort the data that you entered.
6) Click the Recompute button to recalculate the totals.
7) Click the Save button when complete.

To use the User-Defined FTE Algorithm

FTE (Phase) – User-Defined Input Layout: Input Area



1) In the Header Area, ensure the fiscal year is set to the fiscal year you want to phase.
2) Scroll to the right until you see the FTE (Phase) – User-Defined button.
3) Click the FTE (Phase) – User-Defined button. The user-defined input area will open.
4) Enter the percentages for phasing. (the average must equal 100%)
5) Click the User Defined (Qty) button to apply the percentages to the annual numbers.
6) View the output in the FTE and $ (Phase) output area.
7) Click the Save button when complete.

User-Defined FTE Additional Information

FTE (Phase) Input Layout: Input Area

FTE (Annual) | FTE (Annual) - Delta | FTE Rate (Annual) | FTE $ (Annual) | FTE (Phase) | FTE (Phase) - Delta | FTE Rate (Phase) | FTE $ (Phase) | F

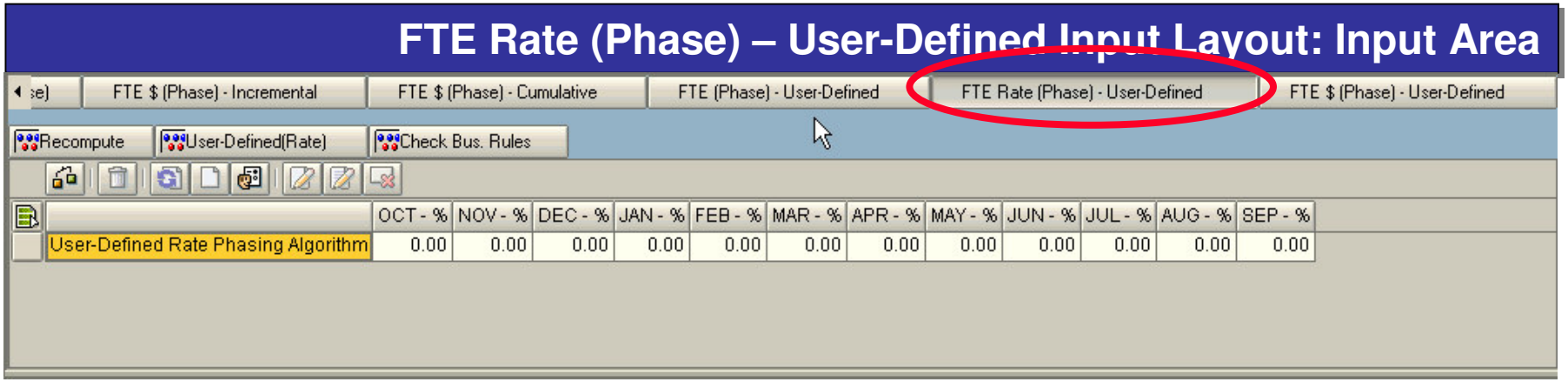
Recompute | Straight-Line (FTEs) | User-Defined | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	OCT - FTEs	NOV - FTEs	DEC - FTEs	JAN - FTEs	FEB - FTEs	MAR - FTEs	A
INGUIDE	#	21CF	Financial Management Division	#	36.0	36.0	36.0	36.0	36.0	36.0	
INGUIDE	#	21CR	Resources Management Office	#	30.0	30.0	30.0	30.0	30.0	30.0	
INGUIDE	#	21DG	Fundamental Biology	#	35.0	35.0	35.0	35.0	35.0	35.0	

You can also see the output in the FTE (Phase) input area.

You can use the User-Defined button in this input area to apply the percentages that you entered on the FTE (Phase) – User-Defined input area. You must put the percentages in the FTE (Phase) – User-Defined prior to clicking on the button in this layout.

To use the User-Defined FTE Rate Algorithm



1) In the Header Area, ensure the fiscal year is set to the fiscal year you want to phase.
2) Scroll to the right until you see the FTE Rate (Phase) – User-Defined button.
3) Click the FTE Rate (Phase) – User-Defined button. The user-defined input area will open.
4) Enter the percentages for phasing. (the average must equal 100%)
5) Click the User Defined (Rate) button to apply the percentages to the annual numbers.
6) View the output in the FTE Rate (Phase) input layout.
7) Click the Save button when complete.

User-Defined FTE Rate Additional Information

FTE Rate (Phase) Input Layout: Input Area

FTE (Annual) | FTE (Annual) - Delta | FTE Rate (Annual) | FTE $ (Annual) | FTE (Phase) | FTE (Phase) - Delta | FTE Rate (Phase) | FTE $ (Phase) | F

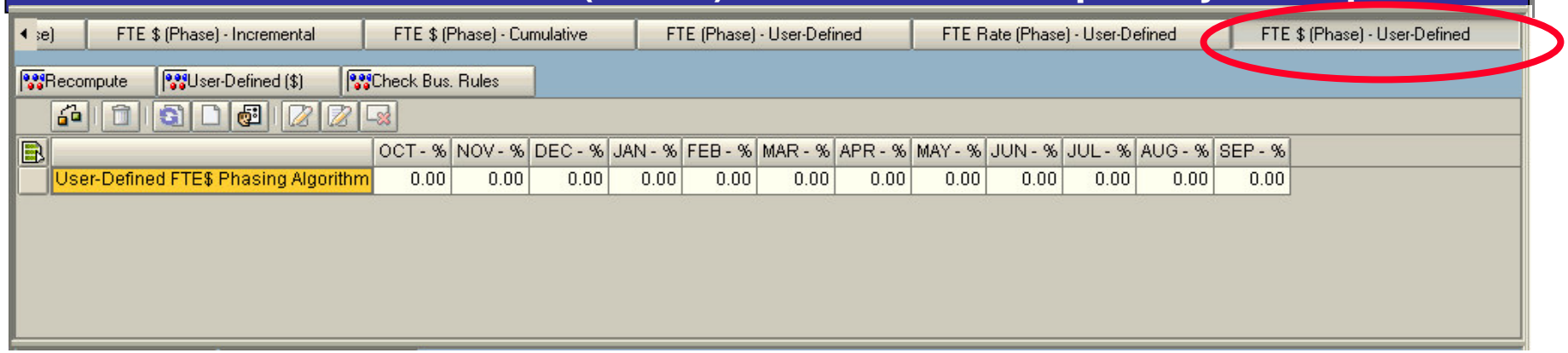
Recompute | Calc Dollars | Straight-Line (Rate) | User-Defined (Rate) | Check Bus. Rules

NASA Org		LC	OCT - Rate	NOV - Rate	DEC - Rate	JAN - Rate	FEB - Rate	MAR - Rate	APR - Rate	MAY - Rate	JUN - Rat
21CF	Financial Management Division	#	6.542	6.542	6.542	6.542	6.542	6.542	6.542	6.542	6.54
21CR	Resources Management Office	#	7.625	7.625	7.625	7.625	7.625	7.625	7.625	7.625	7.62
21DG	Fundamental Biology	#	10.125	10.125	10.125	10.125	10.125	10.125	10.125	10.125	10.12

You can also see the output in the FTE Rate (Phase) input area.
You can use the User-Defined (Rate) button in this input area to apply the percentages that you entered on the FTE Rate (Phase) – User-Defined input area. You must put the percentages in the FTE Rate (Phase) – User-Defined prior to clicking on the button in this layout.

To Use the User-Defined FTE $ Algorithm

FTE $ (Phase) – User-Defined Input Layout: Input Area



1) In the Header Area, ensure the fiscal year is set to year you want to phase.
2) Scroll to the right until you see the FTE $ (Phase) – User-Defined button.
3) Click the FTE $ (Phase) – User-Defined button. The user-defined input area will open.
4) Enter the percentages for phasing. (the average must equal 100%)
5) Click the User Defined ($) button to apply the percentages to the annual numbers.
6) View the output in the FTE and $ (Phase) output area.
7) Click the Save button when complete.

User-Defined FTE $ Additional Information

FTE $ (Phase) Input Layout: Input Area

FTE (Annual) | FTE (Annual) - Delta | FTE Rate (Annual) | FTE $ (Annual) | FTE (Phase) | FTE (Phase) - Delta | FTE Rate (Phase) | FTE $ (Phase) | F

Recompute | Calc Rate | Straight-Line ($) | User-Defined ($) | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $
INGUIDE	#	21CF	Financial Management Division	#	235.500	235.500	235.500	235.500	235.500	235.500	235.500
INGUIDE	#	21CR	Resources Management Office	#	228.750	228.750	228.750	228.750	228.750	228.750	228.750
INGUIDE	#	21DG	Fundamental Biology	#	354.375	354.375	354.375	354.375	354.375	354.375	354.375

You can also see the output in the FTE $ (Phase) input area.

You can use the User-Defined ($) button in this input area to apply the percentages that you entered on the FTE $ (Phase) – User-Defined input area. You must put the percentages in the FTE $ (Phase) – User-Defined prior to clicking on the button in this layout.

To Manually Enter Data

FTE (Phase) Input Layout: Input Area

FTE (Annual) | FTE (Annual) - Delta | FTE Rate (Annual) | FTE $ (Annual) | FTE (Phase) | FTE (Phase) - Delta | FTE Rate (Phase) | FTE $ (Phase)

Recompute | Straight-Line (FTEs) | User-Defined | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	OCT - FTEs	NOV - FTEs	DEC - FTEs	JAN - FTEs	FEB - FTEs	MAR - FTEs
INGUIDE	#	21CF	Financial Management Division	#	36.0	36.0	36.0	36.0	36.0	36.0
INGUIDE	#	21CR	Resources Management Office	#	30.0	30.0	30.0	30.0	30.0	30.0
INGUIDE	#	21DG	Fundamental Biology	#	35.0	35.0	35.0	35.0	35.0	35.0

1) In the Header Area, ensure the fiscal year is set to year you want to phase.
2) Click on the appropriate Phasing Input Area button (to phase FTEs, rates, or dollars).
3) Click on the append a row button to add a row.
4) Enter the guide type, overguide type, NASA Org, Labor Category and the monthly numbers for that organization.
5) Click the transfer variables button to sort the new row.
6) Repeat for each organization.
7) Click the Save button when complete.

FTE $ (Phase) - Incremental

FTE $ (Phase) - Incremental Input Layout: Input Area

FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative | FTE (Phase) - User-Defined | FTE Rate (Phase) - User-Defined | FTE $ (Phase) - User-Defined

Phasing: Straight-Line | Recompute

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total 2018 $	Carr
OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0
OBS - Curr PY	0.000	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	54,664.168	0
COSTS - Prev PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0
COSTS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0
COSTS - Curr PY	0.000	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	54,664.168	0
COSTS - TOTAL	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0

This input area allows you to enter prior and previous program year obligations and costs in an incremental fashion.

The OBS – Curr PY and COSTS – Curr PY shows the total FTE dollars for all of the Organizations that have been obligated, costed and phased for the fiscal year that is shown in the header.

The Straight-Line button allows you to phase the carry-in amounts.

FTE $ (Phase) - Incremental

FTE $ (Phase) - Incremental Input Layout: Input Area

FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative | FTE (Phase) - User-Defined | FTE Rate (Phase) - User-Defined | FTE $ (Phase) - User-Defined

Phasing: Straight-Line | Recompute

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total 2018 $	Carr
OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0
OBS - Curr PY	0.000	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	54,664.168	0
COSTS - Prev PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0
COSTS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0
COSTS - Curr PY	0.000	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	54,664.168	0
COSTS - TOTAL	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0

1) Click on the FTE $ (Phase) - Incremental button to open the input area.

2) The following fields will appear, in monthly increments:

OBS – Prior PY	Obligated dollars for the prior program year
OBS – Curr PY	Obligated dollars for the current program year
COSTS – Prev PY	Costed dollars for ALL previous program years before the current and prior PY
COSTS – Curr PY	Costed dollars for current program year
COSTS – TOTAL	Total costed $

FTE $ (Phase) - Incremental

FTE $ (Phase) - Incremental Input Layout: Input Area

FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative | FTE (Phase) - User-Defined | FTE Rate (Phase) - User-Defined | FTE $ (Phase) - User-Defined

Phasing: Straight-Line | Recompute

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total 2018 $	Carr
OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0
OBS - Curr PY	0.000	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	54,664.168	0
COSTS - Prev PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0
COSTS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0
COSTS - Curr PY	0.000	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	4,555.347	54,664.168	0
COSTS - TOTAL	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0

3) Enter the amounts in the appropriate field.
4) Click the Recompute button to enter the data and recalculate the totals.
5) Click the Save button when complete.

FTE $ (Phase) - Cumulative

FTE $ (Phase) - Cumulative Input Layout: Input Area

FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative | FTE (Phase) - User-Defined | FTE Rate (Phase) - User-Defined | FTE $ (Phase) - User-Defined

Phasing: Straight-Line | Recompute

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total
OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
OBS - Curr PY	0.000	4,555.347	9,110.695	13,666.042	18,221.389	22,776.737	27,332.084	31,887.431	36,442.779	40,998.126	45,553.473	50,108.821	54,664.168	54,6
COSTS - Prev PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
COSTS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
COSTS - Curr PY	0.000	4,555.347	9,110.695	13,666.042	18,221.389	22,776.737	27,332.084	31,887.431	36,442.779	40,998.126	45,553.473	50,108.821	54,664.168	54,6
COSTS - TOTAL	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	

This input area allows you to enter prior and previous program year obligations and costs in a cumulative fashion.

The OBS – Curr PY and COSTS – Curr PY shows the total FTE dollars for all of the Organizations that have been obligated, costed and phased for the fiscal year that is shown in the header.

The Straight-Line button allows you to phase the carry-in amounts.

FTE $ (Phase) - Cumulative

FTE $ (Phase) - Cumulative Input Layout: Input Area

FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative | FTE (Phase) - User-Defined | FTE Rate (Phase) - User-Defined | FTE $ (Phase) - User-Defined

Phasing: Straight-Line | Recompute

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total
OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
OBS - Curr PY	0.000	4,555.347	9,110.695	13,666.042	18,221.389	22,776.737	27,332.084	31,887.431	36,442.779	40,998.126	45,553.473	50,108.821	54,664.168	54,6
COSTS - Prev PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
COSTS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
COSTS - Curr PY	0.000	4,555.347	9,110.695	13,666.042	18,221.389	22,776.737	27,332.084	31,887.431	36,442.779	40,998.126	45,553.473	50,108.821	54,664.168	54,6
COSTS - TOTAL	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	

1) Click on the FTE $ (Phase) - Cumulative button to open the input area.

2) The following fields will appear, shown in cumulative amounts:

OBS – Prior PY	Obligated dollars for the prior program year
OBS – Curr PY	Obligated dollars for the current program year
COSTS – Prev PY	Costed dollars for ALL previous program years before the current and prior PY
COSTS – Curr PY	Costed dollars for current program year
COSTS – TOTAL	Total costed $

FTE $ (Phase) - Cumulative

FTE $ (Phase) – Cumulative Input Layout: Input Area

se) | FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative | FTE (Phase) - User-Defined | FTE Rate (Phase) - User-Defined | FTE $ (Phase) - User-Defined

Phasing: Straight-Line | Recompute

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total
OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
OBS - Curr PY	0.000	4,555.347	9,110.695	13,666.042	18,221.389	22,776.737	27,332.084	31,887.431	36,442.779	40,998.126	45,553.473	50,108.821	54,664.168	54,6
COSTS - Prev PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
COSTS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
COSTS - Curr PY	0.000	4,555.347	9,110.695	13,666.042	18,221.389	22,776.737	27,332.084	31,887.431	36,442.779	40,998.126	45,553.473	50,108.821	54,664.168	54,6
COSTS - TOTAL	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	

3) Enter the amounts in the appropriate field.
4) Click the Recompute button to enter the data and recalculate the totals.
5) Click the Save button when complete.

Where can I see the output?

FTE $ (Phase) – Cumulative Input Layout: Input Area

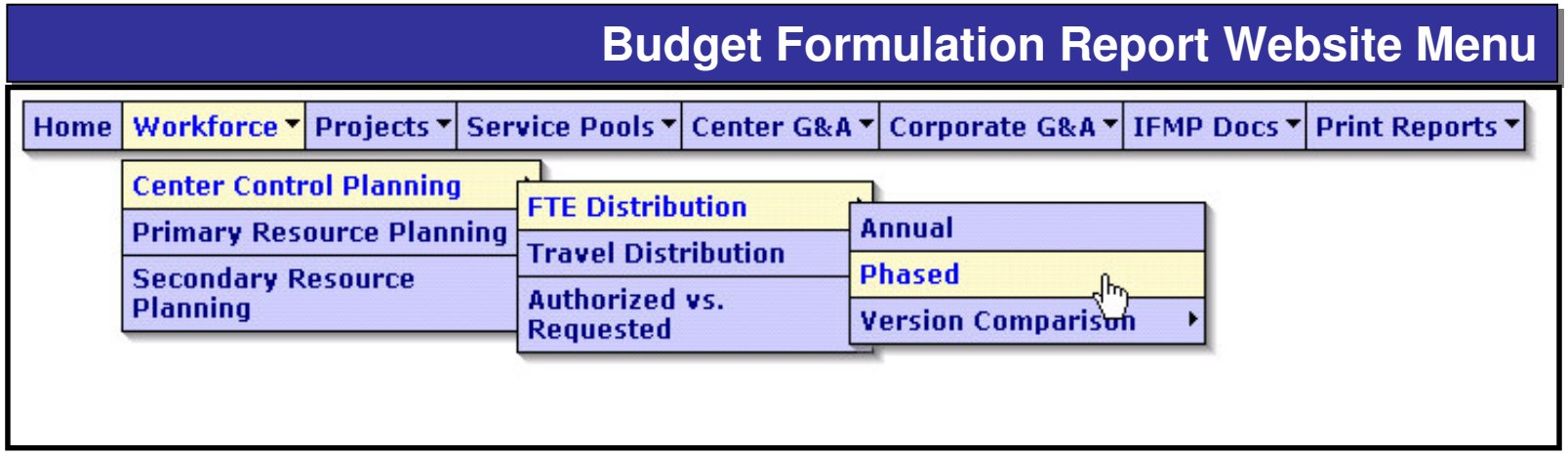
FTE and $ (Annual) | FTE and $ (Phase)

Guide Type	OG Type	NASA Org		LC	OCT - FTE	OCT - $	NOV - FTE	NOV - $	DEC - FTE	DEC - $	JAN - FTE	JAN
INGUIDE	#	21CF	Financial Management Division	#	36.0	235.500	36.0	235.500	36.0	235.500	36.0	235.5
INGUIDE	#	21CR	Resources Management Office	#	30.0	228.750	30.0	228.750	30.0	228.750	30.0	228.7
INGUIDE	#	21DG	Fundamental Biology	#	35.0	354.375	35.0	354.375	35.0	354.375	35.0	354.3
INGUIDE	#	21DW	Biomolecular Physics & Chem Program	#	30.0	328.750	30.0	328.750	30.0	328.750	30.0	328.7

To see the phased output, click on the FTE and $ (Phase) Button.

You will see the monthly FTE quantities and dollars (rates are not shown).

Where can I see the output?



1) Open the Budget Formulation BW report website.
2) Enter your BF user name and password.
3) Click on menus shown above.
4) Enter the header data for the data you want in the report.
5) The report shown on the next page will open.

Where can I see the output?

Center Control Planning, FTE Distribution: Phasing Report

BW Web Application

Home | Workforce | Projects | Service Pools | Center G&A | Corporate G&A | IFMP Docs | Print Reports

Zoom In | 50 % | Zoom Out | Email Comments

Navigation block:

Business area		Guide Type		Labor Category	
NASA Org		OG Type		AR: MTH - FTE Rate, Qty, Amt	

Variable Values

Most Current Data	<= 293
Phase Period 1	October 2018
Phase Year Text	2018
Center	Ames Research Center
Budget Year	2020
Phasing Year	2018
Agency Version	Pre-POP
Center Version	ARC Pre POP
NASA Org	Empty Demarcation
Labor Category	Empty Demarcation

Center Control FTE Distribution - Phased

NASA Org		Labor Category	Guide Type	OG Type	Oct 2018 Rate	Oct 2018 QTY	Oct 2018 $K	Nov 2018 Rate	Nov 2018 QTY	Nov 2018 $K	Dec 2018 Rate	Dec 2018 QTY	Dec 2018 $K
#	NASA/Not assigned	Not assigned		Not assigned			$ 19,888.539			$ 30,232.809			$ 39,577
21CF	Financial Mgmt Div	Not assigned	In Guide	Not assigned	$ 6.54167	36.0 FTE	$ 235.500	$ 6.54167	36.0 FTE	$ 235.500	$ 6.54167	36.0 FTE	$ 235
21CR	Resources Mgmt Off	Not assigned	In Guide	Not assigned	$ 7.62500	30.0 FTE	$ 228.750	$ 7.62500	30.0 FTE	$ 228.750	$ 7.62500	30.0 FTE	$ 228
21DG	Fundamental Biology	Not assigned	In Guide	Not assigned	$ 10.12500	35.0 FTE	$ 354.375	$ 10.12500	35.0 FTE	$ 354.375	$ 10.12500	35.0 FTE	$ 354
21DW	Biomolecular Phy/Ch	Not assigned	In Guide	Not assigned	$ 10.95833	30.0 FTE	$ 328.750	$ 10.95833	30.0 FTE	$ 328.750	$ 10.95833	30.0 FTE	$ 328
21DX	Public Affairs	Not assigned	In Guide	Not assigned	$ 8.79167	10.0 FTE	$ 87.917	$ 8.79167	10.0 FTE	$ 87.917	$ 8.79167	10.0 FTE	$ 87
21FE	Systems Engineering	Not assigned	In Guide	Not assigned	$ 8.54167	10.0 FTE	$ 85.417	$ 8.54167	10.0 FTE	$ 85.417	$ 8.54167	10.0 FTE	$ 85
21FM	Fabrication Dev	Not assigned	In Guide	Not assigned	$ 8.37500	75.0 FTE	$ 628.125	$ 8.37500	75.0 FTE	$ 628.125	$ 8.37500	75.0 FTE	$ 628
21JF	Fac & Maint Mgt Div	Not assigned	In Guide	Not assigned	$ 16.58333	65.1 FTE	$ 539.788	$ 16.58333	65.1 FTE	$ 539.788	$ 16.58333	65.1 FTE	$ 539
21JI	Documentation Devl	Not assigned	In Guide	Not assigned	$ 7.37500	20.0 FTE	$ 147.500	$ 7.37500	20.0 FTE	$ 147.500	$ 7.37500	20.0 FTE	$ 147

Center Control Planning (Travel $) Folder

Center Control Planning (Travel $) Folder

Execute Center Control Planning (Travel $)

Name	Descriptn	Selection	Char. value ext.
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2020	2020
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Fiscal Year	Fiscal year	2018	2018

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules | *** SEM TEAM USE ONL

Annual | Annual - Delta

Refresh Travel $ | Check Bus. Rules

Guide Type	OG Type	NASA Org		FY 2018 $	FY 2019 $	F

Travel $ (Phase) | Travel $ (Phase) - Incremental | Travel $ (Phase) - Cumulative

Guide Type	OG Type	NASA Org		OCT - $	NOV - $	

Output Area

Exercises – Phasing Annual FTEs

Now you will have an opportunity to practice what you have just seen in the Budget Formulation Training Environment

Topic 2: Reviewing and Authorizing FTE/Travel Dollars Requests

Center Control Planning

Topic 2: Reviewing and Authorizing FTE/Travel Dollars Requests

Center Control Planning

Topic 2: Reviewing Authorized vs. Requested FTEs/Travel Dollars

- **Goal**: As negotiations take place (during POP or Pre-POP), review the requested FTEs/Travel Dollars from the Organizations in the Center, and compare them to the authorized.

- **Reviewing Authorized vs. Requested FTEs/Travel Dollars**
  1. Logon
  2. Click on the Center Control Planning Folder
  3. Click on the Annual-Delta button in the Input Area
  4. Enter Header Data

Center Control Planning Folder

FTE (Annual) – Delta Input Layout

Name	Descriptn	Selection	Char. value ext.
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2020	2020
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Fiscal Year	Fiscal year	2018	2018

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules | *** SEM TEAM USE ONLY

FTE (Annual) | FTE (Annual) - Delta | FTE Rate (Annual) | FTE $ (Annual) | FTE (Phase) | FTE (Phase) - Delta | FTE Rate (Phase) | FTE $ (Phase) | F

Recompute | Refresh FTE Requests | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	Authorized FTEs	Requested FTEs	Annual FTE Delta	Annual FTE
INGUIDE	#	21CF	Financial Management Division	#	36.0	0.0	-36.0	78.500
INGUIDE	#	21CR	Resources Management Office	#	30.0	0.0	-30.0	91.500
INGUIDE	#	21DG	Fundamental Biology	#	35.0	0.0	-35.0	121.500

Input Area

FTE and $ (Annual) | FTE and $ (Phase)

Guide Type	OG Type	NASA Org		LC	FY 2018 FTEs	FY 2018 $	FY 2019 FTEs	FY 2019 $	FY 2020 FTEs	FY 20
INGUIDE	#	21CF	Financial Management Division	#	36.0	2,826.000	36.0	2,977.020	36.0	3,096.
INGUIDE	#	21CR	Resources Management Office	#	30.0	2,745.000	30.0	2,886.330	30.0	3,002.
INGUIDE	#	21DG	Fundamental Biology	#	35.0	4,252.500	35.0	4,478.355	35.0	4,658.
INGUIDE	#	21DW	Biomolecular Physics & Chem Program	#	30.0	3,945.000	30.0	4,151.700	30.0	4,319.
INGUIDE	#	21DX	Public Affairs Office	#	10.0	1,055.000	10.0	1,097.540	10.0	1,141.

What goes in the Input Layout?

FTE (Annual) – Delta Input Layout: Input Area

FTE (Annual) | FTE (Annual) - Delta | FTE Rate (Annual) | FTE $ (Annual) | FTE (Phase) | FTE (Phase) - Delta | FTE Rate (Phase) | FTE $ (Phase) | F

Recompute | Refresh FTE Requests | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	Authorized FTEs	Requested FTEs	Annual FTE Delta	Annual FTE Rate	Autho
INGUIDE	#	21CF	Financial Management Division	#	36.0	0.0	-36.0	78.500	2,8
INGUIDE	#	21CR	Resources Management Office	#	30.0	0.0	-30.0	91.500	2,7
INGUIDE	#	21DG	Fundamental Biology	#	35.0	0.0	-35.0	121.500	4,2

1) **Click the Refresh FTE rate and Refresh FTE Requests button**
2) **Review the Planning Data, including the requested FTEs/Travel Dollars.**

Authorized FTEs/Travel $ The number of FTEs/Travel Dollars that are authorized for the fiscal year.

Requested FTEs/Travel $ The number of FTEs/Travel Dollars requested by the Organization.

Annual FTE/Travel $ Delta The difference between authorized and requested FTEs/Travel Dollars.

Dollar and Rate fields – Rates and Dollars calculated for the FTEs.

What goes in the Input Layout?

FTE (Annual) – Delta Input Layout: Input Area

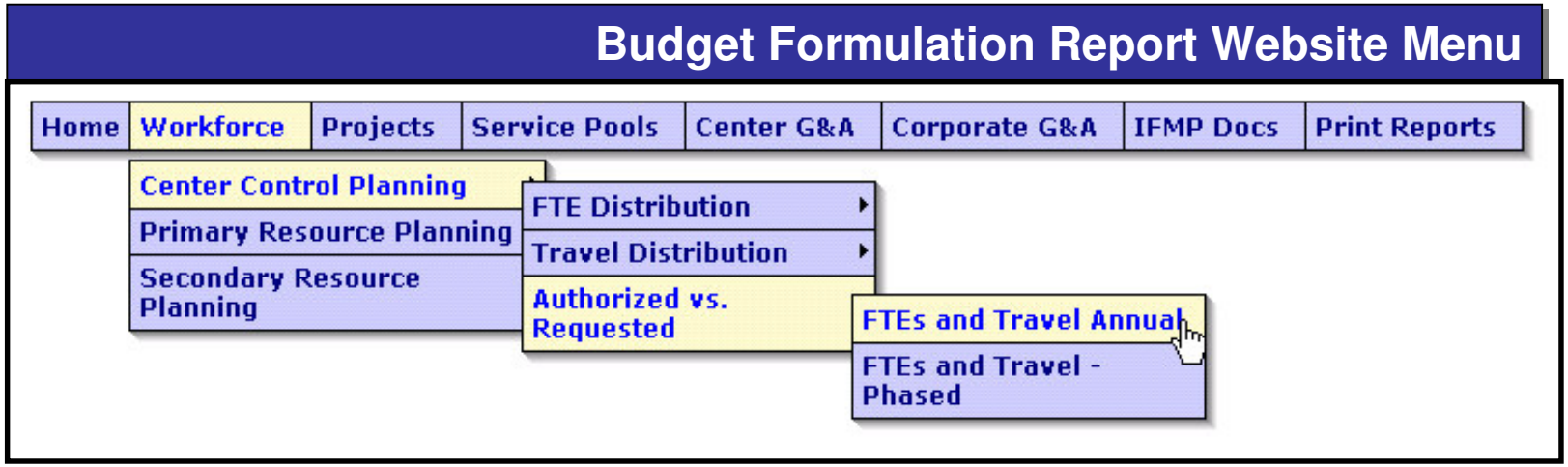
FTE (Annual) | FTE (Annual) - Delta | FTE Rate (Annual) | FTE $ (Annual) | FTE (Phase) | FTE (Phase) - Delta | FTE Rate (Phase) | FTE $ (Phase) | F

Recompute | Refresh FTE Requests | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	Authorized FTEs	Requested FTEs	Annual FTE Delta	Annual FTE Rate	Autho
INGUIDE	#	21CF	Financial Management Division	#	36.0	0.0	-36.0	78.500	2,8
INGUIDE	#	21CR	Resources Management Office	#	30.0	0.0	-30.0	91.500	2,7
INGUIDE	#	21DG	Fundamental Biology	#	35.0	0.0	-35.0	121.500	4,2

3) Change the value in the Authorized field, if needed. Click the Transfer Variables button to sort the new data.
4) Click the Recompute button to recalculate the changes in the dollars.
5) Click the Save button when completed.
6) Repeat for all of the organizations within your responsibility.

Where can I see the output?



1) Open the Budget Formulation BW report website.
2) Enter your BF user name and password.
3) Click on menus shown above.
4) Enter the header data for the data you want in the report.
5) The report shown on the next page will open.

Where can I see the output?

Center Control Planning, Authorized vs. Requested: FTEs and Travel Annual

Auth. vs. Req. by Org - FTEs & Travel

					Fiscal year	2018			2019			2020		
Guide Type	OG Type	NASA Org		LC		FTE QTY	FTE $K	Travel $K	FTE QTY	FTE $K	Travel $K	FTE QTY	FTE $K	Travel $K
In Guide	Not assigned	21CF	Financial Mgmt Div	Not assigned	Center Control Authorized Direct	36.0 FTE	$ 2,826.000	$ 25.000	36.0 FTE	$ 2,977.020	$ 25.000	36.0 FTE	$ 3,096.972	$ 25.000
					Project Requested Direct									
					Service Pool Requested Direct									
					Center G&A Requested Direct									
					Corporate Requested Direct									
					Total Requested Direct									
					========== Delta Values ==========	36.0 FTE	$ 2,826.000	$ 25.000	36.0 FTE	$ 2,977.020	$ 25.000	36.0 FTE	$ 3,096.972	$ 25.000

Other Buttons

FTE (Annual) – Delta Input Layout: Input Area

FTE (Annual) | FTE (Annual) - Delta | FTE Rate (Annual) | FTE $ (Annual) | FTE (Phase) | FTE (Phase) - Delta | FTE Rate (Phase) | FTE $ (Phase) | F

Recompute | Refresh FTE Requests | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	Authorized FTEs	Requested FTEs	Annual FTE Delta	Annual FTE Rate	Autho
INGUIDE	#	21CF	Financial Management Division	#	36.0	0.0	-36.0	78.500	2,8
INGUIDE	#	21CR	Resources Management Office	#	30.0	0.0	-30.0	91.500	2,7
INGUIDE	#	21DG	Fundamental Biology	#	35.0	0.0	-35.0	121.500	4,2

The Refresh FTE/Travel $ button pulls in all of the latest requests from the lower level planning folders (that have been released to C000).

Topic 2: Reviewing and Authorizing FTE Requests Phased

- **Goal**: As negotiations take place (during POP or Pre-POP), review the requested FTEs from the Organizations in the Center, and compare them to the authorized amount *in monthly amounts.*

- **Reviewing Authorized vs. Requested FTEs**:
  1. Logon
  2. Click on the Center Control Planning Folder
  3. Click on the FTE (Phase) Delta button in the Input Area
  4. Enter Header Data

FTE (Phase) - Delta Input Area

FTE (Phase) – Delta Input Layout: Input Area

FTE (Annual) | FTE (Annual) - Delta | FTE Rate (Annual) | FTE $ (Annual) | FTE (Phase) | FTE (Phase) - Delta | FTE Rate (Phase) | FTE $ (Phase) | F

Recompute | Straight-Line (FTEs) | User-Defined | Refresh FTE Requests | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	Fiscal year/period		Authorized FTEs	Requested FTEs	Monthly FTE Delta	Monthly FTE Ra
INGUIDE	#	21CF	Financial Management Division	#	001/2018	October 2018	36.0	0.0	-36.0	6.5
INGUIDE	#	21CF	Financial Management Division	#	002/2018	November 2018	36.0	0.0	-36.0	6.5
INGUIDE	#	21CF	Financial Management Division	#	003/2018	December 2018	36.0	0.0	-36.0	6.5

1) **Review the Phased Planning Data, including the requested FTEs.**

Authorized FTEs	The number of FTEs that are authorized by month for the fiscal year.
Requested FTEs	The monthly number of FTEs requested by the Organization.
Monthly FTE Delta	The difference between the authorized and requested FTEs.
Dollar and Rate fields	Rates and dollars calculated for the FTEs by month.

What goes in the Input Layout?

FTE (Phase) – Delta Input Layout: Input Area

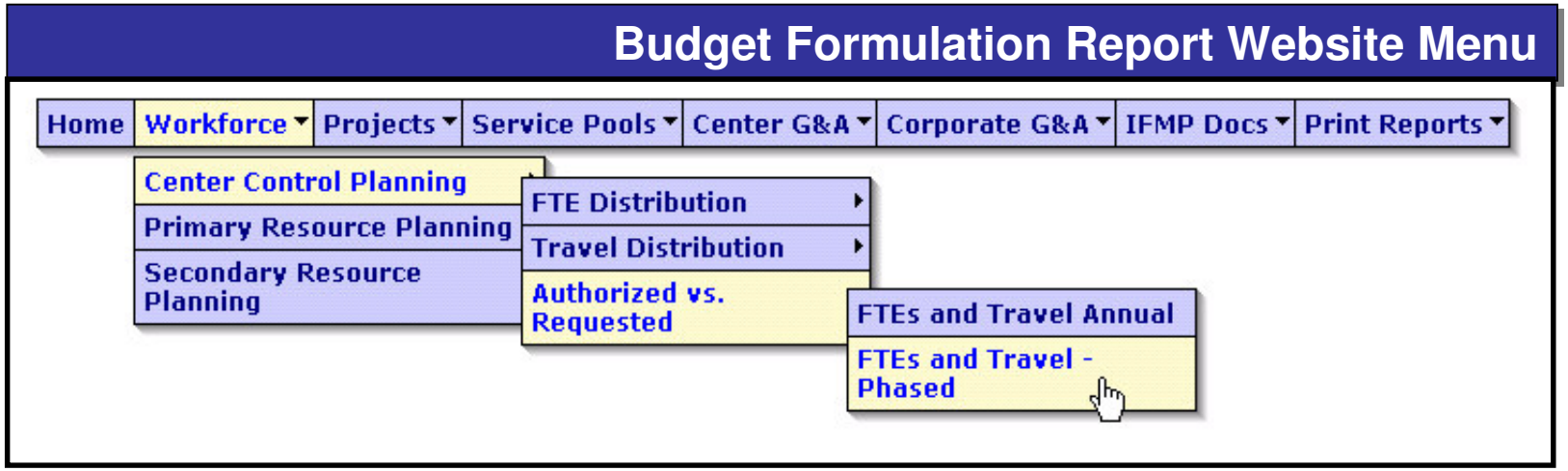
FTE (Annual) | FTE (Annual) - Delta | FTE Rate (Annual) | FTE $ (Annual) | FTE (Phase) | FTE (Phase) - Delta | FTE Rate (Phase) | FTE $ (Phase) | F

Recompute | Straight-Line (FTEs) | User-Defined | Refresh FTE Requests | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	Fiscal year/period		Authorized FTEs	Requested FTEs	Monthly FTE Delta	Monthly FTE Ra
INGUIDE	#	21CF	Financial Management Division	#	001/2018	October 2018	36.0	0.0	-36.0	6.5
INGUIDE	#	21CF	Financial Management Division	#	002/2018	November 2018	36.0	0.0	-36.0	6.5
INGUIDE	#	21CF	Financial Management Division	#	003/2018	December 2018	36.0	0.0	-36.0	6.5

2) Change the value in the Authorized FTE field, if needed. Click the Transfer Variables button to sort the new data.
3) Click the Recompute button to recalculate the changes in the dollars.
4) Click the Save button when completed.
5) Repeat for all of the organizations within your responsibility.

Where can I see the output?



1) Open the Budget Formulation BW report website.
2) Enter your BF user name and password.
3) Click on menus shown above.
4) Enter the header data for the data you want in the report.
5) The report shown on the next page will open.

Where can I see the output?

Center Control Planning, Authorized vs. Requested: FTEs and Travel Phased

Auth. vs. Req. by Org - FTEs & Travel - Phased

Guide Type	OG Type	NASA Org	LC		Oct 2018 FTE QTY	Oct 2018 FTE $K	Oct 2018 Travel $K	Nov 2018 FTE QTY	Nov 2018 FTE $K	Nov 2018 Travel $K	Dec 2018 FTE QTY	Dec 2018 FTE $K	Dec 2018 Travel $K	Jan 2018 FTE QTY	Jan 2 FTE $K
In Guide	Not assigned	Financial Mgmt Div	Not assigned	Center Control Authorized Direct	36.0 FTE	$ 235.500		36.0 FTE	$ 235.500		36.0 FTE	$ 235.500		36.0 FTE	$ 23
				Project Requested Direct											
				Service Pool Requested Direct											
				Center G&A Requested Direct											
				Corporate Requested Direct											
				Total Requested Direct											
				========== Delta Values ==========	36.0 FTE	$ 235.500		36.0 FTE	$ 235.500		36.0 FTE	$ 235.500		36.0 FTE	$ 23

Topic 2: Center Control Planning: Debrief

- This section provided an overview of Center Control Planning activities in the Budget Formulation System.
- The next section will demonstrate how to publish the finished work to the draft submit and final version.

Topic 3

Business Rules and Version Control

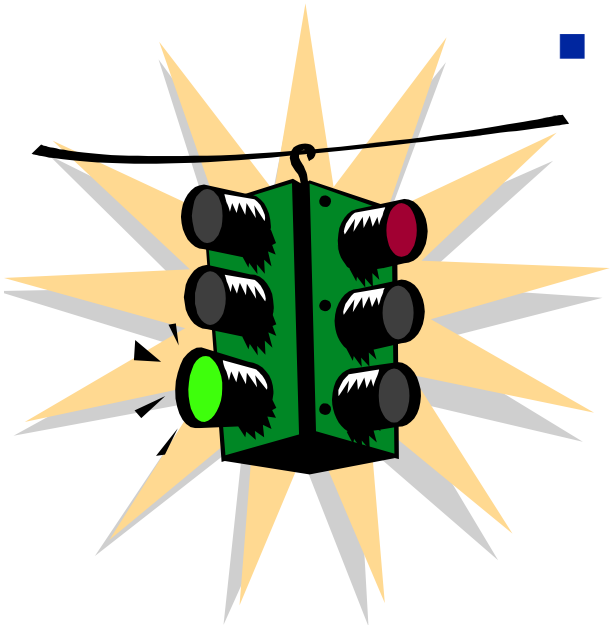
Topic 3: Overview

- Business Rules and how they work
- Version Control and how it works

Business Rules

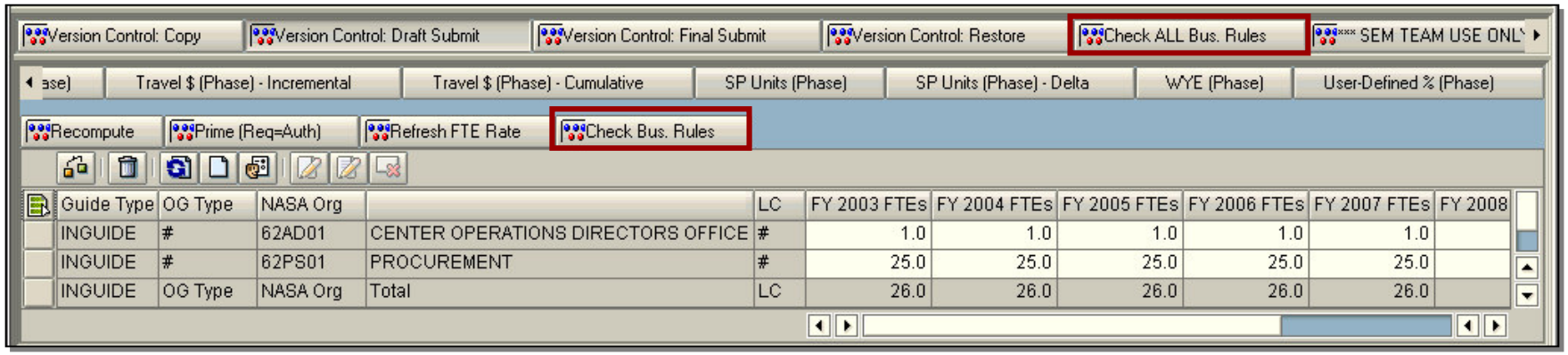
Implemented Business Rules

- Business Rules are application checks that verify data within the system. For example, business rules advise end-users if Authorized FTEs match Requested FTEs before being copied to the final version.



- There are four business rule categories in the initial release of the BF application
  - Authorized vs. Requested Annual Values
  - Authorized vs. Requested Monthly Values
  - Estimated vs. Requested Annual Values
  - Estimated vs. Requested Monthly Values

When are Business Rules Checked?

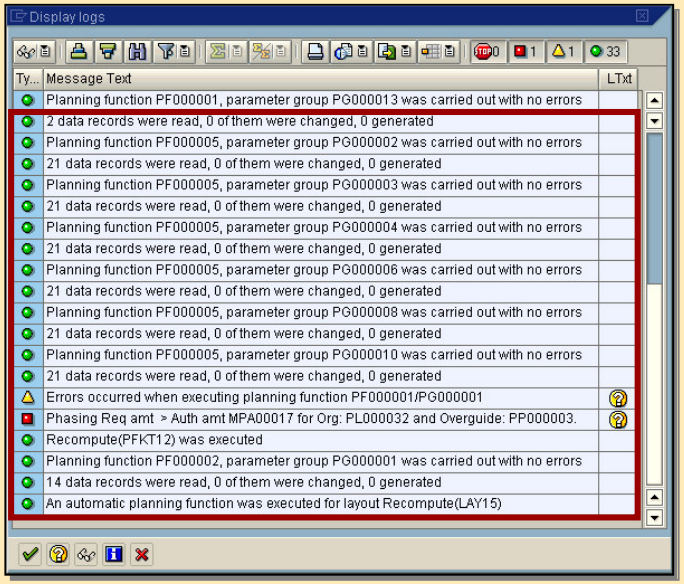


- Business Rules can be run manually by clicking the Check ALL Bus. Rules button. This will check all related Business Rules throughout the system.

- Business Rules can be run manually by clicking the Check Bus. Rules button. This will check all Business Rules for the view you are in.

Business Rules Display

- Once you click on the Check ALL Bus. Rules, the list of business rules will appear.



The Business Rules will be categorized and totaled Red, Yellow, Green and Stop.

Stop – Prohibits you from proceeding

Red – Business Rule failed

Yellow – Business Rule warned

Green – Business Rule passed

Business Rule Details

Planning Folder Edit Goto System Help

Display logs

Ty...	Message Text	LTxt
	Planning function PF000001, parameter group PG000013 was carried out with no errors	
	2 data records were read, 0 of them were changed, 0 generated	
	Planning function PF000005, parameter group PG000002 was carried out with no errors	
	21 data records were read, 0 of them were changed, 0 generated	
	Planning function PF000005, parameter group PG000003 was carried out with no errors	
	21 data records were read, 0 of them were changed, 0 generated	
	Planning function PF000005, parameter group PG000004 was carried out with no errors	
	21 data records were read, 0 of them were changed, 0 generated	
	Planning function PF000005, parameter group PG000006 was carried out with no errors	
	21 data records were read, 0 of them were changed, 0 generated	
	Planning function PF000005, parameter group PG000008 was carried out with no errors	
	21 data records were read,	
	Planning function PF00000 ... errors	
	21 data records were read,	
	Errors occurred when execu	
	Phasing Req amt > Auth ar	
	Recompute(PFKT12) was e	
	Planning function PF00000 ... ors	
	14 data records were read,	
	An automatic planning funct	

To receive more information on a Business Rule, click the "Question Mark" button.

Source	Detail	Guide Type	OG Type	NASA Org	
DIRECT	#	INGUIDE	#	62AD01	CENTER OPERATIONS DIREC
DIRECT	#	INGUIDE	#	62PS01	PROCUREMENT
DIRECT	#	INGUIDE	OG Type	NASA Org	Total
DIRECT	Detail	Guide Type	OG Type	NASA Org	Total

Performance Assistant

Phasing Req amt > Auth amt MPA00017 for Org: PL000032 and Overguide: PP000003.

Message no. ZSEM_BRE001

Process ID

WF-06-02_0001, WF-06-04_0001/2/3/4, WF-06-XXA_0001

Diagnosis

The INGUIDE/OVERGUIDE authorized amount/quantity does not equal the INGUIDE/OVERGUIDE requested

amount/quantity.

System response

The planner can save data, but will receive this error message. The planner can not move to the final Center Version

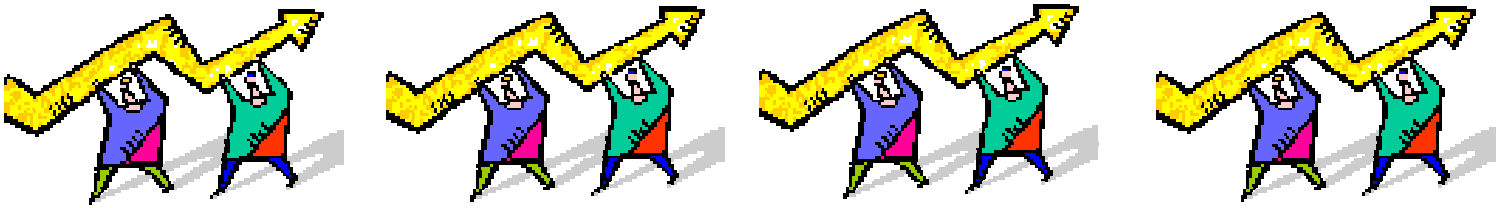
(C000) if the INGUIDE/OVERGUIDE request does not equal the INGUIDE/OVERGUIDE authorized.

Procedure

Modify the OVERGUIDE request amount so that it is equal to the OVERGUIDE authorized.

S2Q (1) (200) semqasvr01 INS

Version Control



Purpose of Version Control

- Center Versions allows Planners to model different budget scenarios.
  - There are five working versions plus two official submit versions.

- Agency Version supports the Budget Formulation cycle.
  - There are six Agency versions, one for each phase of the budget cycle.

Centers have seven center versions:

- Five working versions: C001 through C005
  - These are your own versions to work in
  - Your Center can choose to designate which version to use or allow planners to use versions to create “what-if” scenarios

- Draft submit version: C999
  - Submit your work to C999 when it is ready for review at your Center
  - Data is visible to all users at your Center

Center Versions

Center Planning Version	Center Planning Activity	Timeframe
C001	Baseline budget data carried over from previous year.	October
C002	Direct and Indirect rates established for Corporate and Center G&A, Service Pools, and Projects. Pools establish capacity.	October – 1st week of December
C003	Project/Pool negotiations. Allocation of excess from Pools to Projects.	2nd week of January – End of January
C004	Cost finalization.	1st – 3rd week of February
C005	Final Center Director approval.	4th week of February
C999	Code X area for strategic planning and "what-if" scenarios.	End of February
C000	Submission to Headquarters.	End of February

Agency Versions

- **Version A001- Center Pre-POP**
  - Where Centers work on their Pre-POP
- **Version A002 - Center POP**
  - Where Centers work on their POP
- **Version A003 – Enterprise POP**
  - Where Enterprises review Center POP
- **Version A004 – Agency POP**
  - Where the Agency reviews the Enterprise POP
- **Version A005 – OMB submit**
  - This version gets submitted to OMB
- **Version A006 – Congressional submit**
  - This version gets submitted to Congress

Relationship Between Center and Agency Versions

- Versions are specified in Header Area of the system. When you are planning, you will enter both an Agency Version and a Center Version.
- Each Agency Version has the seven Center Versions associated with it:
  - A001 - C001 - Agency Version A001, Center Version C001 is the first working version in the Center PrePOP; there are 4 more working versions
  - A001- C999 - Agency Version A001, Center Version C999 is the draft submit of the Center PrePOP
  - A001 – C000 - Agency Version A001, Center Version C000 is the final submit of the Center PrePOP
  - A002 – C001 is the first working version of POP
  - A002 – C999 is the draft submit of POP
  - A002 – C000 is the final submit of POP

Topic 4

Primary FTE/Travel Dollar Distribution System Demonstration and Exercises

Topic 4: Overview

- Entering Header Data
- Distributing FTEs/Travel Dollars from an **Organization** to a **Project Definition**
- Distributing FTEs/Travel Dollars from an **Organization** to a **Service Pool**
- Distributing FTEs/Travel Dollars from an **Organization** to **Center G&A**
- Distributing FTEs/Travel Dollars from an **Organization** to **Corporate G&A**
- Phasing FTEs
- Reviewing and Authorizing FTE/Travel Dollar Requests

Topic 4: Primary Distribution Folder Overview

Primary FTE Distribution Planning Folder

Execute Primary Resource Dist. (FTEs)

Name	Descriptn	Selection	Char. value ext.	Selection	CharVal...
Budget Year	Budget Year	2020	2020		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Organization	NASA Org	21SF	Space Projects Divisi...		
Labor Category	LC	#	Not assigned		
Fiscal Year	Fiscal year	2018	2018		

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules

Projects (Annual) | Projects (Annual) - Delta | Svc Pools (Annual) | Svc Pools (Annual) - Delta | Ctr G&A (Annual) | Ctr G&A (Annual) - Delta | Corp G&A (Annual)

Refresh FTE Rate | Check Bus. Rules | Recompute

Guide Type	OG Type	Project Definition		FY 2018 FTEs	FY 2019 FTEs	FY 2020 FTEs	FY 2021 FTEs	FY 2022 FTEs	FY 2023 FTEs	FY 2024 FTEs
INGUIDE	#	21-200-10	21-200-10	30.0	30.0	30.0	30.0	30.0	30.0	0.0
INGUIDE	OG Type	Project Definition	Total	30.0	30.0	30.0	30.0	30.0	30.0	0.0
Guide Type	OG Type	Project Definition	Total	30.0	30.0	30.0	30.0	30.0	30.0	0.0

Projects (Annual) $ | Svc Pools (Annual) $ | Ctr G&A (Annual) $ | Corp G&A (Annual) $ | Projects (Phase) $ | Svc Pools (Phase) $ | Ctr G&A (Phase) $ | Corp G

Guide Type	OG Type	Project Definition		FY 2018 $	FY 2019 $	F

Primary Distribution Folder Overview

- **Annual Planning Input Layouts (FTE/Travel $):**
  - Projects (Annual)
  - Projects (Annual) Delta
  - Service Pools (Annual)
  - Service Pools (Annual) Delta
  - Center G&A (Annual)
  - Center G&A (Annual) Delta
  - Corporate G&A (Annual)
  - Corporate G&A (Annual) Delta

- **Annual Planning Output Layouts (FTE):**
  - Projects (Annual) $
  - Service Pool (Annual) $
  - Center G&A (Annual) $
  - Corporate G&A (Annual) $

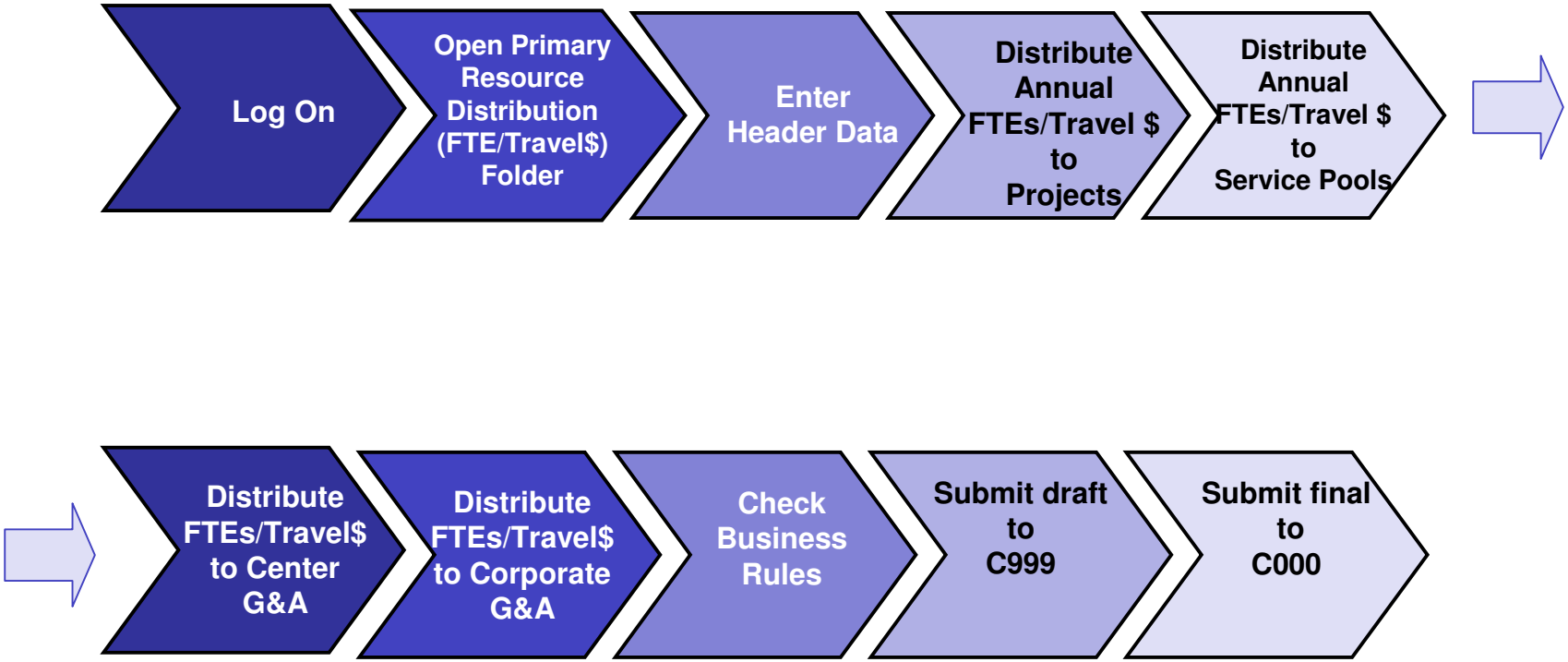
Primary Distribution Folder Overview

- **Phasing Plan Input Layouts (FTE):**
  - Projects (Phase)
  - Projects (Phase) - Delta
  - Projects (Phase) - User-Defined
  - Service Pools (Phase)
  - Service Pools (Phase) - Delta
  - Service Pools (Phase) – User-Defined
  - Center G&A (Phase)
  - Center G&A (Phase) – Delta
  - Center G&A (Phase) – User-Defined
  - Corporate G&A (Phase)
  - Corporate G&A (Phase) – Delta
  - Corporate G&A (Phase) – User-Defined

Primary FTE Distribution Folder Overview

- **Phasing Plan Output Layouts (Travel):**
  - Projects (Phase)
  - Projects (Phase) - Incremental
  - Projects (Phase) - Cumulative
  - Service Pools (Phase)
  - Service Pools (Phase) - Incremental
  - Service Pools (Phase) – Cumulative
  - Center G&A (Phase)
  - Center G&A (Phase) – Incremental
  - Center G&A (Phase) – Cumulative
  - Corporate G&A (Phase)
  - Corporate G&A (Phase) – Incremental
  - Corporate G&A (Phase) – Cumulative
- **Phasing Plan Output Layouts (FTE):**
  - Projects (Phase) $
  - Service Pool (Phase) $
  - Center G&A (Phase) $
  - Corporate G&A (Phase) $

Primary Distribution Planning Process Flow



Topic 4: Entering Header Data

Primary FTE/Travel Dollar Distribution

Topic 4: Entering Header Data

- **Goal**: Enter the appropriate characteristics in the Header Area, to define the data that you want to plan.

- **Entering header data**:
  1. Log On
  2. Open Primary Resource Distribution Folder

Primary Distribution Planning Folder

Primary FTE Distribution Planning Folder

Execute Primary Resource Dist. (FTEs)

Name	Descriptn	Selection	Char. value ext.	Selection	CharVal...
Budget Year	Budget Year	2020	2020		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Organization	NASA Org	21SF	Space Projects Divisi...		
Labor Category	LC	#	Not assigned		
Fiscal Year	Fiscal year	2018	2018		

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules

Projects (Annual) | Projects (Annual) - Delta | Svc Pools (Annual) | Svc Pools (Annual) - Delta | Ctr G&A (Annual) | Ctr G&A (Annual) - Delta | Corp G&A (Annual)

Refresh FTE Rate | Check

Guide Type	OG Type	FTEs
INGUIDE	#	0.0
INGUIDE	OG Type	0.0
Guide Type	OG Type	0.0

Projects (Annual) $ | Svc

Guide Type

Name	Descriptn	Selection	Char. value ext.
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2020	2020
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Organization	NASA Org	21SF	Space Projects Division
Labor Category	LC	#	Not assigned
Fiscal Year	Fiscal year	2018	2018

Header Data

Header Data for Primary Distribution

Header data defines the data that you want to pull from the database and plan. In the Primary Distribution Planning Folder, the data that you specify is the following:

Center	The two-digit Center number (24)
Budget Year	The Budget Year you are planning
Agency Version	The Agency Version you are working in
Center Version	The Center Version you are working in (C001- C005)
NASA Org	The organization that is distributing the FTEs/Travel $*
LC	The Labor Category for the FTEs being distributed*
Fiscal Year	The Fiscal Year you are planning

***Note that the NASA Org and the Labor category have moved from the input layout to the Header Area as this is the next "step down" in the distribution.**

What goes in the Header Area?

Header Area

Name	Descriptn	Selection	Char. value ext.
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2020	2020
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Organization	NASA Org	21SF	Space Projects Division
Labor Category	LC	#	Not assigned
Fiscal Year	Fiscal year	2018	2018

1) Enter the following in the Header Area to define the data that you want to plan:

Center	The two-digit Center number.
Budget Year	The year you are planning.
Agency Version	The Agency Version you are working in.
Center Version	The Center Version you are working in (C001-C005).
Organization	The organization that is distributing the FTEs/Travel $.
Labor Category	The Labor Category for the FTEs being distributed.
Fiscal Year	The fiscal year you are planning.

2) Click the Transfer Variables button to set the data you want to plan.

Topic 4: Distributing FTEs/Travel Dollars from the Organization to a Project Definition

Primary FTE/Travel Dollar Distribution

Topic 4: Distributing FTEs/Travel Dollars from an Organization to a Project Definition

- Goal: Distributing FTEs/Travel Dollars from an Organization to a Project Definition.

- Distribute FTEs/Travel Dollars from an Organization to a Project Definition:
  1. Logon
  2. Open Primary Resource Distribution Planning Folder
  3. Click on the Projects (Annual) button in the Input Area
  4. Enter the appropriate Header Data and click the Transfer Variable Button

Primary Distribution Planning Folder

Projects (Annual) Input Layout

Name	Descriptn	Selection	Char. value ext.	Selection	CharVal...
Center	BA	21	Ames Research Center		
Budget Year	Budget Year	2020	2020		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Organization	NASA Org	21SF	Space Projects Division		
Labor Category	LC	#	Not assigned		
Fiscal Year	Fiscal year	2018	2018		

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules

Projects (Annual) | Projects (Annual) - Delta | Svc Pools (Annual) | Svc Pools (Annual) - Delta | Ctr G&A (Annual) | Ctr G&A (Annual) - Delta | Corp G&A (Annual)

Refresh FTE Rate | Check Bus. Rules | Recompute

Input Area

Guide Type	OG Type	Project Definition		FY 2018 FTEs	FY 2019 FTEs	FY 2020 FTEs	FY 2021 FTEs	FY 2022 FTEs	FY 2023 FTEs	FY 2024 FTEs
INGUIDE	#	21-200-10	21-200-10	30.0	30.0	30.0	30.0	30.0	30.0	0.0
INGUIDE	OG Type	Project Definition	Total	30.0	30.0	30.0	30.0	30.0	30.0	0.0
Guide Type	OG Type	Project Definition	Total	30.0	30.0	30.0	30.0	30.0	30.0	0.0

ual) $ | Svc Pools (Annual) $ | Ctr G&A (Annual) $ | Corp G&A (Annual) $ | Projects (Phase) $ | Svc Pools (Phase) $ | Ctr G&A (Phase) $ | Corp G&A (Phase) $

Guide Type	OG Type	Project Definition		FY 2018 $	FY 2019 $	F

What goes in the Input Area?

Projects (Annual) Input Layout: Input Area

Projects (Annual) | Projects (Annual) - Delta | Svc Pools (Annual) | Svc Pools (Annual) - Delta | Ctr G&A (Annual) | Ctr G&A (Annual) - Delta | Corp G&A (Annual)

Refresh FTE Rate | Check Bus. Rules | Recompute

Guide Type	OG Type	Project Definition		FY 2018 FTEs	FY 2019 FTEs	FY 2020 FTEs	FY 2021 FTEs	FY 2022 FTEs	FY 2023 FTEs	FY 2024 FTEs
INGUIDE	#	21-200-10	21-200-10	30.0	30.0	30.0	30.0	30.0	30.0	0.0
INGUIDE	OG Type	Project Definition	Total	30.0	30.0	30.0	30.0	30.0	30.0	0.0
Guide Type	OG Type	Project Definition	Total	30.0	30.0	30.0	30.0	30.0	30.0	0.0

5) **Click the append row button to add a row.**

6) **Enter the following:**

Guide Type	**Inguide or Overguide**
OG Type	**The type of Overguide: New Initiative, Augment, Price, and (#) unassigned. You must enter the unassigned type if you selected inguide.**
Project Definition	**The project you are authorizing the FTEs/Travel Dollars for, identified by a project definition number.**
FY20XX	**The FTEs/Travel Dollars for two previous years, the budget year and four outyears.**

7) **Click the Transfer Variables button to sort the row of data that you entered and get totals in the input area.**

8) **Click the Refresh FTE Rate button to calculate the dollars in the output area, using the rate entered in Center Control Planning.**

Where can I see the output?

Projects (Annual) $ Output Layout

Projects (Annual) $ | Svc Pools (Annual) $ | Ctr G&A (Annual) $ | Corp G&A (Annual) $ | Projects (Phase) $ | Svc Pools (Phase) $ | Ctr G&A (Phase) $ | Corp G

Guide Type	OG Type	Project Definition		FY 2018 $	FY 2019 $	FY 2020 $	FY 2021 $	FY 2022 $	FY 2023 $	FY 2024 $
INGUIDE	#	21-200-10	21-200-10	3,615.000	3,802.680	3,955.920	4,114.860	4,296.330	4,520.550	0.000
INGUIDE	OG Type	Project Definition	Total	3,615.000	3,802.680	3,955.920	4,114.860	4,296.330	4,520.550	0.000
Guide Type	OG Type	Project Definition	Total	3,615.000	3,802.680	3,955.920	4,114.860	4,296.330	4,520.550	0.000

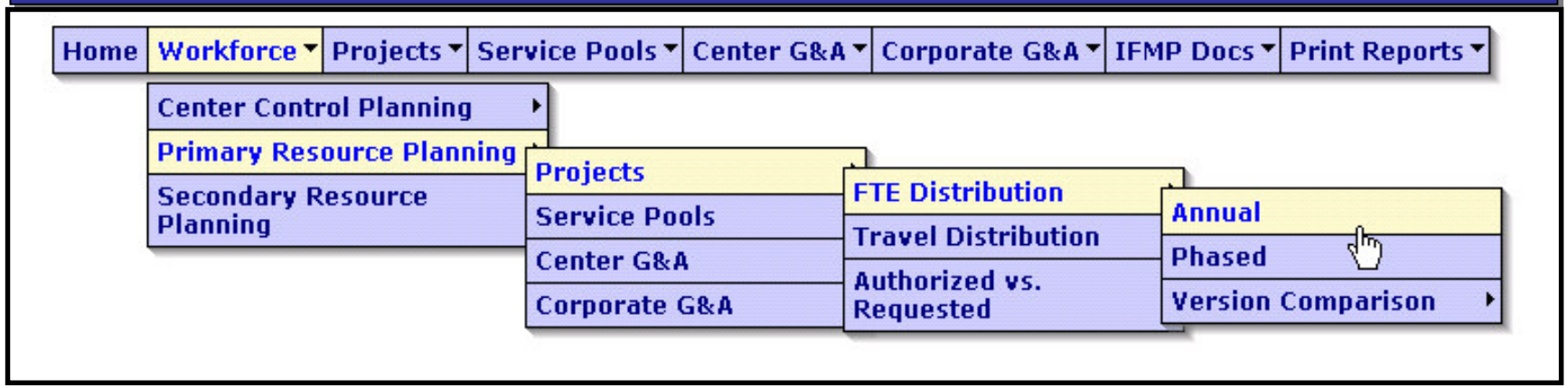
9) **Click the Projects (Annual) $ output button to view the output area.**

10) **The following information is shown:**

Guide Type	**Inguide or Overguide**
OG Type	**The type of Overguide: New Initiative, Augment, Price, and (#) unassigned.**
Project Defin.	**The project definition that the Organization is authorizing the FTEs for, identified by a project definition number.**
FY 20XX $	**The dollars associated with the FTEs. (equal to FTEs X Rate)**
Totals	**The totals for all project definitions listed.**

Where can I see the output?

Budget Formulation Report Website Menu



1) Open the Budget Formulation BW report website.
2) Enter your BF user name and password.
3) Click on the menus shown above.
4) Enter the header data for the data you want in the report.
5) The report shown on the next page will open.

Where can I see the output?

Primary Resource Planning, FTE Distribution, Projects: Annual Report

BW Web Application

Home | Workforce | Projects | Service Pools | Center G&A | Corporate G&A | IFMP Docs | Print Reports

Zoom In | 50 % | Zoom Out | Email Comments

Navigation block:

Business area			Fiscal year			Guide Type		
LC			NASA Org			OG Type		
Project Definition			Project Type			AR: ANN - FTE Rate, Qty, Amt		

Variable Values

Most Current Data	<= 293
Center	Ames Research Center
Budget Year	2020
Agency Version	Pre-POP
Center Version	ARC Pre POP
Labor Category	Not assigned
NASA Org	Space Projects
Project Definition	21-200-10

Primary FTE Distribution - Projects

							Fiscal year	2018			2019			2020		
NASA Org		LC	Guide Type	OG Type	Project Definition		Project Type	FTE Rate $K	FTE QTY	FTE $K	FTE Rate $K	FTE QTY	FTE $K	FTE Rate $K	FTE QTY	
21SF	Space Projects	Not assigned	In Guide	Not assigned	21-200-10	21-200-10	Direct	$ 120.50000	30.0 FTE	$ 3,615.000	$ 126.75600	30.0 FTE	$ 3,802.680	$ 131.86400	30.0 FTE	

Topic 4: Distributing FTEs/Travel Dollars from an Organization to a Service Pool

Primary FTE/Travel Dollar Distribution

Topic 4: Distributing FTEs/Travel Dollars from an Organization to a Service Pool

- **Goal**: Distributing FTEs/Travel Dollars from an Organization to a Service Pool.

- **Distribute FTEs/Travel Dollars from an Organization to a Service Pool:**
  1. Logon
  2. Open Primary Resource Distribution Planning Folder
  3. Click on the Service Pool (Annual) button in the Input Area
  4. Enter Header Data and click the Transfer Variable Button

Primary Distribution Planning Folder

Service Pool (Annual) Input Layout

Name	Descriptn	Selection	Char. value ext.	Selection	CharVal...
Center	BA	21	Ames Research Center		
Budget Year	Budget Year	2020	2020		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Organization	NASA Org	21JF	Facilities And Logistic...		
Labor Category	LC	#	Not assigned		
Fiscal Year	Fiscal year	2018	2018		

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules

Projects (Annual) | Projects (Annual) - Delta | Svc Pools (Annual) | Svc Pools (Annual) - Delta | Ctr G&A (Annual) | Ctr G&A (Annual) - Delta | Corp G&A (Annual)

Recompute | Refresh FTE Rate | Check Bus. Rules

Input Area

Guide Type	OG Type	Pool		FY 2018 FTEs	FY 2019 FTEs	FY 2020 FTEs	FY 2021 FTEs	FY 2022 FTEs	FY 2023 FTEs	FY 2024 FTEs
INGUIDE	#	F&RS	FACIL & REL SERVICES	32.1	32.1	32.1	32.1	32.1	32.1	32.1
INGUIDE	OG Type	Pool	Total	32.1	32.1	32.1	32.1	32.1	32.1	32.1
Guide Type	OG Type	Pool	Total	32.1	32.1	32.1	32.1	32.1	32.1	32.1

Projects (Annual) $ | Svc Pools (Annual) $ | Ctr G&A (Annual) $ | Corp G&A (Annual) $ | Projects (Phase) $ | Svc Pools (Phase) $ | Ctr G&A (Phase) $ | Corp G

Guide Type	OG Type	Pool		FY 2018 $	FY 2019 $	F

What goes in the input area?

Service Pool (Annual) Input Layout: Input Area

Projects (Annual) | Projects (Annual) - Delta | Svc Pools (Annual) | Svc Pools (Annual) - Delta | Ctr G&A (Annual) | Ctr G&A (Annual) - Delta | Corp G&A (Annual)

Recompute | Refresh FTE Rate | Check Bus. Rules

Guide Type	OG Type	Pool		FY 2018 FTEs	FY 2019 FTEs	FY 2020 FTEs	FY 2021 FTEs	FY 2022 FTEs	FY 2023 FTEs	FY 2024 FTEs
INGUIDE	#	F&RS	FACIL & REL SERVICES	32.1	32.1	32.1	32.1	32.1	32.1	32.1
INGUIDE	OG Type	Pool	Total	32.1	32.1	32.1	32.1	32.1	32.1	32.1
Guide Type	OG Type	Pool	Total	32.1	32.1	32.1	32.1	32.1	32.1	32.1

5) Click the append row button to add a row.

6) Enter the following:

Guide Type	Inguide or Overguide
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) unassigned. You must enter the unassigned type if you selected inguide.
Pool	The service pool that the Organization is authorizing the FTEs/Travel Dollars for, (one of six: F&RS, FAB, IT, S&E, TEST, and WT)
FY20XX	The FTEs/Travel Dollars for two previous years, the budget year and four outyears.

7) Click the Transfer Variables button to sort the row of data that you entered and get totals in the input area.

8) Click the Refresh FTE Rate button to calculate the dollars in the output area, using the rate entered in Center Control Planning.

Where can I see the output?

Service Pools (Annual) $ Output Layout

Projects (Annual) $ | Svc Pools (Annual) $ | Ctr G&A (Annual) $ | Corp G&A (Annual) $ | Projects (Phase) $ | Svc Pools (Phase) $ | Ctr G&A (Phase) $ | Corp G

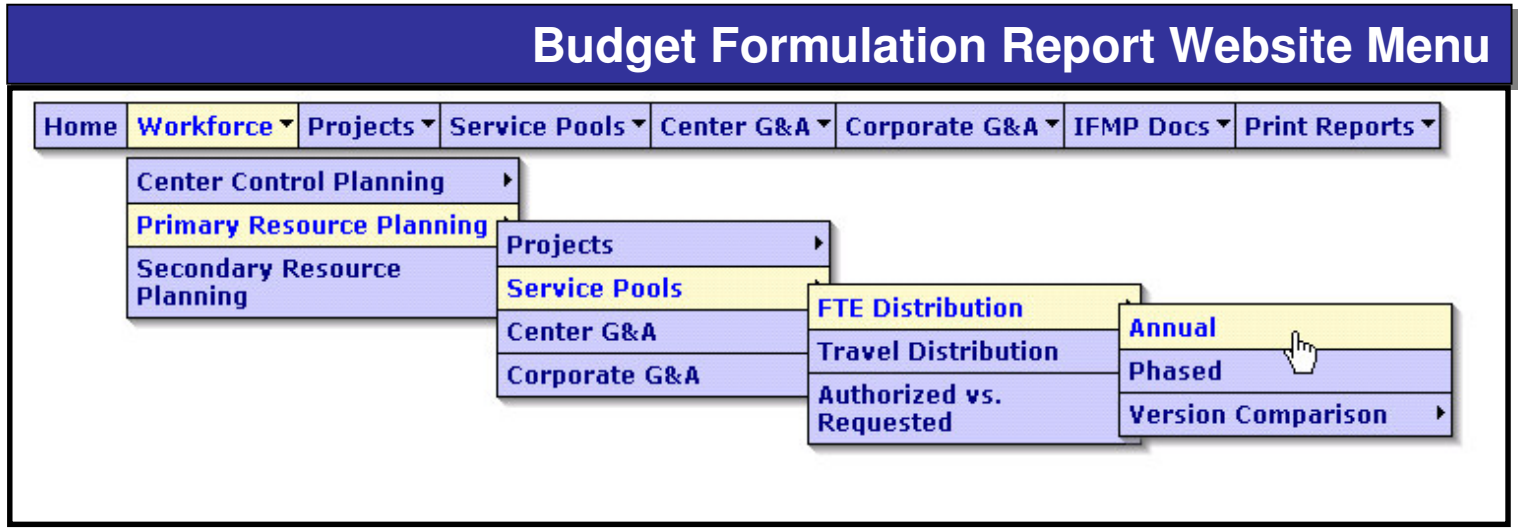
Guide Type	OG Type	Pool		FY 2018 $	FY 2019 $	FY 2020 $	FY 2021 $	FY 2022 $	FY 2023 $	FY 2024 $
INGUIDE	#	F&RS	FACIL & REL SERVICES	3,193.950	3,372.458	3,508.370	3,649.321	3,810.270	4,009.130	4,170.721
INGUIDE	OG Type	Pool	Total	3,193.950	3,372.458	3,508.370	3,649.321	3,810.270	4,009.130	4,170.721
Guide Type	OG Type	Pool	Total	3,193.950	3,372.458	3,508.370	3,649.321	3,810.270	4,009.130	4,170.721

9) **Click the Service Pools (Annual) $ output button to view the output area.**

10) **The following information is shown:**

Guide Type	**Inguide or Overguide**
OG Type	**The type of Overguide: New Initiative, Augment, Price, and (#) unassigned.**
Pool	**The service pool that the Organization is authorizing the FTEs for, identified by an acronym.**
FY 20XX $	**The dollars associated with the FTEs. (equal to FTEs X Rate)**
Totals	**The totals for the service pool.**

Where can I see the output?



1) Open the Budget Formulation BW report website.
2) Enter your BF user name and password.
3) Click on the menus shown above.
4) Enter the header data for the data you want in the report.
5) The report shown on the next page will open.

Where can I see the output?

Primary Resource Planning, FTE Distribution, Projects: Annual Report

BW Web Application

Home | Workforce | Projects | Service Pools | Center G&A | Corporate G&A | IFMP Docs | Print Reports

Zoom In | 50 % | Zoom Out | Email Comments

Navigation block:

Business area		Fiscal year		Guide Type	
Labor Category		NASA Org		OG Type	
Pool		AR: ANN - FTE Rate, Qty, Amt			

Variable Values

Most Current Data	<= 293
Center	Ames Research Center
Budget Year	2020
Agency Version	Pre-POP
Center Version	ARC Pre POP
Labor Category	Not assigned
NASA Org	Fac & Maint Mgt Div
Service Pools	FACIL & REL SERVICES

Primary FTE Distribution - SP and G&A

					Fiscal year	2018			2019			2020		
NASA Org		Labor Category	Guide Type	OG Type	Pool	FTE Rate $K	FTE QTY	FTE $K	FTE Rate $K	FTE QTY	FTE $K	FTE Rate $K	FTE QTY	FTE $K
21JF	Fac & Maint Mgt Div	Not assigned	In Guide	Not assigned	FACIL & REL SERVICES	$ 99.50000	32.1 FTE	$ 3,193.950	$ 105.06100	32.1 FTE	$ 3,372.458	$ 109.29500	32.1 FTE	$ 3,508

Topic 4: Distributing FTEs/Travel $ from an Organization to Center G&A

Primary FTE/Travel Dollar Distribution

Topic 4: Distributing FTEs/Travel Dollars from an Organization to Center G&A

- **Goal**: Distributing FTEs/Travel Dollars from an Organization to Center G&A.

- **Distribute FTEs/Travel Dollars from an Organization to Center G&A:**
  1. Logon
  2. Open Primary Resource Distribution Planning Folder
  3. Click on the Center G&A (Annual) button in the Input Area
  4. Enter Header Data and click the Transfer Variable Button

Primary Distribution Planning Folder

Center G&A (Annual) Input Layout

Name	Descriptn	Selection	Characteristic Value Ext. Display	Selection	CharVal...
Center	BA	21	Ames Research Center		
Budget Year	Budget Year	2020	2020		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Organization	NASA Org	21JF	Facilities And Logistics Mgmt ...		
Labor Category	LC	#	Not assigned		
Fiscal Year	Fiscal year	2018	2018		

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules

Projects (Annual) | Projects (Annual) - Delta | Svc Pools (Annual) | Svc Pools (Annual) - Delta | Ctr G&A (Annual) | Ctr G&A (Annual) - Delta | Corp G&A (Annual)

Recompute | Refresh FTE Rate | Check Bus. Rules

Append Row

Guide Type	OG Type	Pool		FY 2018 FTEs	FY 2019 FTEs
		CTR	CENTER		

Input Area

Projects (Annual) $ | Svc Pools (Annual) $ | Ctr G&A (Annual) $ | Corp G&A (Annual) $ | Projects (Phase) $ | Svc Pools (Phase) $ | Ctr G&A (Phase) $ | Corp G

Guide Type	OG Type	Pool		FY 2018 $	FY 2019 $	F

What goes in the input area?

Center G&A (Annual) Input Layout: Input Area

Projects (Annual) | Projects (Annual) - Delta | Svc Pools (Annual) | Svc Pools (Annual) - Delta | Ctr G&A (Annual) | Ctr G&A (Annual) - Delta | Corp G&A (Annual)

Recompute | Refresh FTE Rate | Check Bus. Rules

Guide Type	OG Type	Pool		FY 2018 FTEs	FY 2019 FTEs	FY 2020 FTEs	FY 2021 FTEs	FY 2022 FTEs	FY 2023 FTEs	FY 2024 FTEs
INGUIDE	#	CTR	CENTER	11.0	11.0	11.0	11.0	11.0	11.0	11.0
INGUIDE	OG Type	CTR	CENTER	11.0	11.0	11.0	11.0	11.0	11.0	11.0
Guide Type	OG Type	CTR	CENTER	11.0	11.0	11.0	11.0	11.0	11.0	11.0

5) **Click the append row button to add a row.**
6) **Enter the following:**

Guide Type	**Inguide or Overguide**
OG Type	**The type of Overguide: New Initiative, Augment, Price, and (#) unassigned. You must enter the unassigned type if you selected inguide.**
Pool	**The Center G&A Pool that the Organization is authorizing FTEs/Travel Dollars for.**
FY20XX $	**The FTEs/Travel Dollars for two previous years, the budget year and four outyears.**

7) **Click the Transfer Variables button to sort the row of data that you entered and get totals in the input area.**
8) **Click the Refresh FTE Rate button to calculate the dollars in the output area, using the rate entered in Center Control Planning.**

Where can I see the output?

Center G&A (Annual) $ Output Layout

Projects (Annual) $ | Svc Pools (Annual) $ | Ctr G&A (Annual) $ | Corp G&A (Annual) $ | Projects (Phase) $ | Svc Pools (Phase) $ | Ctr G&A (Phase) $ | Corp G

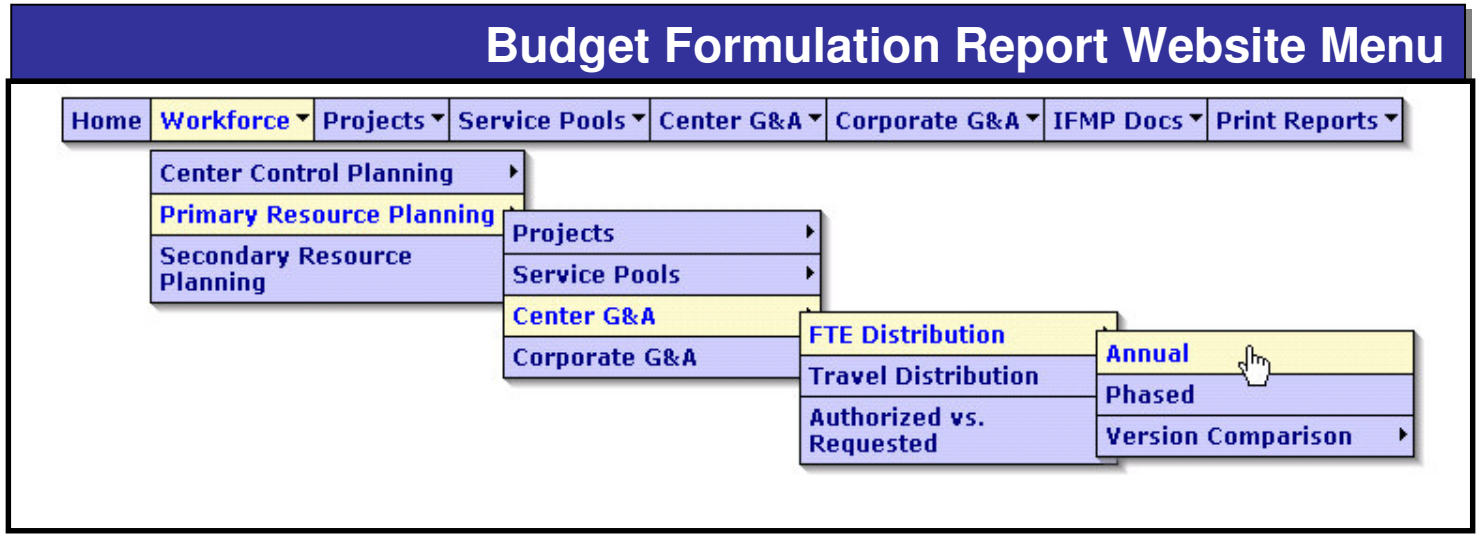
Guide Type	OG Type	Pool		FY 2018 $	FY 2019 $	FY 2020 $	FY 2021 $	FY 2022 $	FY 2023 $	FY 2024 $
INGUIDE	#	CTR	CENTER	863.500	909.645	946.297	984.324	1,027.730	1,081.366	1,124.948
INGUIDE	OG Type	CTR	CENTER	863.500	909.645	946.297	984.324	1,027.730	1,081.366	1,124.948
Guide Type	OG Type	CTR	CENTER	863.500	909.645	946.297	984.324	1,027.730	1,081.366	1,124.948

9) **Click the Center G&A (Annual) $ output button to view the output area.**

10) **The following information is shown:**

Guide Type	**Inguide or Overguide**
OG Type	**The type of Overguide: New Initiative, Augment, Price, and (#) unassigned.**
Pool	**The Center G&A Pool that the Organization is authorizing the FTEs for.**
FY 20XX $	**The dollars associated with the FTEs. (equal to FTEs X Rate)**
Totals	**The totals for the Center G&A pool.**

Where can I see the output?



1) Open the Budget Formulation BW report website.
2) Enter your BF user name and password.
3) Click on the menus shown above.
4) Enter the header data for the data you want in the report.
5) The report shown on the next page will open.

Where can I see the output?

Primary Resource Planning, FTE Distribution, Center G&A: Annual Report

BW Web Application

Home | Workforce | Projects | Service Pools | Center G&A | Corporate G&A | IFMP Docs | Print Reports

Zoom In | 50 % | Zoom Out | Email Comments

Navigation block:

Business area		Fiscal year		Guide Type	
Labor Category		NASA Org		OG Type	
Pool		AR: ANN - FTE Rate, Qty, Amt			

Variable Values

Most Current Data	<= 293
Center	Ames Research Center
Budget Year	2020
Agency Version	Pre-POP
Center Version	ARC Pre POP
Labor Category	Not assigned
NASA Org	Financial Mgmt Div
Service Pools	CENTER

Primary FTE Distribution - SP and G&A

					Fiscal year	2018			2019			2020			2021	
NASA Org		Labor Category	Guide Type	OG Type	Pool	FTE Rate $K	FTE QTY	FTE $K	FTE Rate $K	FTE QTY	FTE $K	FTE Rate $K	FTE QTY	FTE $K	FTE Rate $K	FTE QT
21CF	Financial Mgmt Div	Not assigned	In Guide	Not assigned	CENTER	$ 78.50000	11.0 FTE	$ 863.500	$ 82.69500	11.0 FTE	$ 909.645	$ 86.02700	11.0 FTE	$ 946.297	$ 89.48400	11.

Topic 4: Distributing FTEs/Travel Dollars from an Organization to Corporate G&A

Primary FTE/Travel Dollars Distribution

Topic 4: Distributing FTEs/Travel Dollars from an Organization to Corporate G&A

- **Goal**: Distributing FTEs/Travel Dollars from an Organization to Corporate G&A.

- **Distribute FTEs/Travel Dollars from an Organization to Corporate G&A**:
  1. Logon
  2. Open Primary Resource Distribution (FTEs) Planning Folder
  3. Click on the Corporate G&A (Annual) button in the Input Area
  4. Enter Header Data and click the Transfer Variable Button

Primary Distribution Planning Folder

Corporate G&A (Annual) Input Layout

Name	Descriptn	Selection	Characteristic Value Ext. Display	Selection	CharVal...
Center	BA	21	Ames Research Center		
Budget Year	Budget Year	2020	2020		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Organization	NASA Org	21JT	Applied Information Technolog...		
Labor Category	LC	#	Not assigned		
Fiscal Year	Fiscal year	2018	2018		

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules

Projects (Annual) | Projects (Annual) - Delta | Svc Pools (Annual) | Svc Pools (Annual) - Delta | Ctr G&A (Annual) | Ctr G&A (Annual) - Delta | Corp G&A (Annual)

Recompute | Refresh FTE Rate | Check Bus. Rules

Input Area

Guide Type	OG Type	Pool		FY 2023 FTEs	FY 2024 FTEs
INGUIDE	#	CORP	CORPORATE	10.3	10.3

Projects (Annual) $ | Svc Pools (Annual) $ | Ctr G&A (Annual) $ | Corp G&A (Annual) $ | Projects (Phase) $ | Svc Pools (Phase) $ | Ctr G&A (Phase) $ | Corp G

Guide Type	OG Type	Pool		FY 2018 $	FY 2019 $	F

What goes in the input area?

Corporate G&A (Annual) Input Layout: Input Area

Projects (Annual) | Projects (Annual) - Delta | Svc Pools (Annual) | Svc Pools (Annual) - Delta | Ctr G&A (Annual) | Ctr G&A (Annual) - Delta | Corp G&A (Annual)

Recompute | Refresh FTE Rate | Check Bus. Rules

Guide Type	OG Type	Pool		FY 2018 FTEs	FY 2019 FTEs	FY 2020 FTEs	FY 2021 FTEs	FY 2022 FTEs	FY 2023 FTEs	FY 2024 FTEs
INGUIDE	#	CORP	CORPORATE	10.3	10.3	10.3	10.3	10.3	10.3	10.3
INGUIDE	OG Type	CORP	CORPORATE	10.3	10.3	10.3	10.3	10.3	10.3	10.3
Guide Type	OG Type	CORP	CORPORATE	10.3	10.3	10.3	10.3	10.3	10.3	10.3

5) **Click the append row button to add a row.**

6) **Enter the following:**

Guide Type	**Inguide or Overguide**
OG Type	**The type of Overguide: New Initiative, Augment, Price, and (#) unassigned. You must enter the unassigned type if you selected inguide.**
Pool	**The Corporate G&A Pool for which the Organization is authorizing the FTEs/Travel Dollars.**
FY20XX $	**The FTEs/Travel Dollars for two previous years, the budget year and four outyears.**

7) **Click the Transfer Variables button to sort the row of data that you entered and get totals in the input area.**

8) **Click the Refresh FTE Rate button to calculate the dollars in the output area, using the rate entered in Center Control Planning.**

Where can I see the output?

Corporate G&A (Annual) $ Output Layout

Projects (Annual) $ | Svc Pools (Annual) $ | Ctr G&A (Annual) $ | Corp G&A (Annual) $ | Projects (Phase) $ | Svc Pools (Phase) $ | Ctr G&A (Phase) $ | Corp G

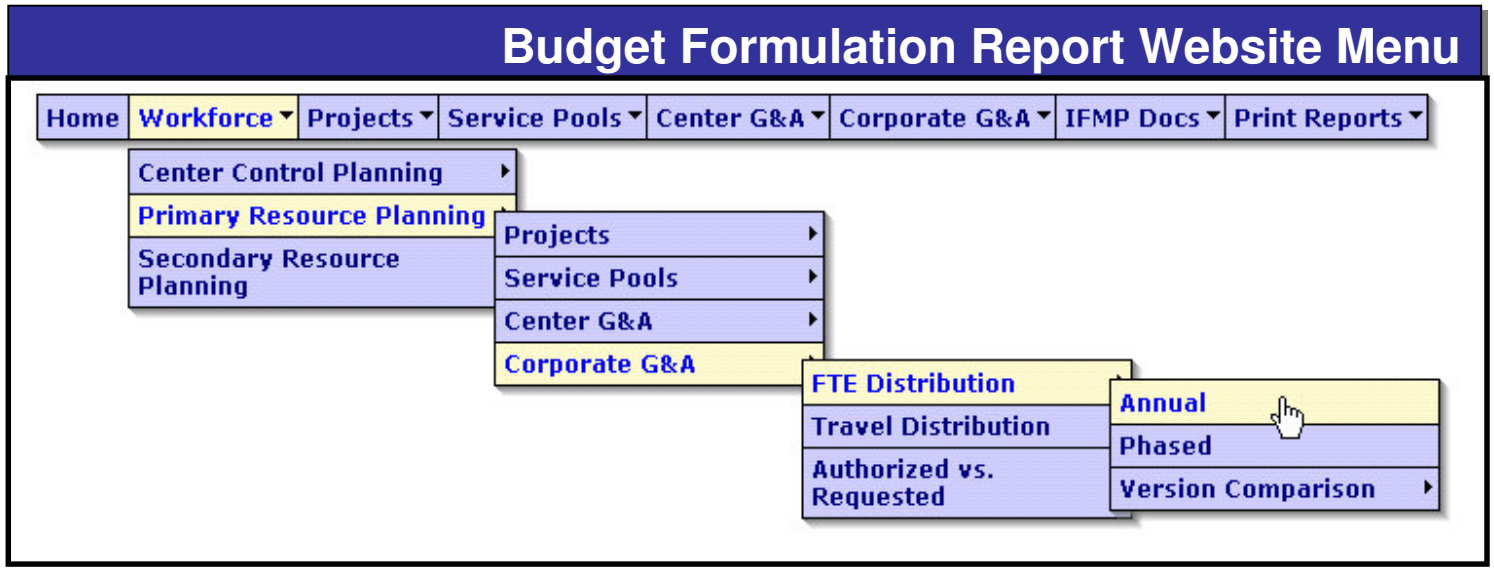
Guide Type	OG Type	Pool		FY 2018 $	FY 2019 $	FY 2020 $	FY 2021 $	FY 2022 $	FY 2023 $	FY 2024 $
INGUIDE	#	CORP	CORPORATE	1,199.950	1,264.850	1,315.835	1,368.695	1,429.063	1,503.635	1,564.240
INGUIDE	OG Type	CORP	CORPORATE	1,199.950	1,264.850	1,315.835	1,368.695	1,429.063	1,503.635	1,564.240
Guide Type	OG Type	CORP	CORPORATE	1,199.950	1,264.850	1,315.835	1,368.695	1,429.063	1,503.635	1,564.240

9) **Click the Corporate G&A (Annual) $ output button to view the output area.**

10) **The following information is shown:**

Guide Type	**Inguide or Overguide**
OG Type	**The type of Overguide: New Initiative, Augment, Price, and (#) unassigned.**
Pool	**The Corporate G&A Pool for which Organization is authorizing the FTEs.**
FY 20XX $	**The dollars associated with the FTEs. (equal to FTEs X Rate)**
Totals	**The totals for the Corporate G&A pool.**

Workforce FTE Distribution Annual Report



1) Open the Budget Formulation BW report website.
2) Enter your BF user name and password.
3) Click on the menus shown above.
4) Enter the header data for the data you want in the report.
5) The report shown on the next page will open.

Where can I see the output?

Primary Resource Planning, FTE Distribution, Corp. G&A: Annual Report

BW Web Application

Home | Workforce | Projects | Service Pools | Center G&A | Corporate G&A | IFMP Docs | Print Reports

Zoom In | 50 % | Zoom Out | Email Comments

Navigation block:

Business area	Fiscal year	Guide Type
Labor Category	NASA Org	OG Type
Pool	AR: ANN - FTE Rate, Qty, Amt	

Variable Values

Most Current Data	<= 293
Center	Ames Research Center
Budget Year	2020
Agency Version	Pre-POP
Center Version	ARC Pre POP
Labor Category	Not assigned
NASA Org	Applied Info Tech
Service Pools	CORPORATE

Primary FTE Distribution - SP and G&A

					Fiscal year	2018			2019			2020			2021
NASA Org		Labor Category	Guide Type	OG Type	Pool	FTE Rate $K	FTE QTY	FTE $K	FTE Rate $K	FTE QTY	FTE $K	FTE Rate $K	FTE QTY	FTE $K	FTE Rate $K
21JT	Applied Info Tech	Not assigned	In Guide	Not assigned	CORPORATE	$ 116.50000	10.3 FTE	$ 1,199.950	$ 122.80100	10.3 FTE	$ 1,264.850	$ 127.75100	10.3 FTE	$ 1,315.835	$ 132

Primary Distribution Annual Exercises

Now you will have an opportunity to practice what you have just seen in the Budget Formulation Training Environment

Topic 4: Phasing

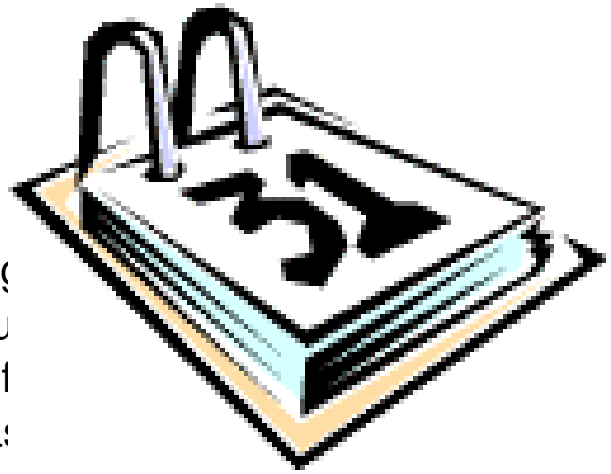
Primary FTE Distribution

Topic 4: Phasing

- **Goal**: During initial and mid-year phasing plan activities, the users will phase FTEs for projects, service pools, Center G&A and Corporate G&A using manual entry or algorithms built into the system.

- **Phasing**:
  1. How to phase
  2. Phasing algorithms
  3. Incremental and cumulative phasing

- **Phasing Steps**
  1. Logon
  2. Open Primary Resource Distribution Planning
  3. Click on the appropriate Phasing Input Layou
  4. Enter Header data (ensure budget year and f
  5. Use algorithm buttons or manually enter phas
  6. View the data in the matching output area
  7. Save the data when complete



Header Data for Phasing

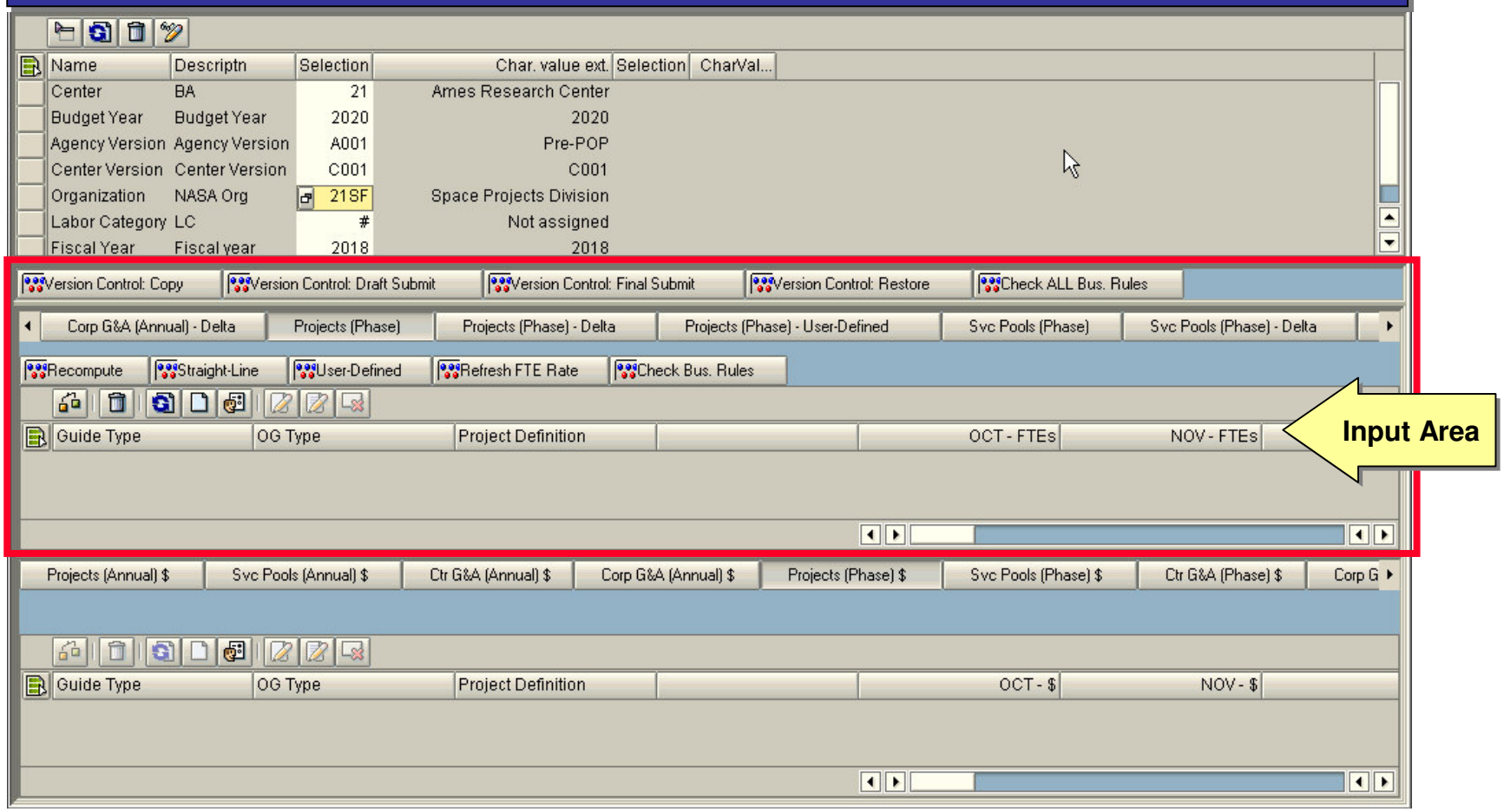
Primary Distribution Header Area

Name	Descriptn	Selection	Char. value ext.
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2020	2020
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Organization	NASA Org	21SF	Space Projects Division
Labor Category	LC	#	Not assigned
Fiscal Year	Fiscal year	2018	2018

Center	**The two-digit Center number (your Center).**
Budget Year	**The Budget year you are planning.**
Agency Version	**The Agency Version you are working in.**
Center Version	**The Center Version you are working in (C001- C005).**
Organization	**The organization that the FTEs belong to.**
Labor Category	**The Labor Category assigned to the FTEs.**
Fiscal Year	**The fiscal year you are phasing.**

Phasing Projects Input Area

Projects (Phase) Input Layout: Input Area



Phasing Service Pools Input Area

Service Pools (Phase) Input Layout: Input Area

Name	Descriptn	Selection	Char. value ext.	Selection	CharVal...
Center	BA	21	Ames Research Center		
Budget Year	Budget Year	2020	2020		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Organization	NASA Org	21CF	Financial Manageme...		
Labor Category	LC	#	Not assigned		
Fiscal Year	Fiscal year	2018	2018		

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules

Corp G&A (Annual) - Delta | Projects (Phase) | Projects (Phase) - Delta | Projects (Phase) - User-Defined | Svc Pools (Phase) | Svc Pools (Phase) - Delta

Recompute | Straight-Line | User-Defined | Refresh FTE Rate | Check Bus. Rules

Guide Type	OG Type	Pool		OCT - FTEs	NOV - FTEs

Input Area

Projects (Annual) $ | Svc Pools (Annual) $ | Ctr G&A (Annual) $ | Corp G&A (Annual) $ | Projects (Phase) $ | Svc Pools (Phase) $ | Ctr G&A (Phase) $ | Corp G

Guide Type	OG Type	Project Definition		FY 2018 $	FY 2019 $	FY

Phasing Center G&A Input Area

Center G&A (Phase) Input Layout: Input Area

Name	Descriptn	Selection	Char. value ext.	Selection	CharVal...
Center	BA	21	Ames Research Center		
Budget Year	Budget Year	2020	2020		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Organization	NASA Org	21CF	Financial Manageme...		
Labor Category	LC	#	Not assigned		
Fiscal Year	Fiscal year	2018	2018		

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules

Svc Pools (Phase) - User-Defined | Ctr G&A (Phase) | Ctr G&A (Phase) - Delta | Ctr G&A (Phase) - User-Defined | Corp G&A (Phase) | Corp G&A (Phase) - Delta

Recompute | Straight-Line | User-Defined | Refresh FTE Rate | Check Bus. Rules

Guide Type	OG Type	Pool		OCT - FTEs	NOV - FTE

Input Area

Projects (Annual) $ | Svc Pools (Annual) $ | Ctr G&A (Annual) $ | Corp G&A (Annual) $ | Projects (Phase) $ | Svc Pools (Phase) $ | Ctr G&A (Phase) $ | Corp G

Guide Type	OG Type	Project Definition		FY 2018 $	FY 2019 $	F

Phasing Corporate G&A Input Area

Corporate G&A (Phase) Input Layout: Input Area

Name	Descriptn	Selection	Char. value ext.	Selection	CharVal...
Center	BA	21	Ames Research Center		
Budget Year	Budget Year	2020	2020		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Organization	NASA Org	21CF	Financial Manageme...		
Labor Category	LC	#	Not assigned		
Fiscal Year	Fiscal year	2018	2018		

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules

Svc Pools (Phase) - User-Defined | Ctr G&A (Phase) | Ctr G&A (Phase) - Delta | Ctr G&A (Phase) - User-Defined | Corp G&A (Phase) | Corp G&A (Phase) - Delta | C

Recompute | Straight-Line | User-Defined | Refresh FTE Rate | Check Bus. Rules

Guide Type	OG Type	Pool		OCT - FTEs	NOV - FTEs

Input Area

Projects (Annual) $ | Svc Pools (Annual) $ | Ctr G&A (Annual) $ | Corp G&A (Annual) $ | Projects (Phase) $ | Svc Pools (Phase) $ | Ctr G&A (Phase) $ | Corp G

Guide Type	OG Type	Project Definition		FY 2018 $	FY 2019 $	F

Phasing Algorithms

- Each Phasing input area has two algorithm buttons:
  - Straight-Line (one each for projects, service pools, Center G&A and Corporate G&A)
  - User-Defined (one each for projects, service pools, Center G&A and Corporate G&A)
- Each button, if used, applies the same algorithm to all of the organizations that were planned during the annual planning.
- Straight-Line:
  - Phases the FTEs using the same amount in each month.
- User-Defined:
  - Allows you to define a series of percentages to apply to the amounts for each month.
- Or, you can manually enter the numbers by each organization.

To Use the Straight-Line Algorithm Button, Using Projects as an Example

Projects (Phase) Input Layout: Input Area

Corp G&A (Annual) - Delta | Projects (Phase) | Projects (Phase) - Delta | Projects (Phase) - User-Defined | Svc Pools (Phase) | Svc Pools (Phase) - Delta

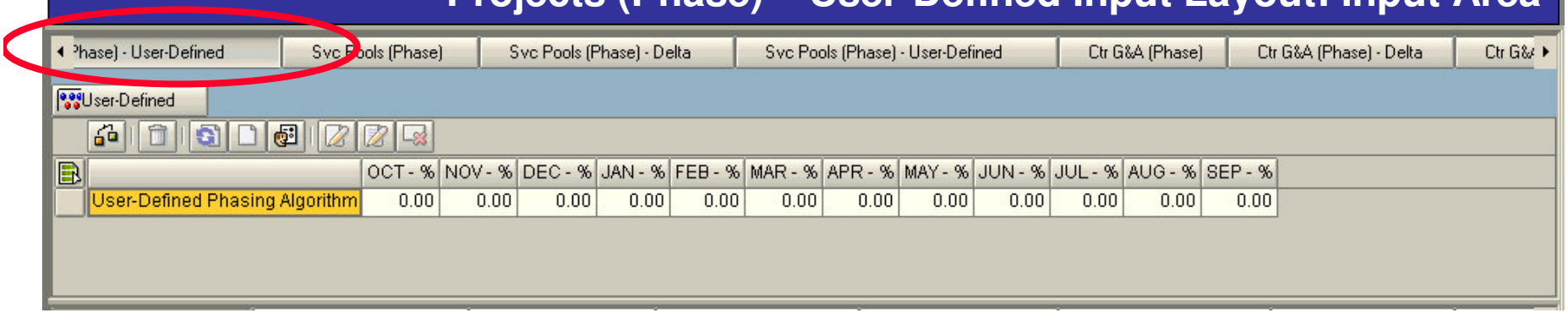
Recompute | Straight-Line | User-Defined | Refresh FTE Rate | Check Bus. Rules

Guide Type	OG Type	Project Definition		OCT - FTEs	NOV - FTEs	DEC - FTEs	JAN - FTEs	FEB - FTEs	MAR - FTEs	APR - FTEs	MAY - FTEs	JUN - FTEs	JUL - F
INGUIDE	#	21-200-10	21-200-10	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	
INGUIDE	OG Type	Project Definition	Total	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	
Guide Type	OG Type	Project Definition	Total	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	

1) In the Header Area, ensure the fiscal year is set the year you want to plan.
2) Select the Projects (Phase) input layout.
3) Click the Straight-Line button. All of the projects where you have planned annual numbers will appear in each month for the fiscal year.
4) Make any adjustments to the numbers.
5) Click the Transfer Variables button to sort the data that you entered.
6) Click the Recompute button to calculate dollars in the output area.
7) View the resulting dollar output in the Projects (Phase) $ output area.
8) Click the save button when complete.

To Use the User-Defined Algorithm, Using Projects as an Example

Projects (Phase) – User-Defined Input Layout: Input Area



	OCT - %	NOV - %	DEC - %	JAN - %	FEB - %	MAR - %	APR - %	MAY - %	JUN - %	JUL - %	AUG - %	SEP - %
User-Defined Phasing Algorithm	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

1) In the Header Area, ensure the fiscal year is set to the fiscal year you want to phase.
2) Scroll to the right until you see the Projects (Phase) – User-Defined button.
3) Click the Projects (Phase) – User-Defined button. The user-defined input area will open.
4) Enter the percentages you want to phase with. (the average must equal 100%)
5) Click the User Defined button to apply the percentages to the annual numbers.
6) View the resulting dollar output in the Projects (Phase) $ output area.
7) Click the Save button when complete.

User-Defined Algorithm Additional Information, Using Projects as an Example

FTE (Phase) – User-Defined Input Layout: Input Area

Corp G&A (Annual) - Delta | Projects (Phase) | Projects (Phase) - Delta | Projects (Phase) - User-Defined | Svc Pools (Phase) | Svc Pools (Phase) - Delta

Recompute | Straight-Line | User-Defined | Refresh FTE Rate | Check Bus. Rules

Guide Type	OG Type	Project Definition		OCT - FTEs	NOV - FTEs	DEC - FTEs	JAN - FTEs	FEB - FTEs	MAR - FTEs	APR - FTEs	MAY - FTEs	JUN - FTEs	JUL - F
INGUIDE	#	21-200-10	21-200-10	15.0	15.0	15.0	30.0	30.0	30.0	30.0	30.0	30.0	
INGUIDE	OG Type	Project Definition	Total	15.0	15.0	15.0	30.0	30.0	30.0	30.0	30.0	30.0	
Guide Type	OG Type	Project Definition	Total	15.0	15.0	15.0	30.0	30.0	30.0	30.0	30.0	30.0	

You can also see the FTE output in the Projects (Phase) input area.

You can use the User-Defined button in this input area to apply the percentages that you entered on the FTE (Phase) – User-Defined input area. You must put the percentages in the FTE (Phase) – User-Defined prior to clicking on the button in this layout.

To Manually Enter Phasing Data, Using Projects as an Example

Projects (Phase) Input Layout: Input Area

Corp G&A (Annual) - Delta | Projects (Phase) | Projects (Phase) - Delta | Projects (Phase) - User-Defined | Svc Pools (Phase) | Svc Pools (Phase) - Delta

Recompute | Straight-Line | User-Defined | Refresh FTE Rate | Check Bus. Rules

Guide Type	OG Type	Project Definition		OCT - FTEs	NOV - FTEs	DEC - FTEs	JAN - FTEs	FEB - FTEs	MAR - FTEs	APR - FTEs	MAY - FTEs	JUN - FTEs	JUL - F
INGUIDE	#	21-200-10	21-200-10	15.0	15.0	15.0	30.0	30.0	30.0	30.0	30.0	30.0	
INGUIDE	OG Type	Project Definition	Total	15.0	15.0	15.0	30.0	30.0	30.0	30.0	30.0	30.0	
Guide Type	OG Type	Project Definition	Total	15.0	15.0	15.0	30.0	30.0	30.0	30.0	30.0	30.0	

1) In the Header Area, ensure the fiscal year is set to year you want to phase.
2) Click on the Projects (Phase) Input Area button.
3) Click on the append a row button to add a row.
4) Enter the guide type, overguide type, project definition, and the monthly numbers for that project.
5) Click the transfer variables button to sort the new row.
6) Repeat for each organization.
7) Click the Save button when complete.

Phasing Algorithms for Service Pools, Center G&A and Corporate G&A

- The Phasing Algorithm buttons work the same way for each of the other areas not demonstrated: Service Pools, Center G&A, and Corporate G&A.
- Each has an output area where you can see the associated dollars by month.
  - Projects (Phase) $ output area
  - Service Pools (Phase) $ output area
  - Center G&A (Phase) $ output area
  - Corporate G&A (Phase) $ output area

FTE $ (Phase) - Incremental

FTE $ (Phase) - Incremental Input Layout: Input Area

Phase) - User-Defined | Corp G&A (Phase) | Corp G&A (Phase) - Delta | Corp G&A (Phase) - User-Defined | FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative

Phasing: Straight-Line | Recompute

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total 2018 $	Carry Out
OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
OBS - Curr PY	0.000	416.788	416.788	416.788	567.413	567.413	567.413	567.413	567.413	567.413	567.413	567.413	567.413	6,357.075	0.000
COSTS - Prev PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
COSTS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
COSTS - Curr PY	0.000	416.788	416.788	416.788	567.413	567.413	567.413	567.413	567.413	567.413	567.413	567.413	567.413	6,357.075	0.000
COSTS - TOTAL	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000

This input area allows you to enter prior and previous program year obligations and costs in an incremental fashion.

The OBS – Curr PY and COSTS – Curr PY shows the total FTE dollars for all of the Organizations that have been obligated, costed and phased for the fiscal year that is shown in the header.

The Straight-Line button here allows you to phase the carry-in amounts.

FTE $ (Phase) - Incremental

FTE $ (Phase) - Incremental Input Layout: Input Area

hase) - User-Defined | Corp G&A (Phase) | Corp G&A (Phase) - Delta | Corp G&A (Phase) - User-Defined | FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative

Phasing: Straight-Line | Recompute

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total 2018 $	Carry Out
OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
OBS - Curr PY	0.000	416.788	416.788	416.788	567.413	567.413	567.413	567.413	567.413	567.413	567.413	567.413	567.413	6,357.075	0.000
COSTS - Prev PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
COSTS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
COSTS - Curr PY	0.000	416.788	416.788	416.788	567.413	567.413	567.413	567.413	567.413	567.413	567.413	567.413	567.413	6,357.075	0.000
COSTS - TOTAL	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000

1) Click on the FTE $ (Phase) - Incremental button to open the input area.

2) The following fields will appear, in monthly increments:

OBS – Prior PY Obligated dollars for the prior program year
OBS – Curr PY Obligated dollars for the current program year
COSTS – Prev PY Costed dollars for ALL previous program years before the current and prior PY
COSTS – Curr PY Costed dollars for current program year
COSTS – TOTAL Total costed $

FTE $ (Phase) - Incremental

FTE $ (Phase) - Incremental Input Layout: Input Area

Phase) - User-Defined | Corp G&A (Phase) | Corp G&A (Phase) - Delta | Corp G&A (Phase) - User-Defined | FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative

Phasing: Straight-Line | Recompute

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total 2018 $	Carry Out
OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
OBS - Curr PY	0.000	416.788	416.788	416.788	567.413	567.413	567.413	567.413	567.413	567.413	567.413	567.413	567.413	6,357.075	0.000
COSTS - Prev PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
COSTS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
COSTS - Curr PY	0.000	416.788	416.788	416.788	567.413	567.413	567.413	567.413	567.413	567.413	567.413	567.413	567.413	6,357.075	0.000
COSTS - TOTAL	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000

3) Enter the amounts in the appropriate field.
4) Click the Recompute button to enter the data and recalculate the totals.
5) Click the Save button when complete.

FTE $ (Phase) - Cumulative

FTE $ (Phase) - Cumulative Input Layout: Input Area

Phase) - User-Defined | Corp G&A (Phase) | Corp G&A (Phase) - Delta | Corp G&A (Phase) - User-Defined | FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative

Phasing: Straight-Line | Recompute

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total 2018 $	Car
OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
OBS - Curr PY	0.000	416.788	833.575	1,250.363	1,817.775	2,385.188	2,952.600	3,520.013	4,087.425	4,654.838	5,222.250	5,789.663	6,357.075	6,357.075	
COSTS - Prev PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
COSTS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
COSTS - Curr PY	0.000	416.788	833.575	1,250.363	1,817.775	2,385.188	2,952.600	3,520.013	4,087.425	4,654.838	5,222.250	5,789.663	6,357.075	6,357.075	
COSTS - TOTAL	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	

This input area allows you to enter prior and previous program year obligations and costs in a cumulative fashion.

The OBS – Curr PY and COSTS – Curr PY shows the total FTE dollars for all of the Organizations that have been obligated, costed and phased for the fiscal year that is shown in the header.

The Straight-Line button here allows you to phase the carry-in amounts.

FTE $ (Phase) - Cumulative

FTE $ (Phase) - Cumulative Input Layout: Input Area

'hase) - User-Defined | Corp G&A (Phase) | Corp G&A (Phase) - Delta | Corp G&A (Phase) - User-Defined | FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative

Phasing: Straight-Line | Recompute

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total 2018 $	Car
OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
OBS - Curr PY	0.000	416.788	833.575	1,250.363	1,817.775	2,385.188	2,952.600	3,520.013	4,087.425	4,654.838	5,222.250	5,789.663	6,357.075	6,357.075	
COSTS - Prev PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
COSTS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
COSTS - Curr PY	0.000	416.788	833.575	1,250.363	1,817.775	2,385.188	2,952.600	3,520.013	4,087.425	4,654.838	5,222.250	5,789.663	6,357.075	6,357.075	
COSTS - TOTAL	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	

1) Click on the FTE $ (Phase) - Incremental button to open the input area.

2) The following fields will appear, shown in cumulative amounts:

OBS – Prior PY — Obligated dollars for the prior program year

OBS – Curr PY — Obligated dollars for the current program year

COSTS – Prev PY — Costed dollars for ALL previous program years before the current and prior PY

COSTS – Curr PY — Costed dollars for current program year

COSTS – TOTAL — Total costed $

FTE $ (Phase) - Cumulative

FTE $ (Phase) – Cumulative Input Layout: Input Area

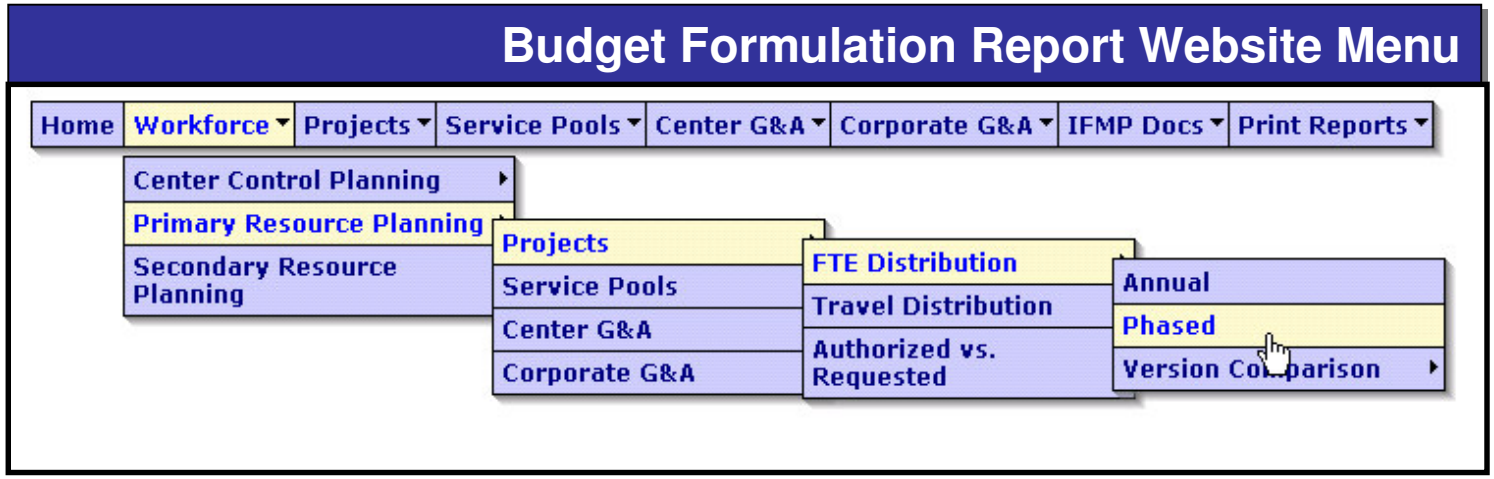
Phase) - User-Defined | Corp G&A (Phase) | Corp G&A (Phase) - Delta | Corp G&A (Phase) - User-Defined | FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative

Phasing: Straight-Line | Recompute

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total 2018 $	Car
OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
OBS - Curr PY	0.000	416.788	833.575	1,250.363	1,817.775	2,385.188	2,952.600	3,520.013	4,087.425	4,654.838	5,222.250	5,789.663	6,357.075	6,357.075	
COSTS - Prev PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
COSTS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
COSTS - Curr PY	0.000	416.788	833.575	1,250.363	1,817.775	2,385.188	2,952.600	3,520.013	4,087.425	4,654.838	5,222.250	5,789.663	6,357.075	6,357.075	
COSTS - TOTAL	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	

3) Enter the amounts in the appropriate field.
4) Click the Recompute button to enter the data and recalculate the totals.
5) Click the Save button when complete.

Workforce FTE Distribution Phasing Reports



1) Open the Budget Formulation BW report website.
2) Enter your BF user name and password.
3) Click on the menus shown above.
4) Enter the header data for the data you want in the report.
5) The report shown on the next page will open.

Workforce FTE Distribution Phasing Reports

Primary Resource Planning, FTE Distribution, Projects: Phasing Report

BW Web Application

Home | Workforce | Projects | Service Pools | Center G&A | Corporate G&A | IFMP Docs | Print Reports

Zoom In | 50 % | Zoom Out | Email Comments

Navigation block:

Business area	Guide Type	LC
NASA Org	OG Type	Project Definition
Project Type	AR: MTH - FTE Rate, Qty, Amt	

Variable Values

Phase Year Text	2018
Phase Period 1	October 2018
Most Current Data	<= 293
Center	Ames Research Center
Budget Year	2020
Phasing Year	2018
Agency Version	Pre-POP
Center Version	ARC Pre POP
Labor Category	Not assigned
NASA Org	Space Projects
Project Definition	21-200-10

Primary FTE Dist - Projects - Phased

NASA Org		LC	Guide Type	OG Type	Project Definition		Project Type	Oct 2018 Rate	Oct 2018 QTY	Oct 2018 $K	Nov 2018 Rate	Nov 2018 QTY	Nov 2018 $K	Dec 2018 Rate	Dec 2018 QTY
21SF	Space Projects	Not assigned	In Guide	Not assigned	21-200-10	21-200-10	Direct	$ 10.04167	15.0 FTE	$ 150.625	$ 10.04167	15.0 FTE	$ 150.625	$ 10.04167	15.0 FTE
			Result						**15.0 FTE**	**$ 150.625**		**15.0 FTE**	**$ 150.625**		**15.0 FTE**
		Result							**15.0 FTE**	**$ 150.625**		**15.0 FTE**	**$ 150.625**		**15.0 FTE**

Each functional area has Phasing Reports. They are available on the Budget Formulation Report Website.

Topic 4: Reviewing and Authorizing FTE/Travel Dollar Requests

Primary FTE/Travel $ Distribution

Topic 4: Reviewing Authorized vs. Requested FTEs/Travel Dollars

- **Goal**: As negotiations take place (during POP or Pre-POP), review the requested FTEs/Travel Dollars from the projects, service pools, Center G&A and Corporate G&A in the Organization, and compare them to the authorized amount. (Using Projects as an example.)

- **Steps**:
  1. Logon
  2. Click on the Primary Resource Distribution Planning Folder
  3. Click on the Project (Annual) Delta button in the Input Area.
  4. Enter Header Data

Primary Resource Planning Folder

Projects (Annual) – Delta Input Layout

Name	Descriptn	Selection	Char. value ext.	Selection	CharVal...
Budget Year	Budget Year	2020	2020		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Organization	NASA Org	21SF	Space Projects Divisi...		
Labor Category	LC	#	Not assigned		
Fiscal Year	Fiscal year	2018	2018		

Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Check ALL Bus. Rules

Projects (Annual) | Projects (Annual) - Delta | Svc Pools (Annual) | Svc Pools (Annual) - Delta | Ctr G&A (Annual) | Ctr G&A (Annual) - Delta | Corp G&A (Annual)

Recompute | Refresh FTE Rate | Refresh FTE Requests | Check Bus. Rules

Guide Type	OG Type	Project Definition		Authorized FTEs	Requested FTEs	Annual FTE Delta	Annual FTE Rate	Authorized $	Requested $
INGUIDE	#	21-200-10	21-200-10	30.0	0.0	-30.0	120.500	3,615.000	0.000
INGUIDE	OG Type	Project Definition	Total	30.0	0.0	-30.0	120.500	3,615.000	0.000
Guide Type	OG Type	Project Definition	Total	30.0	0.0	-30.0	120.500	3,615.000	0.000

Input Area

Projects (Annual) $ | Svc Pools (Annual) $ | Ctr G&A (Annual) $ | Corp G&A (Annual) $ | Projects (Phase) $ | Svc Pools (Phase) $ | Ctr G&A (Phase) $ | Corp G

Guide Type	OG Type	Project Definition		FY 2018 $	FY 2019 $	FY 2020 $	FY 2021 $	FY 2022 $	FY 2023 $	FY 2024 $
INGUIDE	#	21-200-10	21-200-10	3,615.000	3,802.680	3,955.920	4,114.860	4,296.330	4,520.550	0.000
INGUIDE	OG Type	Project Definition	Total	3,615.000	3,802.680	3,955.920	4,114.860	4,296.330	4,520.550	0.000
Guide Type	OG Type	Project Definition	Total	3,615.000	3,802.680	3,955.920	4,114.860	4,296.330	4,520.550	0.000

What goes in the Input Layout?

Projects (Annual) – Delta Input Layout: Input Area

Projects (Annual) | Projects (Annual) - Delta | Svc Pools (Annual) | Svc Pools (Annual) - Delta | Ctr G&A (Annual) | Ctr G&A (Annual) - Delta | Corp G&A (Annual)

Recompute | Refresh FTE Rate | Refresh FTE Requests | Check Bus. Rules

Guide Type	OG Type	Project Definition		Authorized FTEs	Requested FTEs	Annual FTE Delta	Annual FTE Rate	Authorized $	Requested $
INGUIDE	#	21-200-10	21-200-10	30.0	0.0	-30.0	120.500	3,615.000	0.000
INGUIDE	OG Type	Project Definition	Total	30.0	0.0	-30.0	120.500	3,615.000	0.000
Guide Type	OG Type	Project Definition	Total	30.0	0.0	-30.0	120.500	3,615.000	0.000

1) Review the Planning Data, including the requested FTEs/Travel Dollars:

Authorized FTEs/Travel $	The number of FTEs/Travel Dollars that are authorized for the fiscal year.
Requested FTEs/Travel $	The number of FTEs/Travel Dollars requested by the Organization.
Annual FTE/Travel $ Delta	The difference between authorized and requested.
Annual FTE Rate	The labor rate for the FTEs.
Authorized $	The dollars authorized (annual rate x authorized FTEs).
Requested $	The dollars requested (annual rate x requested FTEs).

What goes in the Input Layout?

Projects (Annual) – Delta Input Layout: Input Area

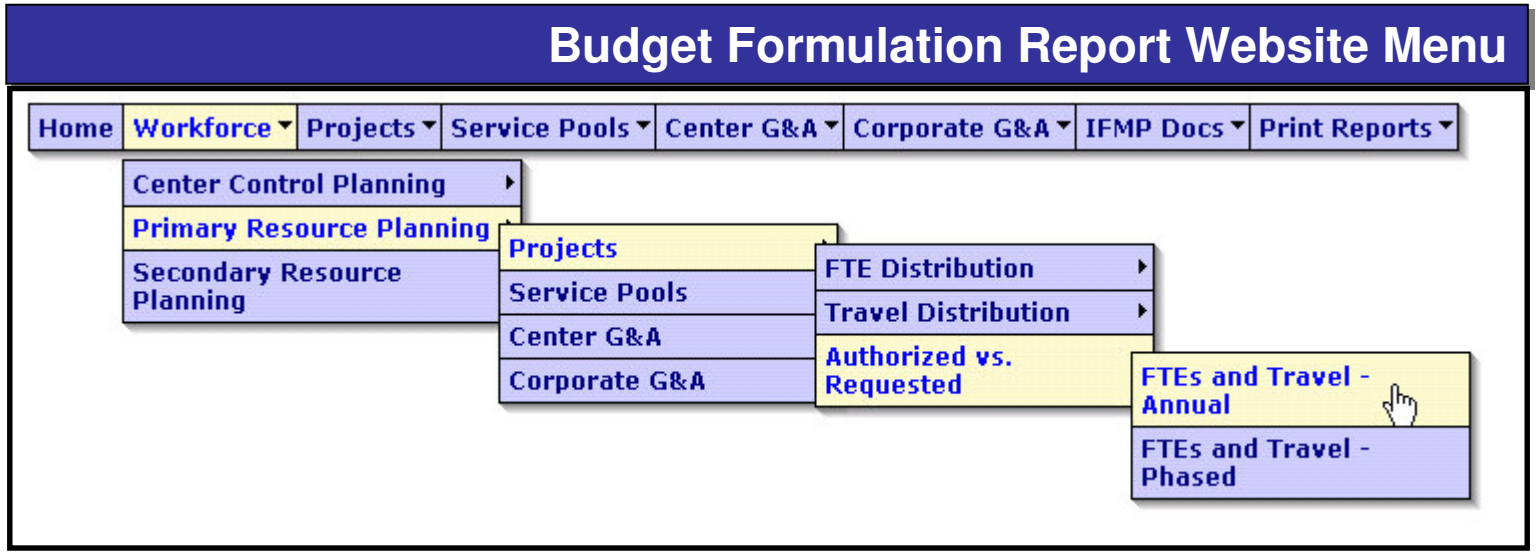
Projects (Annual) | Projects (Annual) - Delta | Svc Pools (Annual) | Svc Pools (Annual) - Delta | Ctr G&A (Annual) | Ctr G&A (Annual) - Delta | Corp G&A (Annual)

Recompute | Refresh FTE Rate | Refresh FTE Requests | Check Bus. Rules

Guide Type	OG Type	Project Definition		Authorized FTEs	Requested FTEs	Annual FTE Delta	Annual FTE Rate	Authorized $	Requested $
INGUIDE	#	21-200-10	21-200-10	30.0	0.0	-30.0	120.500	3,615.000	0.000
INGUIDE	OG Type	Project Definition	Total	30.0	0.0	-30.0	120.500	3,615.000	0.000
Guide Type	OG Type	Project Definition	Total	30.0	0.0	-30.0	120.500	3,615.000	0.000

2) Change the value in the Authorized FTE/Travel $ field, if needed. Click the Transfer Variables button to save the new data.
3) Click the Recompute button to recalculate the changes in the dollars.
4) Click the Save button when completed.
5) Repeat for all of the projects that you are responsible for.

Authorized vs. Requested Annual Report



1) Open the Budget Formulation BW report website.
2) Enter your BF user name and password.
3) Click on the menus shown above.
4) Enter the header data for the data you want in the report.
5) The report shown on the next page will open.

Requested vs. Authorized Annual Report

Primary Resource Planning, Projects, Auth. Vs. Req. FTEs and Travel Annual

Navigation block:

BA		Fiscal year		Guide Type	
LC		NASA Org		OG Type	
Project Definition		Project Type		MP: ANN - Qty, Amt	
MP: SEL - Reconcile Primary Dist. with Project Planning					

Variable Values

Most Current Data	<= 293
Center	Ames Research Center
Budget Year	2020
Agency Version	Pre-POP
Center Version	ARC Pre POP
NASA Org	Space Projects
Project Definition	21-200-10

Auth. vs. Req. by Pri. Dist - FTEs & Travel - PP

								Fiscal year	2018			2019		
NASA Org		LC	Guide Type	OG Type	Project Definition		Project Type		FTE QTY	FTE $K	Travel $K	FTE QTY	FTE $K	Travel $K
21SF	Space Projects	Not assigned	In Guide	Not assigned	21-200-10	21-200-10	Direct	Primary Authorized Direct	30.0 FTE	$ 3,615.000		30.0 FTE	$ 3,802.680	
								Project Requested Direct						
								========== Delta Values ==========	30.0 FTE	$ 3,615.000		30.0 FTE	$ 3,802.680	

Each functional area has Annual Authorized vs. Requested Reports. They are available on the Budget Formulation Report Website.

Other Buttons

Projects (Annual) – Delta Input Layout: Input Area

Projects (Annual) | Projects (Annual) - Delta | Svc Pools (Annual) | Svc Pools (Annual) - Delta | Ctr G&A (Annual) | Ctr G&A (Annual) - Delta | Corp G&A (Annual)

Recompute | Refresh FTE Rate | Refresh FTE Requests | Check Bus. Rules

Guide Type	OG Type	Project Definition		Authorized FTEs	Requested FTEs	Annual FTE Delta	Annual FTE Rate	Authorized $	Requested $
INGUIDE	#	21-200-10	21-200-10	30.0	0.0	-30.0	120.500	3,615.000	0.000
INGUIDE	OG Type	Project Definition	Total	30.0	0.0	-30.0	120.500	3,615.000	0.000
Guide Type	OG Type	Project Definition	Total	30.0	0.0	-30.0	120.500	3,615.000	0.000

The Refresh FTE/Travel $ Requests button pulls in all of the latest requests from the lower level planning folders updates the Requested field on the Delta input areas, and the Phasing Output areas.
The Refresh FTE Rate button pulls in the latest FTE rate from C000.

Other Requested vs. Authorized Input Areas

- There is an Annual "Delta" input area for each of the other areas not demonstrated: Service Pools, Center G&A, and Corporate G&A.
  - Service Pools (Annual) - Delta
  - Center G&A (Annual) - Delta
  - Corporate G&A (Annual) - Delta
- They function the same way as Projects.

Topic 4: Reviewing and Authorizing FTE Requests Phased

- **Goal**: As negotiations take place (during POP or Pre-POP), review the requested FTEs, and compare them to the authorized amount *in monthly amounts.* (using projects as an example)

- **Reviewing Authorized vs. Requested FTEs**
  1. Logon
  2. Click on the Primary Resource Distribution Planning Folder
  3. Click on the Project (Phase) Delta Input Layout Button
  4. Enter header data

Projects (Phase) - Delta Input Area

Projects (Phase) – Delta Input Layout: Input Area

Corp G&A (Annual) - Delta | Projects (Phase) | Projects (Phase) - Delta | Projects (Phase) - User-Defined | Svc Pools (Phase) | Svc Pools (Phase) - Delta

Recompute | Straight-Line | User-Defined | Refresh FTE Rate | Refresh FTE Requests | Check Bus. Rules

Guide Type	OG Type	Project Definition		Fiscal year/period		Authorized FTEs	Requested FTEs	Monthly FTE Delta	Monthly FTE Rate	Auth
INGUIDE	#	21-200-10	21-200-10	001/2018	October 2018	15.0	0.0	-15.0	10.042	1
INGUIDE	#	21-200-10	21-200-10	002/2018	November 2018	15.0	0.0	-15.0	10.042	1
INGUIDE	#	21-200-10	21-200-10	003/2018	December 2018	15.0	0.0	-15.0	10.042	1
INGUIDE	#	21-200-10	21-200-10	004/2018	January 2018	30.0	0.0	-30.0	10.042	3

1) Review the Phased Planning Data, including the requested FTEs.

Authorized FTEs — The number of FTEs that are authorized by month for the fiscal year.

Requested FTEs — The monthly number of FTEs requested by the Organization.

Monthly FTE Delta — The difference between the authorized and requested FTEs.

Dollar and Rate fields –These amounts are associated with the authorized FTEs.

What goes in the Input Layout?

Projects (Phase) – Delta Input Layout: Input Area

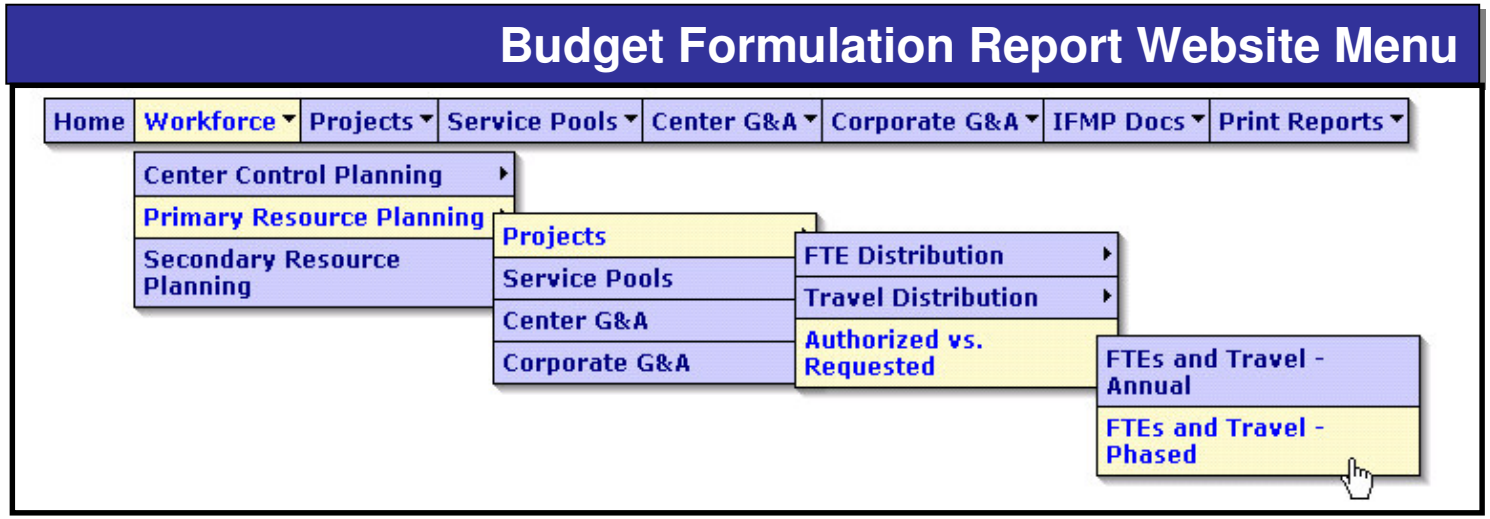
Corp G&A (Annual) - Delta | Projects (Phase) | Projects (Phase) - Delta | Projects (Phase) - User-Defined | Svc Pools (Phase) | Svc Pools (Phase) - Delta

Recompute | Straight-Line | User-Defined | Refresh FTE Rate | Refresh FTE Requests | Check Bus. Rules

Guide Type	OG Type	Project Definition		Fiscal year/period		Authorized FTEs	Requested FTEs	Monthly FTE Delta	Monthly FTE Rate	Auth
INGUIDE	#	21-200-10	21-200-10	001/2018	October 2018	15.0	0.0	-15.0	10.042	1
INGUIDE	#	21-200-10	21-200-10	002/2018	November 2018	15.0	0.0	-15.0	10.042	1
INGUIDE	#	21-200-10	21-200-10	003/2018	December 2018	15.0	0.0	-15.0	10.042	1
INGUIDE	#	21-200-10	21-200-10	004/2018	January 2018	30.0	0.0	-30.0	10.042	3

2) Change the value in the Authorized FTE field, if needed. Click the Transfer Variables button to save the new data.
3) Click the Recompute button to recalculate the changes in the dollars.
4) Click the Save button when completed.
5) Repeat for all of the organizations that you are responsible for.

Workforce FTE Distribution Requested vs. Authorized Phased Report



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Workforce FTE Distribution Requested vs. Authorized Phased Report

Primary Resource Planning, Projects, Auth. Vs. Req. FTEs and Travel Phased

Zoom In | 50 % | Zoom Out | Email Comments

Navigation block:

BA	Guide Type	LC
NASA Org	OG Type	Project Definition
Project Type	MP: MTH - MONTHQTY, MTHAMT	MP: SEL - Reconcile Primary Dist. with Project Planning

Variable Values

Most Current Data	<= 293
Phase Period 1	October 2018
Phase Year Text	2018
Center	Ames Research Center
Budget Year	2020
Phasing Year	2018
Agency Version	Pre-POP
Center Version	ARC Pre POP
NASA Org	Space Projects
Project Definition	21-200-10

Auth. vs. Req. by Pri. Dist - FTEs & Travel - PP - Phase

NASA Org		LC	Guide Type	OG Type	Project Definition		Project Type		Oct 2018 FTE QTY	Oct 2018 FTE $K	Oct 2018 Travel $K	Nov 2018 FTE QTY	Nov 2018 FTE $K	Nov 2018 Travel $K
21SF	Space Projects	Not assigned	In Guide	Not assigned	21-200-10	21-200-10	Direct	Primary Authorized Direct	15.0 FTE	$ 150.625		15.0 FTE	$ 150.625	
								Project Requested Direct						
								========== Delta Values ==========	15.0 FTE	$ 150.625		15.0 FTE	$ 150.625	

Each functional area has Phasing Reports. They are available on the Budget Formulation Report Website.

Other Requested vs. Authorized Input Areas

- There are Phasing "Delta" input areas for each of the other areas not demonstrated: Service Pools, Center G&A, and Corporate G&A.
  - Service Pools (Phase) - Delta
  - Center G&A (Phase) - Delta
  - Corporate G&A (Phase) - Delta
- They function the same way as Projects.

Exercises – Phasing Annual FTEs

Now you will have an opportunity to practice what you have just seen in the Budget Formulation System

End of Course Content

Training Course Feedback

- The training course feedback will:
  - Assess the effectiveness of the instruction and training materials for the course