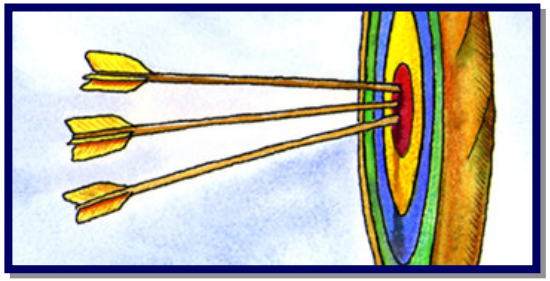
Welcome to…

Budget Formulation: Center G&A Planning

Course Objectives

- **At the end of this course, you should be familiar with how the Budget Formulation System is used to:**
  - Distribute Center G&A FTEs and Travel $ from the Cost Center Groups Level to the lower level of Center G&A
  - Request Center G&A FTEs, Travel, Service Pools, Other Direct $ and WYEs
  - Create Center G&A Phasing Plans
  - Perform Center G&A Allocations
  - Access and manipulate the Center G&A reports
- **At the end of this course, you will have received:**
  - An overview of the system
  - Information on activities that you (or your resource analyst) will perform with your assigned system roles



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.

Center G&A Planning roles

Center G&A Authorizer

- Distributes the Center's G&A authorizations from Cost Centers to lower-level Cost Centers.
- Has access to the Center G&A – Secondary FTE Distribution and Center G&A – Secondary Travel Dollar Distribution folders.

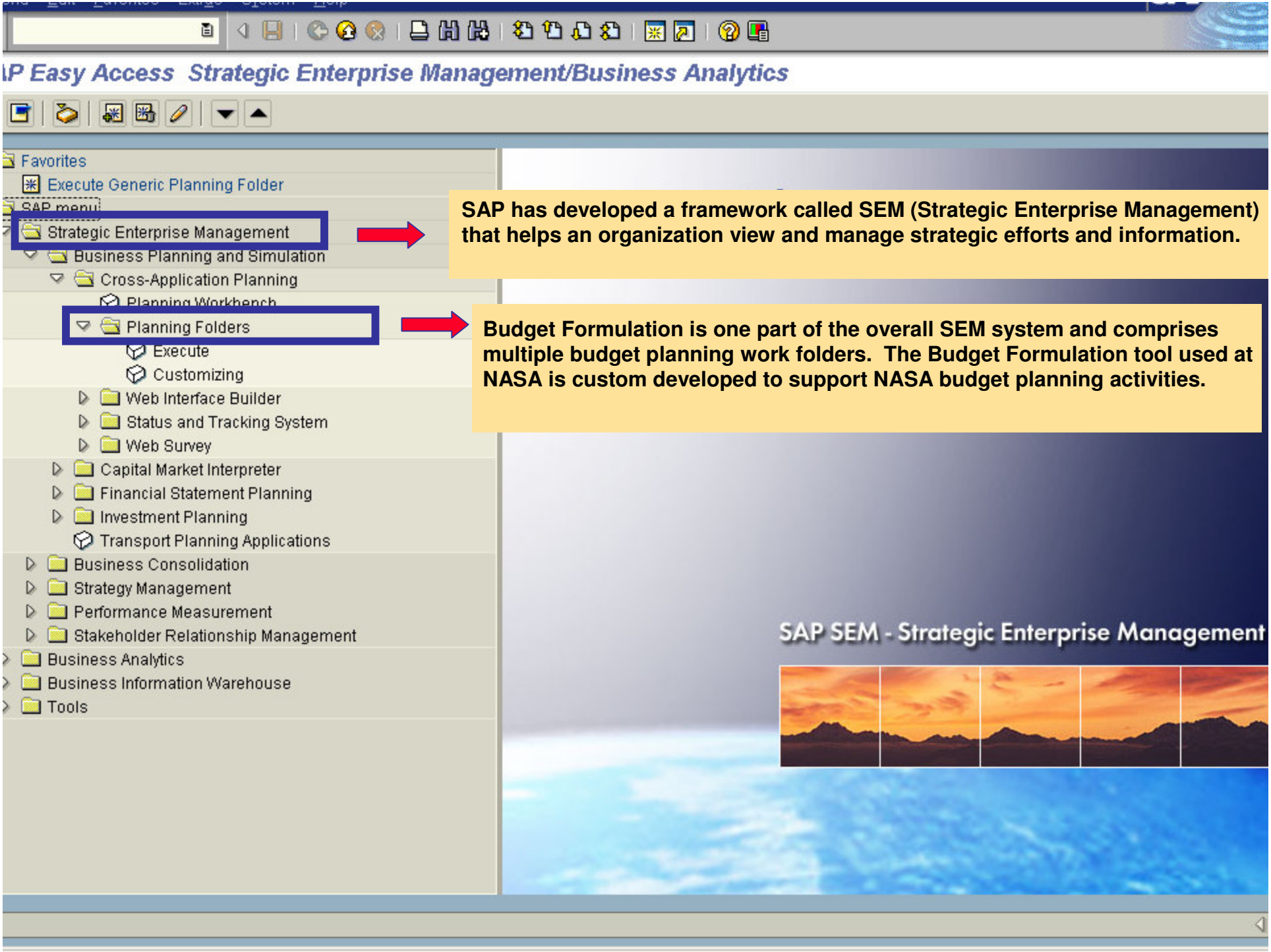
Center G&A Requestor

- Requests Center G&A (at Cost Center level) for FTEs, Travel, Service Pools, Other Direct Dollars and WYEs.
- Has access to the Center G&A (FTE, Travel, SP, Other Direct $, WYE) and Center – Phasing (Other Direct $) folders.

Center G&A Administrator

- Allocates Center G&A to Projects and Corporate G&A Functions residing at their Center
- Has access to the Center G&A – Allocation folder.

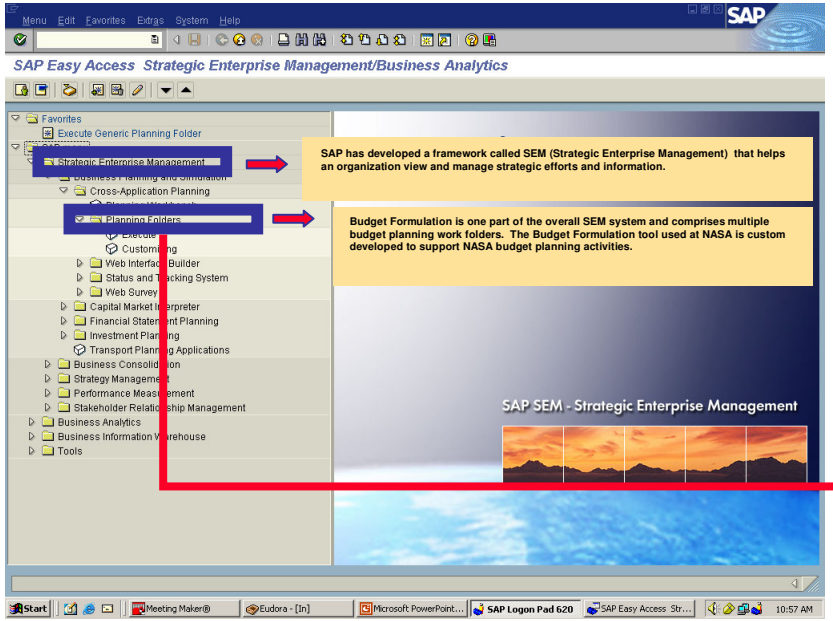
Budget Formulation System Overview

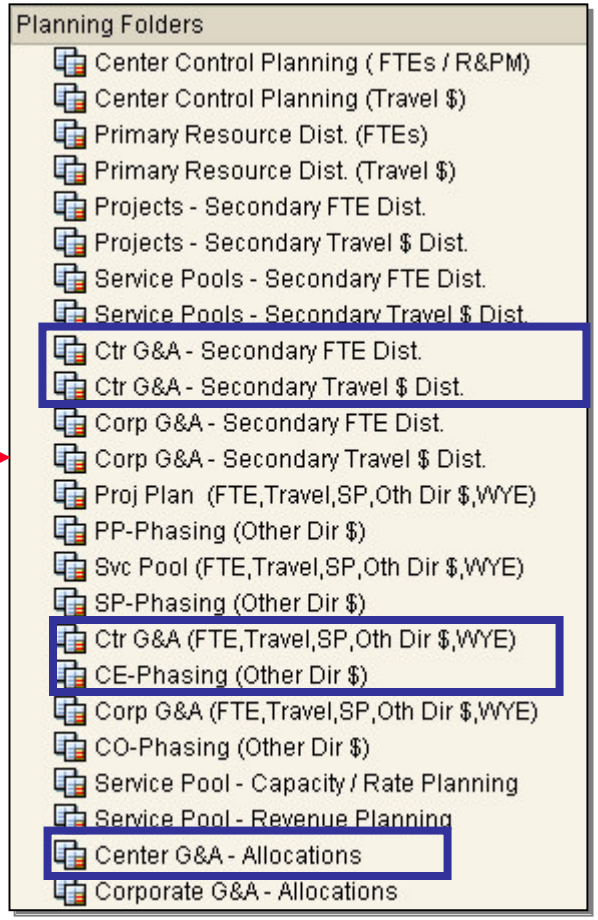


SAP has developed a framework called SEM (Strategic Enterprise Management) that helps an organization view and manage strategic efforts and information.

Budget Formulation is one part of the overall SEM system and comprises multiple budget planning work folders. The Budget Formulation tool used at NASA is custom developed to support NASA budget planning activities.

Where will you be doing your work?

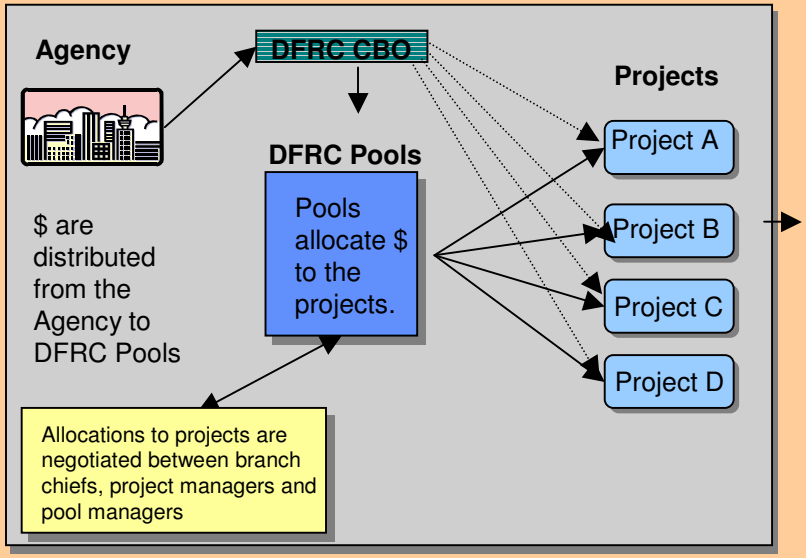




After budget planning activities occur and data is established, it will be handed off to Resource Analysts to enter into the Budget Formulation System. They will be entering the budget data into the appropriate planning folders for their budget planning activity.

Pools in a Full Cost Environment

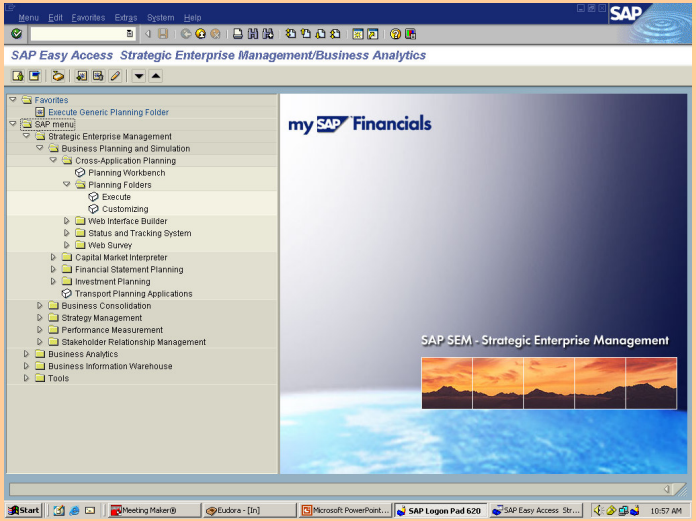
Determine Allocations (Full Cost)



Resource Analysts

Data entry into the BF System

Enter $ in System (Budget Formulation)



What Center G&A Activities you will be performing during theTop-Down Process

- **During Pre-POP:**
  - Center FTE Authorizers receive guidance from the Center Management regarding workforce strategy and decisions
  - Iterations of negotiations take place to assign the FTEs to Organizations and Programs within the Center
  - Rates and dollars associated with the FTEs are developed (by Organization)
  - Center G&A Authorizers begin planning their FTEs and Travel dollars
  - Center G&A Requesters begin planning their FTEs, WYEs, Travel, Service Pools and Other Direct $

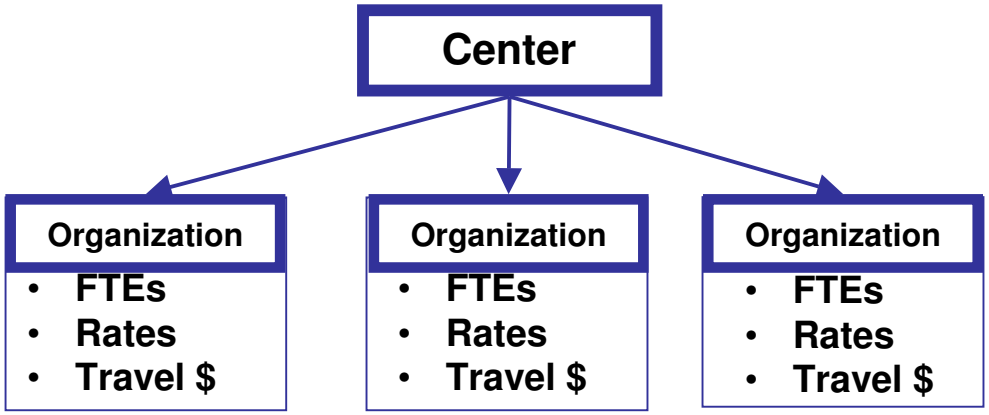
- **During POP:**
  - FTE requirements are further defined
  - Authorizers and Requesters can refine the planning for FTEs, WYEs, Travel, Service Pools and Other Direct $

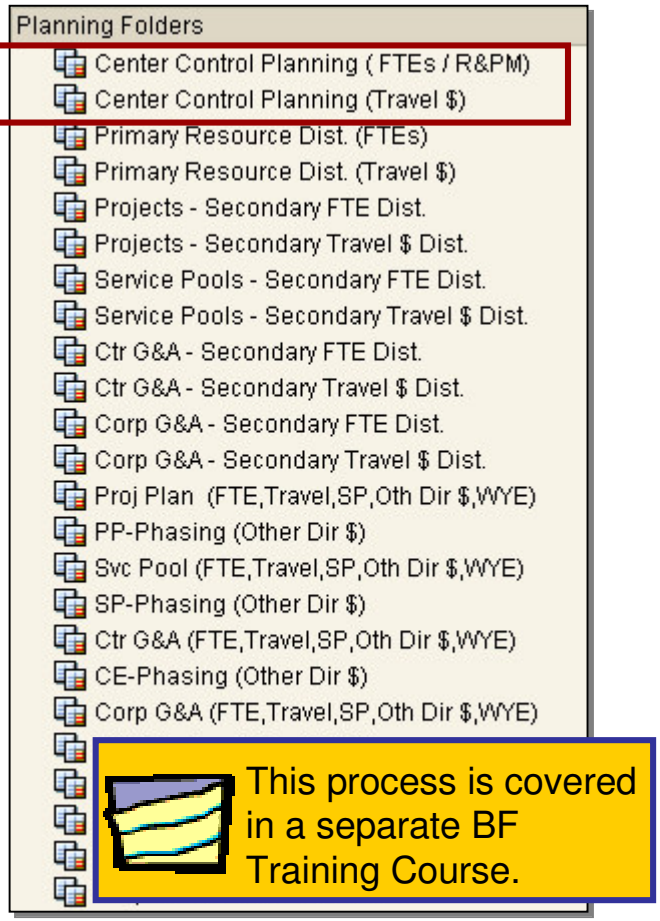
- **During Initial Phasing Plan and Mid-year update:**
  - Authorizers can input monthly FTEs, rates, and dollars

These processes are covered in this course. Other processes are covered in additional BF courses.

Visualizing the System
Center Control Planning FTE Dist.

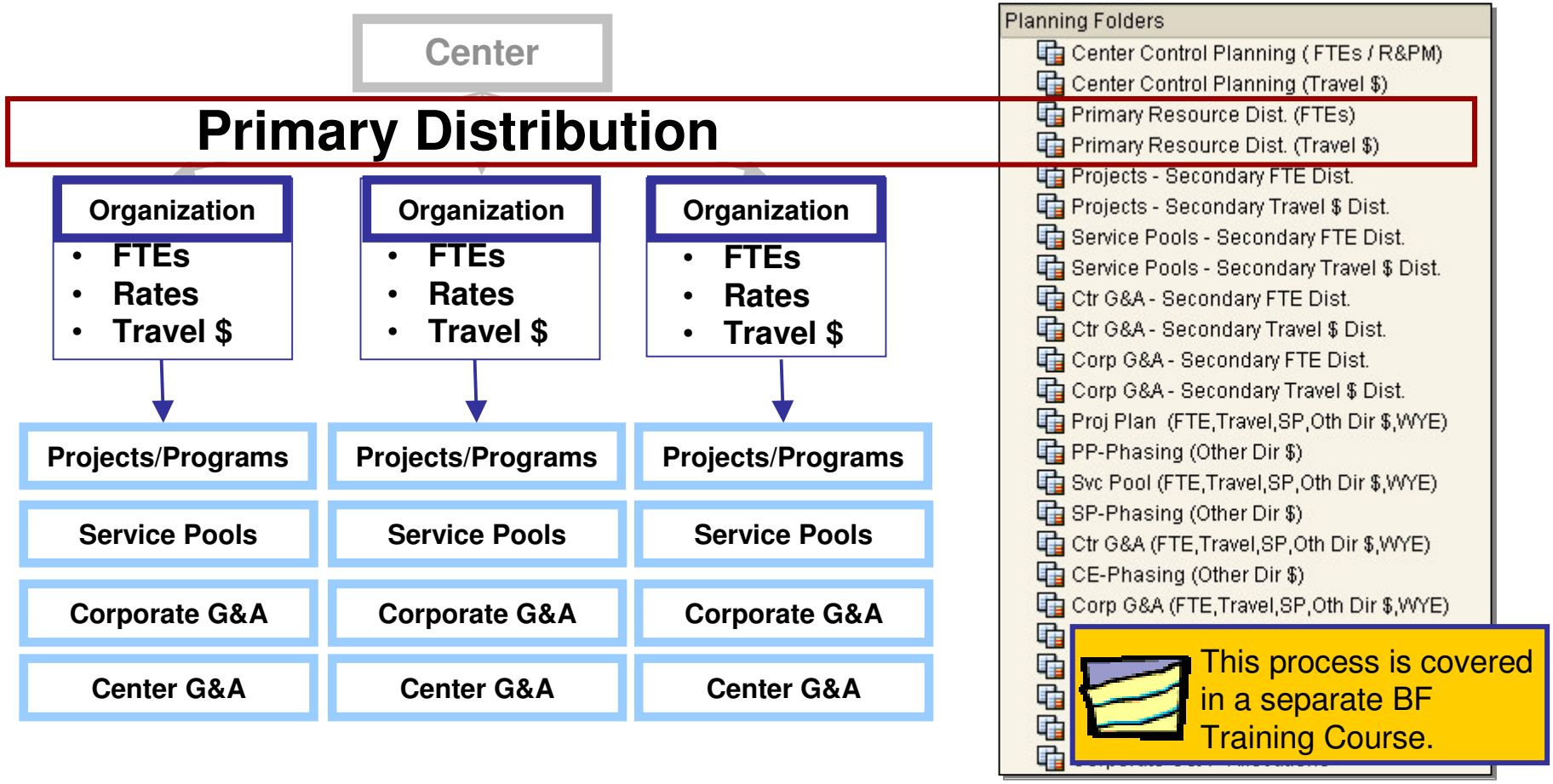
Center Control Planning





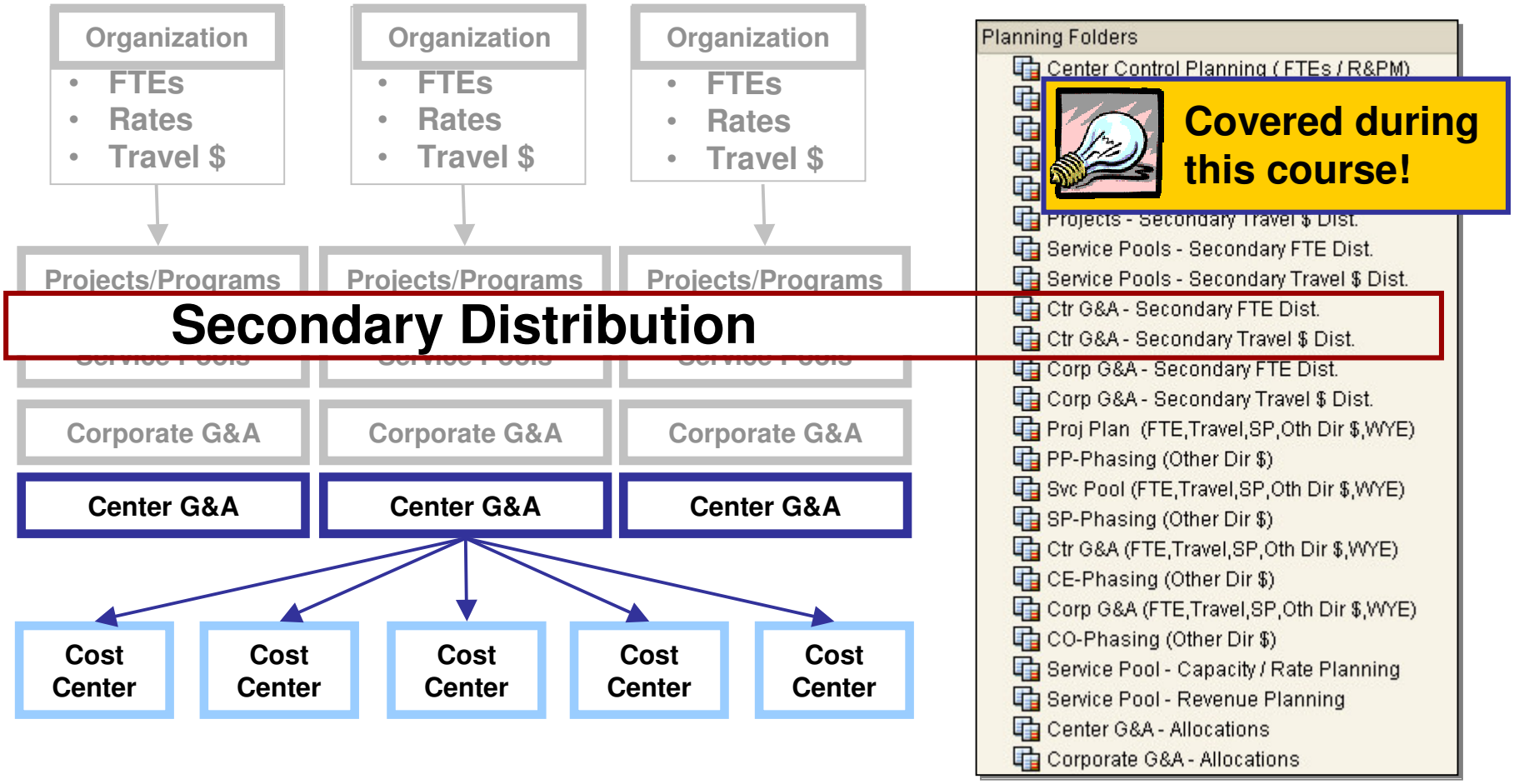
- This data is used by the Center Organizational FTE Authorizers to do the distribution of FTEs throughout the organization.

Visualizing the System
Primary FTE Dist.



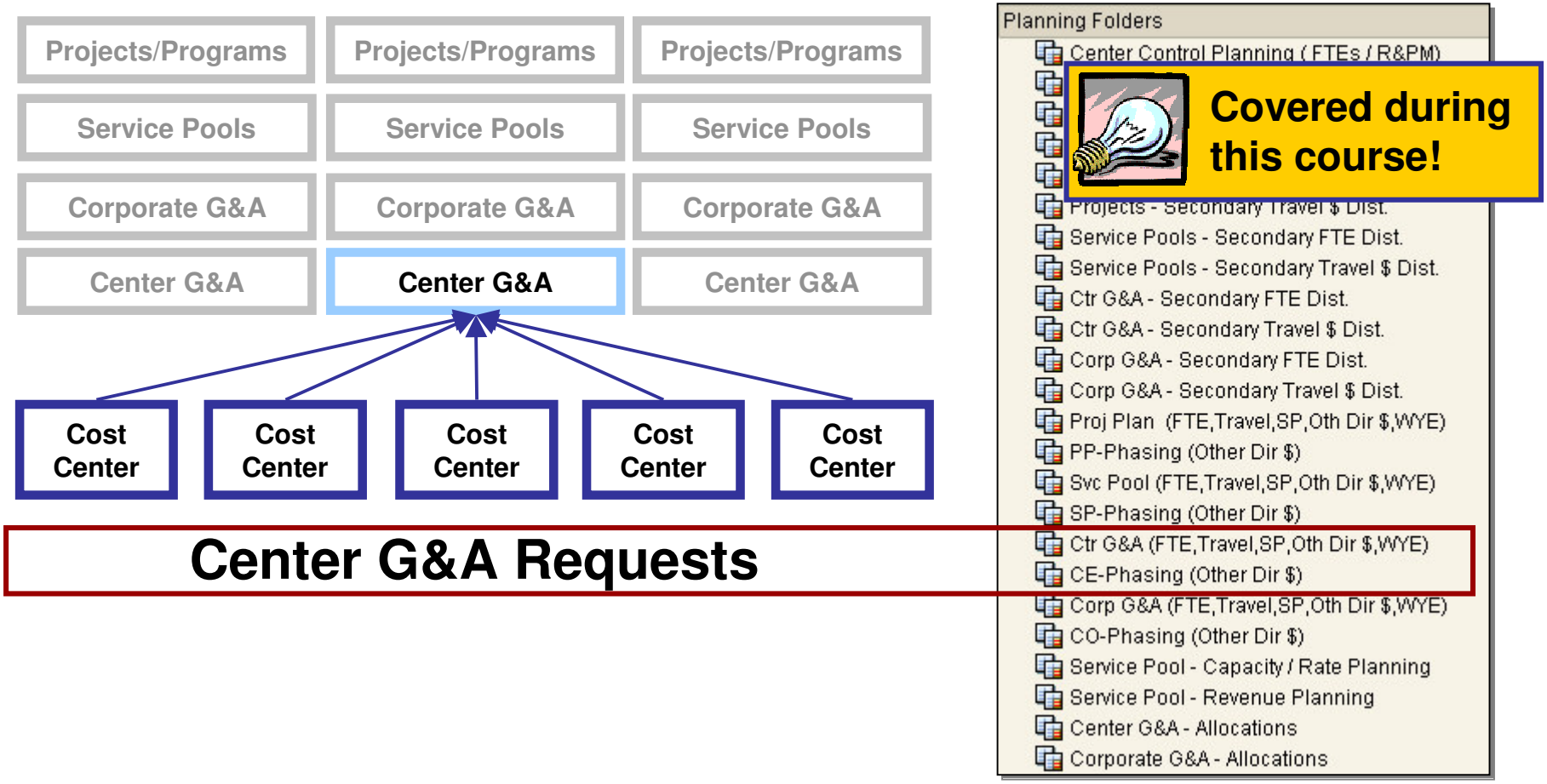
- This data is used by the Secondary Authorizers to do the primary distribution of FTEs to sub-pools, Corporate and Center G&A pools.
  NOTE: Project Definition is defined as a UPN 5

Visualizing the System Secondary FTE Dist.



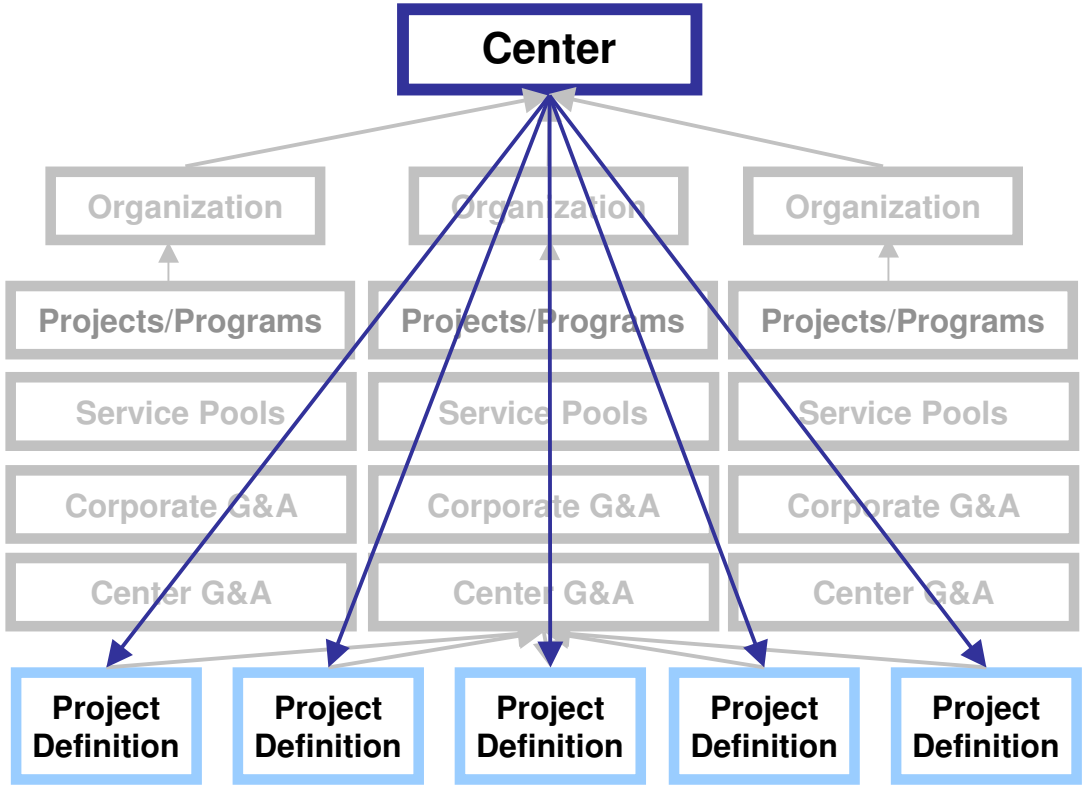
- This data is used by the Center G&A Authorizers to do the secondary distribution of FTEs from Center G&A pools to Cost Centers.

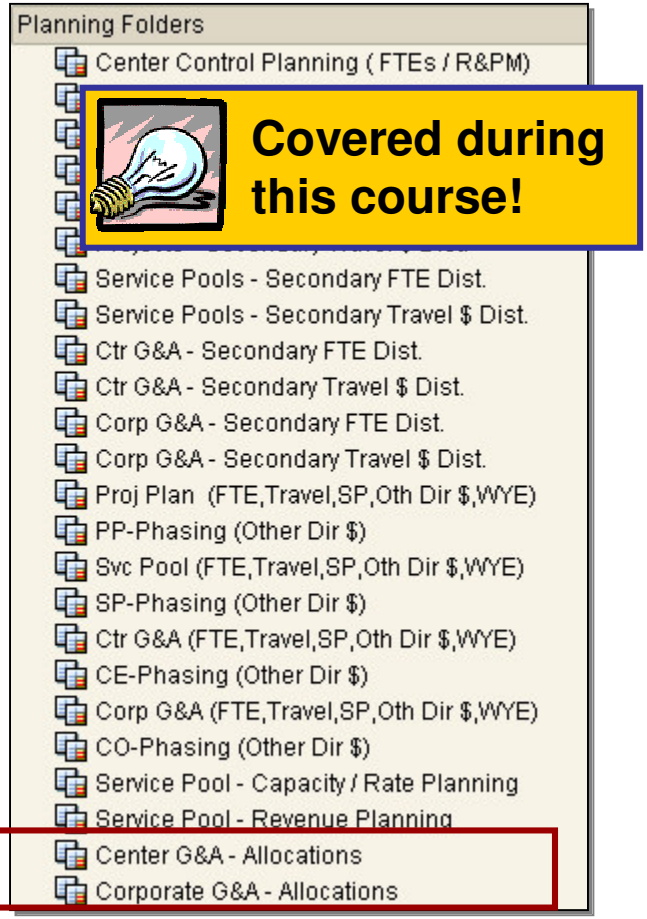
Visualizing the System
Center G&A Requests



- This data is used by the Center G&A Requesters to request FTEs, Travel $, Service Pool units, Other Direct $ and WYEs.

Visualizing the System
Center G&A Allocations





Center G&A Allocations

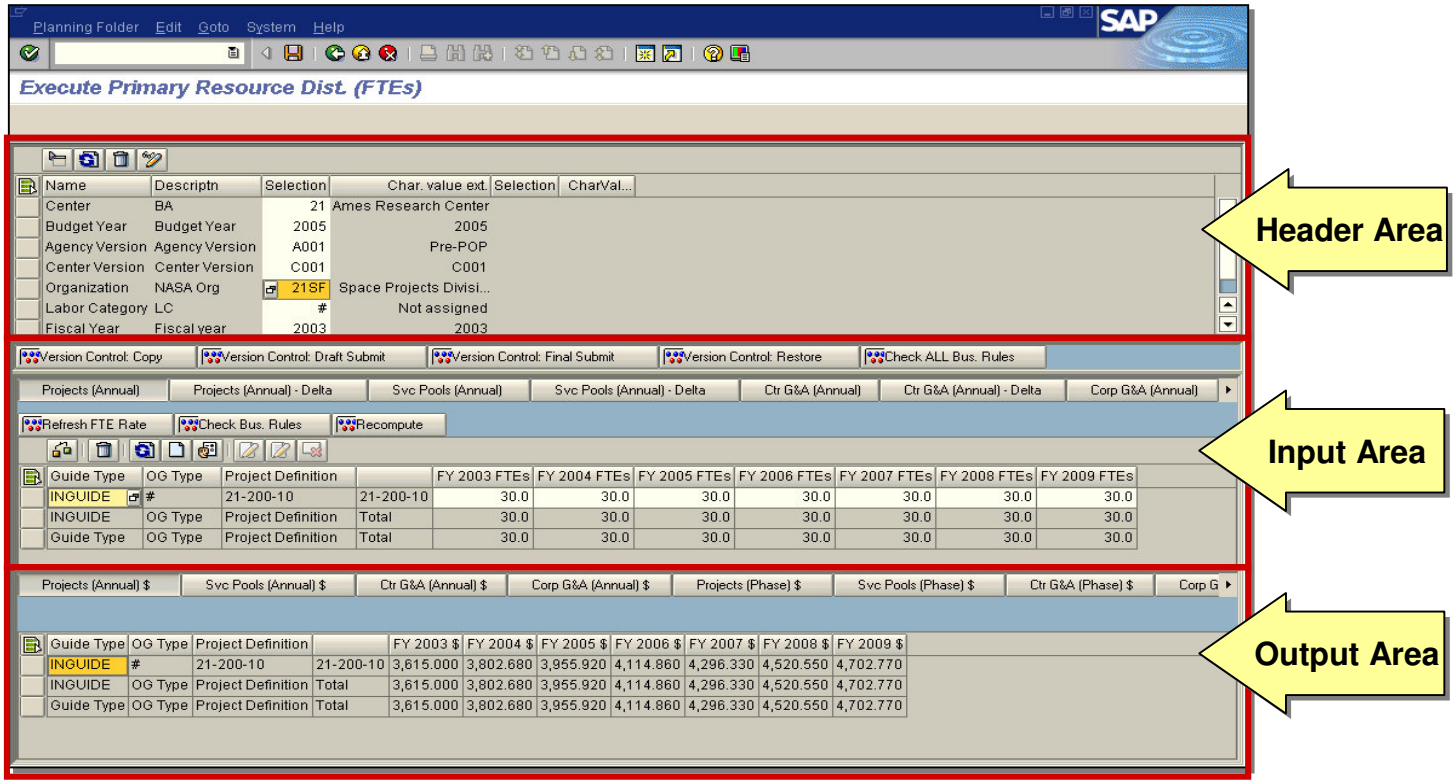
- This data is used by the CBO to perform Center G&A allocations back to Projects.

BF System Overview – Debrief

- The previous section provided an overview of the Budget Formulation application and process.
- The next section will provide an overview of the navigation within the system.

Navigation Basics Demonstration

What Are the Primary Sections of a Typical Screen?



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

Navigation Overview – Debrief

- The previous section provided an overview of basic navigation for the BF application.
- The next section will demonstrate how to perform secondary distribution of Center G&A.

Secondary FTE and Travel $ Distribution

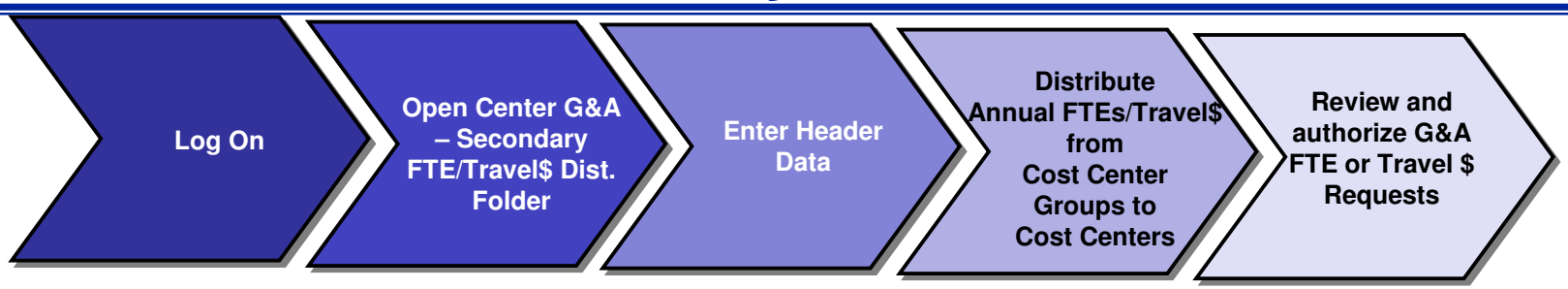
Secondary FTE & Travel $ Distribution Folder Overview

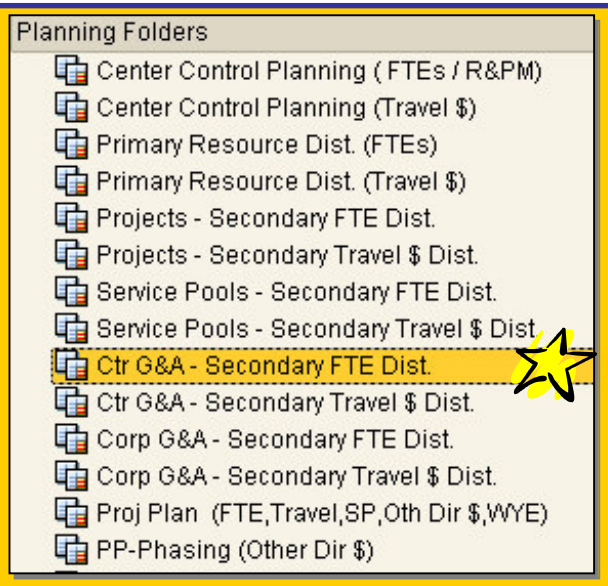
- Annual Planning Input Layouts:
  - FTE (Annual)/Travel $ (Annual)
  - FTE (Annual) Delta/Travel $ (Annual)

- Annual Planning Output Layouts:
  - FTE $ (Annual)/Travel $ (Annual)

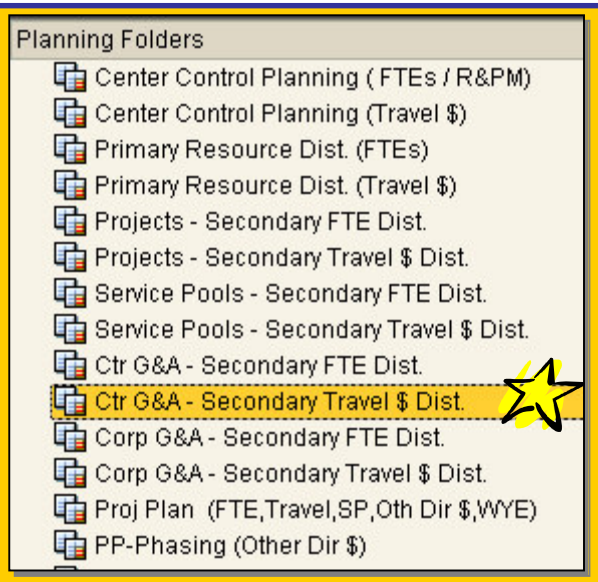
- Phasing Plan
  Output Layouts:
  - FTE (Phase)
  - FTE $ (Phase)/Travel$ (Phase)
  - FTE $ (Phase) – Incremental/Travel$ (Phase) – Incremental
  - FTE $ (Phase) – Cumulative/ Travel $ (Phase) - Cumulative

Process Flow: Secondary FTE & Travel $ Distribution





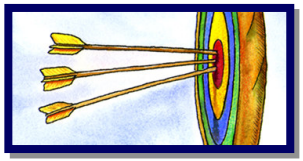
In the **Ctr G&A – Secondary FTE Dist. Folder**, Center G&A Authorizers perform the secondary **distribution of FTEs** to Center G&A Cost Centers.



In the **Ctr G&A – Secondary Travel $ Dist. Folder**, Center G&A Authorizers perform the **secondary distribution of Travel $** to Center G&A Cost Centers.

Enter Header Data

- We will be performing an exercise in the system. First, I will review the steps you will be using to complete the exercises.
- **Goal:** Enter the appropriate characteristics in the Header Area, to **define the data you want to plan**
- Why: All planning data entered into the system is categorized and stored based on the Header Data combinations



Planning Folder Edit Goto System Help

Execute Ctr G&A - Secondary FTE Dist.

Name	Descriptn	Selection	Char. value ext.	Selection	CharVal...
Center	BA	24	Dryden Flight Research Center		
Budget Year	Budget Year	2037	2037		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Organization	NASA Org	240000	Flight Operations Directorate		
Labor Category	LC	#	Not assigned		
Fiscal Year	Fiscal year	2035	2035		

Header Area

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

FTE (Annual)

Recompute

Name	Descriptn	Selection	Char. value ext.
Center	BA	24	Dryden Flight Research Center
Budget Year	Budget Year	2037	2037
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Organization	NASA Org	240000	Flight Operations Directorate
Labor Category	LC	#	Not assigned
Fiscal Year	Fiscal year	2035	2035

Guide Type	038 FTEs	FY 2039 FTEs	FY 2040 FTEs	FY 2041 FTEs
INGUIDE	0.7	0.7	0.7	0.7
INGUIDE	0.7	0.7	0.7	0.7
Guide Type	0.7	0.7	0.7	0.7

FTE $ (Annual) | FTE (Phase) | FTE $ (Phase) | FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative

Guide Type	OG Type	Cost center		FY 2035 $	FY 2036 $	FY

Start | Eudora - [In] | Meeting Mak... | Center_GA_... | Workforce-T... | SAP Logon P... | Execute Ctr. | Execute Ctr G&A - Secondary FTE Dist. | 2:27 PM

What is Header Data?

1) Enter the following in the Header Area to define the data that you want to plan:
Header data is the data you want to pull from the database and plan. In the Center G&A Secondary FTE or Travel $ Distribution Planning Folder, the data you specify is:

Center	The two-digit Center number (24)
Budget Year	The Budget year you are planning
Agency Version	The Agency Version you are working in • A001 = Center PrePOP • A002 = Center POP • A003 = Enterprise Review • A004 = Agency Review • A005 = OMB Submit • A006 = Congressional Submit
Center Version	**The Center Version you are working in (C001-C005)**
Organization/Cost Center	The Cost Center you are planning for
Labor Category	Need to enter # since the center does not use this field
Fiscal Year	**The fiscal year you are working in (Budget Year – 2)**

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

Cost Center Groups

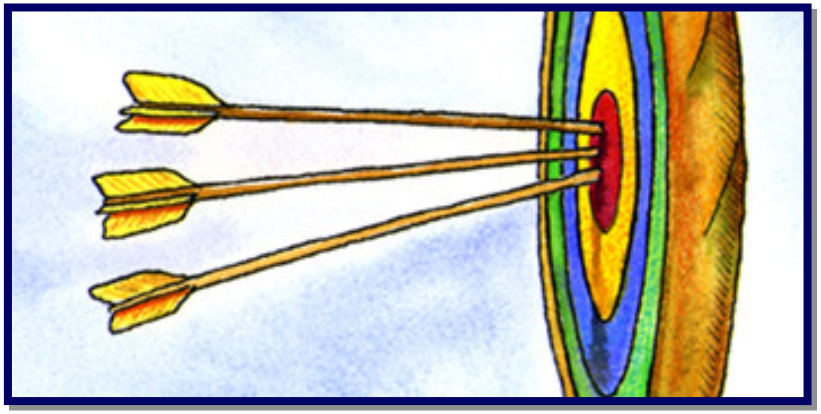
Controlling area NASA

NASA Org	Short Description	Medium Description	BA	Company Co	Srce Sys.	Object cur	Profit cen	Person responsible
2400AA	Acq Mgt Office	Acquisition Management Office	24	NASA	SAPBWS200	USD		Russ Davis
2400CC	Off of CFO	Office of the Comptroller	24	NASA	SAPBWS200	USD		Margaret Ashworth
2400CF	Fin Mgt	Financial Management Branch	24	NASA	SAPBWS200	USD		Margaret Ashworth
2400CR	Resources Mgt	Resource Management Branch	24	NASA	SAPBWS200	USD		Margaret Ashworth
2400DO	Historical DO	Historical DO	24	NASA	SAPBWS200	USD		Margaret Ashworth
2400EE	Off of EEO	Office of Equal Opportunity	24	NASA	SAPBWS200	USD		JoAnn Larson
2400F1	Historical F1	Historical F1	24	NASA	SAPBWS200	USD		Margaret Ashworth
2400FC	Historical FC	Historical FC	24	NASA	SAPBWS200	USD		Margaret Ashworth
2400FD	Fac Design	Facilities Design Branch	24	NASA	SAPBWS200	USD		Louis Steers
2400FE	Sys Engineering	Systems Engineering Branch	24	NASA	SAPBWS200	USD		Louis Steers
2400FF	Rsrch Fac Dr	Research Fac Directorate	24	NASA	SAPBWS200	USD		Louis Steers
2400FI	Inf Systems	Information Systems Branch	24	NASA	SAPBWS200	USD		Louis Steers
2400FM	Maint and Logistics	Maintenance and Logistics Branch	24	NASA	SAPBWS200	USD		Louis Steers
2400FO	Facility Ops	Facility Operations Branch	24	NASA	SAPBWS200	USD		Louis Steers
2400FR	Range Ops	Range Operations Branch	24	NASA	SAPBWS200	USD		Louis Steers
2400FT	Tech Dev	Technology Development Branch	24	NASA	SAPBWS200	USD		Louis Steers
2400HH	HR Mgt & Dev	Human Resources Mgt & Dev Office	24	NASA	SAPBWS200	USD		Catherine Waldal
2400HT	Training	Training	24	NASA	SAPBWS200	USD		Catherine Waldal
2400II	Historical II	Historical II	24	NASA	SAPBWS200	USD		Margaret Ashworth
2400JJ	Security	Security Office	24	NASA	SAPBWS200	USD		Frank Chavez
2400LL	Chief Counsel	Office of the Chief Counsel	24	NASA	SAPBWS200	USD		David Samuels
2400ME	Sys Eng Branch	Systems Engineering Branch	24	NASA	SAPBWS200	USD		Larry Schilling
2400MI	Inf Sys Branch	Information Systems Branch	24	NASA	SAPBWS200	USD		Larry Schilling
2400MM	Research Sys Dir	Research Systems Directorate	24	NASA	SAPBWS200	USD		Larry Schilling
2400MO	Fac Ops Branch	Facilities Ops Branch	24	NASA	SAPBWS200	USD		Larry Schilling
2400MR	Range Ops Branch	Range Operations Branch	24	NASA	SAPBWS200	USD		Larry Schilling
2400MT	Tech Dev Branch	Technology Development Branch	24	NASA	SAPBWS200	USD		Larry Schilling
2400NN	Off of Academic Inv	Office of Academic Investments	24	NASA	SAPBWS200	USD		Susan Miller
2400OA	Avionics	Avionics Branch	24	NASA	SAPBWS200	USD		Gary Krier
2400OC	Instrument Fabr	Instrumentation Fabrication Branch	24	NASA	SAPBWS200	USD		Gary Krier
2400OD	Maint Ops	Maintenance Operations Branch	24	NASA	SAPBWS200	USD		Gary Krier
2400OE	Ops Eng	Operations Engineering Branch	24	NASA	SAPBWS200	USD		Gary Krier

Distributing Annual FTEs & Travel $ from Cost Centers to Lower Level Cost Centers

- Goal: Distribute the annual Center G&A FTE & Travel $ Control Totals from the Cost Centers to lower-level Cost Centers.

- Why: This distribution allows the Center G&A Authorizer to view how many FTEs/Travel $ and associated labor dollars have been allocated to their Cost Centers. This information will assist with overall Center G&A planning.



What goes in the Input Layout?

FTE (Annual) – Input Area

FTE (Annual) | FTE (Annual) - Delta

Recompute | Refresh FTE Rates | Check Bus. Rules

Guide Type	OG Type	Cost center		FY 2036 FTEs	FY 2037 FTEs	FY 2038 FTEs	FY 2039 FTEs	FY 2040 FTEs	FY 2041 FTEs
INGUIDE	#	2400CR	Resource Management Branch	0.5	0.5	0.5	0.5	0.5	0.5
INGUIDE	#	2460JJ003	Security Office - G&A	1.0	1.0	1.0	1.0	1.0	1.0
INGUIDE	OG Type	Cost center	Total	1.5	1.5	1.5	1.5	1.5	1.5
Guide Type	OG Type	Cost center	Total	1.5	1.5	1.5	1.5	1.5	1.5

1) Click the FTE (Annual) or Travel $ (Annual) button. FTE (Annual)
2) Click the append row button to add a row.
3) Enter the following:

Guide Type	Inguide or Overguide
OG Type	Overguide type: New Initiative, Augment, Price or (#) unassigned. You must use unassigned (#) if you selected inguide.
Cost Center	The Cost Center you are distributing FTEs/Travel $ to.
FTEs/Travel $ per Year	Enter FTEs/Travel $ for two previous years, the budget year and four outyears

4) Click the Transfer Variables button to sort the row of data you entered and total the input area.
5) Click the Recompute button Recompute to transfer data from the input area to the output area.
6) Repeat for all of the Cost Center you are responsible for.
7) Click the FTE (Annual) - Delta button to view Authorized vs. Requested FTE/Travel $ totals. FTE (Annual) - Delta
8) Click the Save button to save your data.

Lower Level Cost Centers

Value Help for InfoObject 0COSTCENTER

Controlling area NASA

Cost cente	Short Description	Medium Description	BA	Company Co	Srce Sys.	Object cur	Profit cen	Person responsible
2447MO003	Rsrch Sys O-Sim	Research Systems O Branch - Sim	24	NASA	SAPBWS200	USD		Ken Norlin
2451MM003	Rsrch Sys-Pub	Research Systems - Pub	24	NASA	SAPBWS200	USD		Jenny Baer-Reidhar
2451TT003	Pub Affairs-Pub	Public Affairs; Comm & Edu - Pub	24	NASA	SAPBWS200	USD		Jenny Baer-Reidhar
2460AA003	Acq Mgt Office-G&A	Acquisition Mgt Office - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460CC003	Off of CFO-G&A	G&A Chief Financial Office - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460CF003	Fin Mgt-G&A	Financial Mgt Branch - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460CR003	Resources Mgt-G&A	Resources Mgt Branch - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460EE003	Off of EEO-G&A	Office of Equal Employee Opp - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460FM003	Fac M&L-G&A	Fac Maint & Log Br - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460HH003	HR Mgt & Dev -G&A	Human Resources Mgt & Dev Office - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460JJ003	Security-G&A	Security Office - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460LL003	Chief Counsel-G&A	Office of the Chief Counsel - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460MM003	Rsrch Fac Dr-G&A	Research Systems Directorate - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460NN003	Off of AI-G&A	Office of Academic Investmests - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460OO003	Flt Ops Dr-G&A	Flight Operations Directorate - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460PP003	Aero Proj Dr-G&A	Aerospace Projects Directorate - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460PR003	Aero Projects-G&A	Aerospace Projects - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460RR003	Rsrch Eng Dr-G&A	Research Engineering Directorate - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460SH003	Safety H&E-G&A	Safety; Health & Environ - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460SS003	Off Safety-G&A	Off of Safety & Mission Assurance - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460TT003	Pub Affairs-G&A	Public Affairs; Comm & Edu Office - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460XA003	PAO-G&A	PAO - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460XE003	Emp Assist Pgm-G&A	Employee Assistance Program - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460XX003	Off of Director-G&A	Office of the Director - G&A	24	NASA	SAPBWS200	USD		Gwen Young
2460YY003	Airborne Sci Dr-G&A	Airborne Science Directorate - G&A	24	NASA	SAPBWS200	USD		Gwen Young
24CLEARING	DFRC Clearing CCtr	Dryden Flight Research Center Clearing	24	NASA	SAPBWS200	USD		IFMP
24CNV	GL Conversion	General Ledger Conversion	24	NASA	SAPBWS200	USD		Lisa Gardner
24INV	Inventory	Inventory	24	NASA	SAPBWS200	USD		Cindy Brandvig
24INVADJ	Inventory Adj	Inventory Adjustment	24	NASA	SAPBWS200	USD		Cindy Brandvig
24RMCTROH	Reimb Ctr OH	Reimbursables - Ctr Overhead	24	NASA	SAPBWS200	USD		Cindy Brandvig
24RMCTROS	Reimb Ctr OH (Stat)	Reimbursables - Ctr Overhead Stat Cost	24	NASA	SAPBWS200	USD		Cindy Brandvig

Where can I see the output?

FTE $ (Annual) – Output Layout

FTE $ (Annual) | FTE (Phase) | FTE $ (Phase) | FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative

Guide Type	OG Type	Cost center		FY 2003 $	FY 2004 $	FY 2005 $	FY 2006 $	FY 2007 $	FY 2008 $	FY 2009 $
INGUIDE	#	2400CR	Resource Management Branch	1,196.400	1,196.400	1,196.400	1,196.400	1,196.400	1,196.400	1,196.400
INGUIDE	#	2460JJ003	Security Office - G&A	14,396.680	14,396.680	14,396.680	14,396.680	14,396.680	14,396.680	14,396.680
INGUIDE	OG Type	Cost center	Total	15,593.080	15,593.080	15,593.080	15,593.080	15,593.080	15,593.080	15,593.080
Guide Type	OG Type	Cost center	Total	15,593.080	15,593.080	15,593.080	15,593.080	15,593.080	15,593.080	15,593.080

1) Click the FTE $ (Annual) or Travel $ (Annual) output button to view the output area.

2) The following information is shown:

Guide Type	Inguide or Overguide
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned.
Cost Center	The cost center you are distributing FTEs/Travel $ to.
FY 20XX $	The dollars associated with the FTEs (equal to FTEs X Rate) or Travel $.
Totals	The totals for all Cost Centers listed.

Summary – Distribution to Cost Centers

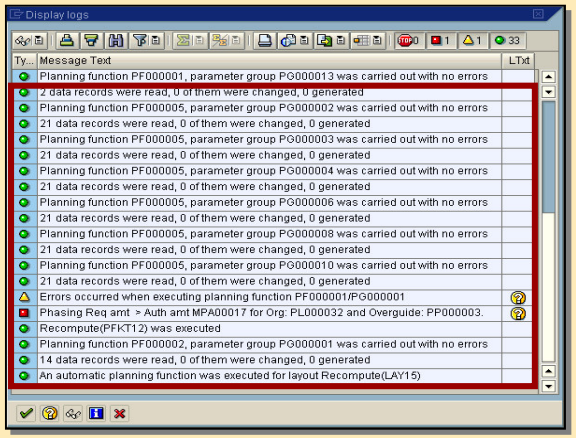
Steps for entering data:

1. Log On
2. Open Center G&A – Secondary FTE or Travel $ Distribution folder
3. Enter Header Data
4. Click the Transfer Header Variables button
5. Click the FTE (Annual) or Travel $ (Annual) button
6. Enter the Input data
7. Click the Transfer Variables button
8. Click the Save button to save your data

Business Rules Display

FYI! 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.

- 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

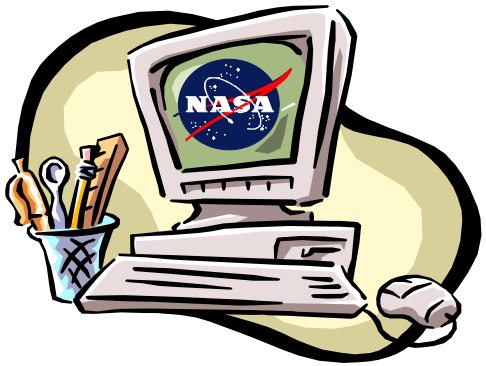
Yellow – Business Rule warned

Green – Business Rule passed

Exercises

<u>Annual Scenario</u>: You are a Center G&A Authorizer for the Ames Research Center (ARC). During Pre-POP and/or POP, you are responsible for distributing the civil service full-time equivalents (FTEs) to the appropriate Center G&A Cost Centers. Your control totals have already been distributed in the Primary Distribution exercise.

Using your exercise handout, go to
Center G&A Authorizer: Exercise 1a & 1b



Secondary FTE & Travel $ Distro. – Debrief

- The previous section demonstrated how to accomplish secondary FTE and Travel dollar distribution.

- The next section will discusses requesting FTEs, Travel $, WYEs, Other Direct $ and Service Pool.

Bottom-Up Center G&A Requests

Center G&A (FTE, Travel, SP, Other Direct $, WYE) Folder Overview

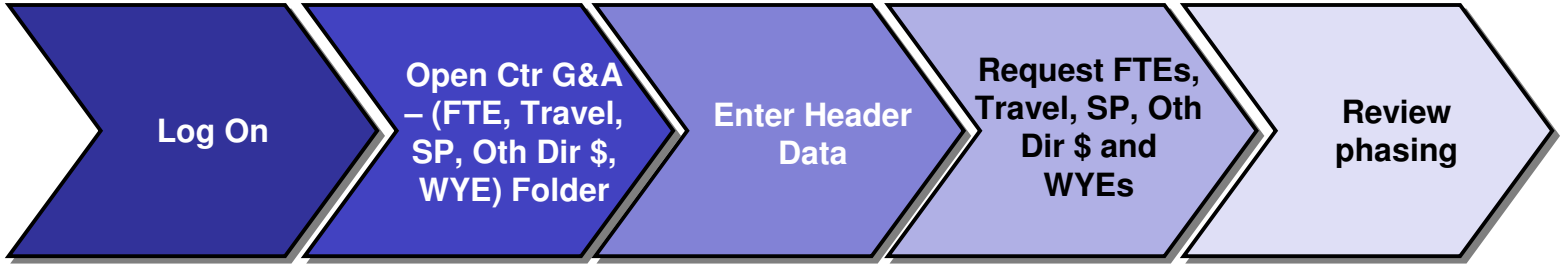
- Annual Planning **Input Layouts**:
  - FTE (Annual)
  - FTE (Annual) - Delta
  - Travel $ (Annual)
  - Travel $ (Annual) – Delta
  - SP Units (Annual)
  - SP Units (Annual) – Delta
  - Other Dir $ (Annual)
  - WYE (Annual)

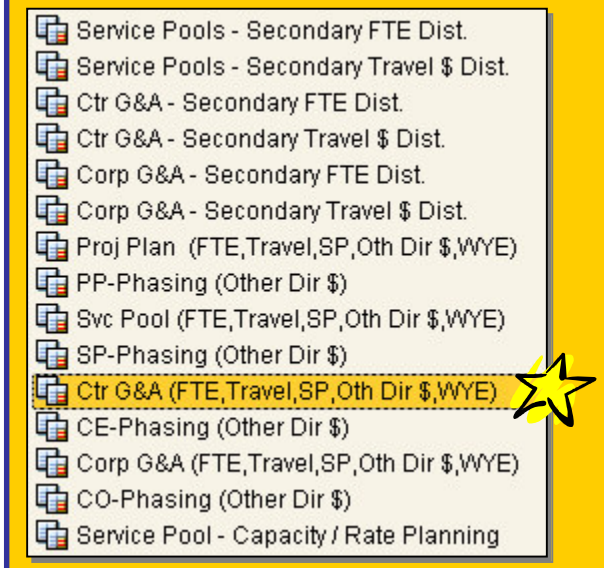
- Phasing Plan **Input Layouts**:
  - FTE (Phase)
  - FTE $ (Phase) – Incremental
  - FTE $ (Phase) – Cumulative
  - Travel $ (Phase)
  - Travel $ (Phase) – Incremental
  - Travel $ (Phase) – Cumulative
  - SP Units (Phase)
  - SP Units (Phase) – Delta
  - WYE (Phase)
  - User-Defined % (Phase)

- Annual Planning **Output Layouts**:
  - FTE and $ (Annual)
  - Travel $ (Annual)
  - SP Units and $ (Annual)
  - Other Dir $ (Annual)
  - WYE (Annual)

- Phasing Plan **Output Layouts**:
  - FTE and $ (Phase)
  - Travel $ (Phase)
  - SP Units and $ (Phase)
  - Other Dir $ (Phase)
  - WYE (Phase)

Process Flow: Bottom-Up G&A Requests





In the Ctr G&A (FTE, Travel, SP, Oth Dir $, WYE) folder, the Center G&A Requester requests FTEs, Travel $, Service Pool units, Other Direct $ and WYEs.

What goes in the Header Area?

Header Area

Name	Descriptn	Selection	Char. value ext.
Center	BA	24	Dryden Flight Research Center
Budget Year	Budget Year	2037	2037
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Center G&A	Cost center	2400CR	Resource Management Branch
Fiscal Year	Fiscal year	2035	2035

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 (A001-A006)
Center Version	The Center Version you are working in (C001-C005)
Center G&A	The Cost Center you are requesting for
Fiscal Year	The fiscal year you are working in (Budget Year -2)

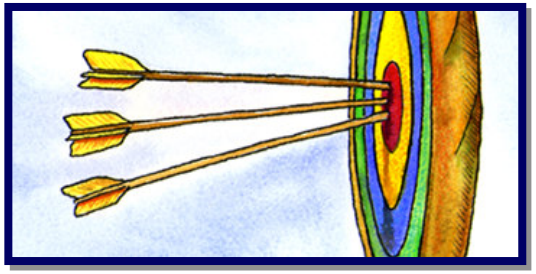
2) Click the Transfer Variables button to set the data you want to plan.

Requesting Annual Service Pool Units

- We will be performing several exercises in the system. First, I will review the steps you will be using to complete the exercises.

- Goal: Request annual Service Pool units from Cost Center.

- Why: One of the Center G&A Planner's responsibilities is to determine how many service pool units are needed to support the Center G&A functions. This allows the Planner to communicate to the Authorizer and Cost Center whether the authorized service pool units are sufficient or insufficient to meet Center G&A requirements.



What goes in the Input Layout?

SP Units (Annual) – Input Area

FTE (Annual) | FTE (Annual) - Delta | Travel $ (Annual) | Travel $ (Annual) - Delta | SP Units (Annual) | SP Units (Annual) - Delta | Other Dir $ (Annual)

Recompute | Execute Allocation | Prime (Req=Est) | Refresh SP Rate | Check Bus. Rules

Guide Type	OG Type	BA	NASA Org		Service pool	Sub-pool	UOM	SP Type	FY 2035 Units	FY 2036 Units	FY 2037 Units	FY 2038 Units	FY 20
INGUIDE	#	24	2400X2	ODIN	IT	GENERAL	EA	DSP	1.5	1.5	1.5	1.5	
INGUIDE	#	24	2401FD003	Fac Design Branch - Office	F&RS	OFFICE	FT2	ASP	1.0	1.0	1.0	1.0	

1) Click the SP Units (Annual) button SP Units (Annual)
2) Click the append row button to add a row.
3) Enter the following:

Guide Type Inguide or Overguide.
OG Type Overguide type: New Initiative, Augment, Price or (#) unassigned. You must use unassigned (#) if you selected inguide.
BA Business Area or Center that hosts the SP you are requesting use of.
NASA Org/Cost Center The directorate or division requesting Service Pool Units.
Service Pool The Service Pool you are requesting use of.
Sub Pool The SP Sub Pool you are requesting use of.
FY 20XX Units Enter SP Unit requests for two previous years, the budget year and four outyears. SP Units are measured in different units depending on the type of SP usage requested. (e.g. hours, square feet, headcount, etc.)

4) Click the Transfer Variables button to sort the row of data you entered and total the input area
5) Click the Recompute button to transfer data from the input area to the output area Recompute
6) Repeat for all of the Cost Centers you are responsible for.
7) Click the Save button to save your data

Allocating Service Pool Costs

SP Units (Annual) – Input Area

FTE (Annual) | FTE (Annual) - Delta | Travel $ (Annual) | Travel $ (Annual) - Delta | SP Units (Annual) | SP Units (Annual) - Delta | Other Dir $ (Annual)

Recompute | Execute Allocation | Prime (Req=Est) | Refresh SP Rate | Check Bus. Rules

Guide Type	OG Type	BA	NASA Org		Service pool	Sub-pool	UOM	SP Type	FY 2035 Units	FY 2036 Units	FY 2037 Units	FY 2038 Units	FY 203
INGUIDE	#	24	2400X2	ODIN	IT	GENERAL	EA	DSP	1.5	1.5	1.5	1.5	
INGUIDE	#	24	2401FD003	Fac Design Branch - Office	F&RS	OFFICE	FT2	ASP	1.0	1.0	1.0	1.0	

You need to click the Execute Allocation button in order to receive any allocation of service pool costs based upon your Cost Center's subscription to a service pool. These costs are comprised of FTEs, FTE $, Travel $, Other Direct $, and WYEs and are based on the percentage of the requested service pool's capacity being consumed by the service pool for which you are planning.

Where can I see the output?

SP Units and $ (Annual) – Output Layout

FTE and $ (Annual) | Travel $ (Annual) | SP Units and $ (Annual) | Other Dir $ (Annual) | WYE (Annual) | FTE and $ (Phase) | Travel $ (Phase) | SP Units a

Source	Detail	Guide Type	OG Type	BA	NASA Org		Service pool	Sub-pool	UOM	SP Type	FY 2035 Units	FY 2035 $	FY 2036 Units	FY 2036 $	FY
DIRECT	#	INGUIDE	#	24	2400X2	ODIN	IT	GENERAL	EA	DSP	1.5	0.000	1.5	0.000	
DIRECT	#	INGUIDE	#	24	2401FD003	Fac Design Branch - Office	F&RS	OFFICE	FT2	ASP	1.0	0.000	1.0	0.000	
DIRECT	#	INGUIDE	OG Type	BA	NASA Org	Total	Service pool	Sub-pool			2.5	0.000	2.5	0.000	
DIRECT	Detail	Guide Type	OG Type	BA	NASA Org	Total	Service pool	Sub-pool			2.5	0.000	2.5	0.000	
Source	Detail	Guide Type	OG Type	BA	NASA Org	Total	Service pool	Sub-pool			2.5	0.000	2.5	0.000	

1) Click the SP Units and $ (Annual) output button to view the output area.
2) The following information is shown:

Source	The name of the Service Pool or Direct if planned yourself.
Detail	The name of the Sub-pool
Guide Type	Inguide or Overguide
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned.
BA	Business Area or Center.
NASA Org/Cost Center	The directorate or division the FTEs are being requested for.
Service Pool	The Service Pool you are requesting use of.
Sub Pool	The SP Sub Pool you are requesting use of.
UOM	Unit of Measure for the requested SP.
SP Type	ASP (Allocated Service Pool) or DSP (Demand Service Pool)
FY 20XX Units	The number of SP Units requested.
FY 20XX $	The dollars associated with the SP (equal to SP Units X Rate).
Totals	The totals for all Cost Centers listed.

Requesting Travel $, FTEs, Other Direct $, & WYEs

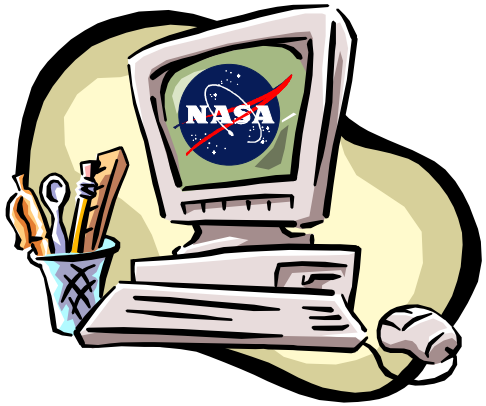
- The same process used to Request Service Pools is used to request
  - FTEs FTE (Annual)
  - Travel Dollars Travel $ (Annual)
  - Other Direct Dollars Other Dir $ (Annual)
  - WYEs WYE (Annual)
  - However the information needed in the input area may vary

- Each has an **output area** where request enter can be viewed

Demonstrations and Exercises

- **Annual Scenario:** You are a Center G&A Requester for the Ames Research Center (ARC). During Pre-POP and/or POP, you are responsible for requesting the civil service FTEs, travel, service pool, other direct cost, and work-year equivalent (WYE) annual requirements needed to support your Center G&A activities.

Using your exercise handout, go to
Center G&A Requester: Exercise 2a,2b,2c,2d,& 2e



Bottom-Up G&A Requests – Debrief

- The previous section demonstrated how to perform bottom-up Center G&A planning.
- The next section will demonstrate how Center G&A allocations are handled.

Center G&A Allocations

Center G&A Allocations Folder Overview

- Worksheet Input Layouts:
  - Project Allocation Worksheet
  - Corp G&A Allocation Worksheet

- Summary Input Layout:
  - Center G&A Total $ (Summary)

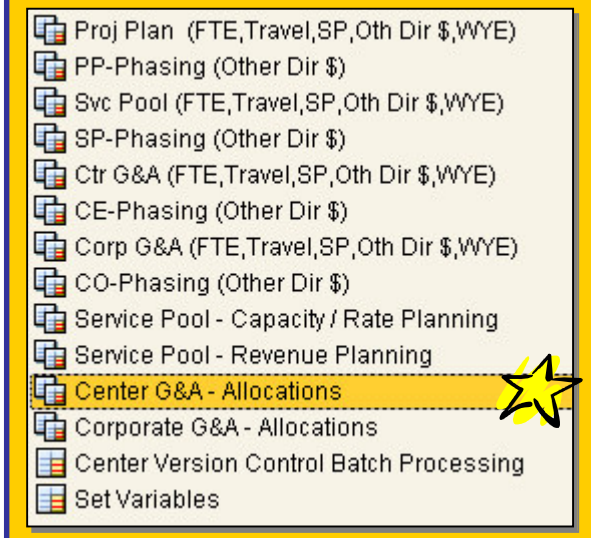
- Detail Input Layouts:
  - Center G&A Total $ (Detail)
  - Center G&A FTE (Detail)
  - Center G&A Travel $ (Detail)
  - Center G&A All Other $ (Detail)
  - Center G&A WYE (Detail)

While these layouts are in the Input Area, they are read-only.

- Summary Output Layouts:
  - Project OSWF (Summary)
  - Corp G&A OSWF (Summary)

- Detail Output Layouts:
  - Project (Detail)
  - Project Allocation (Detail)
  - Corp G&A (Detail)
  - Corp G&A Allocation (Detail)

Process Flow: Center G&A Allocations



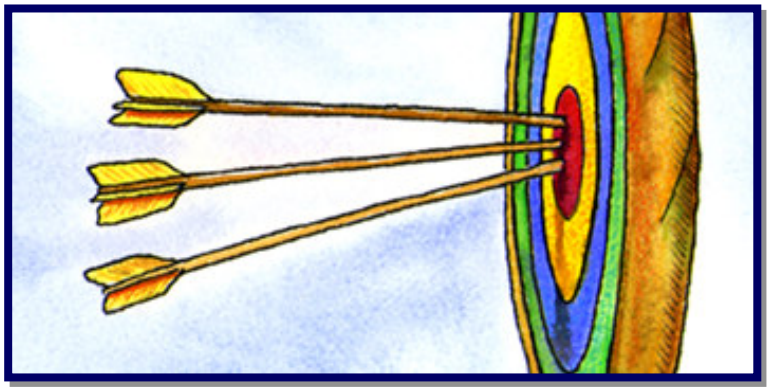
In the Center G&A – Allocation folder, the CBO performs Center G&A allocations back to Projects.

Center G&A Allocation

- We will be performing Center Allocation exercise. Before we begin the exercises we will review the steps used to Allocate Center G&A cost.

- Goal: Enter the appropriate characteristics in the Header Area, to define the data you want to allocate G&A for.

- Why: All planning data entered into the system is categorized and stored based on the Header Data combinations



What goes in the Header Area?

Header Area

Name	Descriptn	Selection	Char. value ext.
Center	BA	24	Dryden Flight Research Center
Budget Year	Budget Year	2035	2035
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Fiscal Year	Fiscal year	2037	2037

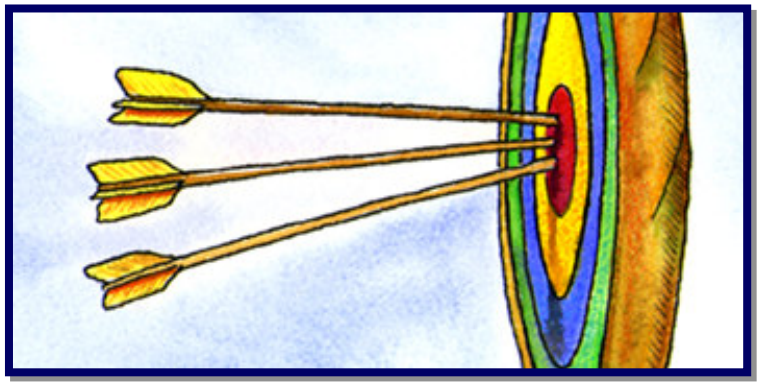
1) Enter the following in the Header Area to define the data that you want to plan:

Center	The two-digit Center number.
Budget Year	The year you are planning.
Agency Version	The Agency Version you are working in (A001-A006).
Center Version	The Center Version you are working in (C001-C005).
Fiscal Year	The fiscal year you are working in (Budget Year -2).

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

Reviewing Center G&A

- Goal: Review Center G&A cost build up by Total $ or by FTEs, Travel $ or All Other $. Also, view total Center G&A WYE headcount.
- Why: The Center G&A Administrator can review the content of the Center G&A dollars for accuracy and completeness before executing the allocation to the Projects and Corporate G&A.



What's in the Input Layout?
Center G&A Total $ (Summary)

Center G&A Total $ (Summary) – Input Area

Project Allocation Worksheet | Corp G&A Allocation Worksheet | Center G&A Total $ (Summary) | Center G&A Total $

Cost center		WYEs	FTEs	FTE $	Travel $	Other Direct $	Total $
62CD50	GOVT & COMMUNITY RELATIONS DEPT	2.0	12.0	0.000	100.000	175.000	275.000
62CD60	EDUCATION PROGRAMS DEPT	57.0	144.4	0.000	35.000	175.000	210.000
62PS50	SPACE TRANSPORTATION SUPPORT DEPT	3.0	26.0	0.000	200.000	300.000	500.000
62RS50	Institutional Operations Office	14.3	26.7	3,337.012	76.402	3,297.624	6,711.037
62RS60	INTEG CUST SPT DPT	4.0	16.0	0.000	75.000	1,450.000	1,525.000
Cost center	Total	80.3	225.1	3,337.012	486.402	5,397.624	9,221.037

1) Click the Center G&A Total $ (Summary) button to review the data.
2) Review the following:

Cost Center The Cost Center from which the G&A is being collected.
WYEs Number of requested WYEs.
FTEs Number of requested FTEs.
FTE $ The total requested cost of all FTEs (equal to # of FTE X Rate).
Travel $ The requested travel dollars.
Other Direct $ The costs associated with the Other Direct $.
Total $ Total G&A costs for the Cost Center (FTE $ + Travel $ + Other Direct $).

Summary of Layouts Available

Detailed Layouts- Input

Refresh G&A Costs | Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore

Refresh Allocation Worksheet | Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore | Center G&A Tra

r G&A Total $ (Summary) | Center G&A Total $ (Detail) | Center G&A FTE (Detail) | Center G&A Travel $ (Detail) | Center G&A All Other $ (Detail) | Center G&A WYE (Detail)

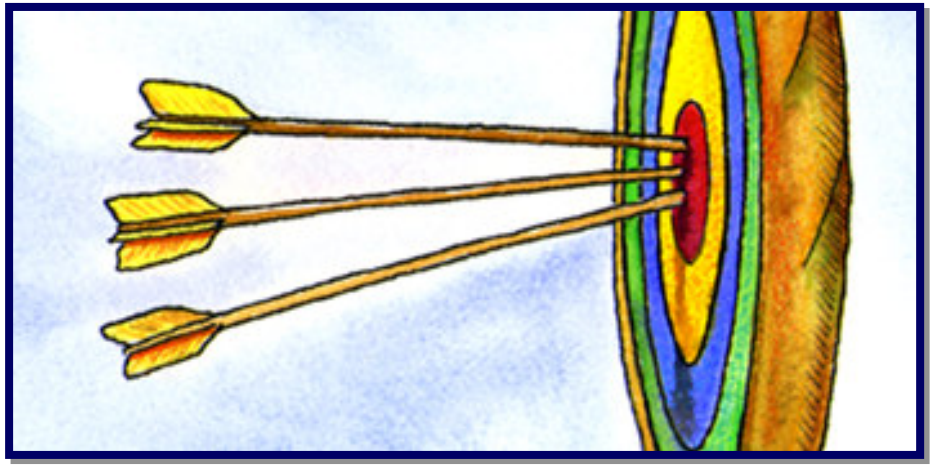
Cost center		Corp Total OSWF	Corp % of Total	Ctr G&A $ Distrib @ 100%	Ctr G&A $ Distrib @ UD	Ctr G&A UD Distrib Delta	Ctr G&A
2202000002	CFO SSC	2.0	0.20	2.017	2.017	0.000	
2205000002	SSC - MISSION SAFETY ASSURANCE	13.0	1.33	13.113	13.113	0.000	
2205000003	ODIN	10.0	1.02	10.087	10.087	0.000	
2206000004	PRACA (ISO)	6.0	0.61	6.043	6.043	0.000	

Detailed Layouts expand on the Center G&A Total $ (Summary) Layouts and provide more specific information regarding Center G&A costs

Center G&A Total $ (Detail)	**Total Center G&A WYE and FTE headcount, Dollars amount for FTEs, Travel and all other Direct $ & Total Center G&A Cost**
Center G&A FTE (Detail)	**FTE Headcount and FTE dollars associated with Center G&A**
Center G&A Travel $ (Detail)	**Travel Dollars needed for Center G&A**
Center G&A Other $ (Detail)	**Other Direct Dollars associated with each cost center collecting and cost center requested from**
Center G&A WYE (Detail)	**Center G&A Total WYE Headcount information including Source, Contractor, etc.**

Allocating Center G&A

- Goal: Allocate Center G&A dollars to Projects and Corporate G&A.
- Why: Agency Full Cost Guidance states that Center G&A dollars will be distributed to Projects and Corporate G&A based on on-site workforce.



What's in the Input Layout?
Project/Corporate G&A Allocation Worksheet

Project Allocation Worksheet – Input Area

Refresh Allocation Worksheet | Version Control: Copy | Version Control: Draft Submit | Version Control: Final Submit | Version Control: Restore

Project Allocation Worksheet | Corp G&A Allocation Worksheet | Center G&A Total $ (Summary) | Center G&A Total $ (Detail) | Center G&A FTE (Detail) | Center G&A Tra

Recompute Deltas | Reset Ctr G&A $ Distrib @ UD | Execute Ctr G&A Allocation

Project Definition		Project Total OSWF	Project % of Total	Ctr G&A $ Distrib @ 100%	Ctr G&A $ Distrib @ UD	Ctr G&A UD Distrib Delta
22-336-33	Flight Systems	506.0	51.61	510.387	510.387	0.000
22-708-18	Oil Free Turbine Engine Technology	138.0	14.07	139.196	139.196	0.000
22-714-01	Systems Integration And Assessment	215.0	21.93	216.864	216.864	0.000
22-714-02	Nox Emissions Reduction	65.5	6.68	66.068	66.068	0.000

1) Click the Project/Corporate Allocation Worksheet button.
2) Click the Refresh Allocation Worksheet button to pull in allocation data
3) Click to Reset Ctr G&A $ Distrib @ UD button to populate the Ctr G&A $ Distrib @ UD column with the default allocation values for each Project Definition/Corp Cost Center
4) If you want to change G&A allocations for a project/corporate cost center, enter the following:
   Ctr G&A $ Distrib @ UD Changes the amount of Center G&A dollars the specified Project/Corp cost centers will receive. **NOTE:** 100% of G&A must be allocated. If one Project's/Corp Cost center portion is reduced, it must be distributed to other Projects/Corp Cost Centers.
5) Click the Recompute Deltas button to view any differences between distribution at 100% and distribution at user defined.
6) Once all allocations are determined, click the Execute Center G&A Allocation button to allocate the G&A.
7) Click the Save button to save your data.

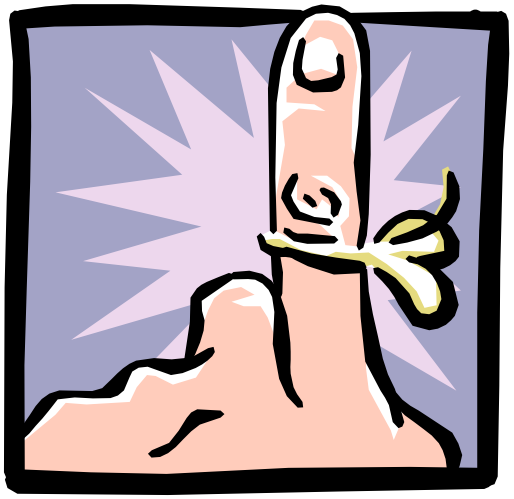
What's in the Input Layout?
Project/Corporate G&A Allocation Worksheet

Project Allocation Worksheet – Input Area

Project Allocation Worksheet | Corp G&A Allocation Worksheet | Center G&A Total $ (Summary) | Center G&A Total $ (Detail) | Center G&A FTE (Detail) | Center G&A T

Recompute Deltas | Reset Ctr G&A $ Distrib @ UD | Execute Ctr G&A Allocation

Project Definition		Project Total OSWF	Project % of Total	Ctr G&A $ Distrib @ 100%	Ctr G&A $ Distrib @ UD	Ctr G&A UD Distrib Delta	Ctr G&A $ Distrib Result
62-242-86	62-242-86	302.0	11.38	1,049.614	0.000	-1,049.614	0.000
62-376-10	62-376-10	608.5	22.94	2,114.940	0.000	-2,114.940	0.000



Once you are satisfied with the allocation amounts that are to be distributed to each Project Definition, click the Execute Ctr G&A Allocation [Execute Ctr G&A Allocation] button to distribute Center G&A to the projects. Center G&A is distributed based on a Project's/Corporate Cost Center's percentage of a Center's on-site workforce (FTEs + WYEs).

Where can I see the output?

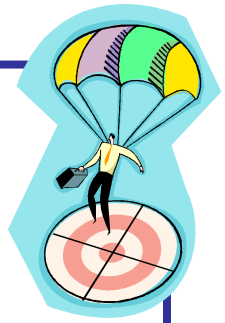
Center G&A Allocation folder – Output Layout

Project OSWF (Summary) | Project (Detail) | Project Allocation (Detail) | Corp G&A OSWF (Summary) | Corp G&A (Detail) | Corp G&A Allocation (Detail)

Project Definition		FY 2003 FTEs	FY 2003 WYEs	Total 2003 OSWF	% of Total OSWF
62-242-86	62-242-86	125.0	177.0	302.0	11.38
62-376-10	62-376-10	391.0	217.5	608.5	22.94
62-455-40	62-455-40	350.0	411.0	761.0	28.68
62-721-26	62-721-26	250.0	218.0	468.0	17.64
62-755-11	62-755-11	88.0	8.0	96.0	3.62
6210-777-20	6210-777-20	80.0	105.0	185.0	6.97

- Each of the output buttons provide a different set of detail on the Center G&A. This allows users to “slice and dice” the data. Project OSWF (Summary) is shown as an example.

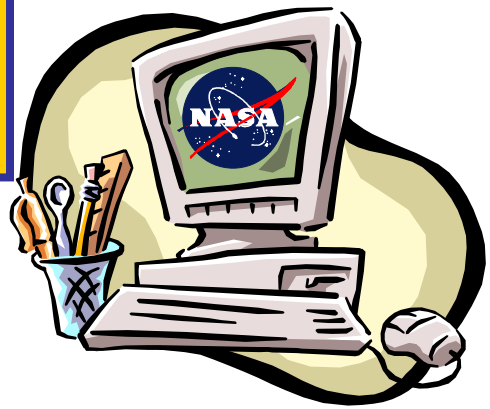
Note: Unlike in other folders, the output buttons in Center G&A Allocations folder do not correspond with the buttons in the input area. Meaning, you do not need to view a particular input area before selecting your output button.



Demonstrations and Exercises

- **Annual Scenario:** You are a Center G&A Administrator for the Ames Research Center (ARC). During Pre-POP and/or POP, you are responsible for assuring the completeness of the Center G&A content and allocating the final amount to the center projects.

Using your exercise handout, go to
Center G&A Allocations: Exercise 3



Center G&A Allocations – Debrief

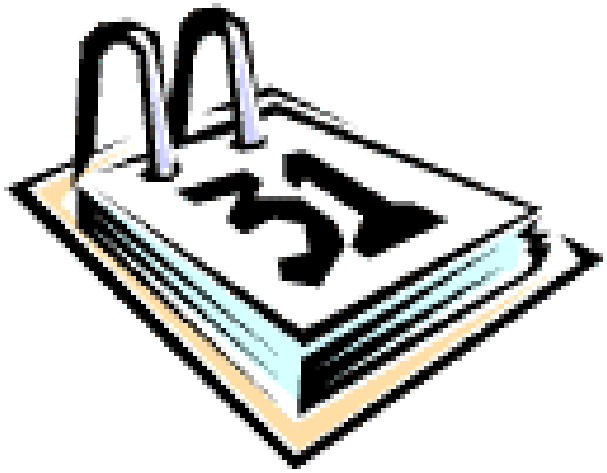
- The previous section demonstrated how to perform Center G&A allocations.
- The next section will demonstrate how phasing is conducted.

Phasing

Phasing

- During initial and mid-year phasing plan creation, phasing occurs for projects, service pools, Center G&A and Corporate G&A using manual entry or algorithms built into the system.

- Phasing Topics:
  - How to phase
  - Phasing algorithms
  - Incremental and cumulative phasing



Phasing Algorithms

- **Straight-Line:** Straight-Line
  - Uses the same percentage in each month (Total / 12)
- **User-Defined:** User-Defined
  - Allows you to define a series of percentages to apply to the amounts for each month
- **Ramp Up:** Ramp-Up (Only Available for WYEs,Travel, & SP)
  - Amount *increases* each month & average equals the annual planned
- **Ramp Down:** Ramp-Down (Only Available for WYEs,Travel, & SP)
  - Amount *decreases* each month & average equals the annual planned
- **Manual:** FTE (Phase)
  - Manually enter the numbers Cost Center by Cost Center.
- **Cumulative Phasing** FTE $ (Phase) - Cumulative
  - Carries in prior year money available monthly
- **Incremental Phasing** FTE $ (Phase) - Incremental
  - Shows the entire amount of money carried in from prior years that has been phased up to the current month

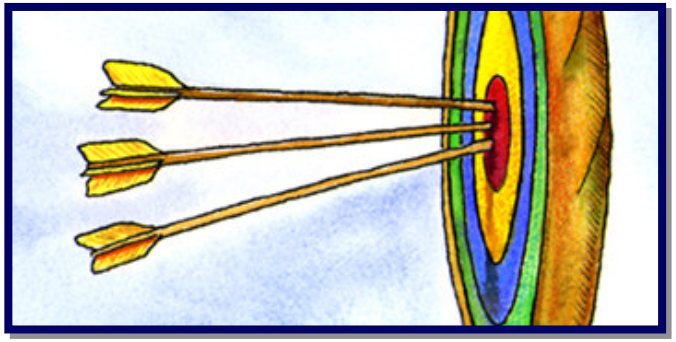
- Each button, if used, applies the same algorithm to all of the Cost Center that were planned during the annual planning.

Phasing Goal

- We will be doing exercises pertaining to Phasing. Therefore, we will review the steps needed to phase.

- Goal: Use the phasing input areas to phase Center G&A requests for FTEs, FTE $, Travel $, Service Pool Units, Other Direct Costs, and WYEs.

- Why: The Center G&A Planner is responsible for developing the phasing plan that will be used in the execution year to track monthly status and variances.



Header Data for Phasing

Center G&A Requester Header Area

Name	Descriptn	Selection	Char. value ext.
Center	BA	24	Dryden Flight Research Center
Budget Year	Budget Year	2037	2037
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Center G&A	Cost center	2460CR003	Resources Mgt Branch - G&A
Fiscal Year	Fiscal year	2035	2035

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).
Center G&A	The Cost Center making the request.
Fiscal Year	The fiscal year you are phasing.

FTE (Phase) Input Area

FTE (Phase) – Input Area

Planning Folder Edit Goto System Help

Execute Ctr G&A (FTE,Travel,SP,Oth Dir $,WYE)

Name	Descriptn	Selection	Char. value ext.	Selection	CharVal...
Center	BA	24	Dryden Flight Research Center		
Budget Year	Budget Year	2037	2037		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Center G&A	Cost center	2460CR003	Resources Mgt Branch - G&A		
Fiscal Year	Fiscal year	2035	2035		

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

WYE (Annual) | FTE (Phase) | FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative | Travel $ (Phase) | Travel $ (Phase) - Incremental | Travel $ (Phase) - C

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

Guide Type	OG Type	NASA Org		LC	OCT - FTEs	NOV - FTEs	DEC - FTEs	JAN - FTEs	FEB - FTEs	MAR - FTEs	APR - FTEs	MAY - FTEs
INGUIDE	#	2400MM	Research Systems Directorate	#	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7
INGUIDE	#	2400OO	Flight Operations Directorate	#	0.5	0.5	0.5	0.5	0.5	0.5	0.5	
INGUIDE	OG Type	NASA Org	Total	LC	1.2	1.2	1.2	1.2	1.2	1.2	1.2	
Guide Type	OG Type	NASA Org	Total	LC	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1

Input Area

FTE and $ (Annual) | Travel $ (Annual) | SP Units and $ (Annual) | Other Dir $ (Annual) | WYE (Annual) | FTE and $ (Phase) | Travel $ (Phase) | SP Units a

Source	Detail	Guide Type	OG Type	NASA Org		LC	FY 2035 FTEs	FY 2035 $	FY 2036 FTEs	FY 2036 $	FY 2037 FTEs	FY 2037
DIRECT	#	INGUIDE	#	2400MM	Research Systems Directorate	#	0.7	0.000	0.7	0.000	0.7	0.00
DIRECT	#	INGUIDE	#	2400OO	Flight Operations Directorate	#	0.5	0.000	0.5	0.000	0.5	0.00
DIRECT	#	INGUIDE	OG Type	NASA Org	Total	LC	1.2	0.000	1.2	0.000	1.2	0.00

Straight-Line Phasing of FTEs

Straight-Line FTE (Phase) – Input Area

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

YE (Annual) | FTE (Phase) | FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative | Travel $ (Phase) | Travel $ (Phase) - Incremental | Travel $ (Phase) - C

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

Guide Type	OG Type	NASA Org		LC	OCT - FTEs	NOV - FTEs	DEC - FTEs	JAN - FTEs	FEB - FTEs	MAR - FTEs	APR - FTEs	MAY - FTEs
INGUIDE	#	2400MM	Research Systems Directorate	#	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7
INGUIDE	#	2400OO	Flight Operations Directorate	#	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
INGUIDE	OG Type	NASA Org	Total	LC	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2
Guide Type	OG Type	NASA Org	Total	LC	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2

1) In the Header Area, ensure the fiscal year is set the year you want to plan.
2) Select the appropriate FTE (Phase) input layout.
3) Click the Straight-Line button. All of the FTEs you have planned 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 you entered.
6) Click the Recompute button to total your rows and move the data to the output area
7) View the resulting output in the FTE and $ (Phase) output area.
8) Click the save button when complete.

Ramp Up & Ramp Down

Travel $ (Phase) – Input Area

YE (Annual) | FTE (Phase) | FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative | Travel $ (Phase) | Travel $ (Phase) - Incremental | Travel $ (Phase) - C

Recompute | Straight-Line | Ramp-Up | Ramp-Down | User-Defined | Check Bus. Rules

Guide Type	OG Type	NASA Org		OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total 2003 $
INGUIDE	#	62PS01	PROCUREMENT	16.667	16.667	16.667	16.667	16.667	16.667	16.667	16.667	16.667	16.667	16.667	16.667	200.000
INGUIDE	OG Type	NASA Org	Total	16.667	16.667	16.667	16.667	16.667	16.667	16.667	16.667	16.667	16.667	16.667	16.667	200.000
Guide Type	OG Type	NASA Org	Total	16.667	16.667	16.667	16.667	16.667	16.667	16.667	16.667	16.667	16.667	16.667	16.667	200.000

1) In the Header Area, ensure the fiscal year is set the year you want to plan.
2) Select the appropriate input layout.
3) Click the Ramp Up or Ramp Down.
4) Make any adjustments to the numbers.
5) Click the Transfer Variables button to sort the data you entered.
6) Click the Recompute button to total your rows and move the data to the output area
7) View the resulting output in the output area.
8) Click the save button when complete.

User-Defined Phasing of FTEs

User-Defined % (Phase) – Input Area

ase) | Travel $ (Phase) - Incremental | Travel $ (Phase) - Cumulative | SP Units (Phase) | SP Units (Phase) - Delta | WYE (Phase) | User-Defined % (Phase)

	OCT - %	NOV - %	DEC - %	JAN - %	FEB - %	MAR - %	APR - %	MAY - %	JUN - %	JUL - %	AUG - %	SEP - %
Phasing: FTE	120	120	120	120	120	120	80	80	80	80	80	80
Phasing: Travel	120	120	120	120	120	120	80	80	80	80	80	80
Phasing: Svc Pools	120	120	120	120	120	120	80	80	80	80	80	80
Phasing: WYE	120	120	120	120	120	120	80	80	80	80	80	80

1) In the Header Area, ensure the fiscal year is set to the fiscal year you want to phase.
2) In the input area, scroll to the right until you see the User-Defined % (Phase) button.
3) Enter the percentages you want to phase with. (The average of the cells in a row must add up to 100).
(continued)

Note: Unlike most of the other input areas, the User-Defined % (Phase) input area does not require you to click either the Transfer Variables button or the Recompute button. Recompute **Do not worry, your data will be saved.**

User-Defined Phasing of FTEs

User Defined FTE (Phase) – Input and Output Areas

WYE (Annual) | FTE (Phase) | FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative | Travel $ (Phase) | Travel $ (Phase) - Incremental | Travel $ (Phase) - C

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

User-Defined

Guide Type	OG Type	NASA Org		LC	OCT - FTEs	NOV - FTEs	DEC - FTEs	JAN - FTEs	FEB - FTEs	MAR - FTEs	APR - FTEs	MAY - FTEs
INGUIDE	#	2400MM	Research Systems Directorate	#	0.8	0.8	0.8	0.8	0.8	0.8	0.6	0.6
INGUIDE	#	2400OO	Flight Operations Directorate	#	0.6	0.6	0.6	0.6	0.6	0.6	0.4	0.4
INGUIDE	OG Type	NASA Org	Total	LC	1.4	1.4	1.4	1.4	1.4	1.4	1.0	1.0
Guide Type	OG Type	NASA Org	Total	LC	1.4	1.4	1.4	1.4	1.4	1.4	1.0	1.0

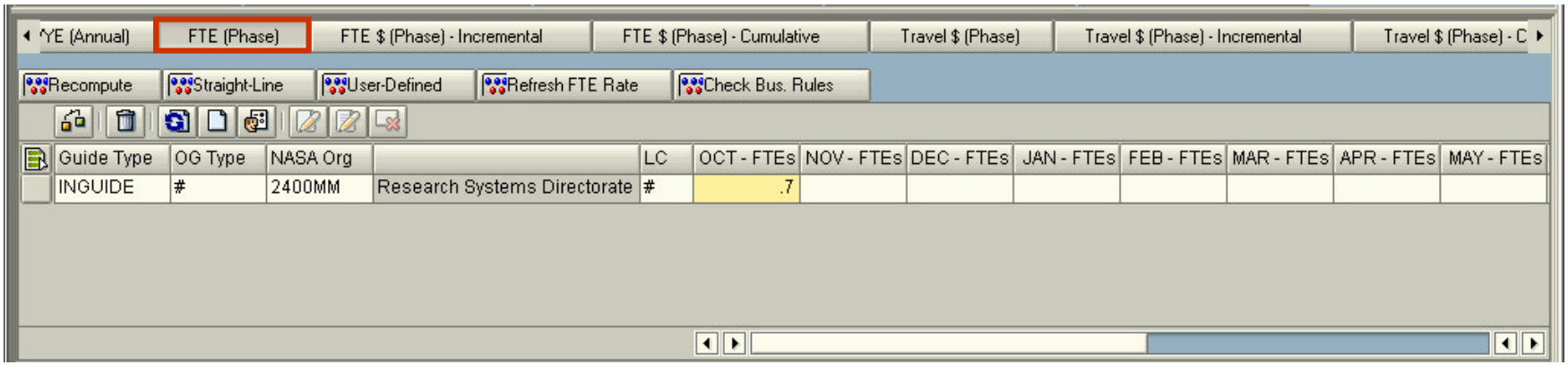
FTE and $ (Annual) | Travel $ (Annual) | SP Units and $ (Annual) | Other Dir $ (Annual) | WYE (Annual) | FTE and $ (Phase) | Travel $ (Phase) | SP Units a

Source	Detail	Guide Type	OG Type	NASA Org	LC	OCT - FTEs	OCT - $	NOV - FTEs	NOV - $	DEC - FTEs	DEC - $	JAN - FTEs	JAN - $	FEB - FTEs	FEB - $	MAR - FTEs	MAR -
DIRECT	#	INGUIDE	#	2400MM	#	0.8	0.000	0.8	0.000	0.8	0.000	0.8	0.000	0.8	0.000	0.8	0.00
DIRECT	#	INGUIDE	#	2400OO	#	0.6	0.000	0.6	0.000	0.6	0.000	0.6	0.000	0.6	0.000	0.6	0.00
DIRECT	#	INGUIDE	OG Type	NASA Org	LC	1.4	0.000	1.4	0.000	1.4	0.000	1.4	0.000	1.4	0.000	1.4	0.00
DIRECT	Detail	Guide Type	OG Type	NASA Org	LC	1.4	0.000	1.4	0.000	1.4	0.000	1.4	0.000	1.4	0.000	1.4	0.00
Source	Detail	Guide Type	OG Type	NASA Org	LC	1.4	0.000	1.4	0.000	1.4	0.000	1.4	0.000	1.4	0.000	1.4	0.00

4) In the input area, click the FTE (Phase) button.
5) In the lower-level of input area buttons, click the User Defined button to apply the percentages to the annual numbers.
6) View the resulting FTE output in the FTE and $ (Phase) output area.
7) Click the Save button when complete.

Manual Phasing of FTEs

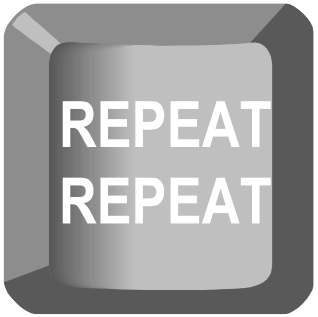
FTE (Phase) – Input



1) In the Header Area, ensure the fiscal year is set to year you want to phase.
2) In the input area, click on the FTE (Phase) button.
3) Click on the append a row button to add a row.
4) Enter the direct/other, guide type, overguide type, Cost Center, labor category, and the monthly numbers for the Cost Center.
5) Click the transfer variables button to sort the new row.
6) Repeat for each Cost Center.
7) Click the Save button when complete.

Phasing FTE$, Travel, SP, and WYEs

- The Phasing Algorithm buttons work the same way for each of the other areas not demonstrated
  - FTE $
  - Travel
  - Service Pools
  - WYEs



- Each has an output area where you can see the associated dollars by month.
  - FTE and $ (Phase)
  - Travel $ (Phase)
  - SP Units and $ (Phase)
  - Other Direct $ (Phase)
  - WYE (Phase)

Incremental and Cumulative Phasing

- The difference between Incremental vs. Cumulative Phasing layouts:
  - Incremental layout depicts the monthly phased $ for a single month in the month columns.
  - Cumulative layout depicts the year-to-date phased $ in the month columns.

Incremental

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total 2058 $
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	60.000	75.000	60.000	75.000	60.000	75.000	60.000	75.000	60.000	75.000	60.000	75.000	810.000

The same data presented differently

Cumulative

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total 2058 $
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	60.000	135.000	195.000	270.000	330.000	405.000	465.000	540.000	600.000	675.000	735.000	810.000	810.000

Phase $ - Incremental

FTE $ (Phase) - Incremental

YE (Annual) | FTE (Phase) | FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative | Travel $ (Phase) | Travel $ (Phase) - Incremental | T

Recompute

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total 2003 $	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	125.000	83.333	83.333	83.333	156.250	156.250	156.250	156.250	156.250	156.250	156.250	416.667	1,885.417	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	125.000	83.333	83.333	83.333	156.250	156.250	156.250	156.250	156.250	156.250	156.250	416.667	1,885.417	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) In the Header Area, ensure the fiscal year is set the year you want to plan.
2) In the input area, click the FTE $ (Phase) – Incremental button.
3) Enter Carry In values for:

OBS – Prior PY	Prior Program Year money available to obligate
COSTS – Prior PY	Obligated Prior Program Year money available to cost.
COSTS – Prev PY	The sum of all Obligated money available to cost (predating the Prior PY).
COSTS – TOTAL	Total of all your Program Year costs

Phase $ - Cumulative

FTE $ (Phase) - Cumulative

YE (Annual) | FTE (Phase) | FTE $ (Phase) - Incremental | FTE $ (Phase) - Cumulative | Travel $ (Phase) | Travel $ (Phase) - Incremental | Travel $ (Phase

Recompute

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total 2003 $	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	125.000	208.333	291.667	375.000	531.250	687.500	843.750	1,000.000	1,156.250	1,312.500	1,468.750	1,885.417	1,885.417	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	125.000	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	125.000
COSTS - Curr PY	0.000	125.000	208.333	291.667	375.000	531.250	687.500	843.750	1,000.000	1,156.250	1,312.500	1,468.750	1,885.417	1,885.417	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) In the Header Area, ensure the fiscal year is set the year you want to plan.
2) Select the FTE $ (Phase) – Cumulative input layout.
3) Enter Carry In values for:

OBS – Prior PY	Prior Program Year money available to obligate
COSTS – Prior PY	Obligated Prior Program Year money available to cost.
COSTS – Prev PY	The sum of all Obligated money available to cost (predating the Prior PY).
COSTS – TOTAL	Total of all your Program Year costs

Header Data for Other Direct $ Phasing

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)
Center G&A	The Cost Center you are phasing for
Fiscal Year	The fiscal year you are phasing
Guide Type	Inguide or Overguide (continued)
Overguide Type	Overguide type: New Initiative, Augment, Price or (#) unassigned. You must enter unassigned (#) if you selected inguide
Org/Cost Center	The Cost Center from which Other Dir $ are being requested
Fund Source	Fund Source
Contract	The contract number (or "#" if a contract number has not been assigned yet)
Commitment Item	Commitment Item

Incremental Phasing – Other Direct $

Incremental Phasing of Other Direct $ - Input Area

Incremental | Cumulative

Recompute | Phasing: Straight-Line | Check Bus. Rules

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total 2003 $	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	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	300.000	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	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	300.000	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) In the Header Area, ensure the fiscal year is set the year you want to plan.
2) Click the Incremental button.
3) Enter Carry In values for:

OBS – Prior PY — Prior Program Year money available to obligate

OBS – Curr PY — Current Program Year money available to obligate

COSTS – Prev PY — The sum of all Obligated money available to cost (predating the Prior PY).

(continued)

Incremental Phasing – Other Direct $

Incremental Phasing of Other Direct $ - Input Area

Incremental | Cumulative

Recompute | Phasing: Straight-Line | Check Bus. Rules

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total 2003 $	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	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	300.000	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	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	300.000	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 Carry In values for (continued):

COSTS – Prior PY Obligated Prior Program Year money available to cost.

COSTS – Curr PY Current year obligated money to be costed

COSTS – TOTAL Total of all your Program Year costs

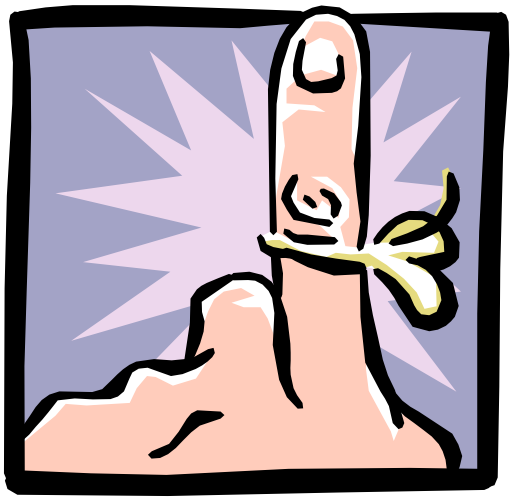
Cumulative Phasing – Other Direct $

Cumulative Phasing of Other Direct $ - Input Area

Incremental | Cumulative

Recompute | Check Bus. Rules

	Carry In	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	Total 2003 $	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	25.000	50.000	75.000	100.000	125.000	150.000	175.000	200.000	225.000	250.000	275.000	300.000	300.000	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	25.000	50.000	75.000	100.000	125.000	150.000	175.000	200.000	225.000	250.000	275.000	300.000	300.000	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

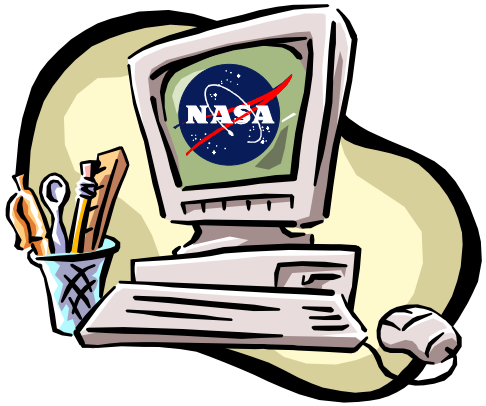


Reminder: Cumulative phased data is the same as Incremental phased data only presented differently. Therefore, we will not review Cumulative phased data during this course.

Demonstrations and Exercises

- **Annual Scenario:** You are a Center G&A Requester for the Ames Research Center (ARC). During Pre-POP and/or POP, you are responsible for requesting the civil service FTEs, travel, service pool, other direct cost, and work-year equivalent (WYE) annual requirements needed to support your Center G&A activities. You now want to phase these requests

Using your exercise handout, go to
Center G&A Phasing: Exercise 4



Phasing – Debrief

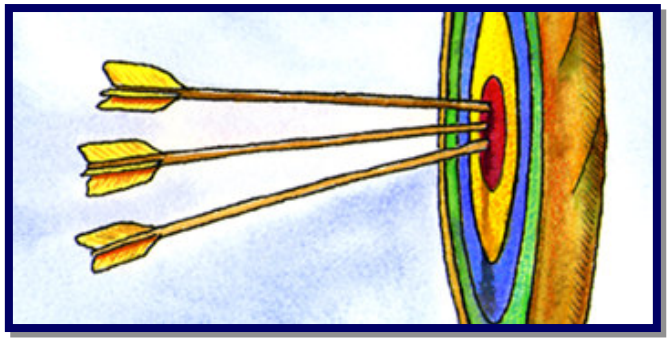
- The previous section demonstrated how phasing is performed.
- The next section will be demonstrate how to review reports.

Welcome to Budget Formulation

BW Report Viewer Overview

Course Objectives

- At the end of this course, individuals should be able to
  - Log into the Budget Formulation BW Reports website.
  - Define report parameters
  - Run Budget Formulation BW Reports
  - Manipulate report
  - Print reports



Topic 1

Logging In

Logging In

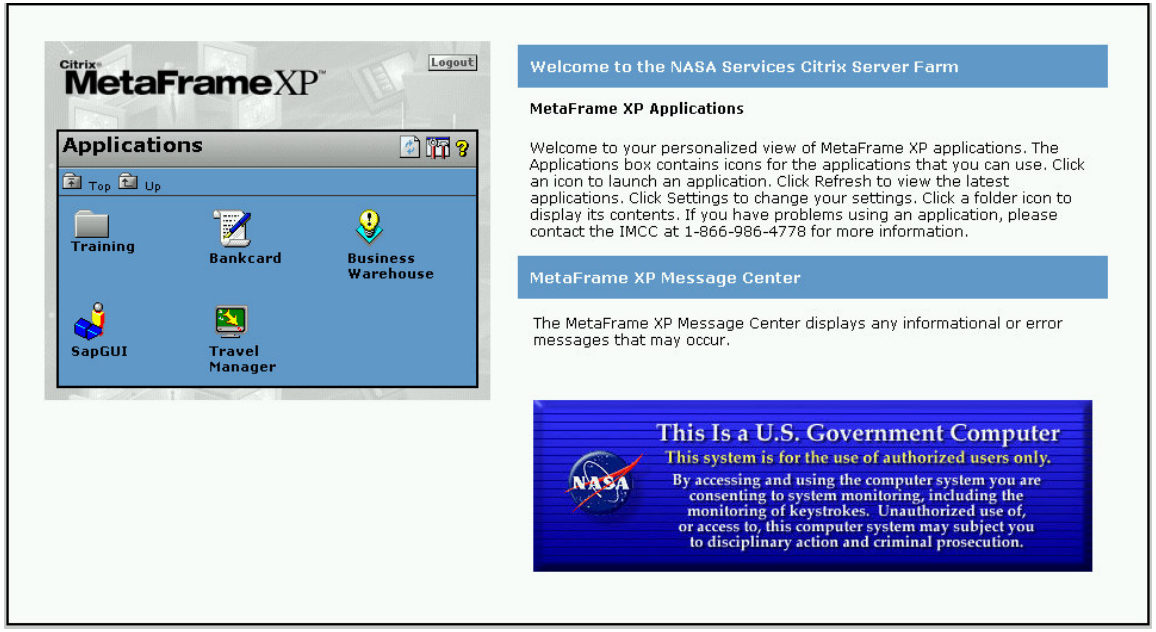
- **PC Users**
  - **Go To IE**
  - **URL:**
    - https://access.ifmp.nasa.gov
  - **Choose Budget Formulation**

Logging In

- Mac Users
- Logon to NISSU / Citrix
  - URL
    - https://utility.nasa.gov

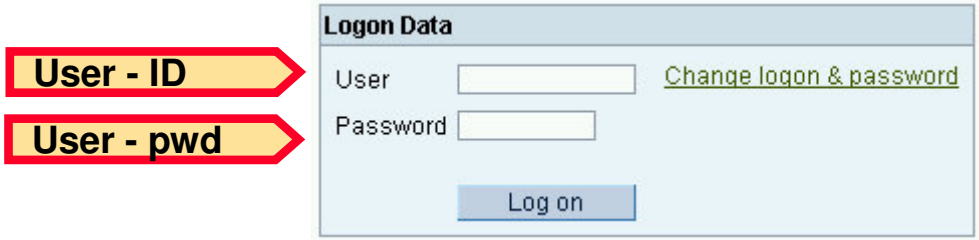
NISSU Logon

NISSU Application Options



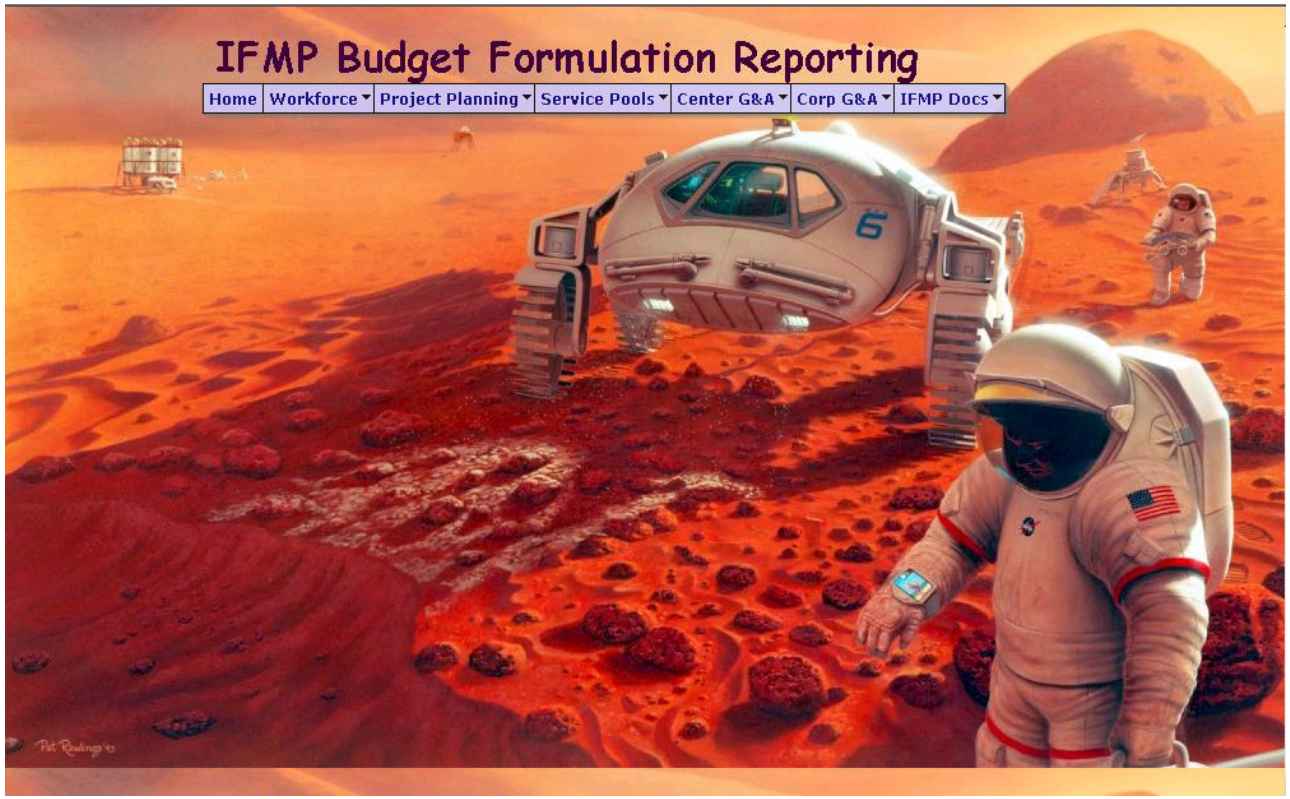
Logging In

- **You will be prompted to enter your User Name and Password**
  - **Enter your SEM User Name and Password**



Logging In

- **Main Menu of Budget Formulation Reports Portal**



Using the pull-down menus

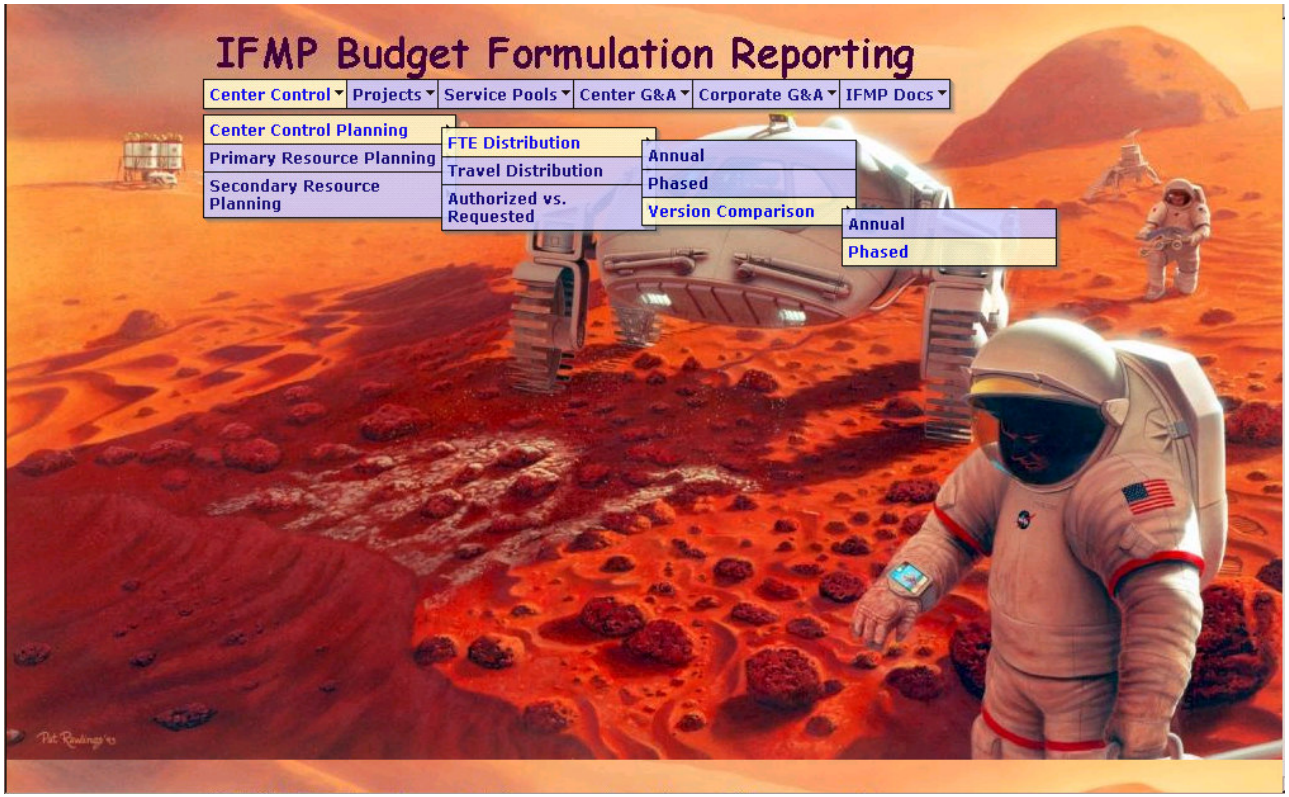
- **The lavender colored pull-down menus contain links to each of the reports in the system.**

Select a report by:

- Hover over a top level menu item until it turns yellow
- Click the yellow menu item
- A sub-menu will appear
- Navigate through the sub-menu by hovering over the menu options
- Click on the menu item of the report that you wish to run

Using the pull-down menus

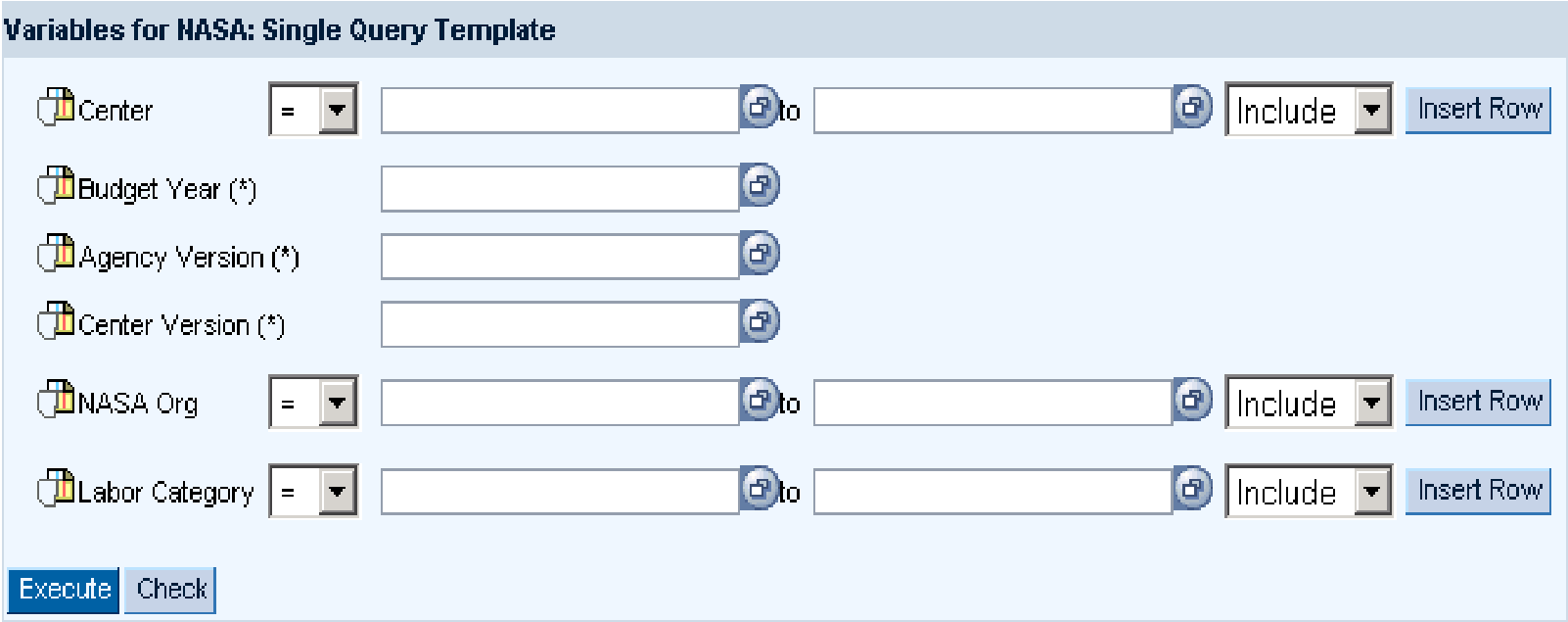
- **Pull Down Menu 'sample'**



Entering Variables

- Once you have selected a report, you will be prompted to enter variables for the report

- The report will use the variables you enter to determine which records should be displayed (just like the header area in planning folders)

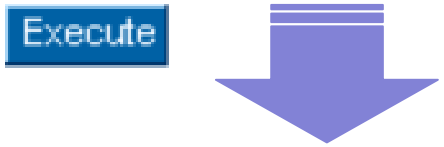


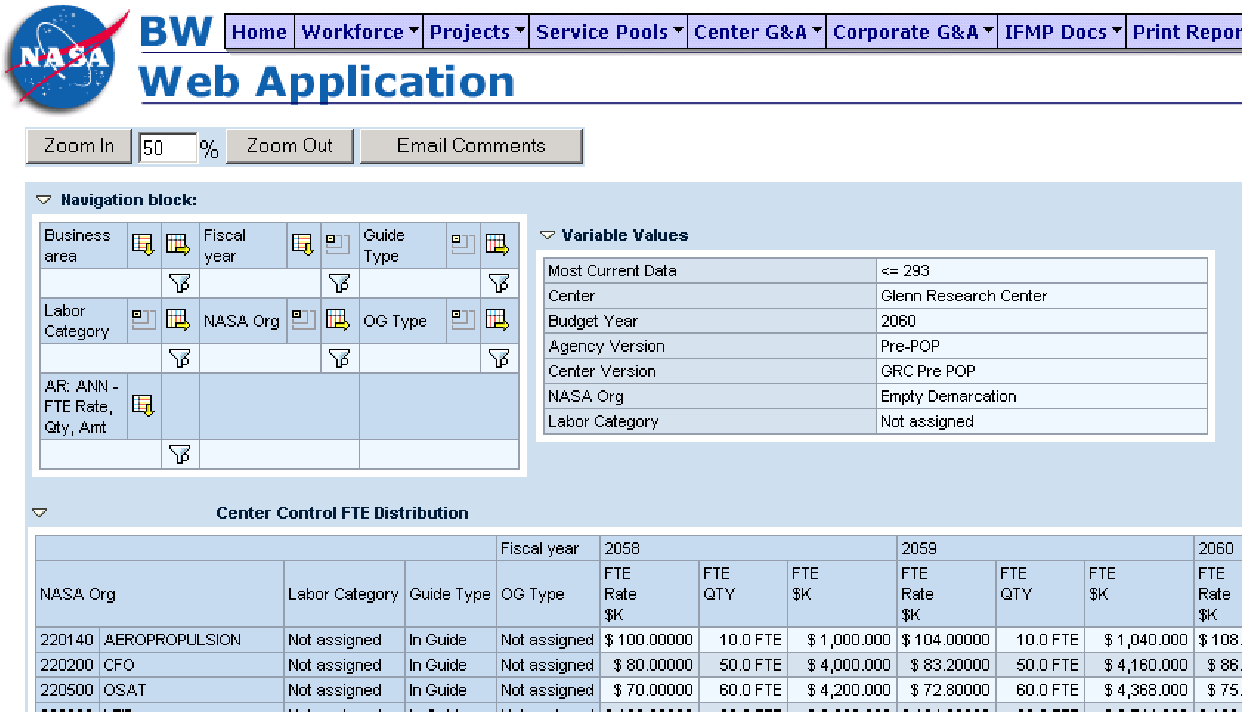
Topic 3

Viewing Reports

Viewing Reports

- **Once you have finished entering your variables and have clicked the "Execute" button, your report is displayed**





Screen Tour

- **Features of the navigation block**
  - Drill-down
  - Drill-across
  - Filter Value

- **Miscellaneous**
  - Click the icon to hide the Navigation block, Variables block, or the Data block of a report
  - Click the icon to show the Navigation block, Variables block, or the Data block of a report
  - Dollar amounts are expressed in thousands ($810,000)

Context Menu

- Some useful features of the context menu
  - Exporting data to Excel
  - Sorting rows
  - Bookmaking

Topic 4

Printing Reports

Printing Reports

- Reports can be formatted for printing so that
  - Page numbers appear
  - Screen colors are removed
  - Data fits better on a page
  - Headers and footers are included on each page

Printing Reports

- **To generate printable output**
  1. Run a report.
  2. Click the “Print Reports” menu item
  3. Click the “Print Table 1” sub-menu
  4. Adjust print settings
  5. Print.

Adjusting Print Settings

Preview Mode

Header Line

&IMG:Mime/Customer/Image | &TITLE& |

height (inches) 0.80 indent left (inches) 0.25 intent right (inches) 0.25

Data Area

padding top (inches) 0.25 indent left (inches) 0.25 indent right (inches) 0.25

Data Rows 38 Data Columns 0

Footer Line

&DATE& | &PAGE& of &PAGETOT& |

height (inches) 0.25 indent left (inches) 0.25 indent right (inches) 0.25

Select Print Orientation and Font

Landscape with 6pt Font

Enter Reset

End of Course Content

Version Control

Version Control

BUDGET CYCLE ACTIVITY	AGENCY VERSION	CENTER VERSION		CENTER SUBMIT VERSIONS	
Center Pre-POP	A001	C001	Baseline budget data carried over from previous year	CENTER DRAFT SUBMIT VERSION C000	CENTER SUBMIT VERSION TO HEADQUARTERS C999
		C002	Direct and Indirect rates established for Corporate and Center G&A, Service Pools, and Projects. Pools establish capacity.		
		C003	Project/Pool negotiations. Allocation of excess from Pools to Projects.		
		C004	Cost finalization and Final Center Director Approval.		
		C005	Code X area for strategic planning and "what-if" scenarios.		
Center POP	A002	C001	Baseline budget data carried over from previous year		
		C002	Direct and Indirect rates established for Corporate and Center G&A, Service Pools, and Projects. Pools establish capacity.		
		C003	Project/Pool negotiations. Allocation of excess from Pools to Projects.		
		C004	Cost finalization and Final Center Director Approval.		
		C005	Code X area for strategic planning and "what-if" scenarios.		
Enterprise POP	A003		Enterprise balancing; no center input unless enterprise requests changes or rebalancing required due to Enterprise modifications.		
Agency POP	A004		Agence balancing; no center input unless enterprise/Code B requests changes or rebalancing required due to modifications.		
OMB Submit	A005		No Center input		
Congressional Submit	A006		No Center input		

Business Rules & Version Control – Debrief

- In this section we discussed version control.
- Next section is the conclusion of the training course.

End of Course Review

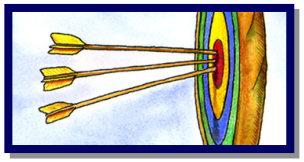
Review Objectives & Expectations

- Individuals should now be familiar with:

- ✓ The structure of Budget Formulation
- ✓ Distribution of G&A from Secondary Distribution to lowest planning levels
- ✓ Requesting G&A for FTEs, FTE $, Travel, Service Pools, WYE and Other Direct $
- ✓ Phasing for all G&A
- ✓ Performing G&A Allocations
- ✓ Access and manipulate the G&A reports

Training Course Feedback

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



Supplemental Material

Navigation Basics

Review of Icons

Checked/OK – Enters your data

Save – Saves your work

Back – Takes you back one screen

Exit – Exits you out of the system

Cancel – Cancels your data

Create New Session – Opens another session

Add to Favorites- Adds Transaction to favorites

Display/Change – Removes ability to edit the Header Characteristics.

All Values – Displace all available values

Hide Variable Values – Hides the header characteristics leaving the Input and Output Areas.

Refresh – Sends information and updates the users screen.

Delete – Deletes selected data row in the input area for planning

Create Row– Inserts a blank row in the input area for planning.

Insert in Personal List- Adds data to your drop down box

Check – Checks all of the fields in your planning area

Lead Column Settings – Allows the user to indicate what lead columns should be totaled and subtotaled.

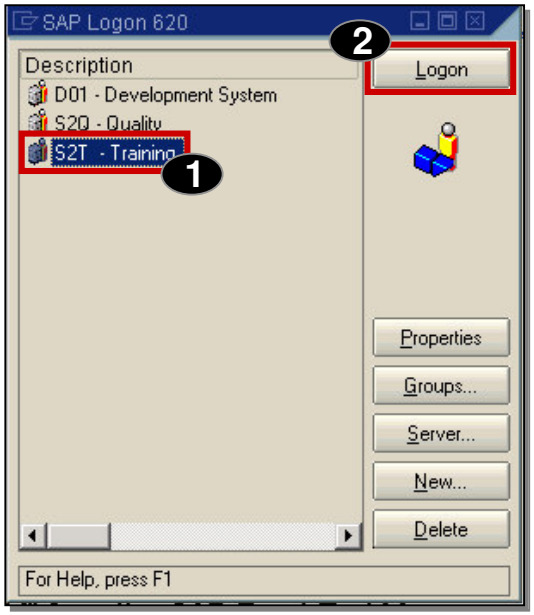
How Do I Log In to the BF Application?

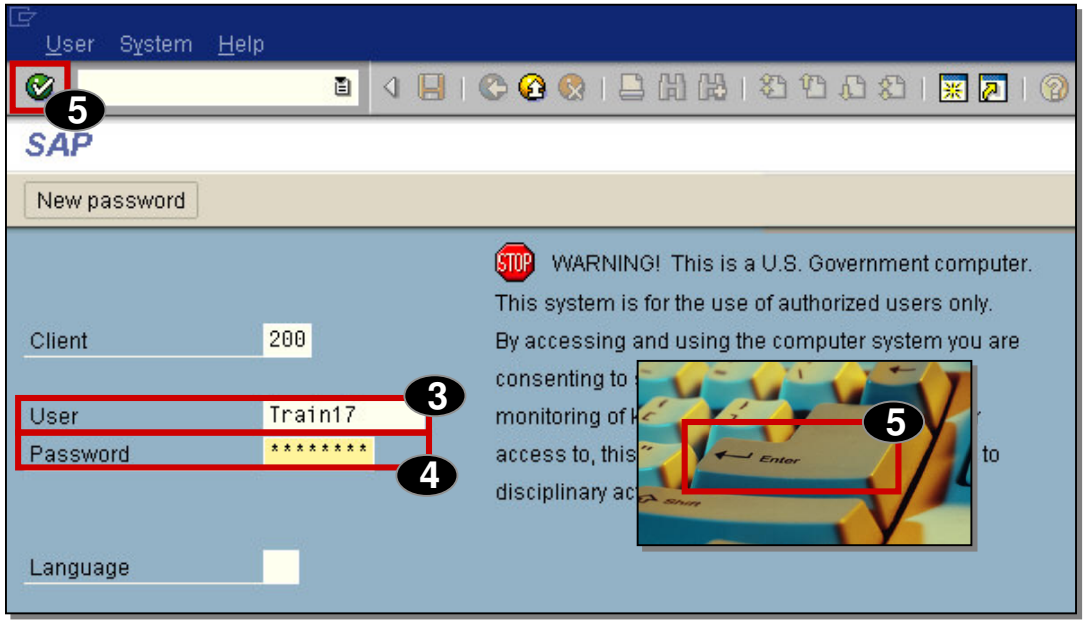
1. Select the ***Start*** button from the lower left-hand corner of your computer.
2. Select ***Programs*** from the Start menu.
3. Select ***SAP Front End*** from the extended menu.
4. Select ***SEM*** from the extended menu.
5. Select ***SAPLogon*** to log on to the BF Application.

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?



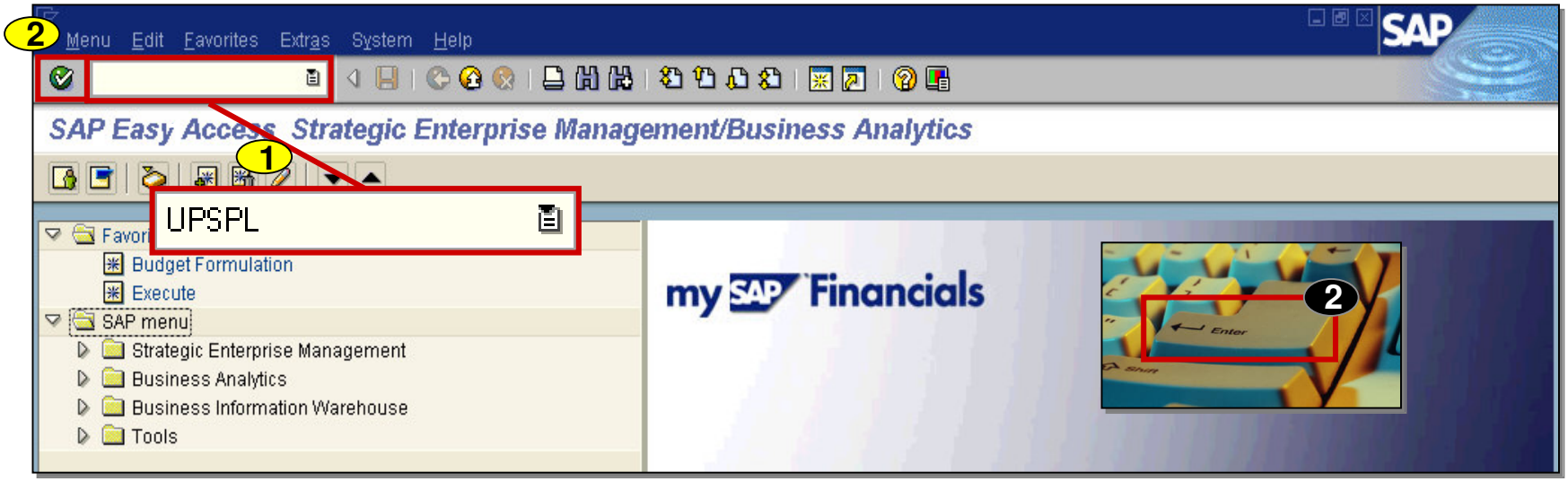


1. Select ***S2T – Training.***
2. Click the ***Logon*** button to obtain your logon screen.

Note: Client field should be 200

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?



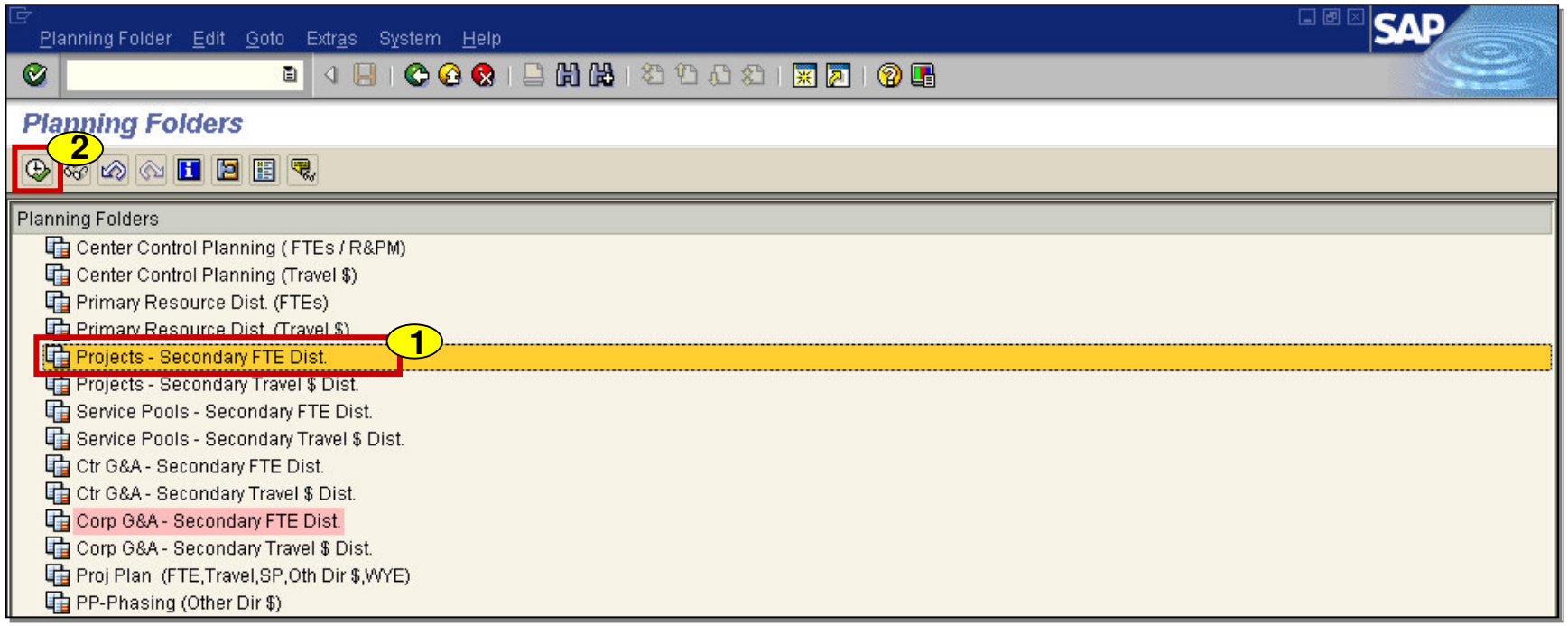
1. Type ***upspl*** in the blank field under the menu bar to go to a list of planning folders.
2. Click the ***Enter*** button or press the ***Enter key*** on your keyboard.

How Do I Create a Favorite?

1. Click the dropdown arrow for ***SAP Menu.***
2. Click the dropdown arrow for ***Strategic Enterprise Management.***
3. Click the dropdown arrow for ***Business Planning and Simulation.***
4. Click the dropdown arrow for ***Cross–Application Planning.***
5. Click the dropdown arrow for ***Planning Folders.***
6. Select ***Execute***.

(continued)

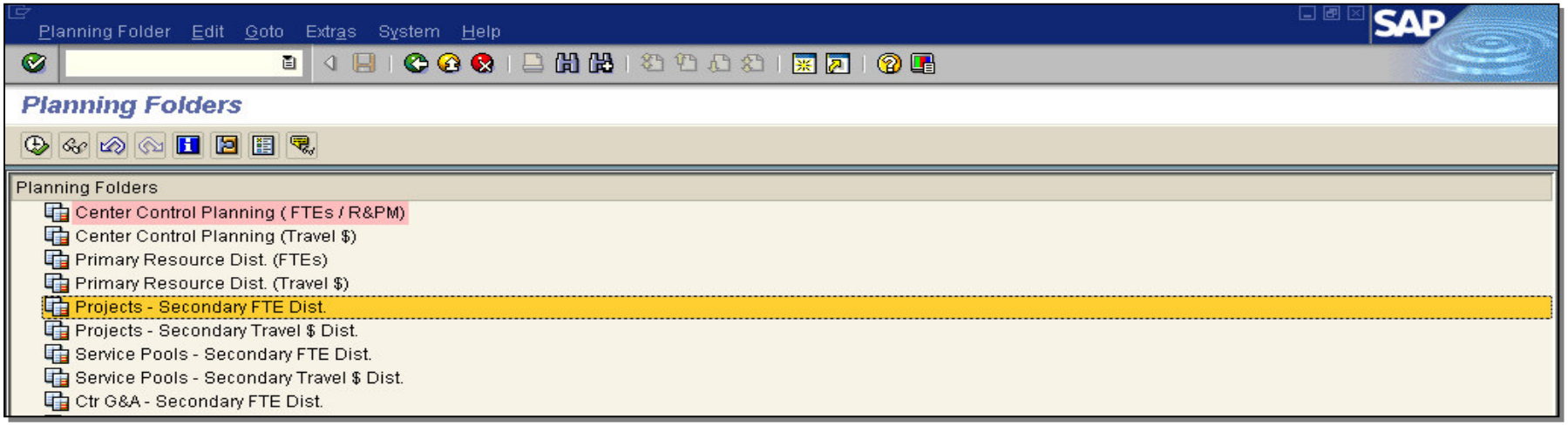
How Do I Access a Planning Folder?



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.

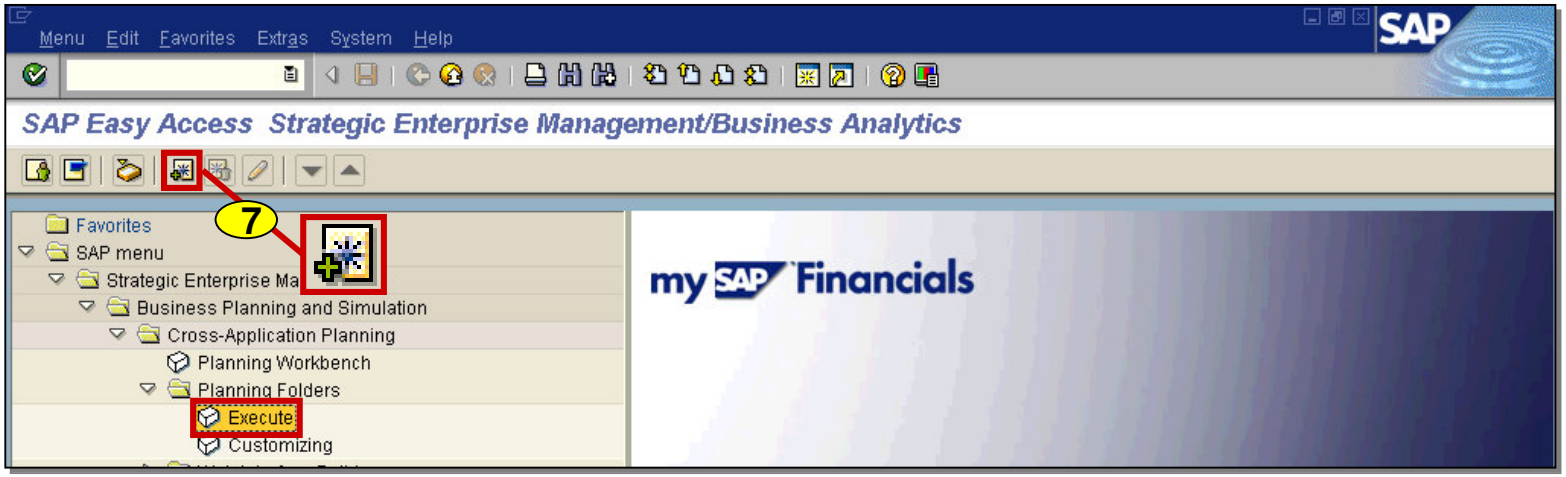
What Do the Planning Folder Colors Mean?



- 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.

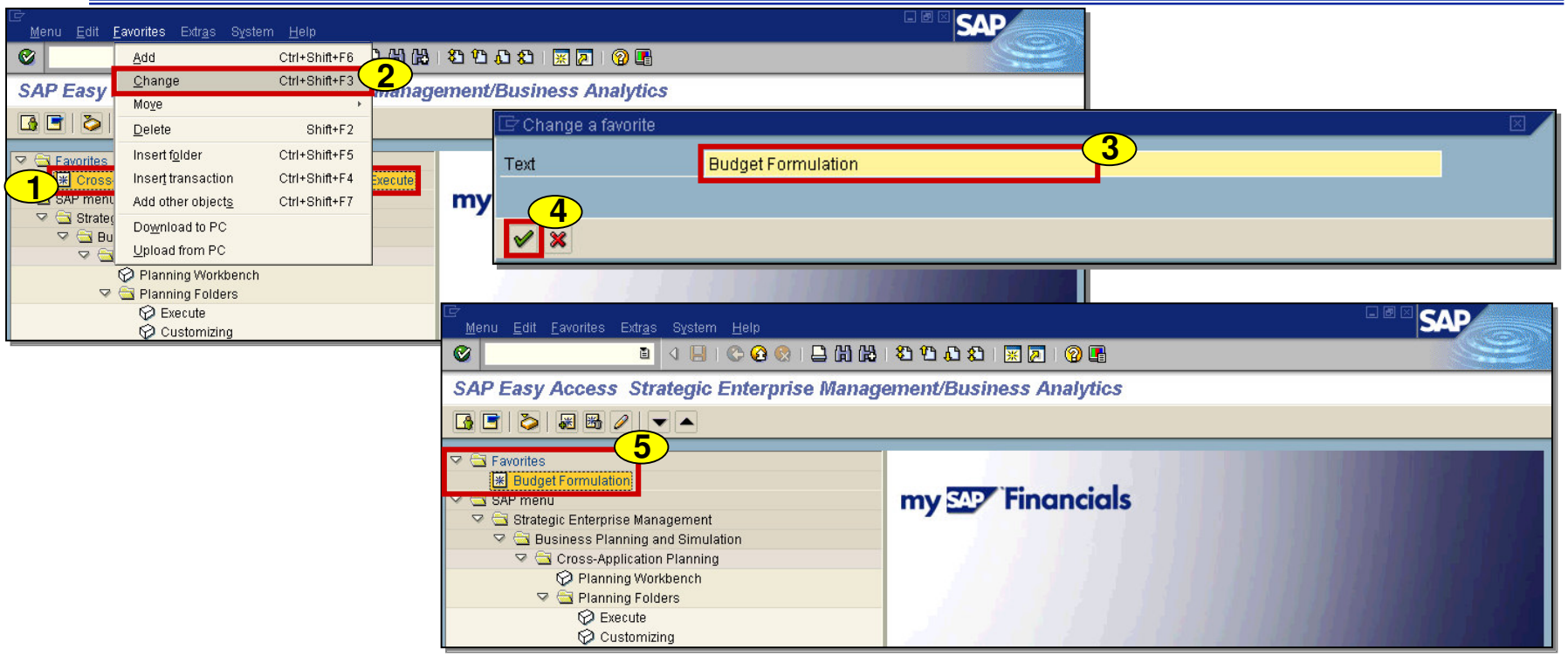
How Do I Create a Favorite?



7 With ***Execute*** highlighted, click the ***Add Favorites*** button.

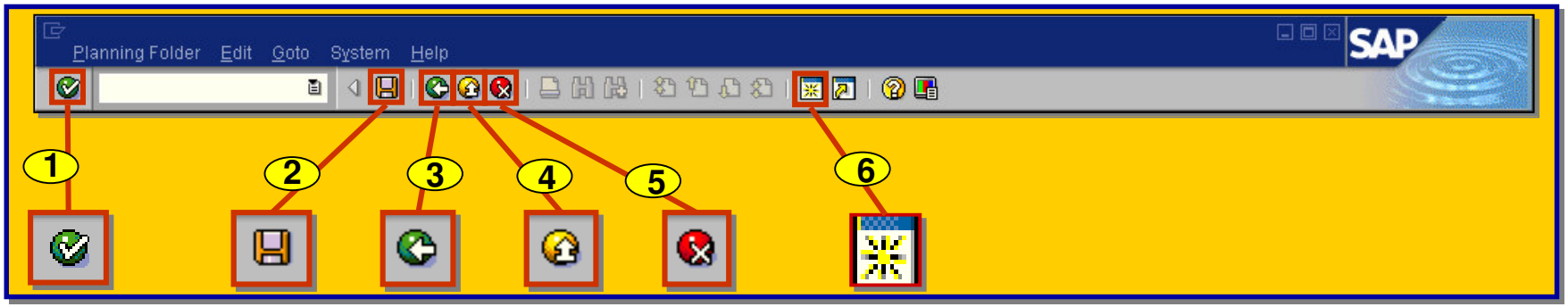
NOTE: This will create your Budget Formulation favorite in the Favorites folder. You can use this favorite to link directly to the Planning Folder Menu page.

How Do I Rename a Favorite?



1. Select the Favorite you want to rename.
2. From the Favorite menu, select ***Change***. A message box will appear prompting you to enter the name of your Favorite.
3. Enter the new name of the Favorite in the ***Text*** field.
4. Click the ***Green Checkmark*** button.
5. Your Favorite will be renamed.

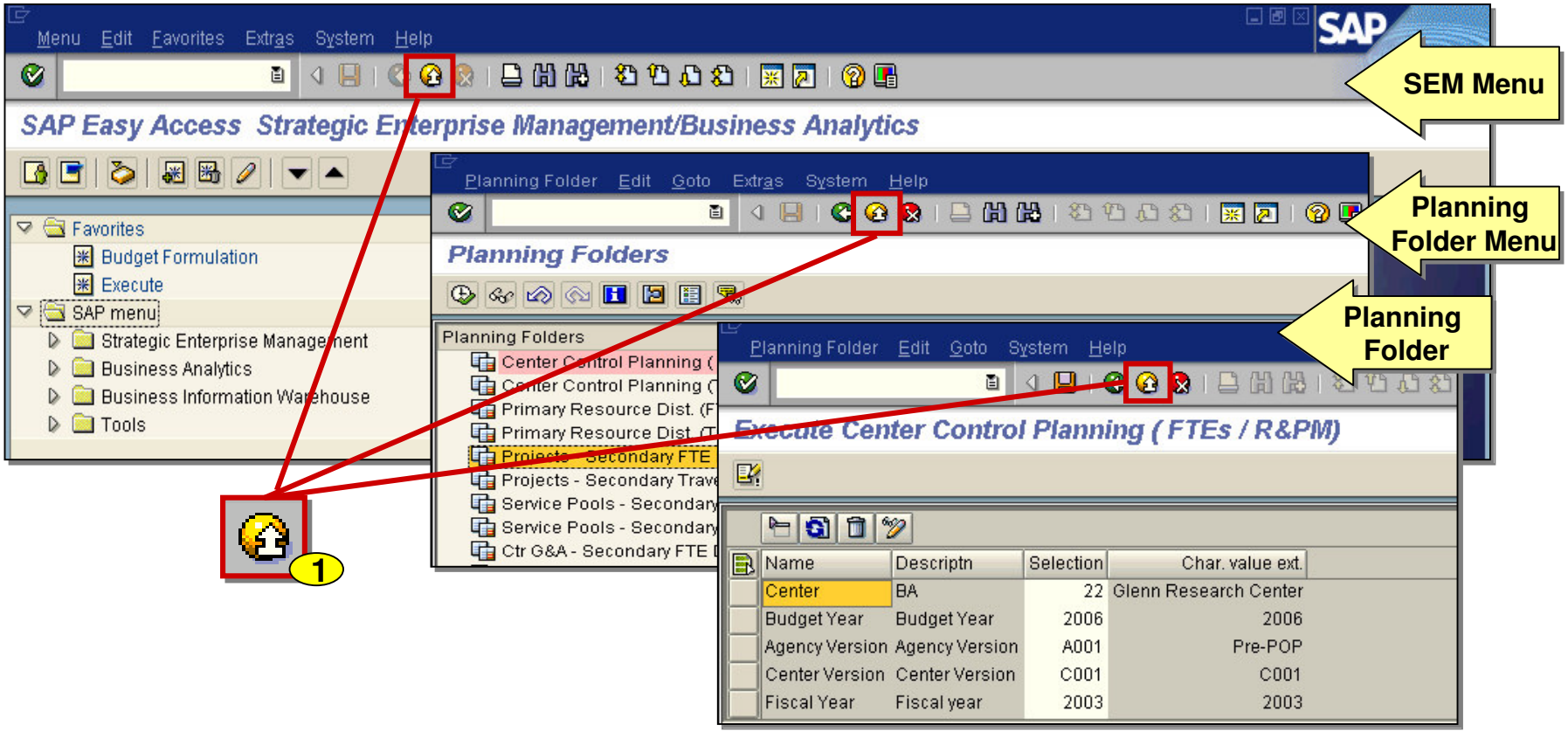
What Are the Menu Buttons?



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

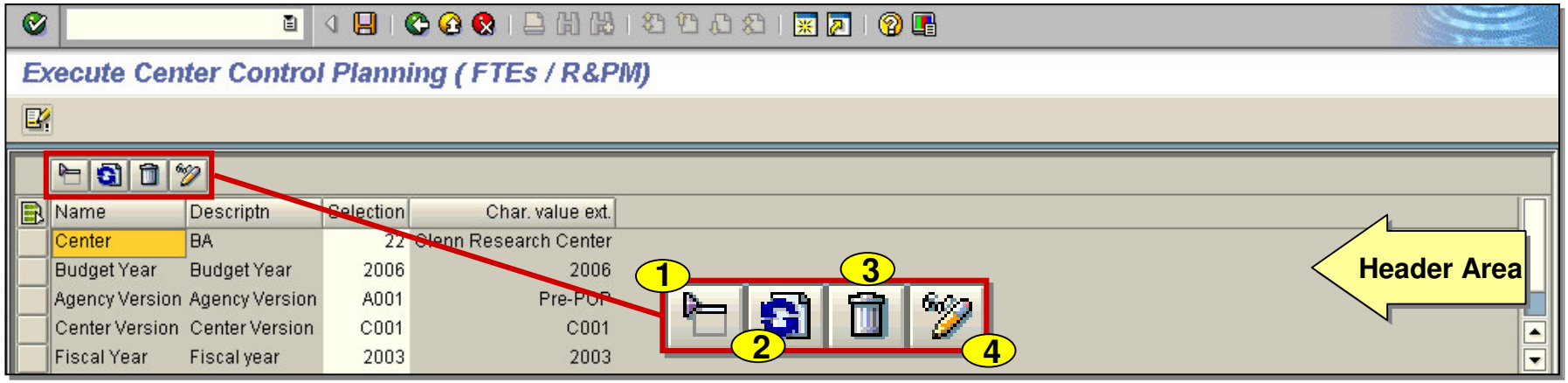
How Do I Log Out?



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

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

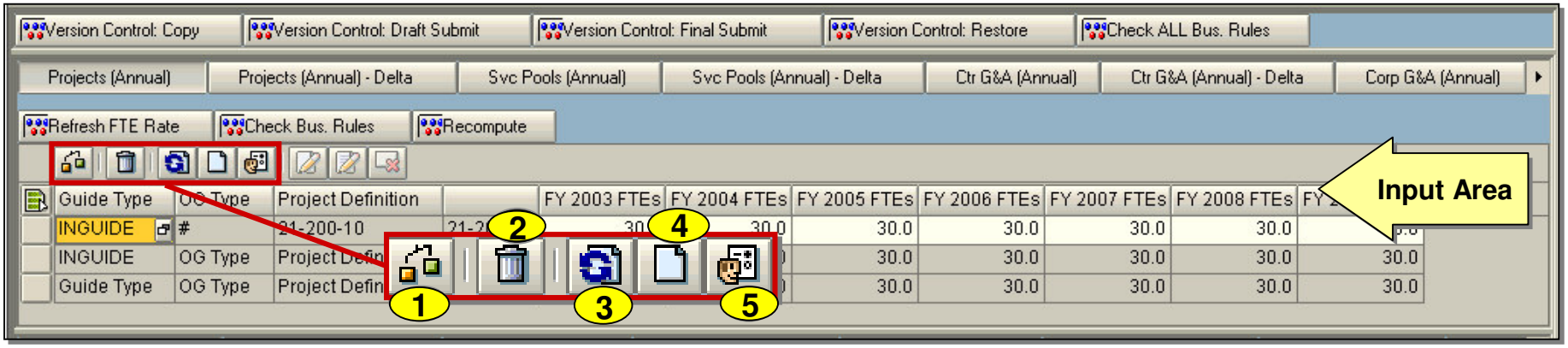
What Are the Header Area Buttons?



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.

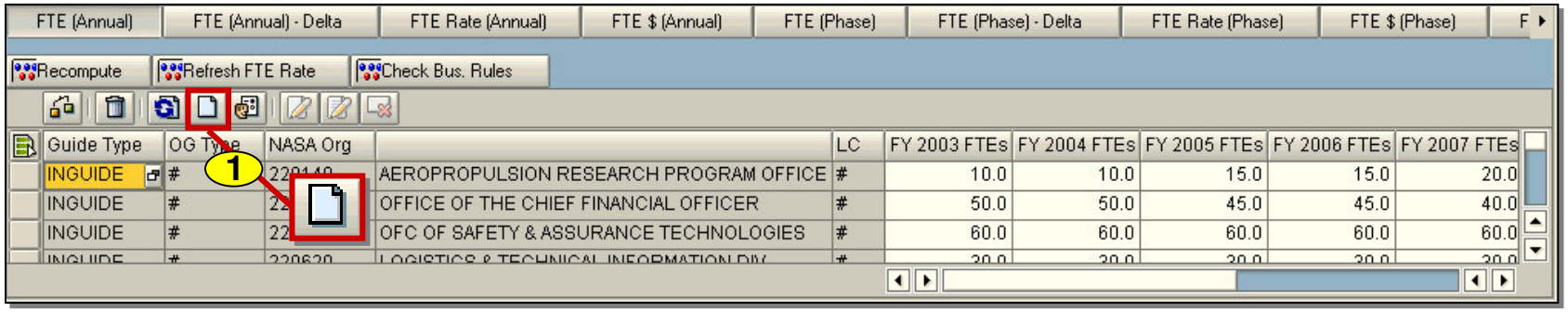
What Are the Input Area Buttons?

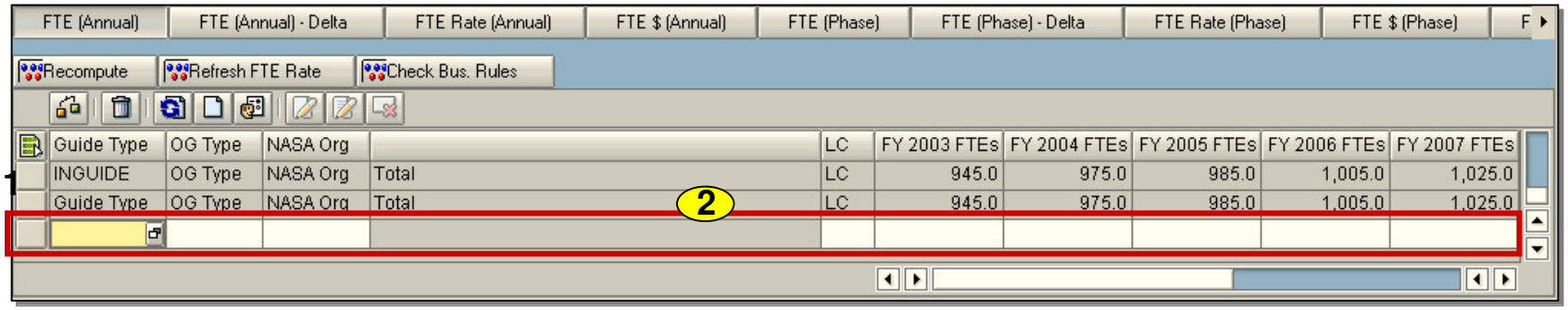


Input Area Menu Buttons

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.

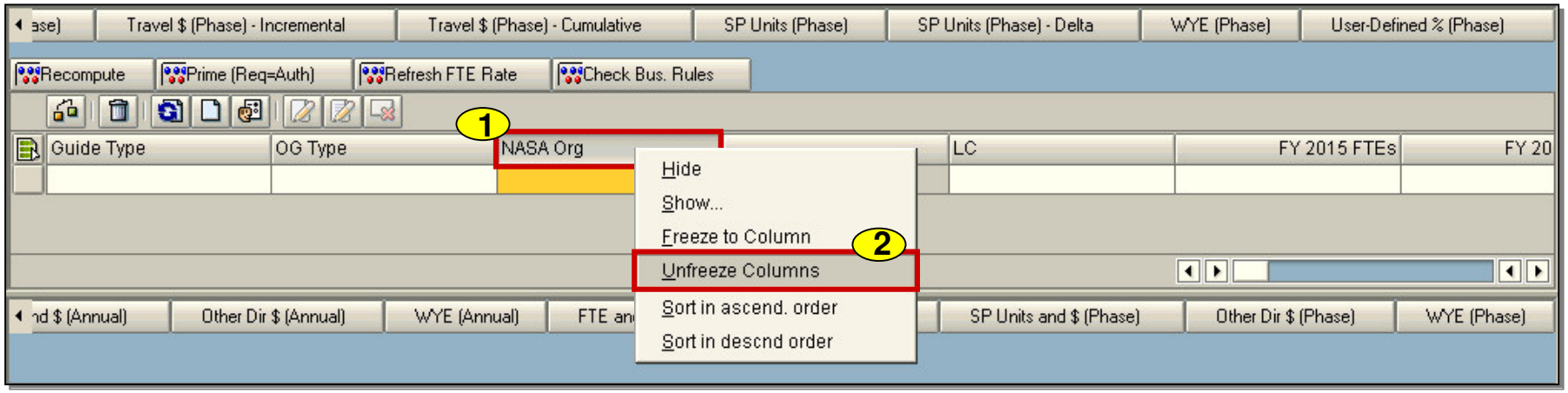
How Do I Add a Row of Data?





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.

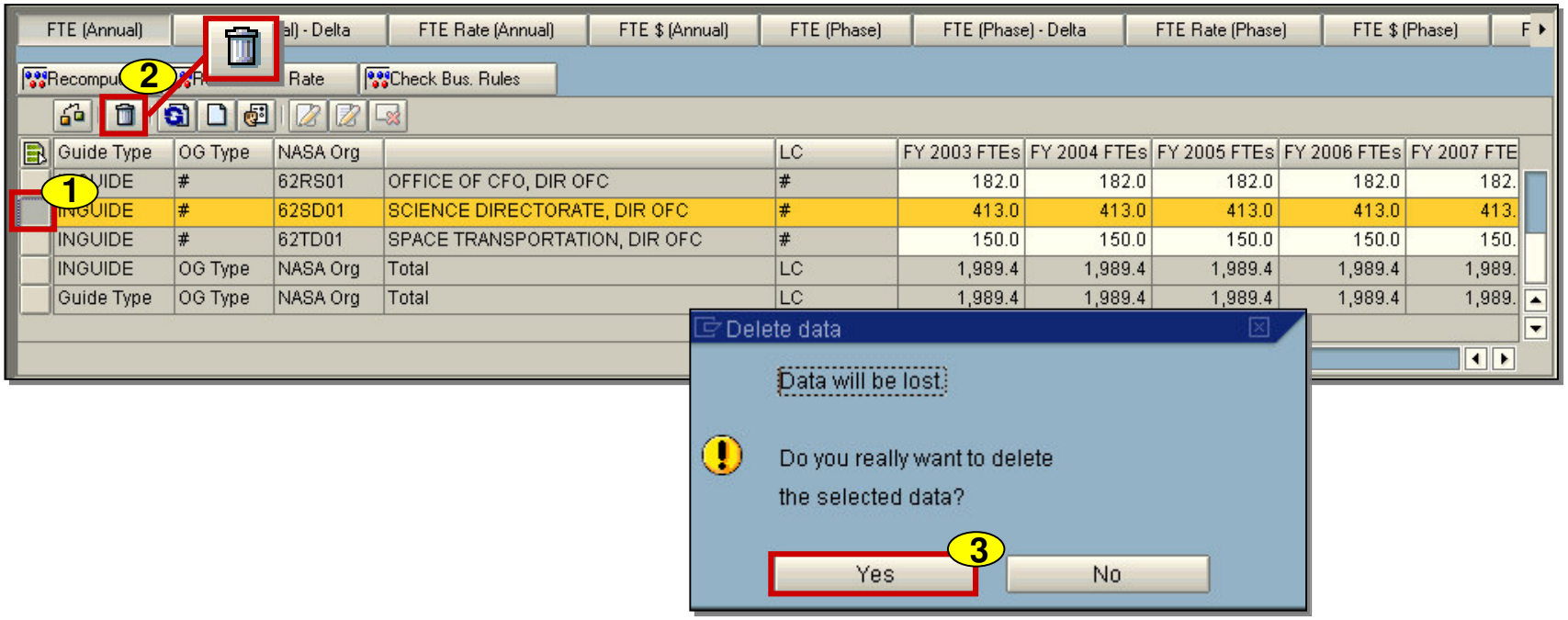
How Do I Scroll Right To See/Enter My Data?



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

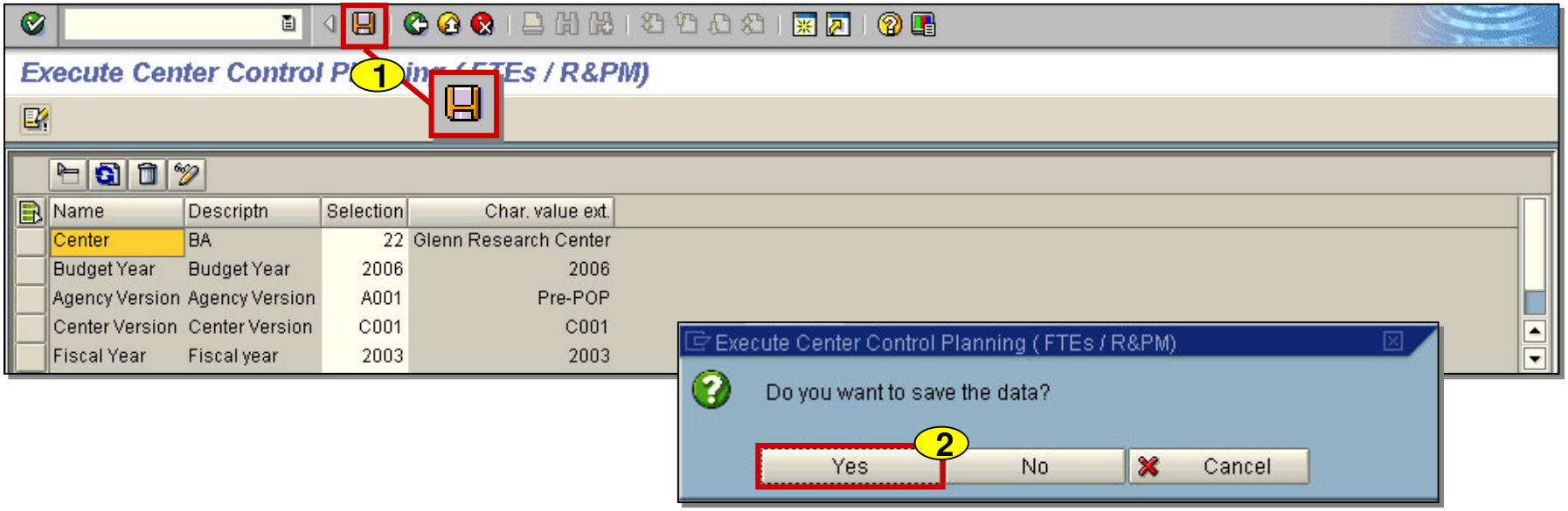
NOTE: Upon entering a row, you need to unfreeze columns. This will allow you to scroll through data to the right of the visible screen.

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

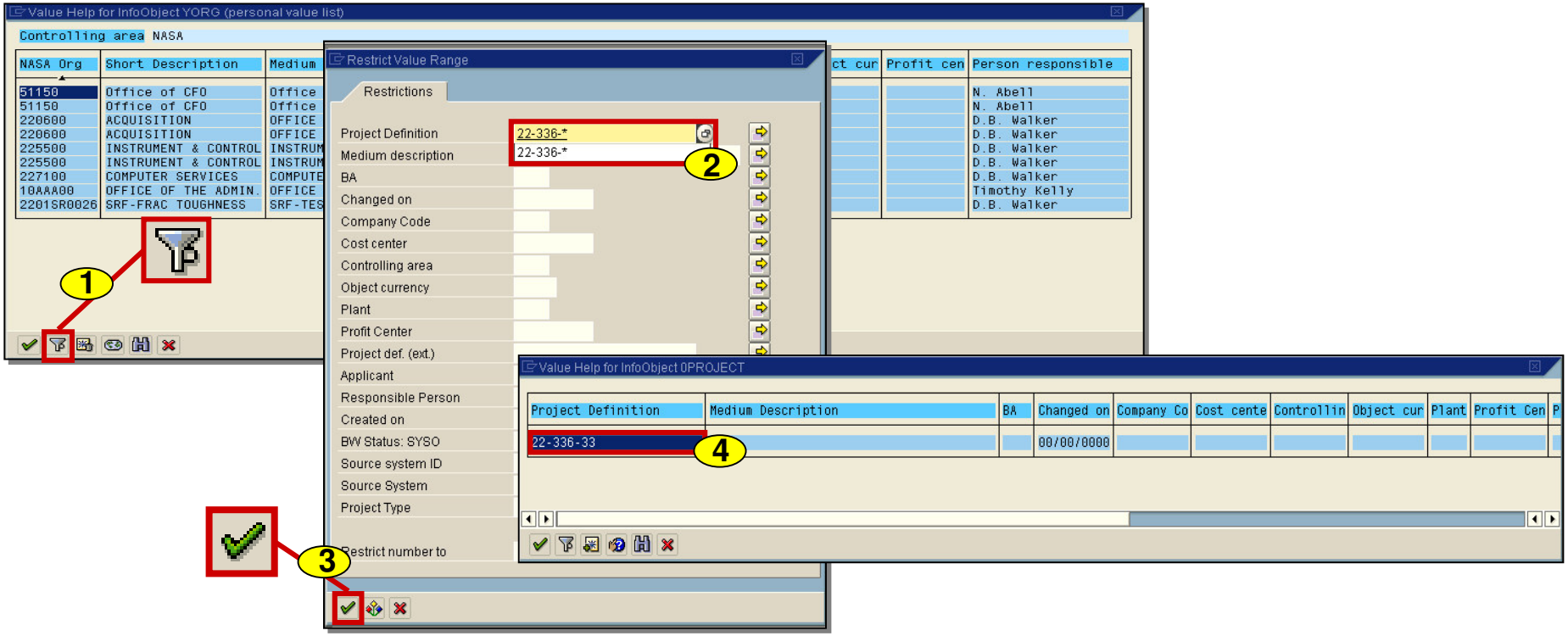
Controlling area NASA

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

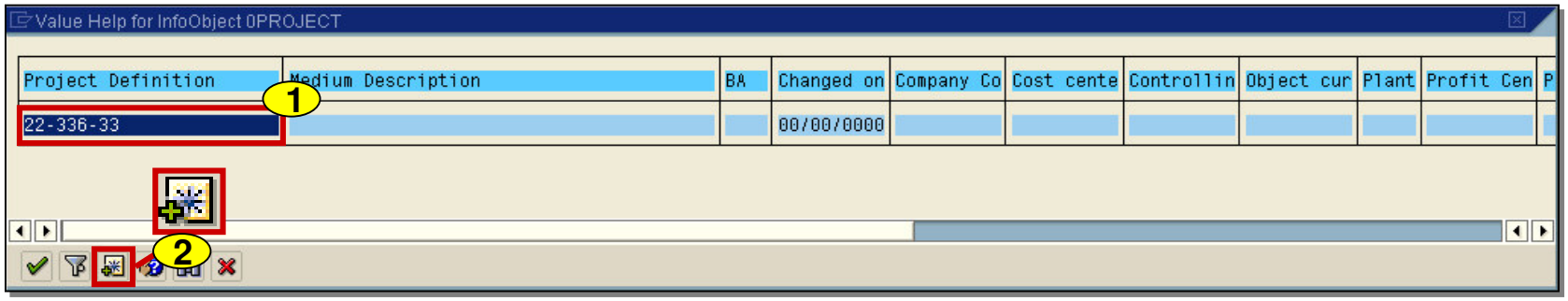
1 In the dropdown box, click the ***All Values*** button. This will expand the list of available information.

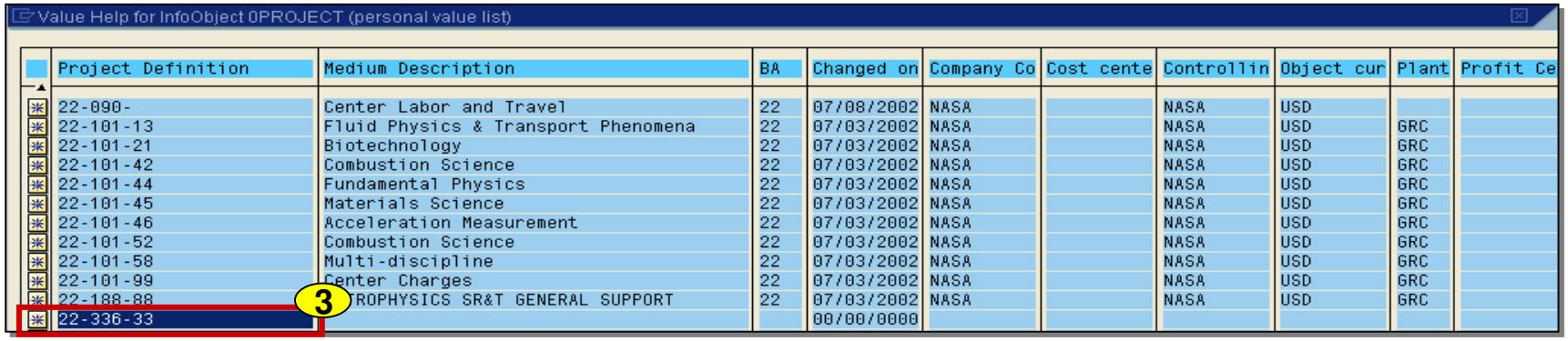
How Do I Filter Information In a Dropdown Box?



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.

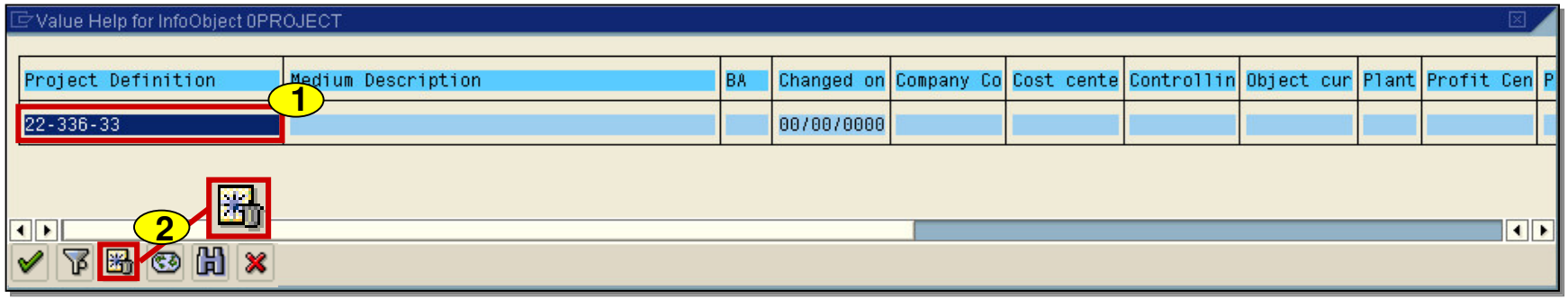
How Do I Create a Personal List?

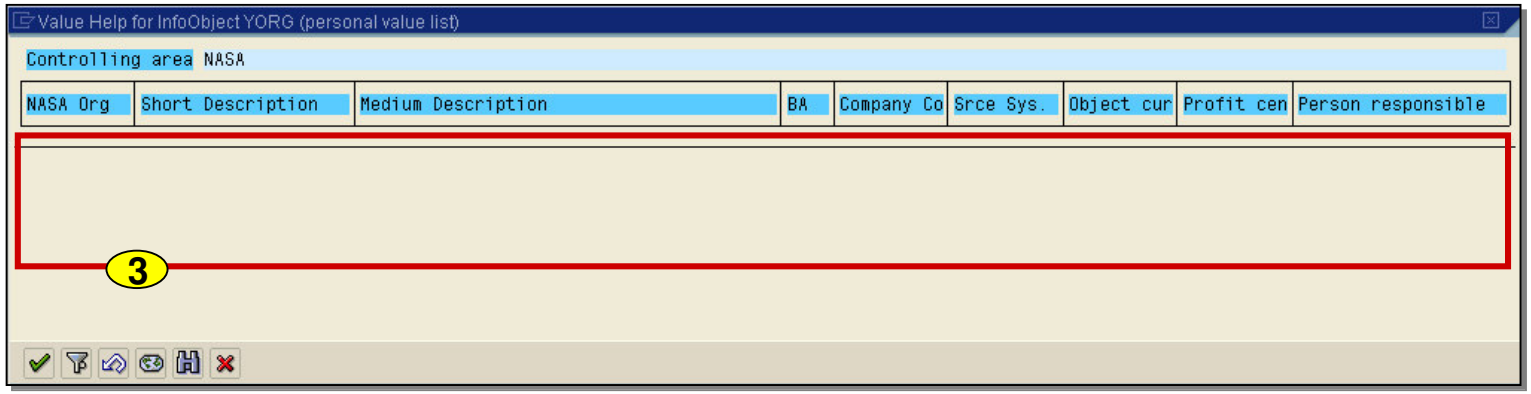




1. Select the data you want to see added to the dropdown box.
2. Click the ***Insert In Personal List*** button.
3. The selected data is added to your dropdown box. Any subsequent entry will display in your personal list.

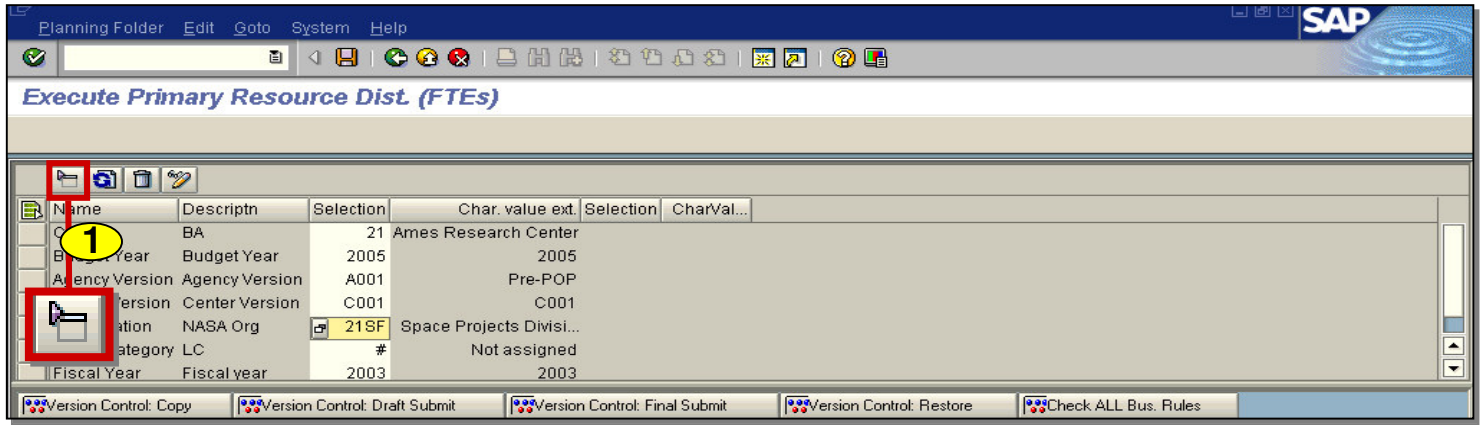
How Do I Delete Information From My Personal List?

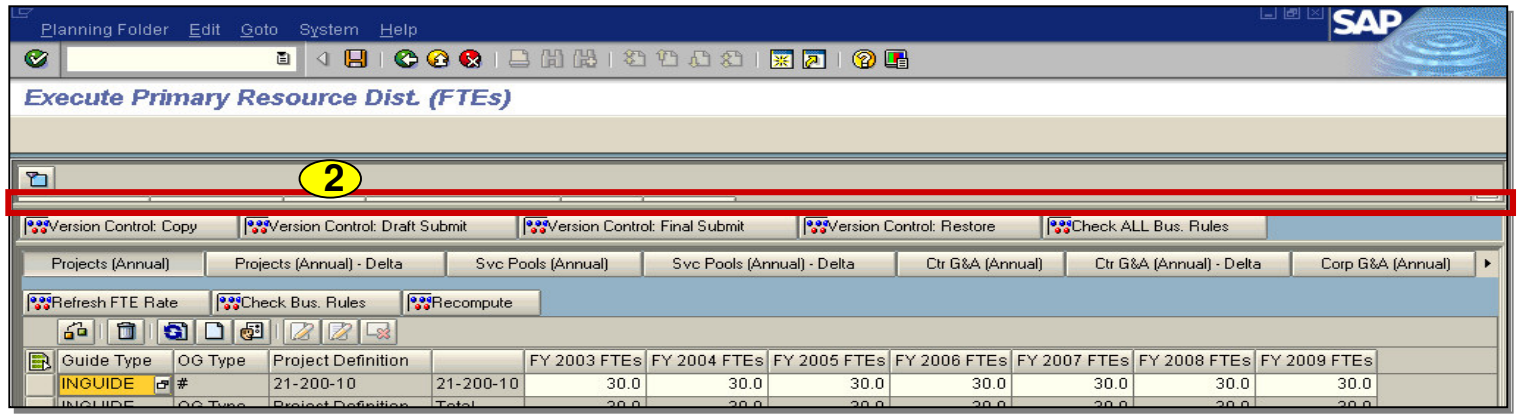




1. Select the data you want to delete the dropdown box.
2. Click the ***Delete From Personal List*** button.
3. The selected data is deleted from your dropdown box.

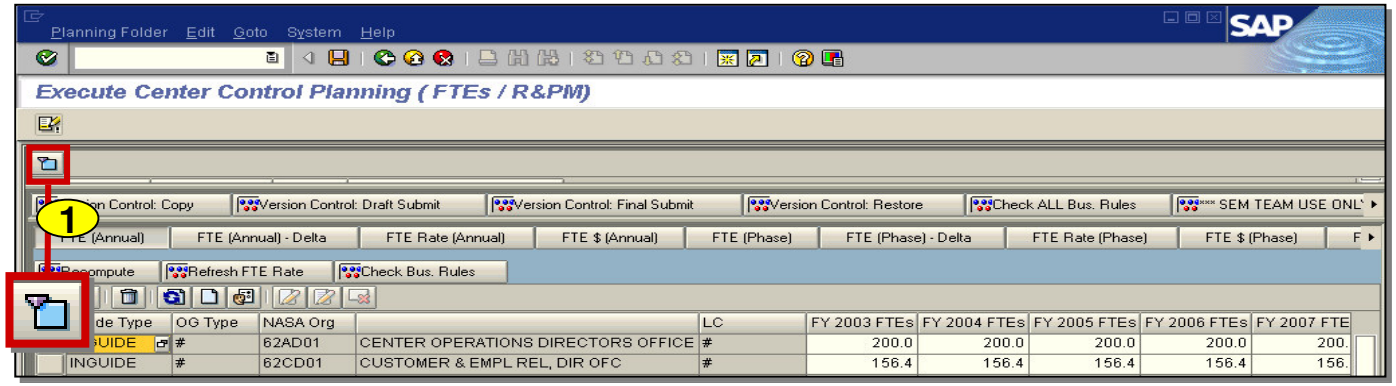
How Do I Hide the Header?

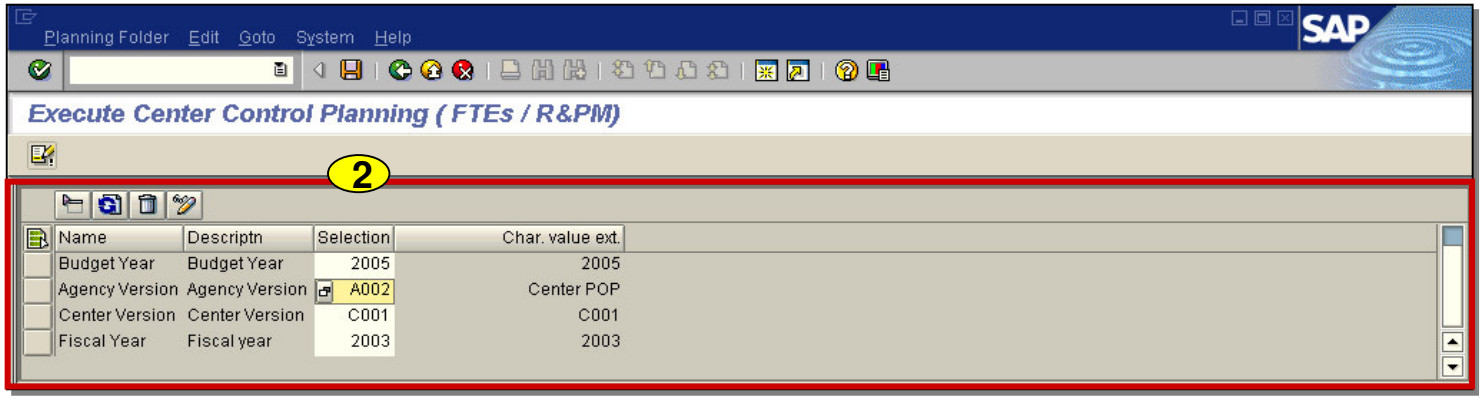




1. Click the ***Hide Variable Values*** button.
2. The Header will be hidden, leaving only the Input and Output Areas.

How Do I Display the Header?



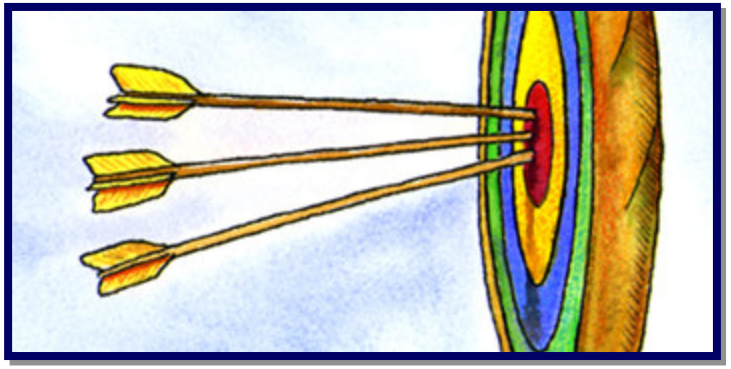


1. Click the ***Display Variable Values*** button.
2. The Header will appear, along with the Input and Output Areas.

Requesting FTEs

- **Goal**: Request annual G&A FTEs from Cost Centers (Organizations).

- Why: One of the Center G&A Planner's responsibilities is to determine how many FTEs are needed to perform the Center G&A functions. This allows the Planner to communicate to the Authorizer and Cost Center whether the authorized FTEs are sufficient or insufficient to meet Center G&A requirements.



Requesting FTEs, WYEs, & Other Direct $

What goes in the Input Layout?

FTE (Annual) – Input Area

FTE (Annual) | FTE (Annual) - Delta | Travel $ (Annual) | Travel $ (Annual) - Delta | SP Units (Annual) | SP Units (Annual) - Delta | Other Dir $ (Annual)

Recompute | Prime (Req=Auth) | Refresh FTE Rate | Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	FY 2035 FTEs	FY 2036 FTEs	FY 2037 FTEs	FY 2038 FTEs	FY 2039 FTEs	FY 2040 FTEs	FY 2041
INGUIDE	#	2400MM	Research Systems Directorate	#	0.7	0.7	0.7	0.7	0.7	0.7	
INGUIDE	#	2400OO	Flight Operations Directorate	#	0.7	0.7	0.7	0.7	0.7	0.7	
INGUIDE	OG Type	NASA Org	Total	LC	1.4	1.4	1.4	1.4	1.4	1.4	

1) Click the FTE (Annual) button FTE (Annual)
2) Click the append row button to add a row
3) Enter the following:

Guide Type Inguide or Overguide

OG Type Overguide type: New Initiative, Augment, Price or (#) unassigned. You must use unassigned (#) if you selected inguide.

NASA Org/Cost Center The directorate or division requesting FTEs.

Labor Category The labor category assigned to the FTEs. You must enter the unassigned category (#) because were are not using Labor Categories

FTEs per Year Enter FTE requests for two previous years, the budget year and four outyears

4) Click the Transfer Variables button to sort the row of data you entered and total the input area
5) Click the Recompute button to transfer data from the input area to the output area Recompute
6) Repeat for all of the Cost Centers that you are responsible for.
7) Click the Save button to save your data

Where can I see the output?

FTE and $ (Annual) – Output Layout

FTE and $ (Annual) | Travel $ (Annual) | SP Units and $ (Annual) | Other Dir $ (Annual) | WYE (Annual) | FTE and $ (Phase) | Travel $ (Phase) | SP Units a

Source	Detail	Guide Type	OG Type	NASA Org		LC	FY 2035 FTEs	FY 2035 $	FY 2036 FTEs	FY 2036 $	FY 2037 FTEs	FY 2037 $	FY 2038 FTEs
DIRECT	#	INGUIDE	#	2400MM	Research Systems Directorate	#	0.7	0.000	0.7	0.000	0.7	0.000	0.7
DIRECT	#	INGUIDE	#	2400OO	Flight Operations Directorate	#	0.7	0.000	0.7	0.000	0.7	0.000	0.7
DIRECT	#	INGUIDE	OG Type	NASA Org	Total	LC	1.4	0.000	1.4	0.000	1.4	0.000	1.4
DIRECT	Detail	Guide Type	OG Type	NASA Org	Total	LC	1.4	0.000	1.4	0.000	1.4	0.000	1.4
Source	Detail	Guide Type	OG Type	NASA Org	Total	LC	1.4	0.000	1.4	0.000	1.4	0.000	1.4

1) Click the FTE and $ (Annual) output button to view the output area.
2) In the input area, click the Refresh FTE Rate button to calculate the dollars associated with FTEs

3) The following information is shown:

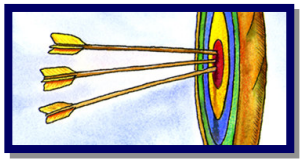
Source	The name of the Service Pool or Direct if planned yourself.
Detail	The name of the Sub-pool.
Guide Type	Inguide or Overguide
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned.
NASA Org/Cost Center	The directorate or division the FTEs are being requested for.
Labor Category	The labor category assigned to the FTEs. You must enter the unassigned category (#) if you are not using Labor Categories
FY 20XX FTEs	The number of requested FTEs.
FY 20XX $	The dollars associated with the FTEs (equal to FTEs X Rate).
Totals	The totals for all Cost Centers listed.

Requesting Annual Travel $

- We will be performing an exercise in which you will request Travel Dollars in the system. First, I will review the steps you will be using to complete the exercises.

- Goal: Request annual Center G&A Travel $ from Cost Center.

- Why: One of the Center G&A Planner's responsibilities is to determine how much travel funding is needed to perform the Center G&A functions. This allows the Planner to communicate to the Authorizer and Cost Center whether the authorized Travel funding is sufficient or insufficient to meet Center G&A requirements.



What goes in the Input Layout?

Travel $ (Annual) – Input Area

FTE (Annual) | FTE (Annual) - Delta | Travel $ (Annual) | Travel $ (Annual) - Delta | SP Units (Annual) | SP Units (Annual) - Delta | Other Dir $ (Annual)

Recompute | Prime (Req = Auth) | Check Bus. Rules

Guide Type	OG Type	NASA Org		FY 2035 $	FY 2036 $	FY 2037 $	FY 2038 $	FY 2039 $	FY 2040 $	FY 2041 $
INGUIDE	#	2460CR003	Resources Mgt Branch - G&A	0.800	0.800	0.800	0.800	0.800	0.800	0.800
INGUIDE	OG Type	NASA Org	Total	0.800	0.800	0.800	0.800	0.800	0.800	0.800
Guide Type	OG Type	NASA Org	Total	0.800	0.800	0.800	0.800	0.800	0.800	0.800

1) Click the Travel $ (Annual) button. [Travel $ (Annual)]
2) Click the append row button to add a row.
3) Enter the following:

Guide Type Inguide or Overguide

OG Type Overguide type: New Initiative, Augment, Price or (#) unassigned. You must use unassigned (#) if you selected inguide.

NASA Org/Cost Center The directorate or division requesting Travel $.

Travel $ per Year Enter Travel $ requests for two previous years, the budget year and four outyears

4) Click the Transfer Variables button to sort the row of data you entered and total the input area.
5) Click the Recompute button to transfer data from the input area to the output area.
6) Repeat for all of the Cost Centers that you are responsible for.
7) Click the Save button to save your data.

Where can I see the output?

Travel $ (Annual) – Output Layout

FTE and $ (Annual) | Travel $ (Annual) | SP Units and $ (Annual) | Other Dir $ (Annual) | WYE (Annual) | FTE and $ (Phase) | Travel $ (Phase) | SP Units a

Source	Detail	Guide Type	OG Type	NASA Org		FY 2035 $	FY 2036 $	FY 2037 $	FY 2038 $	FY 2039 $	FY 2040 $	FY 2041 $
DIRECT	#	INGUIDE	#	2460CR003	Resources Mgt Branch - G&A	0.800	0.800	0.800	0.800	0.800	0.800	0.800
DIRECT	Detail	Guide Type	OG Type	NASA Org	Total	0.800	0.800	0.800	0.800	0.800	0.800	0.800
Source	Detail	Guide Type	OG Type	NASA Org	Total	0.800	0.800	0.800	0.800	0.800	0.800	0.800

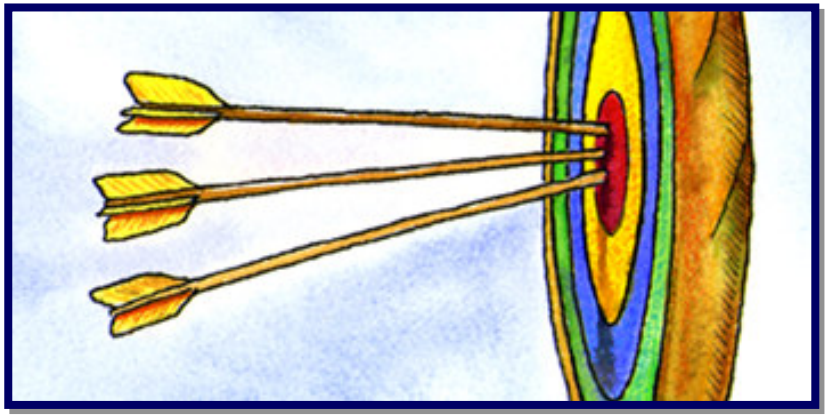
1) Click the Travel $ (Annual) output button to view the output area.
2) The following information is shown:

Source	The name of the Service Pool or Direct if planned yourself.
Detail	The name of the Sub-pool.
Guide Type	Inguide or Overguide.
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned.
NASA Org/Cost Center	The directorate or division the Travel $ are being requested for.
FY 20XX $	The actual dollars associated with Travel by Cost Centers.
Totals	The totals for all Cost Centers listed.

Requesting Annual Other Direct $

- Goal: Request annual Other Direct $ units from Cost Center.

- Note: Planners do not request Other Direct $ from Cost Center. There is no “authorized vs. requested” amounts like there are for workforce and travel. Other Direct $ are merely entered into the system by the planners.



What goes in the Input Layout?

Other Direct $ (Annual) – Input Area

FTE (Annual) | FTE (Annual) - Delta | Travel $ (Annual) | Travel $ (Annual) - Delta | SP Units (Annual) | SP Units (Annual) - Delta | Other Dir $ (Annual)

Check Bus. Rules

Guide Type	OG Type	NASA Org		FS	Contract	Vendor Name	CI	Prior Year(s) $	FY 2035 $	FY 2036 $	FY 2037 $	FY 2038 $	FY 2039 $	FY
INGUIDE	#	2400RF	Flight Systems Branch	#	NAS9-99053	#	#	0.000	1.000	1.000	1.000	1.000	1.000	
INGUIDE	OG Type	NASA Org	Total	FS	Contract		CI	0.000	1.000	1.000	1.000	1.000	1.000	
Guide Type	OG Type	NASA Org	Total	FS	Contract		CI	0.000	1.000	1.000	1.000	1.000	1.000	

1) Click the Other Dir $ (Annual) button. Other Dir $ (Annual)
2) Click the append row button to add a row
3) Enter the following:

Guide Type	Inguide or Overguide.
OG Type	Overguide type: New Initiative, Augment, Price or (#) unassigned. You must use unassigned (#) if you selected inguide.
NASA Org/Cost Center	The directorate or division for which other dir $ are being planned.
FS	Fund Source.
Contract	The associated contract ID.
CI	Commitment Item.
Prior Year(s) $	The sum of all prior year costs.
FY 20XX $	Enter Other Dollar requests for two previous years, the budget year and four outyears.

4) Click the Transfer Variables button to sort the row of data that you entered and total the input area.
5) Repeat for all of the Cost Centers that you are responsible for.
6) Click the Save button to save your data.

Where can I see the output?

Other Direct $ (Annual) – Output Layout

FTE and $ (Annual) | Travel $ (Annual) | SP Units and $ (Annual) | Other Dir $ (Annual) | WYE (Annual) | FTE and $ (Phase) | Travel $ (Phase) | SP Units a

Source	Detail	Guide Type	OG Type	NASA Org		FS	Contract	Vendor Name	CI	Prior Year(s) $	FY 2035 $	FY 2036 $	FY 2037 $	FY 2038 $	FY 2039 $
DIRECT	#	INGUIDE	#	2400RF	Flight Systems Branch	#	NAS9-99053	#	#	0.000	1.000	1.000	1.000	1.000	1.000
DIRECT	#	INGUIDE	OG Type	NASA Org	Total	FS	Contract		CI	0.000	1.000	1.000	1.000	1.000	1.000
DIRECT	Detail	Guide Type	OG Type	NASA Org	Total	FS	Contract		CI	0.000	1.000	1.000	1.000	1.000	1.000
Source	Detail	Guide Type	OG Type	NASA Org	Total	FS	Contract		CI	0.000	1.000	1.000	1.000	1.000	1.000

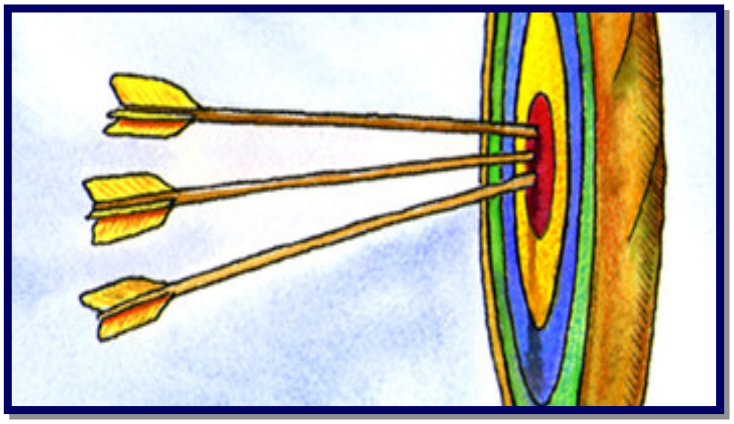
1) Click the Other Dir $ (Annual) output button to view the output area.
2) The following information is shown:

Source	The name of the Service Pool or Direct if planned yourself.
Detail	The name of the Sub-pool
Guide Type	Inguide or Overguide
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned.
NASA Org/Cost Center	The directorate or division for which other dir $ are being planned.
FS	Fund Source.
Contract	The associated contract ID.
Vendor Name	The name of the company associated with the contract.
CI	Commitment Item.
Prior Year(s) $	The sum of all prior year costs
FY 20XX $	The actual amount of requested Direct Other $.
Totals	The totals for all Cost Centers listed.

Requesting Annual WYEs

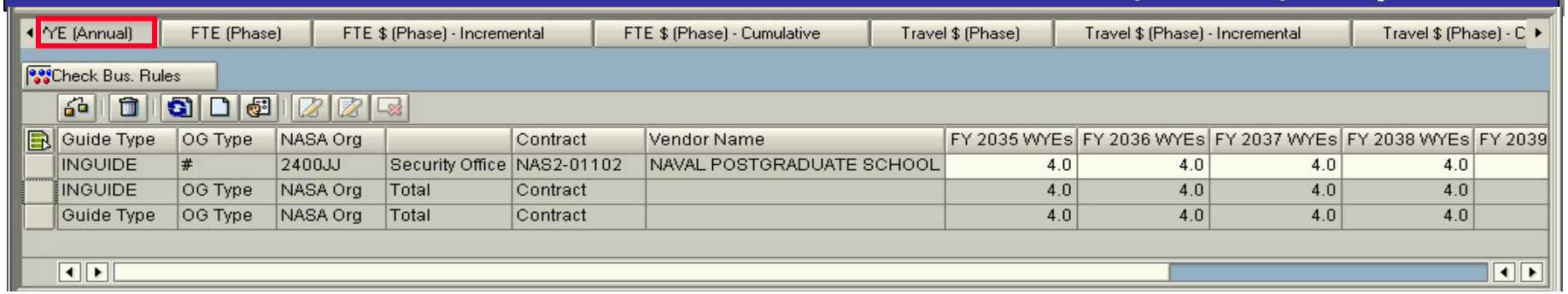
- Goal: Request annual WYEs from Cost Center.

- Note: Planners do not request WYEs from Cost Center. There is no “authorized vs. requested” amounts like there are for workforce and travel. The WYEs are merely entered into the system by the planners.



What goes in the Input Layout?

WYE (Annual) – Input Area



Guide Type	OG Type	NASA Org		Contract	Vendor Name	FY 2035 WYEs	FY 2036 WYEs	FY 2037 WYEs	FY 2038 WYEs	FY 2039
INGUIDE	#	2400JJ	Security Office	NAS2-01102	NAVAL POSTGRADUATE SCHOOL	4.0	4.0	4.0	4.0	
INGUIDE	OG Type	NASA Org	Total	Contract		4.0	4.0	4.0	4.0	
Guide Type	OG Type	NASA Org	Total	Contract		4.0	4.0	4.0	4.0	

1) Click the WYE (Annual) button WYE (Annual)
2) Click the append row button to add a row
3) Enter the following:

Guide Type	Inguide or Overguide
OG Type	Overguide type: New Initiative, Augment, Price or (#) unassigned. You must use unassigned (#) if you selected inguide.
NASA Org/Cost Center	The directorate or division requesting WYEs.
Contract	The contract ID the WYEs are associated to.
Vendor Name	The name of the company the WYEs are employed by.
WYEs per Year	Enter WYE requests for two previous years, the budget year and four outyears

4) Click the Transfer Variables button to sort the row of data you entered and total the input area.
5) Repeat for all of the Cost Centers that you are responsible for.
6) Click the Save button to save your data

Where can I see the output?

WYE (Annual) – Output Layout

FTE and $ (Annual) | Travel $ (Annual) | SP Units and $ (Annual) | Other Dir $ (Annual) | WYE (Annual) | FTE and $ (Phase) | Travel $ (Phase) | SP Units a

Source	Detail	Guide Type	OG Type	NASA Org		Contract	Vendor Name	FY 2035 WYEs	FY 2036 WYEs	FY 2037 WYEs	FY 2038 WYEs
DIRECT	#	INGUIDE	#	2400JJ	Security Office	NAS2-01102	NAVAL POSTGRADUATE SCHOOL	4.0	4.0	4.0	4.0
DIRECT	#	INGUIDE	OG Type	NASA Org	Total	Contract		4.0	4.0	4.0	4.0
DIRECT	Detail	Guide Type	OG Type	NASA Org	Total	Contract		4.0	4.0	4.0	4.0
Source	Detail	Guide Type	OG Type	NASA Org	Total	Contract		4.0	4.0	4.0	4.0

1) Click the WYE (Annual) output button to view the output area WYE (Annual)
2) The following information is shown:

Source	The name of the Service Pool or Direct if planned yourself.
Detail	The name of the Sub-pool.
Guide Type	Inguide or Overguide.
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned.
NASA Org/Cost Center	The directorate or division the WYEs are being requested for.
Contract	The contract ID the WYEs are associated to.
Vendor Name	The name of the company the WYEs are employed by.
FY 20XX WYEs	The number of requested WYEs.
Totals	The totals for all Cost Centers listed.

Center G&A Allocation Layouts

What's in the Input Layout?
Center G&A Total $ (Detail)

Center G&A Total $ (Detail) – Input Area

Project Allocation Worksheet | Corp G&A Allocation Worksheet | Center G&A Total $ (Summary) | Center G&A Total $ (Detail) | Center G&A FTE (Detail) | Center G&A

Cost center		Source	Detail	Guide Type	OG Type	NASA Org	
62CD50	GOVT & COMMUNITY RELATIONS DEPT	DIRECT	#	INGUIDE	#	62CD01	CUSTOMER & EMPL REL, DIR OFC
62CD50	GOVT & COMMUNITY RELATIONS DEPT	DIRECT	#	INGUIDE	#	62CD01	CUSTOMER & EMPL REL, DIR OFC
62CD50	GOVT & COMMUNITY RELATIONS DEPT	Source	Detail	Guide Type	OG Type	NASA Org	Total

1) Click the Center G&A Total $ (Detail) button to review the data.
2) Review the following:

Cost Center	The Cost Center from which the G&A is being collected.
Source	The name of the Service Pool or Direct if planned yourself.
Detail	The name of the Sub-pool
Guide Type	Inguide or Overguide.
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned.
NASA Org/Cost Center	The directorate or division the FTEs are being requested from.
Contract	The associated contract ID.
Vendor Name	The name of the company associated with the contract.
WYEs	The number of requested WYEs.
FTEs	The number of requested FTEs.
FTE $	The total requested cost of all FTEs (equal to # of FTE X Rate).
Travel	The requested travel dollars.
Other Direct $	The costs associated with Other Direct $.
Total $	Total G&A costs for the Cost Center (FTE $ + Travel $ + Other Direct $).

What's in the Input Layout?
Center G&A FTE (Detail)

Center G&A FTE (Detail) – Input Area

Project Allocation Worksheet | Corp G&A Allocation Worksheet | Center G&A Total $ (Summary) | Center G&A Total $ (Detail) | Center G&A FTE (Detail) | Center G&A

Cost center		Source	Detail	Guide Type	OG Type	NASA Org	
62CD50	GOVT & COMMUNITY RELATIONS DEPT	DIRECT	#	INGUIDE	#	62CD01	CUSTOMER & EMPL REL, DIR OFC
62CD50	GOVT & COMMUNITY RELATIONS DEPT	Source	Detail	Guide Type	OG Type	NASA Org	Total

1) Click the Center G&A FTE (Detail) button to review the data.
2) Review the following:

Cost Center	The Cost Center from which the G&A is being collected.
Source	The name of the Service Pool or Direct if planned yourself.
Detail	The name of the Sub-pool
Guide Type	Inguide or Overguide.
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned.
NASA Org/Cost Center	The directorate or division the FTEs are being requested from.
Total FY 20XX FTEs	Total FTE headcount.
Total FY 20XX FTE $	Total cost of all FTEs.

What's in the Input Layout?
Center G&A Travel $ (Detail)

Center G&A Travel $ (Detail) – Input Area

r G&A Total $ (Summary) | Center G&A Total $ (Detail) | Center G&A FTE (Detail) | Center G&A Travel $ (Detail) | Center G&A All Other $ (Detail) | Center G&A WYE (De

Cost center		Source	Detail	Guide Type	OG Type	NASA Org	
62CD50	GOVT & COMMUNITY RELATIONS DEPT	DIRECT	#	INGUIDE	#	62CD01	CUSTOMER & EMPL REL, DIR OFC
62CD50	GOVT & COMMUNITY RELATIONS DEPT	Source	Detail	Guide Type	OG Type	NASA Org	Total

1) Click the Center G&A Travel $ (Detail) button to review the data.
2) Review the following:

Cost Center	The Cost Center from which the G&A is being collected.
Source	The name of the Service Pool or Direct if planned yourself.
Detail	The name of the Sub-pool
Guide Type	Inguide or Overguide.
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned.
NASA Org/Cost Center	The directorate or division the FTEs are being requested from.
Total FY 20XX Travel $	Total cost of all Travel $.

What's in the Input Layout?
Center G&A All Other $ (Detail)

Center G&A All Other $ (Detail) – Input Area

r G&A Total $ (Summary) | Center G&A Total $ (Detail) | Center G&A FTE (Detail) | Center G&A Travel $ (Detail) | Center G&A All Other $ (Detail) | Center G&A WYE (De

Cost center		Source	Detail	Guide Type	OG Type	NASA Org	
62CD50	GOVT & COMMUNITY RELATIONS DEPT	DIRECT	#	INGUIDE	#	62CD01	CUSTOMER & EMPL REL, DIR OFC
62CD50	GOVT & COMMUNITY RELATIONS DEPT	Source	Detail	Guide Type	OG Type	NASA Org	Total

1) Click the Center G&A All Other $ (Detail) button to review the data.
2) Review the following:

Cost Center	The Cost Center from which the G&A is being collected.
Source	The name of the Service Pool or Direct if planned yourself.
Detail	The name of the Sub-pool
Guide Type	Inguide or Overguide.
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned.
NASA Org/Cost Center	The directorate or division the FTEs are being requested from.
Contract	The associated contract ID.
Vendor Name	The name of the company associated with the contract.
All Other FY 20XX $	Dollar amount associated with the Other Dir $ entry.

What's in the Input Layout?
Center G&A WYE (Detail)

Center G&A WYE (Detail) – Input Area

G&A Total $ (Summary) | Center G&A Total $ (Detail) | Center G&A FTE (Detail) | Center G&A Travel $ (Detail) | Center G&A All Other $ (Detail) | Center G&A WYE (Detail)

Cost center		Source	Detail	Guide Type	OG Type	NASA Org		Co
62CD50	GOVT & COMMUNITY RELATIONS DEPT	DIRECT	#	INGUIDE	#	62CD01	CUSTOMER & EMPL REL, DIR OFC	UC
62CD50	GOVT & COMMUNITY RELATIONS DEPT	Source	Detail	Guide Type	OG Type	NASA Org	Total	Co

1) Click the Center G&A WYE (Detail) button to review the data.
2) Review the following:

Cost Center	The Cost Center from which the G&A is being collected.
Source	The name of the Service Pool or Direct if planned yourself.
Detail	The name of the Sub-pool
Guide Type	Inguide or Overguide.
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned.
NASA Org/Cost Center	The directorate or division the FTEs are being requested from.
Contract	The contract ID the WYEs are associated to.
Vendor Name	The name of the company the WYEs are employed by.
Total FY 20XX WYEs	Total WYE headcount.