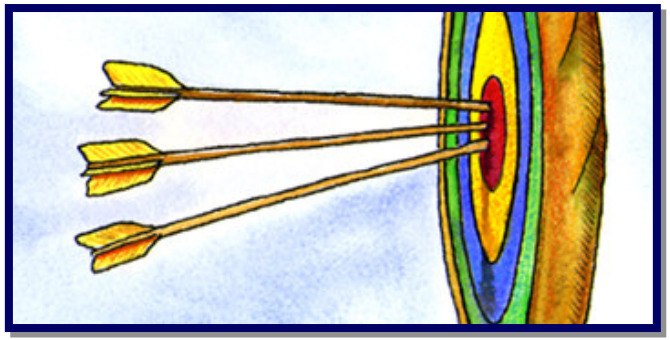
Welcome to…

Budget Formulation: Service Pool Estimation

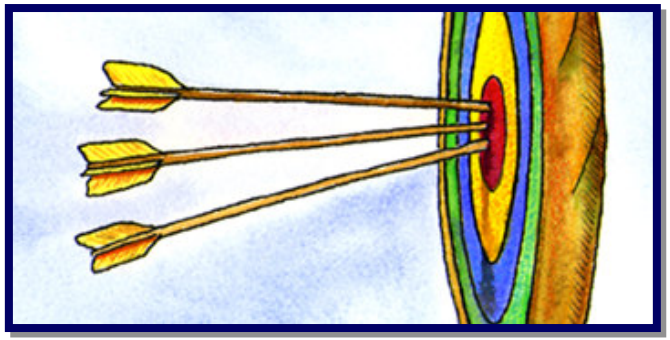
Course Objectives

- At the end of this course, individuals should be able to use the Budget Formulation System to:
  - Plan Service sub-pool capacity and rates
  - Prepare revenue plans for service sub-pools
  - Access and manipulate the service pool reports



Course Objectives (Cont.)

- At the end of this course, individuals should understand:
  - An overview of the system and how it is integrated
  - The business context for using the system
  - The roles that are in the class



Benefits of Service Pool Estimation

- The Budget Formulation System provides a means to:
  - Formulate institutional, program, enterprise and Agency level budgets.
  - Support budget development, advocacy, internal/external reporting, and full cost budgeting and management.
  - Support top-down and bottom-up decision making.

Service Pool Estimation Business Process Overview and Role Overview

Role Overview

- The role(s) in the class
  - Service Pool Estimator
    - Defines capacity for Sub-pools and derives rates.
    - Plans revenue for the sub-pool.
    - Has access to the Service Pool/Capacity / Rate Planning and Service Pool – Revenue Planning folders.
- Closely related roles
  - Service Pool Authorizer
    - Distributes the Center's SP authorizations for FTEs and Travel $ from Service Pools to Sub-pools.
    - Has access to the Service Pools – Secondary FTE Distribution and Service Pools – Secondary Travel Dollar Distribution folders.
  - Service Pool Requester
    - Requests FTEs, Travel, Service Pool units, Other Direct Dollars and WYEs at the sub-pool level.
    - Has access to the Svc Pool (FTE, Travel, SP, Other Direct $, WYE) and SP – Phasing (Other Direct $) folders.

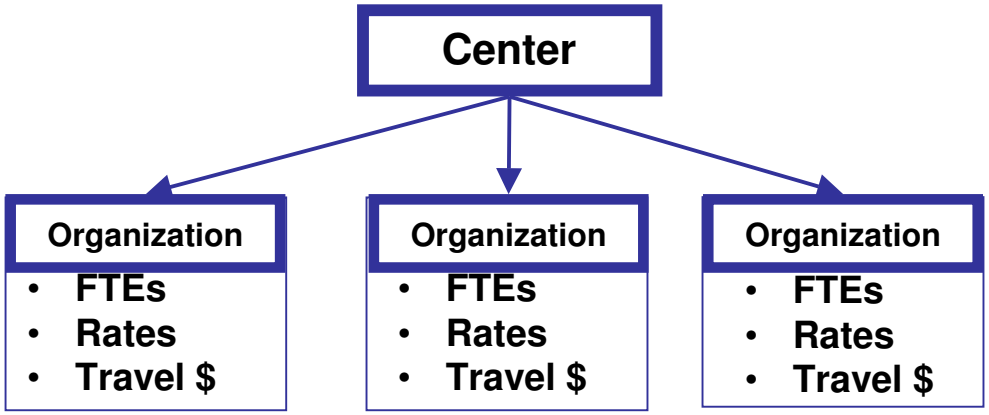
Service Pool Estimation Business Process Overview

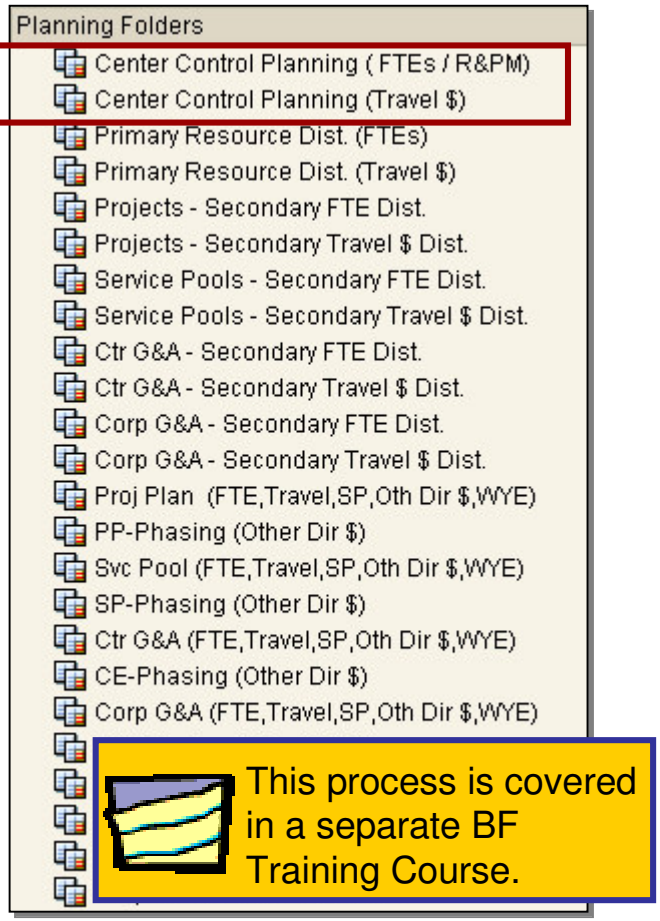
- Key Points:

  - The overall goal of the functionality
  - The process as it relates to the system, i.e. what gets entered first, where it goes after you are done with it
  - What is happening in the different phases of the budget cycle

Visualizing the system
Center Control Planning FTE Dist.

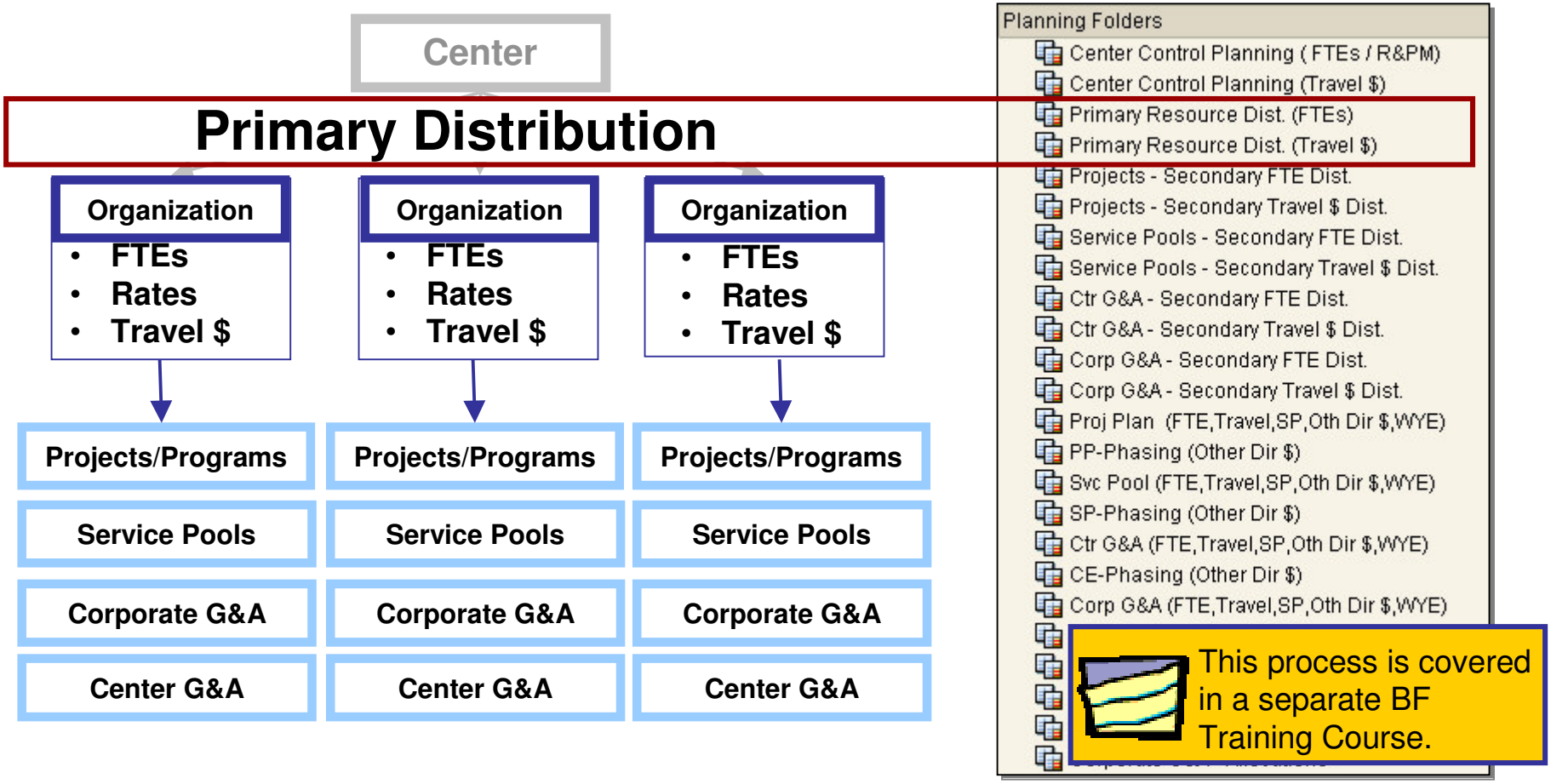
Center Control Planning





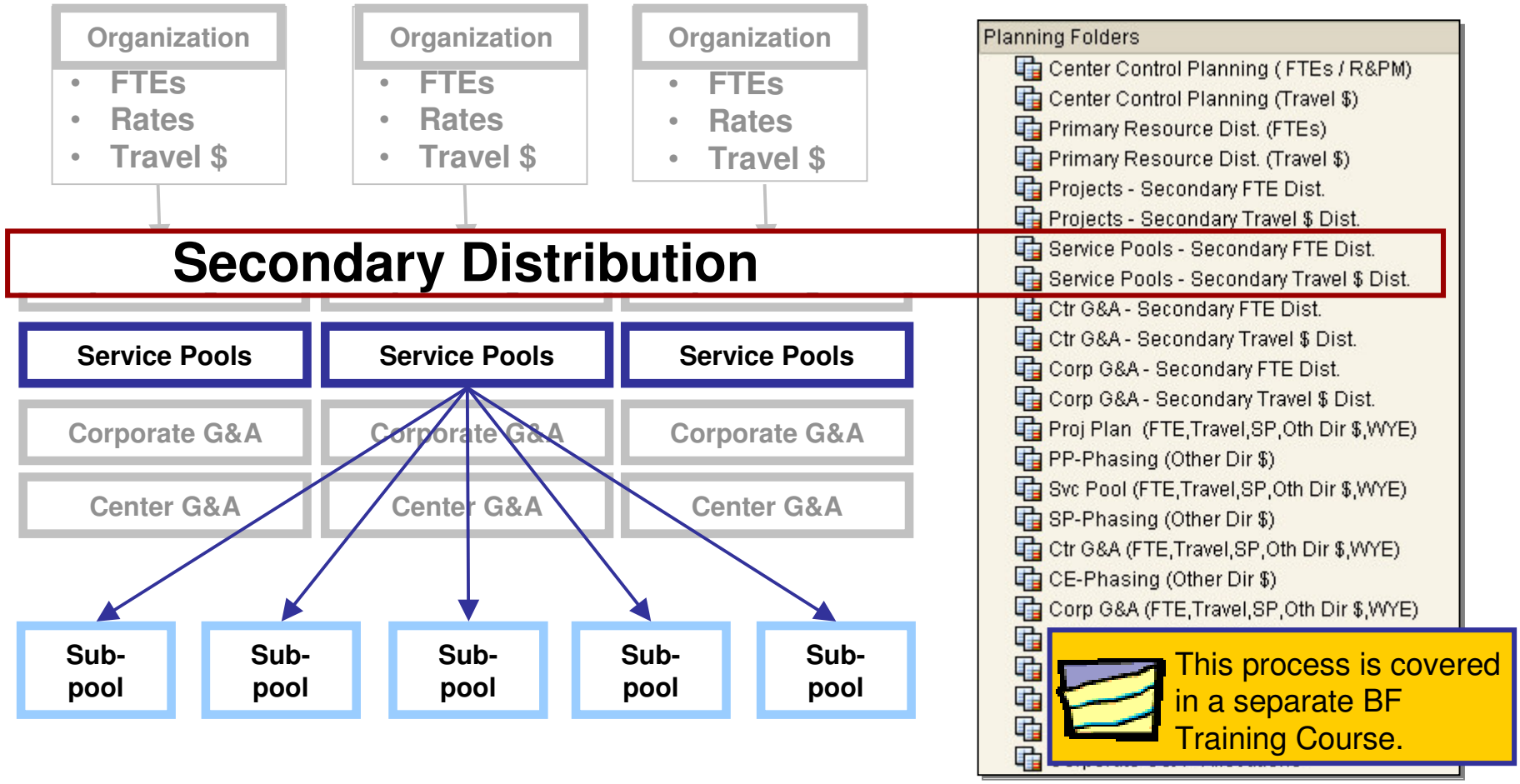
- This data is used by the Center Organizational FTE Authorizers to do the distribution of FTEs throughout the organization.

Visualizing the system
Primary FTE Dist.



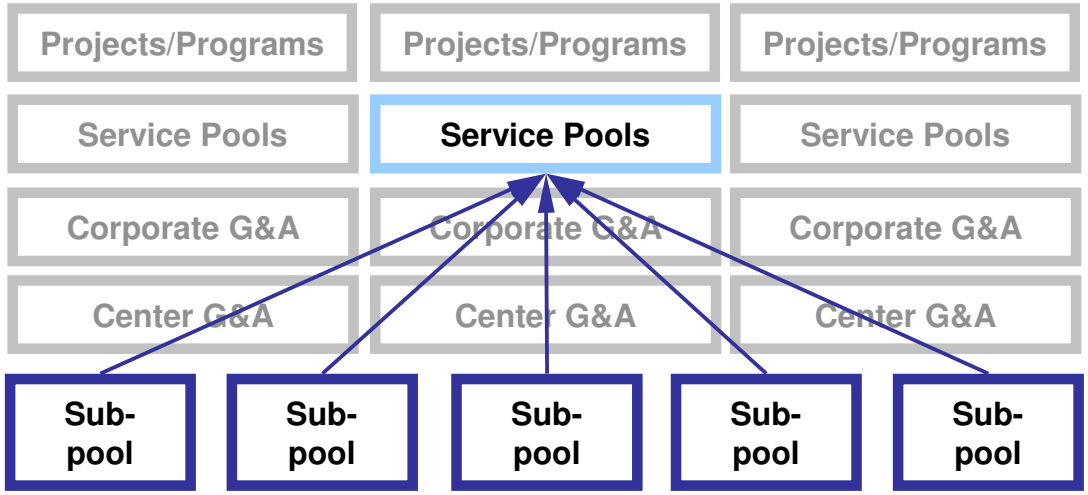
- This data is used by the Secondary Authorizers to do the primary distribution of FTEs to WBS', sub-pools, Corporate and Center G&A pools. *NOTE: Project Definition is defined as a UPN 5*

Visualizing the system Secondary FTE Dist.

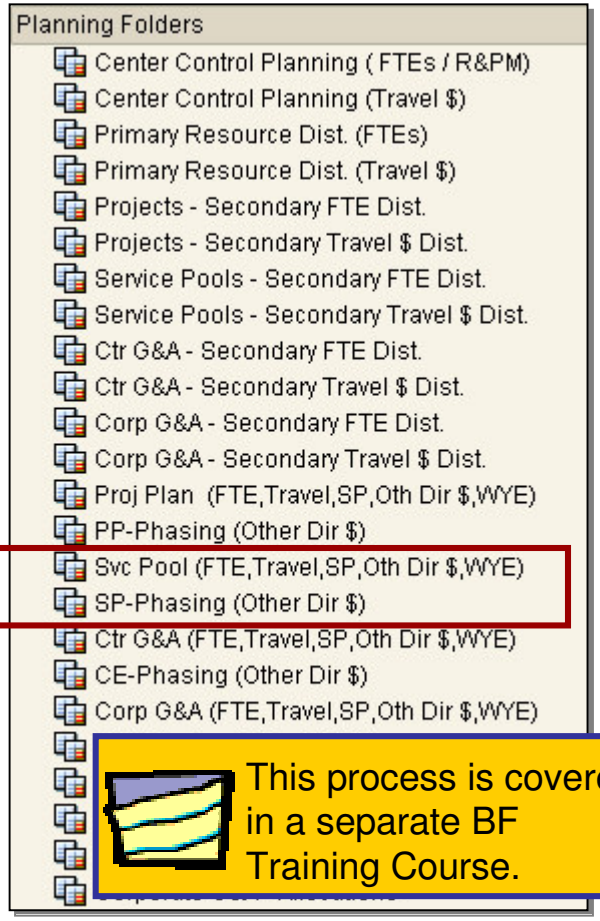


- This data is used by the Service Pool Authorizers to do the secondary distribution of FTEs from Service Pools to Sub-pools.

Visualizing the system
Sub-pool Requests



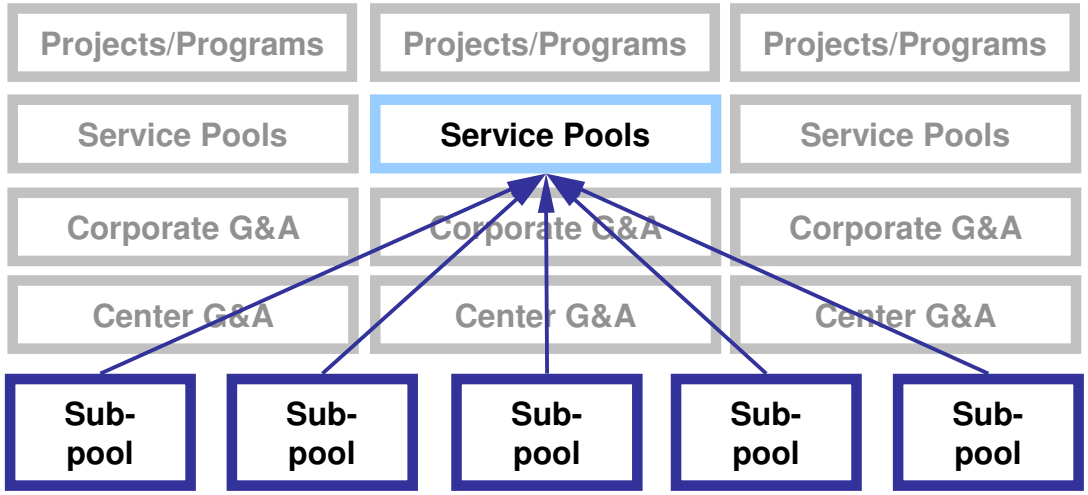
Sub-pool Requests

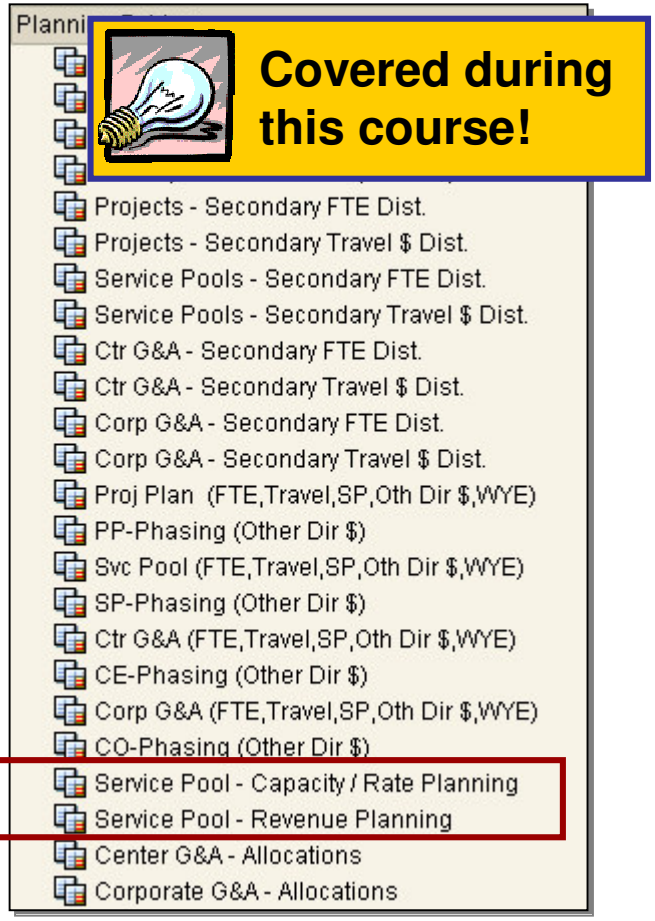


This process is covered in a separate BF Training Course.

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

Visualizing the system
Sub-pool Capacity, Rates, and Revenue





Capacity, Rates, and Revenue

- This data is used by the Service Pool Estimators to plan sub-pool capacity, rates, and revenue.

Service Pool Capacity / Rate Planning Business Process Overview

- **During Pre-POP:**
  - Estimated costs of operating the sub-pool are developed based on historical data
  - Service sub-pool capacity is refined based upon historical capacity levels.
  - Rates for Service sub-pools are derived based upon planned sub-pool usage and capacity.
  - Service sub-pool usage is planned also based upon historical data
  - Costs are allocated to sub-pool customers based on units of consumption times the sub-pool rate
- **During POP:**
  - Sub-pool capacity and rates are further refined
  - Revenue plans are updated and sub-pool cost allocations are revised.

Service Pool Capacity / Rate Planning Business Process Overview

- **During Initial Phasing Plan:**
  - Cost estimates are phased
  - Sub-pool capacity and usage estimates are phased

- **During the mid-year update:**
  - Cost estimates, rates, and capacity are revised based upon year to date actuals.

Service Pool Revenue Planning Business Process Overview

- **During Pre-POP:**
  - Sub-pool planners estimate their customer requirements to ensure full cost recovery.
  - Sub-pool subscribers adjust their usage estimates and receive cost allocations.

- **During POP:**
  - After guidelines have been issued, final sub-pool service negotiations take place between sub-pools and their customers.

Service Pool Revenue Planning Business Process Overview

- **During Initial Phasing Plan:**
  - Sub-pool planners estimate the phased customer requirements.
  - Sub-pool subscribers estimate phased requirements for demand service pools only – allocated service pools are only phased by service pool planners.
- **During the mid-year update:**
  - Sub-pool planners update estimates of customer requirements.
  - Sub-pool subscribers update requirements for usage of demand service pools.

Activities in the System

- The estimator selects the "Service Pool – Capacity / Rate Planning" folder.
- The estimator selects the appropriate Header characteristics for Business Area, Budget Year, Agency Version, Center Version, Requested Service Pool, Requested Sub-pool, and Fiscal Year.
- The estimator enters annual and monthly capacity in units of measure.
- SEM derives the sub-pool rate based upon subscriptions and capacity.

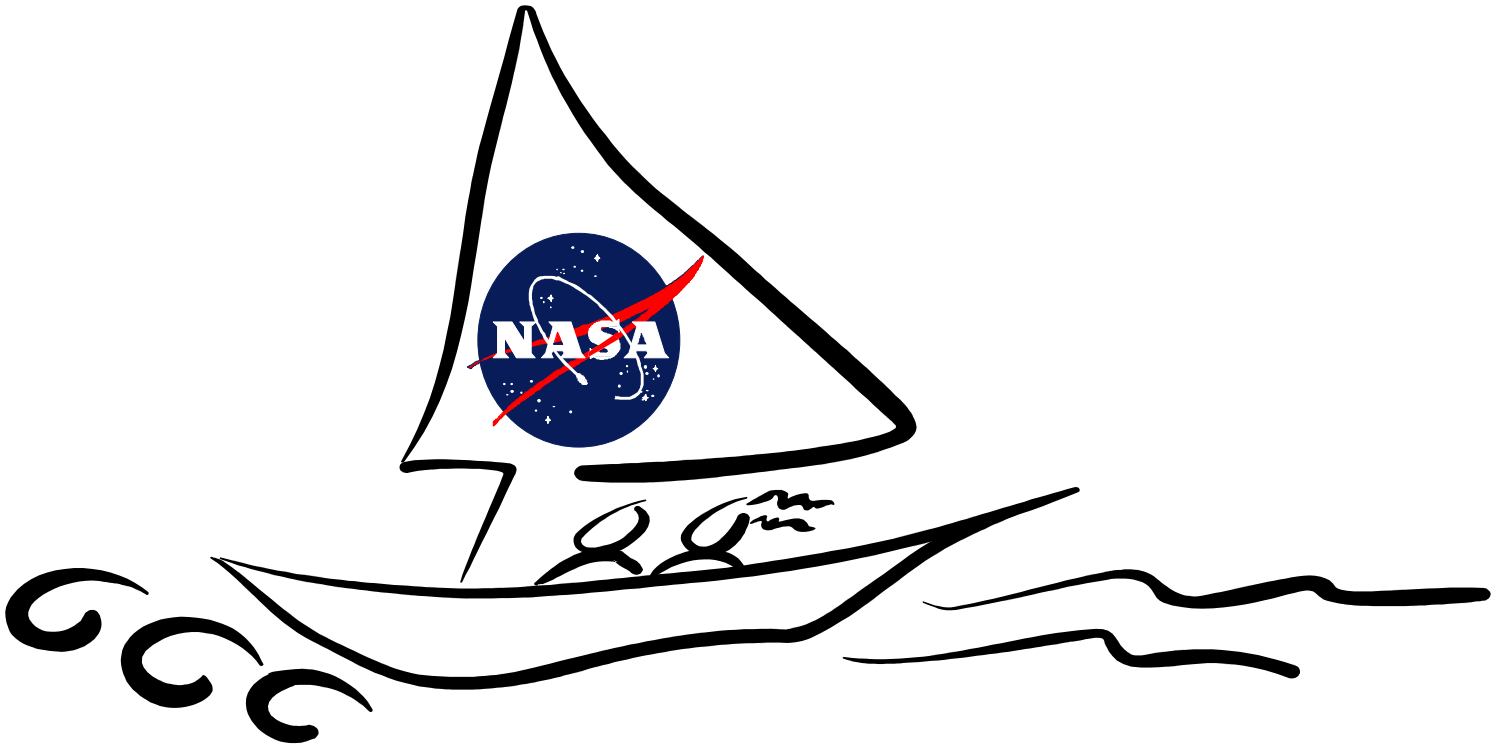
Activities in the System

- The estimator selects the "Service Pool – Revenue Planning" folder.
- The estimator selects the appropriate Header characteristics for Business Area, Budget Year, Agency Version, Center Version, Requested Service Pool, Requested Sub-pool, and Fiscal Year.
- The estimator enters forecasted annual and phased usage by projects, service pools, and center and corporate G&A.

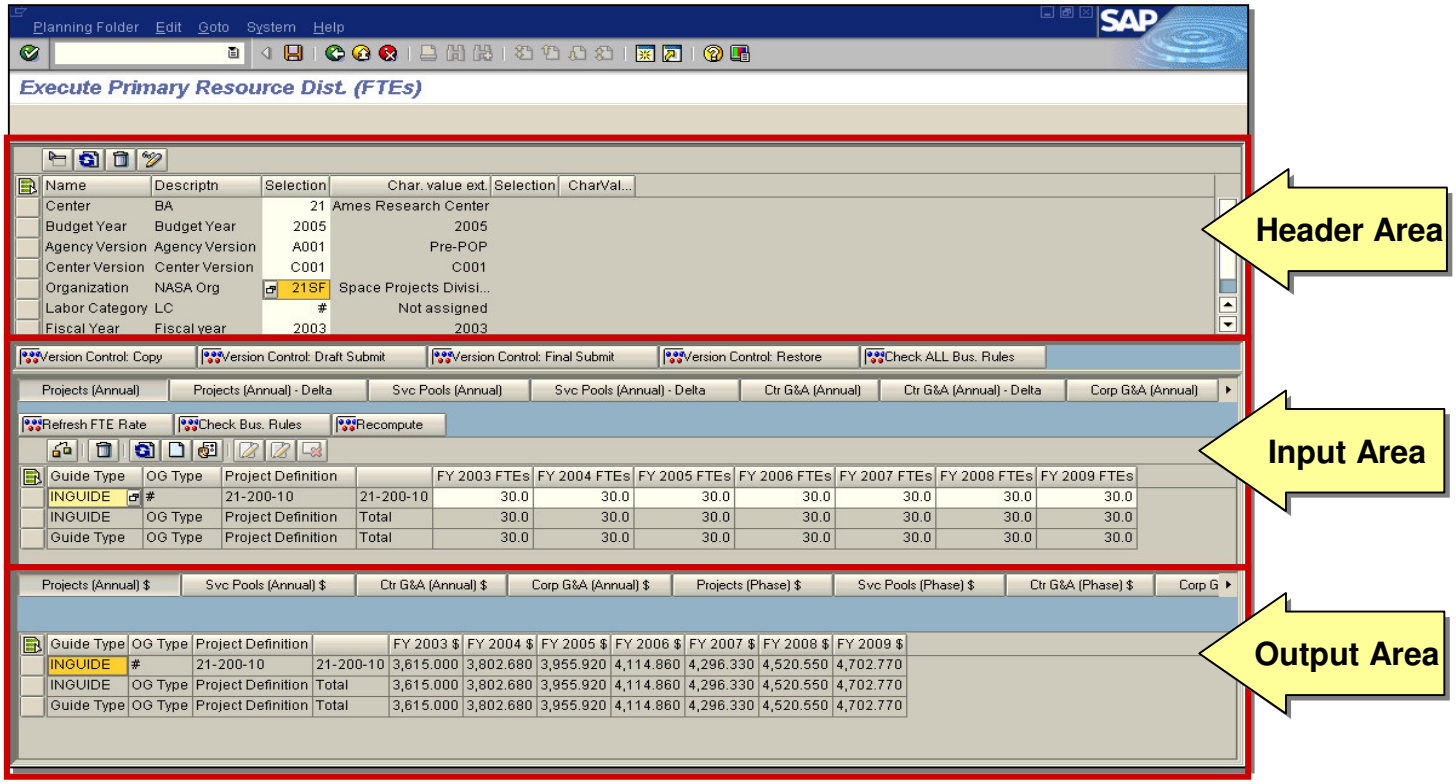
Service Pool Estimation Business Process Overview: Debrief

- This section provided an overview of Service Pool Capacity and Rate Planning and Service Pool Revenue Planning.
- The next section will demonstrate how to do these activities in the Budget Formulation System.

Navigation Overview



What Are the Primary Sections of a Typical Screen?

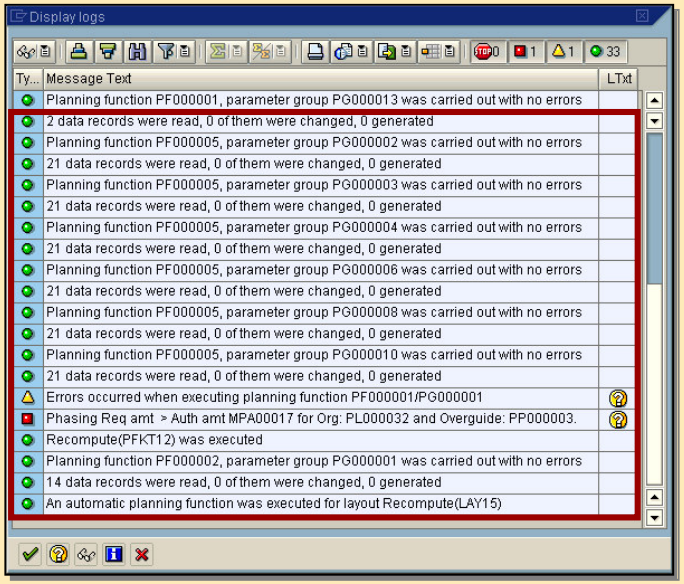


- Screens have three primary areas:
  - Header area
  - Input Area
  - Output Area

Business Rules

Business Rules Display

- Once you click on the Check ALL Bus. Rules, Version Control Draft Submit or Version Control Final Submit button, the list of business rules will appear.



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

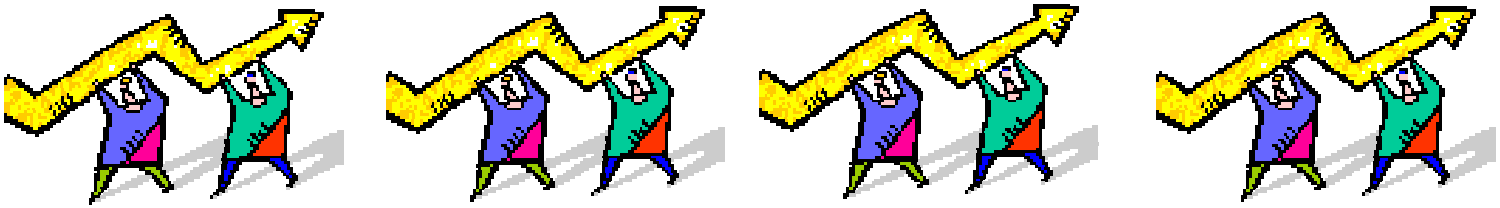
Stop – Prohibits you from proceeding

Red – Business Rule failed

Yellow – Business Rule warned

Green – Business Rule passed

Version Control



Purpose of Version Control

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

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

Version Control

BUDGET CYCLE ACTIVITY	AGENCY VERSION	CENTER VERSION		CENTER SUBMIT VERSIONS	
Center Pre-POP	A001	C001 C002 C003 C004 C005	Baseline budget data carried over from previous year Direct and Indirect rates established for Corporate and Center G&A, Service Pools, and Projects. Pools establish capacity. Project/Pool negotiations. Allocation of excess from Pools to Projects. Cost finalization and Final Center Director Approval. Code X area for strategic planning and "what-if" scenarios.	CENTER DRAFT SUBMIT VERSION C000	CENTER SUBMIT VERSION TO HEADQUARTERS C999
Center POP	A002	C001 C002 C003 C004 C005	Baseline budget data carried over from previous year Direct and Indirect rates established for Corporate and Center G&A, Service Pools, and Projects. Pools establish capacity. Project/Pool negotiations. Allocation of excess from Pools to Projects. Cost finalization and Final Center Director Approval. 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		

Center Versions

Centers have seven center versions:

- Five working versions: C001 through C005
  - These are your own versions to work in
  - Your Center can choose to designate which version to use or allow planners to use versions to create “what-if” scenarios
- Draft submit version: C999
  - Submit your work to C999 when it is ready for review at your Center
  - Data is visible to all users at your Center
- Draft submit version: C000
  - Submit your work to C000 when the CBO is ready to move to the next version
  - Data is visible to all users at your Center

Agency Versions

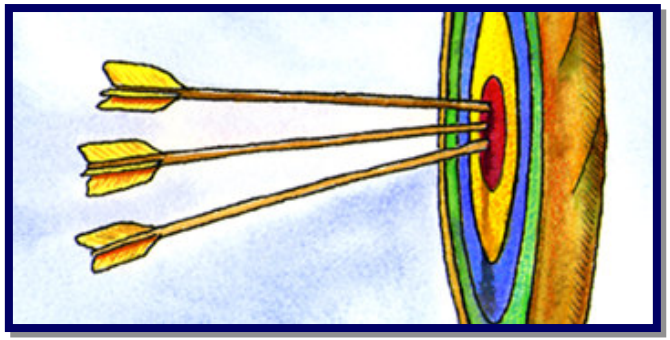
- Version A001- Center Pre-POP
  - Where Centers work on their Pre-POP
- Version A002 - Center POP
  - Where Centers work on their POP
- Version A003 – Enterprise POP
  - Where Enterprises review Center POP
- Version A004 – Agency POP
  - Where the Agency reviews the Enterprise POP
- Version A005 – OMB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

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

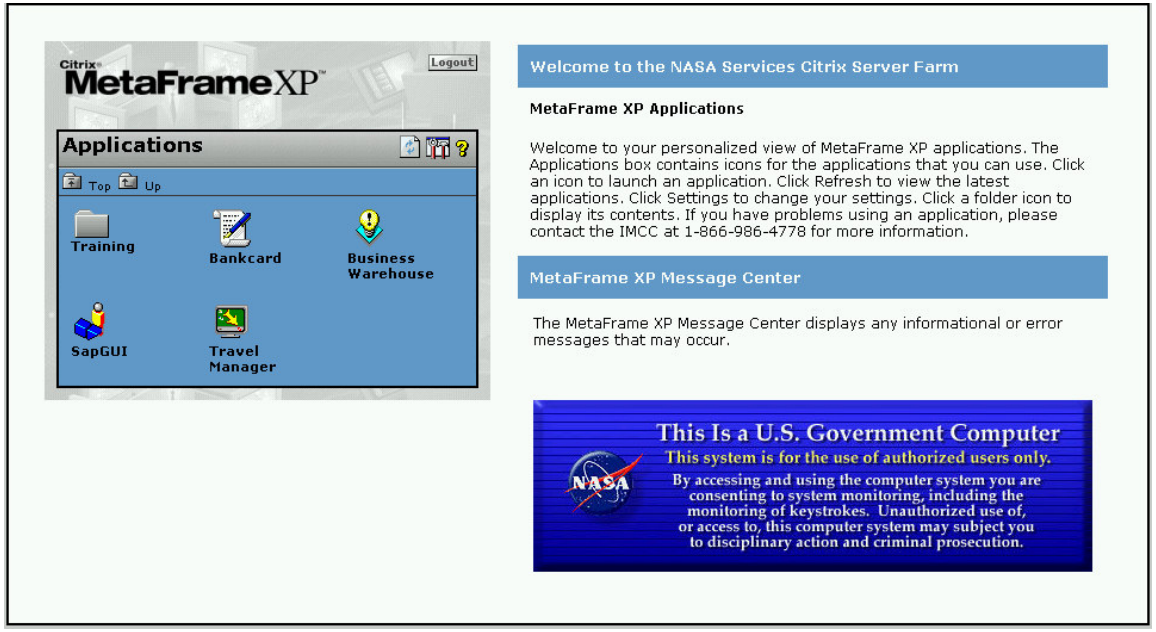
- **PC Users**
  - **Go To IE**
  - **URL:**
    - https://access.ifmp.nasa.gov
  - **Choose Budget Formulation**

Logging In

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

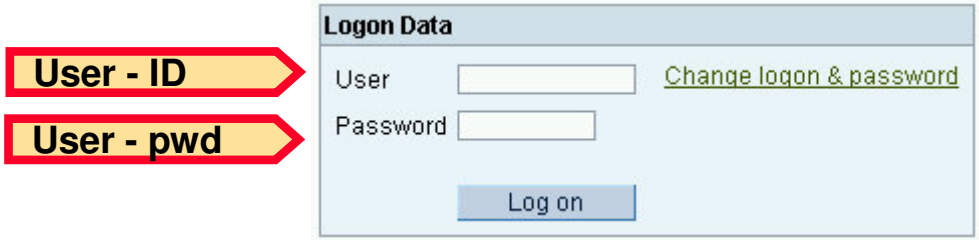
NISSU Logon

NISSU Application Options



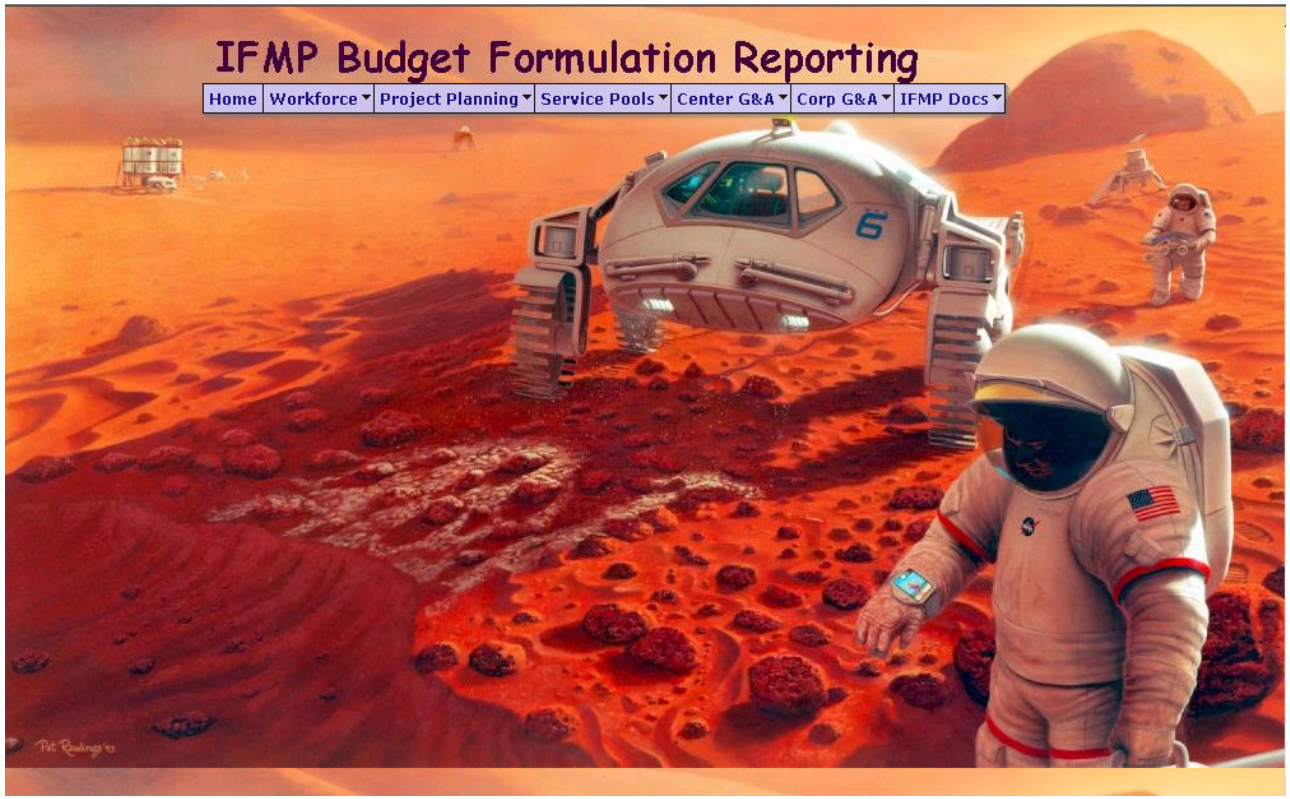
Logging In

- **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

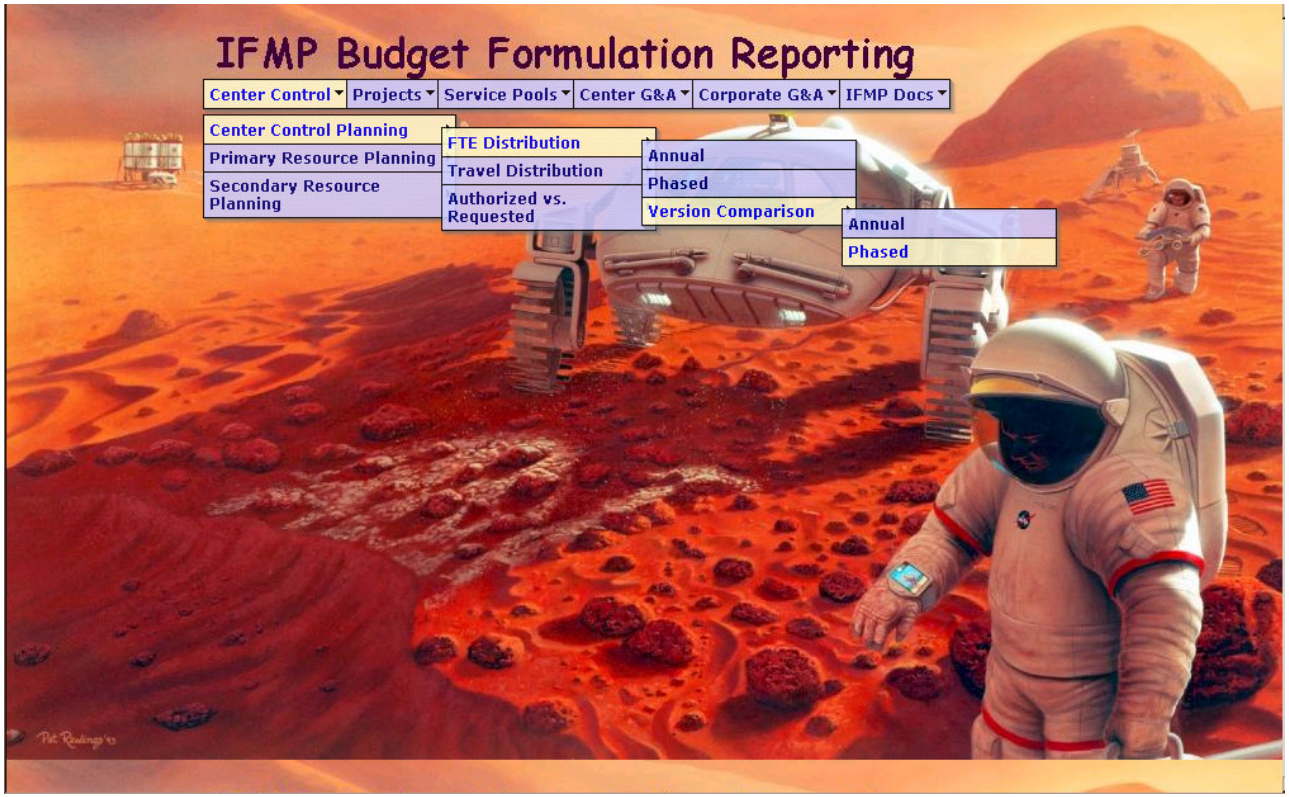
- **The lavender colored pull-down menus contain links to each of the reports in the system.**

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

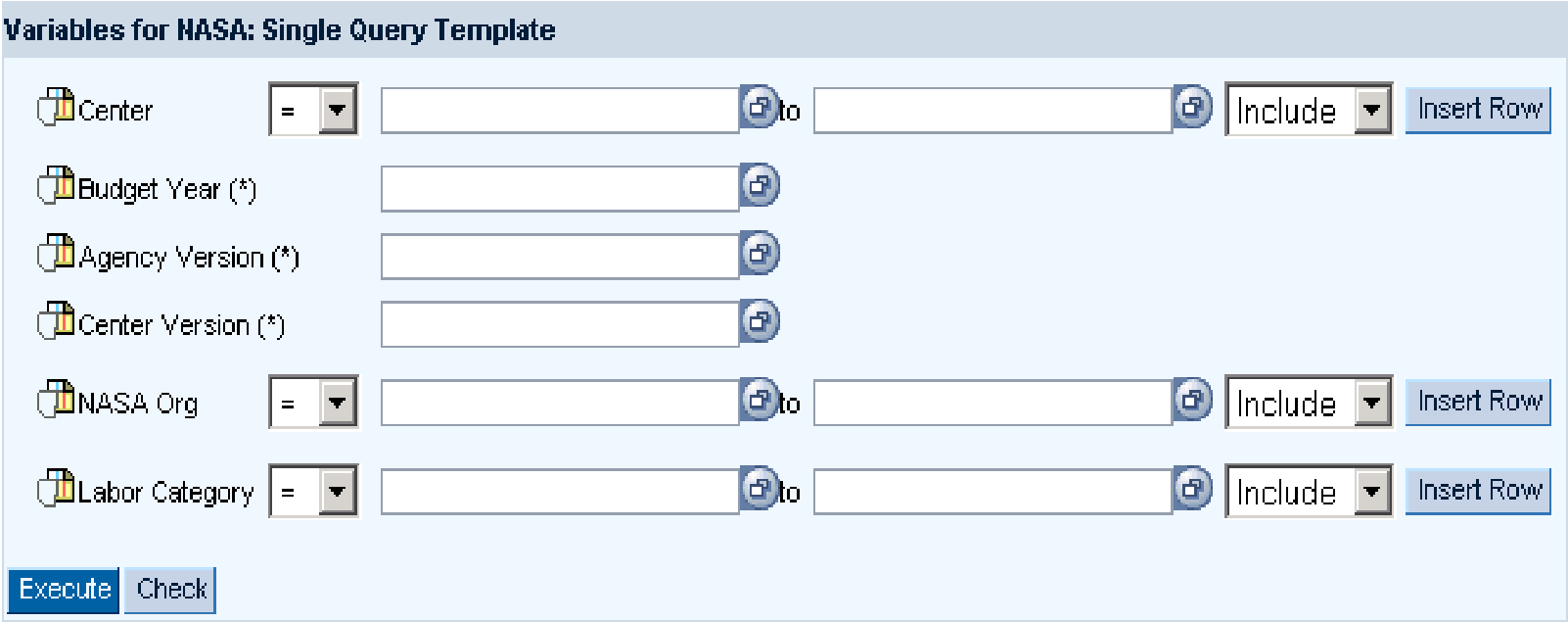
- **Pull Down Menu 'sample'**



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)

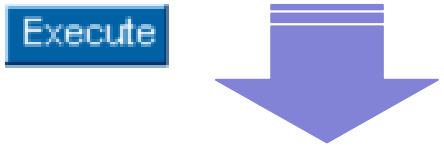


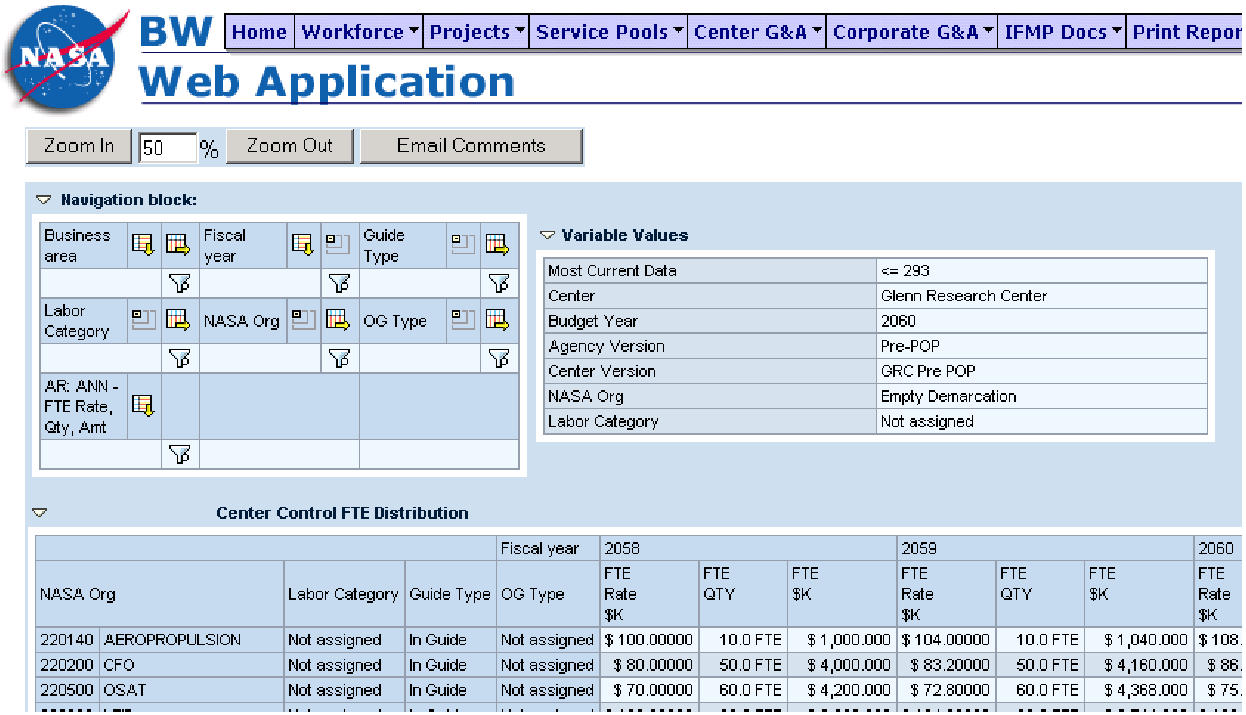
Topic 3

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

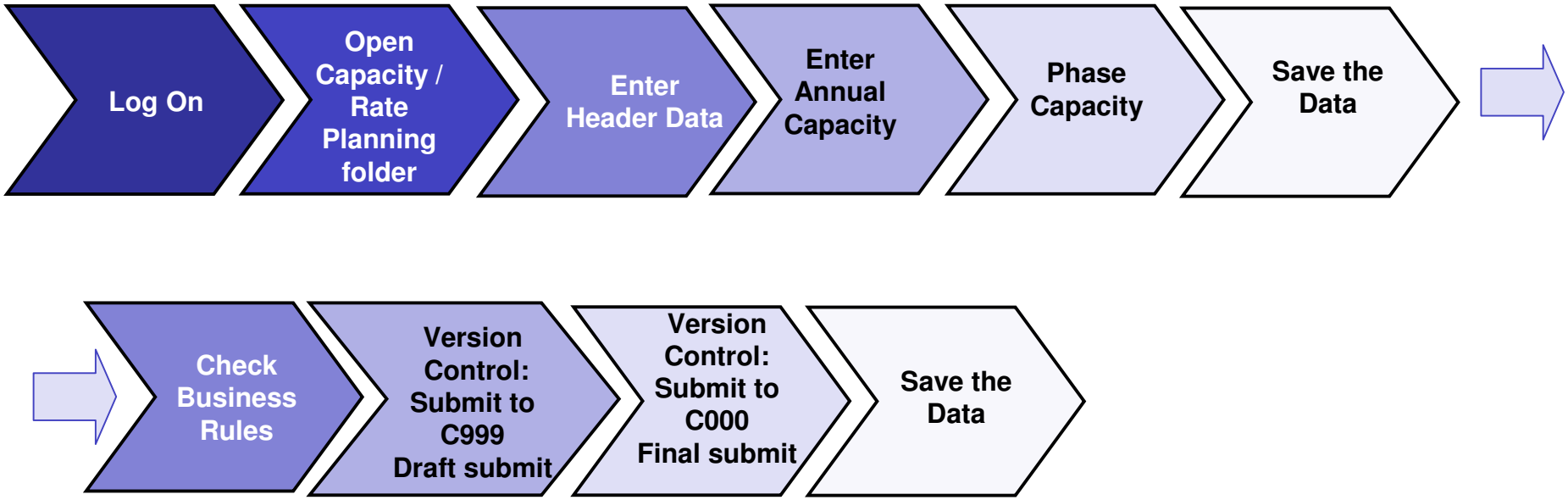
End of Course Content

Capacity and Rate Planning System Demonstration and Exercises

Capacity / Rate Planning Overview

- Annual Planning Input Layouts:
  - Capacity (Annual)
- Phasing Plan Input Layouts:
  - Capacity (Phase)
  - User-Defined % (Phase)
- Output Layouts:
  - Rate (Annual)
  - Cost Overview (Annual)
  - Rate (Phase)
  - Cost Overview (Phase)

Capacity / Rate Planning Overview Process Flow



Overview

- Activity 1: Entering Header Data
- Activity 2: Planning Annual Capacity and Viewing Rates
- Activity 3: Phasing Capacity

Capacity and Rate Planning Overview

Capacity and Rate Planning Folder

Name of Variable	Descriptn	Selection	Char. value ext.
Center	BA	22	Glenn Research Center
Budget Year	Budget Year	2060	2060
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Requested Service Pool	Service pool	F&RS	FACIL & REL SERVICES
Req Service Sub-Pool	Sub-pool	OFFICE	OFFICE
Fiscal Year	Fiscal year	2058	2058

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

Capacity (Annual) | Capacity (Phase) | User-Defined % (Phase)

Recompute | Refresh SP Costs | Check Bus. Rules

	FY 2058 Capacity	FY 2059 Capacity	FY 2060 Capacity	FY 2061 Capacity	FY 2062 Capacity	FY 2063 Capacity	FY 2064 Capacity
Annual - Capacity	10.0	100.0	100.0	100.0	100.0	100.0	100.0

Rate (Annual) | Cost Overview (Annual) | Rate (Phase) | Cost Overview (Phase)

	FY 2058 Rate	FY 2059 Rate	FY 2060 Rate	FY 2061 Rate	FY 2062 Rate	FY 2063 Rate	FY 2064 Rate
Annual - Service Rate	1.000	0.000	0.000	0.000	0.000	0.000	0.000
Annual - Functional Rate	87.000	8.924	9.262	9.613	9.977	10.355	10.751

Entering Header Data

Service Pool Capacity / Rate Planning

Entering Header Data

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

- Steps:
- Entering header data:
  1. Log On
  2. Open Service Pool Capacity / Rate Planning Folder

Service Pool Capacity / Rate Folder

Capacity (Annual) Input Layout

Name of Variable	Descriptn	Selection	Char. value ext.
Center	BA	22	Glenn Research Center
Budget Year	Budget Year	2060	2060
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Requested Service Pool	Service pool	F&RS	FACIL & REL SERVICES
Req Service Sub-Pool	Sub-pool	OFFICE	OFFICE
Fiscal Year	Fiscal year	2058	2058

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

Capacity (Annual) | Capacity (Phase) | User Defined % (Phase)

Recompute | Refre

	FY 2061 Capacity
Annual - Capacity	

Rate (Annual) | Co

Name of Variable	Descriptn	Selection	Char. value ext.
Center	BA	22	Glenn Research Center
Budget Year	Budget Year	2060	2060
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Requested Service Pool	Service pool	F&RS	FACIL & REL SERVICES
Req Service Sub-Pool	Sub-pool	OFFICE	OFFICE
Fiscal Year	Fiscal year	2058	2058

Header Data

	FY 2058 Rate	FY 2059 Rate	FY 2060 Rate	FY 2061 Rate	FY 2062 Rate	FY 2063 Rate	FY 2064 Rate
Annual - Service Rate	1.000	0.000	0.000	0.000	0.000	0.000	0.000
Annual - Functional Rate	87.000	8.924	9.262	9.613	9.977	10.355	10.751

Header Data for Service Pool Capacity / Rate Planning

Header data is the data that you want to pull from the database and plan. In the Service Pool Capacity / Rate Folder, the data that you specify is the following:

Center	The two-digit Center number (your Center).
Budget Year	The Budget year you are planning.
Agency Version	The Agency Version you are working in (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).
Requested Service Pool	The service pool that you are planning capacity for.
Requested Service Sub-Pool	The service sub-pool that you are planning capacity for.
Fiscal Year	The fiscal year you are planning.

Entering Data in the Header Area

Header Area

Name of Variable	Descriptn	Selection	Char. value ext.
Center	BA	22	Glenn Research Center
Budget Year	Budget Year	2060	2060
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Requested Service Pool	Service pool	F&RS	FACIL & REL SERVICES
Req Service Sub-Pool	Sub-pool	OFFICE	OFFICE
Fiscal Year	Fiscal year	2058	2058

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

Center	The two-digit Center number
Budget Year	The budget year you are planning
Agency Version	The Agency Version you are working in A001=PrePOP, A002=POP
Center Version	The Center Version you are working in (C001-C005)
Req Service Pool	The service pool that you are planning capacity for
Req Svc Sub-pool	The service sub-pool that you are planning
Fiscal Year	The fiscal year you are updating

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

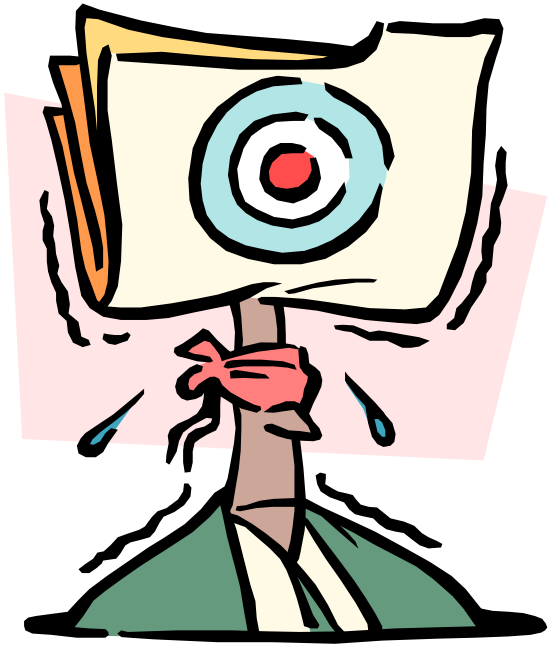
Planning Annual Capacity and Viewing Rates

Service Pool Capacity / Rate Planning

Planning Annual Capacity and Viewing Rates

- Goal: To enter annual capacity for a service sub-pool

- Steps:
- Entering header data:
  1. Log On
  2. Open Service Pool
     Capacity / Rate Planning Folder
  3. Click on Capacity (Annual) Button
  4. Enter Header Data



What goes in the Input Layout?

Capacity Annual Input Layout - Input Area

Capacity (Annual) | Capacity (Phase) | User-Defined % (Phase)

Recompute | Refresh SP Costs | Check Bus. Rules

	FY 2058 Capacity	FY 2059 Capacity	FY 2060 Capacity	FY 2061 Capacity	FY 2062 Capacity	FY 2063 Capacity	FY 2064 Capacity
Annual - Capacity	10.0	100.0	100.0	100.0	100.0	100.0	100.0

Note: The toolbar buttons that allow you to add and delete rows are disabled in this folder. The reason for this is that there can only be one row of data for the combination of fields in the header area.

Disabled buttons

1) **Enter the following:**
   FY 20XX Capacity **The service sub-pool's annual capacity in units.**
2) **Click either the "Recompute" button or the "Refresh SP Costs" button to compute service pool rates.**
3) **Repeat for all service-subpools that you need to plan.**
4) **Click on the Save button when complete.**

Where can I see the output?

Rate Annual Output Layout

Rate (Annual) | Cost Overview (Annual) | Rate (Phase) | Cost Overview (Phase)

	FY 2058 Rate	FY 2059 Rate	FY 2060 Rate	FY 2061 Rate	FY 2062 Rate	FY 2063 Rate	FY 2064 Rate
Annual - Service Rate	6.619	13.500	13.500	13.500	13.500	13.500	13.500
Annual - Functional Rate	10.714	22.100	22.100	22.100	22.100	22.100	22.100

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

Annual – Service Rate	**The per-unit dollar charge that sub-pool subscribers will pay.**
Annual – Functional Rate	**The per-unit dollar cost of operating the sub-pool.**
FY 20XX Rate	**Service/Functional rates for FY 20XX.**

Where can I see the output?

Cost Overview Annual Output Layout

Rate (Annual) | Cost Overview (Annual) | Rate (Phase) | Cost Overview (Phase)

	FY 2058 $	FY 2059 $	FY 2060 $	FY 2061 $	FY 2062 $	FY 2063 $	FY 2064 $
Annual - Direct	860.000	860.000	860.000	860.000	860.000	860.000	860.000
Annual - Other	1,390.000	1,350.000	1,350.000	1,350.000	1,350.000	1,350.000	1,350.000
Annual - Total	2,250.000	2,210.000	2,210.000	2,210.000	2,210.000	2,210.000	2,210.000

1) **Click the Cost Overview (Annual) output button to view the output area.**
2) **The following information is shown:**

Annual – Direct	**The total dollar charge that sub-pool subscribers will pay.**
Annual – Other	**The actual dollar cost of operating the sub-pool.**
FY 20XX $	**Direct/Other costs for FY 20XX.**

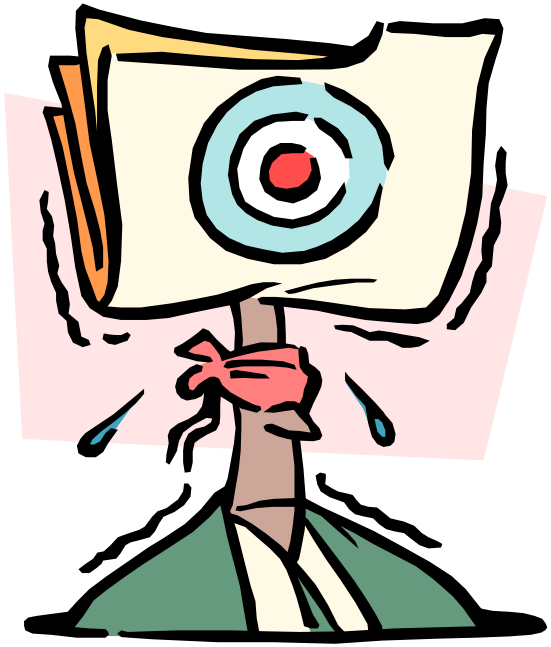
Phasing Monthly Capacity and Viewing Rates

Service Pool Capacity / Rate Planning

Phasing Monthly Capacity and Viewing Rates

- Goal: To enter monthly capacity for a service sub-pool

- Steps:
- Entering header data:
  1. Log On
  2. Open Service Pool
     Capacity / Rate Planning Folder
  3. Click on Capacity (Phase) Button
  4. Enter Header Data



What goes in the Input Layout?

Capacity Phase Input Layout - Input Area

Capacity (Annual) | Capacity (Phase) | User-Defined % (Phase)

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

	OCT - Capacity	NOV - Capacity	DEC - Capacity	JAN - Capacity	FEB - Capacity	MAR - Capacity	APR - Capacity	MAY - Capacity	JUN - Capacity	JUL - Capacity
Monthly - Capacity	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

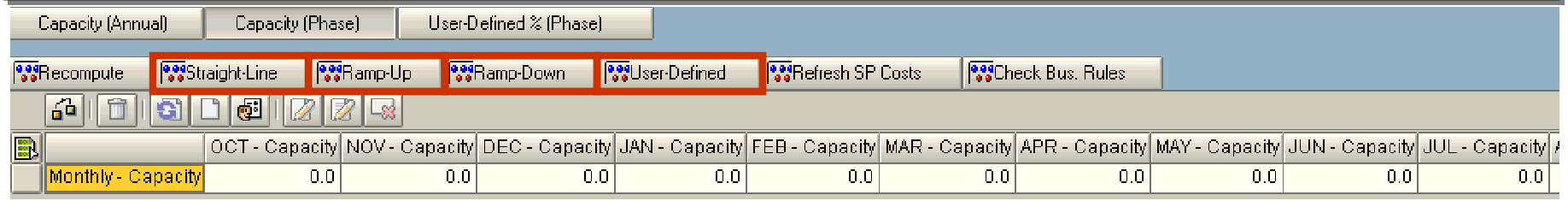
Note: The toolbar buttons that allow you to add and delete rows are disabled in this folder. The reason for this is that there can only be one row of data for the combination of fields in the header area.

Disabled buttons

1) **Enter the following:**
   OCT - SEP Capacity — **The service sub-pool's monthly capacity in units.**
2) **Click either the "Recompute" button or the "Refresh SP Costs" button to compute service pool rates.**
3) **Repeat for all service-subpools that you need to plan.**
4) **Click on the Save button when complete.**

What goes in the Input Layout?

Capacity Phase Input Layout - Input Area



5) OR choose one of the phasing algorithm buttons.

Straight-Line: Each month has the same capacity.

Ramp-Up: Capacity increases each month.

Ramp-Down: Capacity decreases each month.

User-Defined: Applies the percentage of the annual Capacity defined in User-Defined % (Phase)

Where can I see the output?

Rate Phase Output Layout

Rate (Annual) | Cost Overview (Annual) | Rate (Phase) | Cost Overview (Phase)

	OCT - Rate	NOV - Rate	DEC - Rate	JAN - Rate	FEB - Rate	MAR - Rate	APR - Rate	MAY - Rate	JUN - Rate	JUL - Rate	AUG - Rate	SEP - Rate	Annual I
Monthly - Service Rate	13.900	13.900	13.900	13.900	13.900	13.900	13.900	13.900	13.900	13.900	13.900	13.900	2
Monthly - Functional Rate	22.500	22.500	22.500	22.500	22.500	22.500	22.500	22.500	22.500	22.500	22.500	22.500	22

1) **Click the Rate (Phase) output button to view the output area.**
2) **The following information is shown:**

Monthly – Service Rate	**The per-unit dollar charge that sub-pool subscribers will pay.**
Monthly – Functional Rate	**The per-unit dollar cost of operating the sub-pool.**
OCT-SEP Rate	**Monthly Service/Functional rates.**

Where can I see the output?

Cost Overview Phase Output Layout

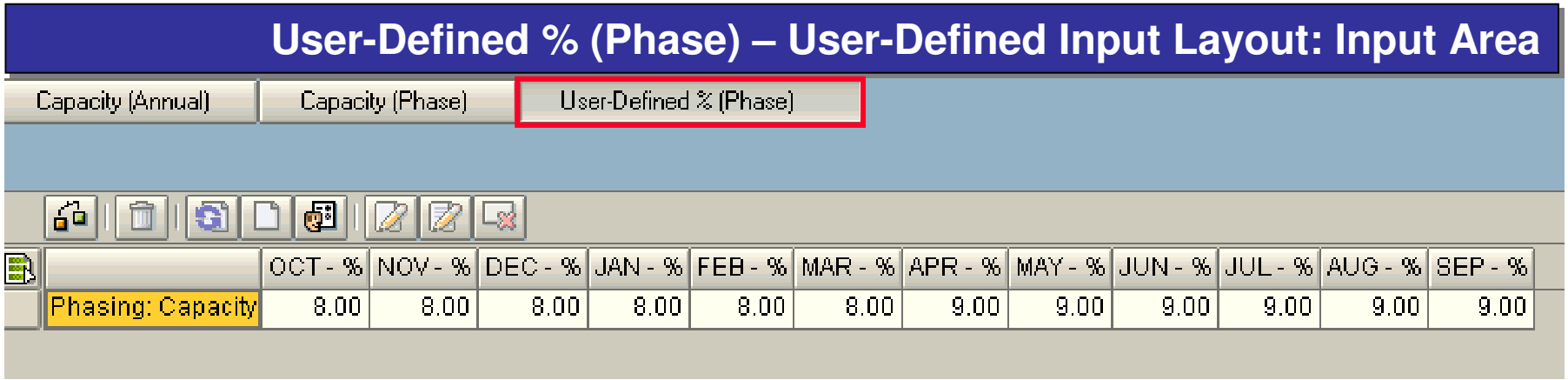
Rate (Annual) | Cost Overview (Annual) | Rate (Phase) | Cost Overview (Phase)

	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MAY - $	JUN - $	JUL - $	AUG - $	SEP - $	FY 2058 $
Monthly - Direct	160.833	175.833	160.833	175.833	160.833	175.833	160.833	175.833	160.833	175.833	160.833	175.833	2,020.000
Monthly - Other	20.000	20.000	20.000	20.000	20.000	20.000	20.000	20.000	20.000	20.000	20.000	20.000	240.000
Monthly - Total	180.833	195.833	180.833	195.833	180.833	195.833	180.833	195.833	180.833	195.833	180.833	195.833	2,260.000

1) **Click the Cost Overview (Phase) output button to view the output area.**
2) **The following information is shown:**

Monthly – Direct	**The total dollar charge that sub-pool subscribers will pay.**
Monthly – Other	**The actual dollar cost of operating the sub-pool.**
Monthly – Total	**The total of the direct and other columns.**
FY 20XX $	**Monthly Direct/Other costs.**

To use the User-Defined % Phase Algorithm

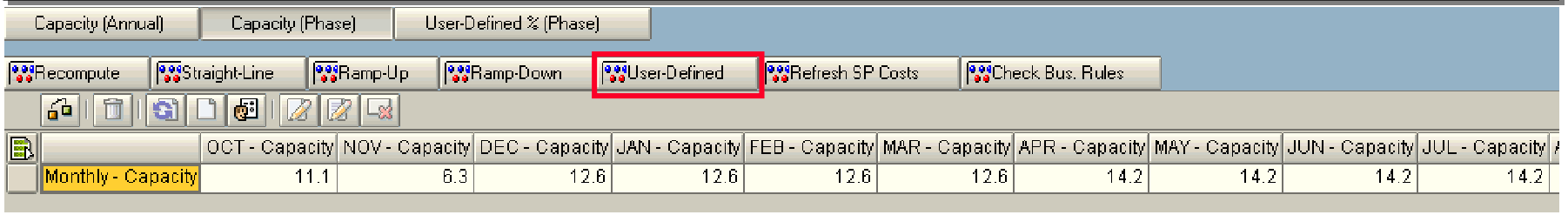


	OCT - %	NOV - %	DEC - %	JAN - %	FEB - %	MAR - %	APR - %	MAY - %	JUN - %	JUL - %	AUG - %	SEP - %
Phasing: Capacity	8.00	8.00	8.00	8.00	8.00	8.00	9.00	9.00	9.00	9.00	9.00	9.00

1) In the Header Area, ensure the fiscal year is set to the fiscal year you want to phase.
2) Scroll to the right until you see the User Defined % (Phase) button.
3) Click the User Defined % (Phase) – User-Defined button. The user-defined input area will open.
4) Enter the percentages you want to phase with.
5) Click the Capacity (Phase) button

To use the User-Defined % Phase Algorithm

Capacity (Phase) –Input Layout: Input Area



	OCT - Capacity	NOV - Capacity	DEC - Capacity	JAN - Capacity	FEB - Capacity	MAR - Capacity	APR - Capacity	MAY - Capacity	JUN - Capacity	JUL - Capacity
Monthly - Capacity	11.1	6.3	12.6	12.6	12.6	12.6	14.2	14.2	14.2	14.2

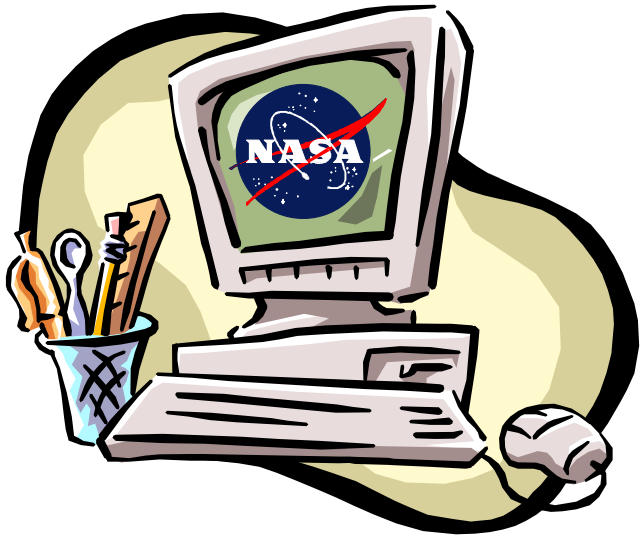
6) Click the User-Defined button to apply the user defined phasing percentages you just entered.
7) Click the Recompute button to update totals.
8) Click the Rate (Phase) button in the output area to view phased rates.

Exercises

- The Service Pool Estimator is responsible for planning the Service Sub-Pool capacity level and to derive the service rate the Sub-Pool will charge projects, other service pools, Center G&A and Corporate G&A for the services the Sub-Pool performs

Using your exercise handout, go to Service Pool *Estimator ExerciseAnnual & Monthly Scenario:*

Page 4-5



Service Pool Revenue Planning System Demonstration and Exercises

Overview

- Activity 1: Entering Header Data
- Activity 2: Annual Revenue Planning – Projects
- Activity 3: Annual Revenue Planning – Service Pools
- Activity 4: Annual Revenue Planning – Center G&A
- Activity 5: Annual Revenue Planning – Corp G&A
- Activity 6: Phasing Revenue Plans

Revenue Planning Overview

Revenue Planning Folder

Name of Variable	Descriptn	Selection	Char. value ext.
Center	BA	22	Glenn Research Center
Budget Year	Budget Year	2060	2060
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Requested Service Pool	Service pool	F&RS	FACIL & REL SERVICES
Req Service Sub-Pool	Sub-pool	OFFICE	OFFICE
Fiscal Year	Fiscal year	2058	2058

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

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

Recompute | Check Bus. Rules

Guide Type	OG Type	BA	NASA Org		WBS element		Network	Network activity	FY 2058 Units	FY 2059 Units	FY 2060 Units
INGUIDE	#	22	226000	SPACE DIRECTORATE	22-101-11-	Biotechnology	#	#	20.0	20.0	20.0
INGUIDE	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	20.0	20.0	20.0
Guide Type	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	20.0	20.0	20.0

Capacity (Annual) | Cost Overview (Annual) | Capacity (Phase) | Cost Overview (Phase) | Projects $ (Annual) | Service Pools $ (Annual) | Ctr G&A $ (Annual)

	FY 2058 Capacity	FY 2059 Capacity	FY 2060 Capacity	FY 2061 Capacity	FY 2062 Capacity	FY 2063 Capacity	FY 2064 Capacity
Annual - Capacity	110.0	100.0	100.0	100.0	100.0	100.0	100.0

Capacity / Rate Planning Overview

- Annual Planning Input Layouts:
  - Projects (Annual)
  - Projects (Annual) - Delta
  - Service Pools
  - Service Pools (Annual) – Delta
  - Ctr G&A (Annual)
  - Ctr G&A (Annual) – Delta
  - Corp G&A (Annual)
  - Corp G&A (Annual) – Delta
  - Cost Overview (Phase)

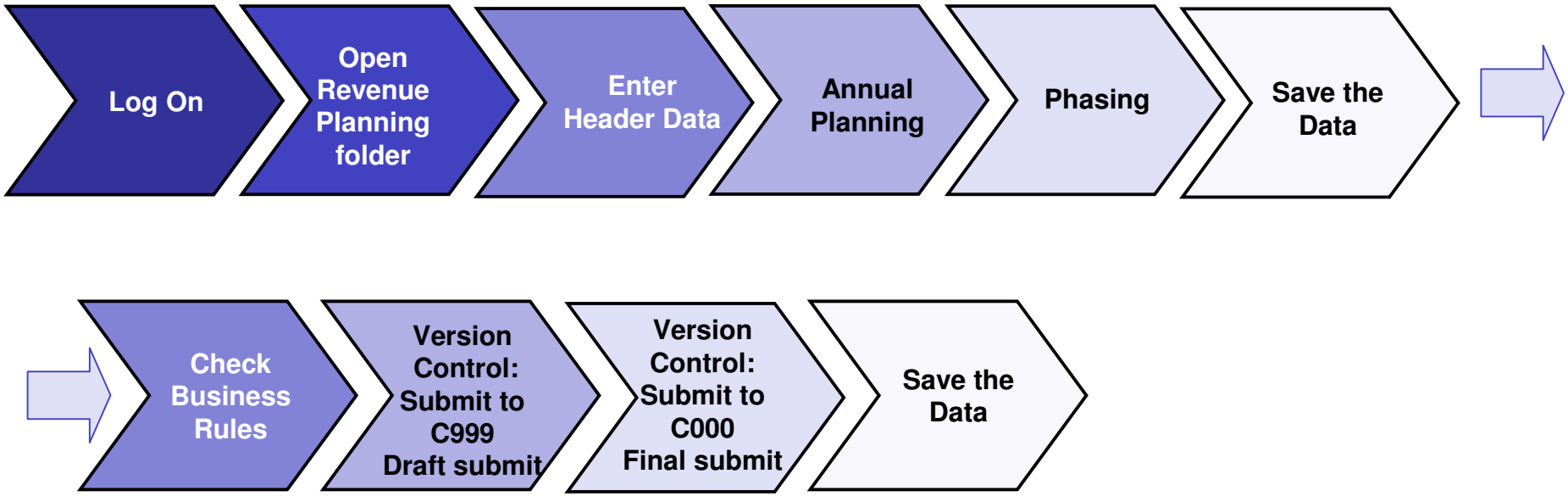
Capacity / Rate Planning Overview

- Phasing Plan Input Layouts:
  - Projects (Phase)
  - Projects (Phase) – Delta
  - Service Pools (Phase)
  - Service Pools (Phase) – Delta
  - Ctr G&A (Phase)
  - Ctr G&A (Phase) – Delta
  - Corp G&A (Phase)
  - Corp G&A (Phase) – Delta
  - User-Defined % (Phase)

Capacity / Rate Planning Overview

- Output Layouts:
  - Capacity (Annual)
  - Cost Overview (Annual)
  - Capacity (Phase)
  - Cost Overview (Phase)
  - Projects $ (Annual)
  - Service Pools $ (Annual)
  - Ctr G&A $ (Annual)
  - Corp G&A $ (Annual)
  - Projects $ (Phase)
  - Service Pools $ (Phase)
  - Ctr G&A $ (Phase)
  - Corp G&A $ (Phase)

Revenue Planning Overview Process Flow



Entering Header Data

Service Pool Revenue Planning

Entering Header Data

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

- Steps:
- Entering header data:
  1. Log On
  2. Open Service Pool Revenue Planning Folder

Service Pool Revenue Planning Folder

Revenue Planning Folder

Name of Variable	Descriptn	Selection	Char. value ext.
Center	BA	22	Glenn Research Center
Budget Year	Budget Year	2060	2060
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Requested Service Pool	Service pool	F&RS	FACIL & REL SERVICES
Req Service Sub-Pool	Sub-pool	OFFICE	OFFICE
Fiscal Year	Fiscal year	2058	2058

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

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

Recompute | Check Bus. R

Guide Type	OG Type	B
INGUIDE	#	2
INGUIDE	OG Type	B
Guide Type	OG Type	B

058 Units	FY 2059 Units	FY 2060 Units
		20.0
		20.0
		20.0

Header Data

Capacity (Annual) | Cost O | ols $ (Annual) | Ctr G&A $ (Annual)

	FY 2058 Capacity	FY 2059 Capacity	FY 2060 Capacity	FY 2061 Capacity	FY 2062 Capacity	FY 2063 Capacity	FY 2064 Capacity
Annual - Capacity	110.0	100.0	100.0	100.0	100.0	100.0	100.0

Header Data for Service Pool Revenue Planning

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

Center	The two-digit Center number (your Center).
Budget Year	The Budget year you are planning.
Agency Version	The Agency Version you are working in (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).
Requested Service Pool	The service pool that you are planning revenue for.
Requested Service Sub-Pool	The service sub-pool that you are planning revenue for.
Fiscal Year	The fiscal year you are planning.

Entering Data in the Header Area

Header Area

Name of Variable	Descriptn	Selection	Char. value ext.
Center	BA	22	Glenn Research Center
Budget Year	Budget Year	2060	2060
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Requested Service Pool	Service pool	F&RS	FACIL & REL SERVICES
Req Service Sub-Pool	Sub-pool	OFFICE	OFFICE
Fiscal Year	Fiscal year	2058	2058

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

Center	The two-digit Center number
Budget Year	The budget year you are planning
Agency Version	The Agency Version you are working in A001=PrePOP, A002=POP
Center Version	The Center Version you are working in (C001-C005)
Req Service Pool	The service pool that you are planning revenue for
Req Svc Sub-pool	The service sub-pool that you are planning
Fiscal Year	The fiscal year you are updating

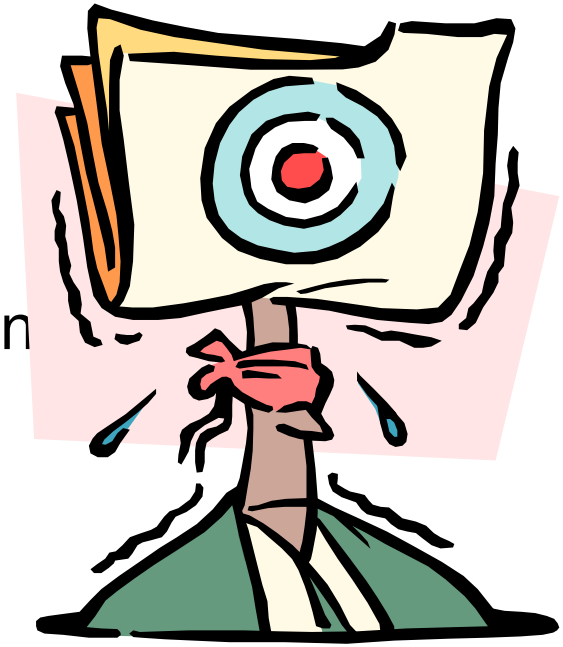
2) **Click the Transfer Variables button to set the data you want to plan.**

Annual Revenue Planning - Projects

Service Pool Revenue Planning

Annual Revenue Planning - Projects

- Goal: To estimate service pool revenue coming from projects.
- Steps:
- Entering header data:
  1. Log On
  2. Open Service Pool Revenue Planning Folder
  3. Click on Projects (Annual) Button in
  4. Enter Header Data



What goes in the Input Layout?

Projects (Annual) Input Layout - Input Area

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

Recompute | Check Bus. Rules

Guide Type	OG Type	BA	NASA Org		WBS element		Network	Network activity	FY 2058 Units	FY 2059 Units	FY 2060 Units
INGUIDE	#	22	226000	SPACE DIRECTORATE	22-101-11-	Biotechnology	#	#	20.0	20.0	20.0
INGUIDE	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	20.0	20.0	20.0
Guide Type	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	20.0	20.0	20.0

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

Guide Type	**Inguide or Overguide**
OG Type	**The type of Overguide: New Initiative, Augment, Price, and (#) unassigned.**
BA	**Business Area (Center number)**
NASA Org	**The directorate or division.**
WBS element	**The WBS element of the subscribing project**
Network	**The Network number (if applicable) of the subscribing project, otherwise "#"**

What goes in the Input Layout?

Projects (Annual) Input Layout - Input Area

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

Recompute | Check Bus. Rules

Guide Type	OG Type	BA	NASA Org		WBS element		Network	Network activity	FY 2058 Units	FY 2059 Units	FY 2060 Units
INGUIDE	#	22	226000	SPACE DIRECTORATE	22-101-11-	Biotechnology	#	#	20.0	20.0	20.0
INGUIDE	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	20.0	20.0	20.0
Guide Type	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	20.0	20.0	20.0

2) Enter the following (continued):

Network Activity The Network Activity number (if applicable) of the subscribing project, otherwise "#"

FY 20XX Units The number of units the project is expected to consume.

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

Where can I see the output?

Projects $ (Annual) Output Layout

Capacity (Annual) | Cost Overview (Annual) | Capacity (Phase) | Cost Overview (Phase) | Projects $ (Annual) | Service Pools $ (Annual) | Ctr G&A $ (Annual)

Guide Type	OG Type	BA	NASA Org		WBS element		Network	Network activity	FY 2058 $	FY 2059 $	FY 2060 $	FY 2061 $	FY 2062 $	FY 20
INGUIDE	#	22	226000	SPACE DIRECTORATE	22-101-11-	Biotechnology	#	#	20.000	0.000	0.000	0.000	0.000	0.
INGUIDE	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	20.000	0.000	0.000	0.000	0.000	0.
Guide Type	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	20.000	0.000	0.000	0.000	0.000	0.

1) **Click the Projects $ (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.**
BA	**Business Area (Center number)**
NASA Org	**The directorate or division.**
WBS element	**The WBS element of the subscribing project**
Network	**The Network number (if applicable) of the subscribing project, otherwise "#"**

Where can I see the output?

Projects $ (Annual) Output Layout

Capacity (Annual) | Cost Overview (Annual) | Capacity (Phase) | Cost Overview (Phase) | Projects $ (Annual) | Service Pools $ (Annual) | Ctr G&A $ (Annual)

Guide Type	OG Type	BA	NASA Org		WBS element		Network	Network activity	FY 2058 $	FY 2059 $	FY 2060 $	FY 2061 $	FY 2062 $	FY 20
INGUIDE	#	22	226000	SPACE DIRECTORATE	22-101-11-	Biotechnology	#	#	20.000	0.000	0.000	0.000	0.000	0.
INGUIDE	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	20.000	0.000	0.000	0.000	0.000	0.
Guide Type	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	20.000	0.000	0.000	0.000	0.000	0.

2) The following information is shown (continued):

Network Activity The Network Activity number (if applicable) of the subscribing project, otherwise "#"

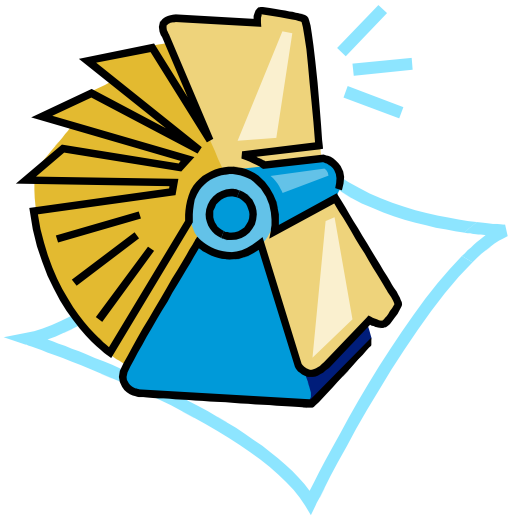
FY 20XX $ The dollars that will be charged to the project.

Annual Revenue Planning – Service Pools

Service Pool Revenue Planning

Annual Revenue Planning – Service Pools

- Goal: To estimate service pool revenue coming from service pools.
- Steps:
- Entering header data:
  1. Log On
  2. Open Service Pool Revenue Planning Folder
  3. Click on Service Pools (Annual) Button in the input area
  4. Enter Header Data



What goes in the Input Layout?

Service Pools (Annual) Input Layout - Input Area

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

Recompute | Check Bus. Rules

Guide Type	OG Type	BA	NASA Org		Pool	Sub-Pool	FY 2058 Units	FY 2059 Units	FY 2060 Units	FY 2061 Units	FY 2062 Units	FY
INGUIDE	#	22	226000	SPACE DIRECTORATE	F&RS	POWERRELIA	5.0	5.0	5.0	5.0	5.0	
INGUIDE	#	22	226000	SPACE DIRECTORATE	IT	APPLICDEV	9.0	9.0	9.0	9.0	9.0	
INGUIDE	#	22	226000	SPACE DIRECTORATE	S&E	MAINT&LOG	14.0	14.0	14.0	14.0	14.0	

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

Guide Type	Inguide or Overguide
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) unassigned.
BA	Business Area (Center number)
NASA Org	The directorate or division.
Pool	The subscribing pool
Sub-Pool	The subscribing sub-pool
FY 20XX Units	The subscription amount in units of measure.

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

Where can I see the output?

Service Pools $ (Annual) Output Layout

Capacity (Annual) | Cost Overview (Annual) | Capacity (Phase) | Cost Overview (Phase) | Projects $ (Annual) | Service Pools $ (Annual) | Ctr G&A $ (Annual)

Guide Type	OG Type	BA	NASA Org		Pool	Sub-Pool	FY 2058 $	FY 2059 $	FY 2060 $	FY 2061 $	FY 2062 $	FY 2063 $	FY 2064 $
INGUIDE	#	22	226000	SPACE DIRECTORATE	F&RS	POWERRELIA	43.987	42.453	42.188	41.925	41.667	41.411	41.159
INGUIDE	#	22	226000	SPACE DIRECTORATE	IT	APPLICDEV	79.177	76.415	75.938	75.466	75.000	74.540	74.085
INGUIDE	#	22	226000	SPACE DIRECTORATE	S&E	MAINT&LOG	123.165	118.868	118.125	117.391	116.667	115.951	115.244
INGUIDE	OG Type	BA	NASA Org	Total	Pool	Sub-Pool	246.329	237.736	236.250	234.783	233.333	231.902	230.488
Guide Type	OG Type	BA	NASA Org	Total	Pool	Sub-Pool	246.329	237.736	236.250	234.783	233.333	231.902	230.488

1) **Click the Service Pools $ (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.
BA	Business Area (Center number)
NASA Org	The directorate or division.
Pool	The subscribing pool
Sub-Pool	The subscribing sub-pool
FY 20XX $	The subscription amount in dollars.

Annual Revenue Planning – Center G&A

Service Pool Revenue Planning

Annual Revenue Planning – Center G&A

- Goal: To estimate service pool revenue coming from Center G&A.
- Steps:
- Entering header data:
  1. Log On
  2. Open Service Pool Revenue Planning Folder
  3. Click on Ctr G&A (Annual) Button in the input area
  4. Enter Header Data

What goes in the Input Layout?

Ctr G&A (Annual) Input Layout - Input Area

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

Recompute | Check Bus. Rules

Guide Type	OG Type	BA	NASA Org		Cost center		FY 2058 Units	FY 2059 Units	FY 2060 Units	FY 2061 Units
INGUIDE	#	22	226000	SPACE DIRECTORATE	220100	OFFICE OF THE DIRECTOR	100.0	100.0	100.0	100.0
INGUIDE	OG Type	BA	NASA Org	Total	Cost center	Total	100.0	100.0	100.0	100.0
Guide Type	OG Type	BA	NASA Org	Total	Cost center	Total	100.0	100.0	100.0	100.0

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

Guide Type	Inguide or Overguide
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) unassigned.
BA	Business Area (Center number)
NASA Org	The directorate or division.
Cost Center	The subscribing cost center
FY 20XX Units	The subscription amount in units of measure.

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

Where can I see the output?

Ctr G&A $ (Annual) Output Layout

Capacity (Annual) | Cost Overview (Annual) | Capacity (Phase) | Cost Overview (Phase) | Projects $ (Annual) | Service Pools $ (Annual) | Ctr G&A $ (Annual)

Guide Type	OG Type	BA	NASA Org		Cost center		FY 2058 $	FY 2059 $	FY 2060 $	FY 2061 $	FY 2062 $	FY 2063 $	FY 2064
INGUIDE	#	22	226000	SPACE DIRECTORATE	220100	OFFICE OF THE DIRECTOR	879.747	849.057	843.750	838.509	833.333	828.221	823.17
INGUIDE	OG Type	BA	NASA Org	Total	Cost center	Total	879.747	849.057	843.750	838.509	833.333	828.221	823.17
Guide Type	OG Type	BA	NASA Org	Total	Cost center	Total	879.747	849.057	843.750	838.509	833.333	828.221	823.17

1) **Click the Ctr G&A $ (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.
BA	Business Area (Center number)
NASA Org	The directorate or division.
Cost Center	The subscribing cost center
FY 20XX $	The subscription amount in dollars.

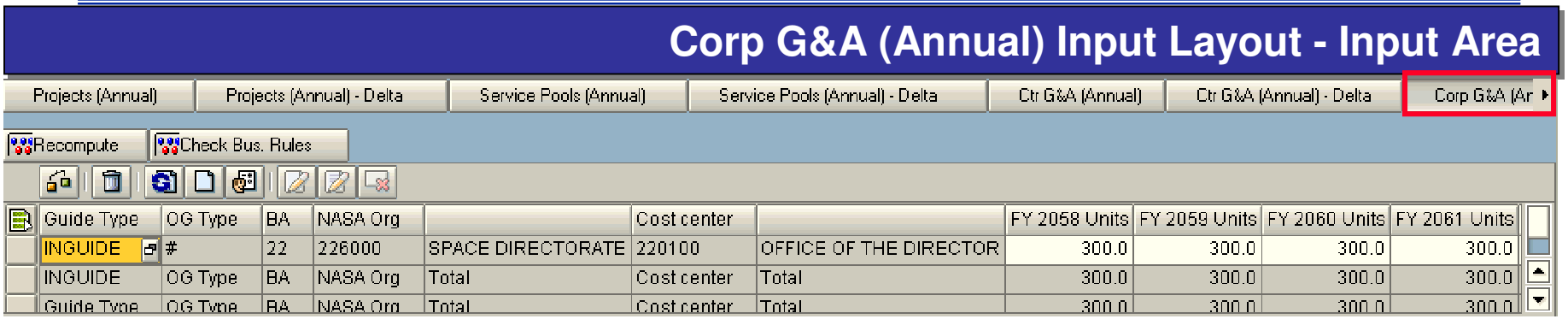
Annual Revenue Planning – Corp G&A

Service Pool Revenue Planning

Annual Revenue Planning – Corp G&A

- Goal: To estimate service pool revenue coming from Corporate G&A.
- Steps:
- Entering header data:
  1. Log On
  2. Open Service Pool Revenue Planning Folder
  3. Click on Corp G&A (Annual) Button in the input area
  4. Enter Header Data

What goes in the Input Layout?



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

Guide Type	**Inguide or Overguide**
OG Type	**The type of Overguide: New Initiative, Augment, Price, and (#) unassigned.**
BA	**Business Area (Center number)**
NASA Org	**The directorate or division.**
Cost Center	**The subscribing cost center**
FY 20XX Units	**The subscription amount in units of measure.**

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

Where can I see the output?

Corp G&A $ (Annual) Output Layout

Capacity (Annual) | Cost Overview (Annual) | Capacity (Phase) | Cost Overview (Phase) | Projects $ (Annual) | Service Pools $ (Annual) | Ctr G&A $ (Annual)

Guide Type	OG Type	BA	NASA Org		Cost center		FY 2058 $	FY 2059 $	FY 2060 $	FY 2061 $	FY 2062 $	FY 2063 $	FY 2064
INGUIDE	#	22	226000	SPACE DIRECTORATE	220100	OFFICE OF THE DIRECTOR	879.747	849.057	843.750	838.509	833.333	828.221	823.17
INGUIDE	OG Type	BA	NASA Org	Total	Cost center	Total	879.747	849.057	843.750	838.509	833.333	828.221	823.17
Guide Type	OG Type	BA	NASA Org	Total	Cost center	Total	879.747	849.057	843.750	838.509	833.333	828.221	823.17

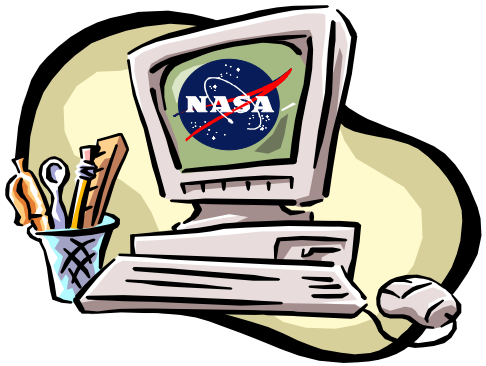
1) **Click the Corp G&A $ (Annual) output button to view the output area.**
2) **The following information is shown:**

Guide Type	**Inguide or Overguide**
OG Type	**The type of Overguide: New Initiative, Augment, Price, and (#) unassigned.**
BA	**Business Area (Center number)**
NASA Org	**The directorate or division.**
Cost Center	**The subscribing cost center**
FY 20XX $	**The subscription amount in dollars.**

Exercise: Requesting FTEs

<u>Annual Scenario</u>: You are a Service Pool Estimator for the Ames Research Center (ARC). During Pre-POP and/or POP, you are responsible for planning the estimated consumption of Sub-Pool services

Using your exercise handout, go to
Service Pool Estimator: Service Pool-Revenue Planning (Page 1-2, steps 1-17)



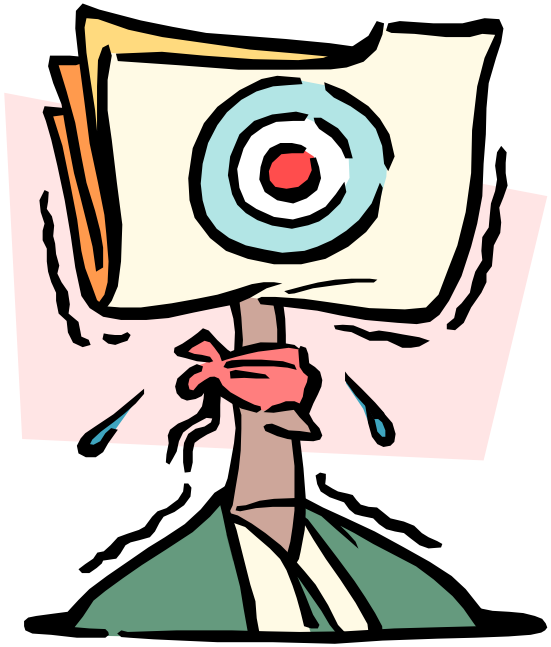
Phasing Revenue Plans

Service Pool Revenue Planning

Planning Monthly Service Pool Revenue

- Goal: To enter monthly revenue for a service sub-pool

- Steps:
- Entering header data:
  1. Log On
  2. Open Service Pool Revenue Planning Folder
  3. Click on Projects (Phase) Button
  4. Enter Header Data



What goes in the Input Layout?

Projects Phase Input Layout - Input Area

nual) | Corp G&A (Annual) - Delta | Projects (Phase) | Projects (Phase) - Delta | Service Pools (Phase) | Service Pools (Phase) - Delta | Ctr G&A (Phase)

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

Guide Type	OG Type	BA	NASA Org		WBS element		Network	Network activity	JUN - Units	JUL - Units	AUG - Units	SEP - Units	To
INGUIDE	#	22	226000	SPACE DIRECTORATE	22-101-46-03	A Mams	#	#	18.0	19.0	20.0	21.0	
INGUIDE	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	18.0	19.0	20.0	21.0	
Guide Type	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	18.0	19.0	20.0	21.0	

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

Guide Type	Inguide or Overguide
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) unassigned.
BA	Business Area (Center number)
NASA Org	The directorate or division.
WBS Element	The WBS element of the subscribing project
Network	The Network # of the subscribing project (or "#" if unused)
Network Activity	The Network Activity # of the subscribing project (or "#" if unused).
OCT-SEP Units	The subscription amount in units of measure per month.

What goes in the Input Layout?

Projects Phase Input Layout - Input Area

nual) | Corp G&A (Annual) - Delta | Projects (Phase) | Projects (Phase) - Delta | Service Pools (Phase) | Service Pools (Phase) - Delta | Ctr G&A (Phase) | C

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

Guide Type	OG Type	BA	NASA Org		WBS element		Network	Network activity	JUN - Units	JUL - Units	AUG - Units	SEP - Units	To
INGUIDE	#	22	226000	SPACE DIRECTORATE	22-101-46-03	A Mams	#	#	18.0	19.0	20.0	21.0	
INGUIDE	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	18.0	19.0	20.0	21.0	
Guide Type	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	18.0	19.0	20.0	21.0	

3) **Repeat for all service-subpools that you need to plan.**
4) **Click on the Save button when complete.**

What goes in the Input Layout?

Projects Phase Input Layout - Input Area

nual) | Corp G&A (Annual) - Delta | Projects (Phase) | Projects (Phase) - Delta | Service Pools (Phase) | Service Pools (Phase) - Delta | Ctr G&A (Phase)

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

Guide Type	OG Type	BA	NASA Org		WBS element		Network	Network activity	JUN - Units	JUL - Units	AUG - Units	SEP - Units
INGUIDE	#	22	226000	SPACE DIRECTORATE	22-101-46-03	A Mams	#	#	18.0	19.0	20.0	21.0
INGUIDE	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	18.0	19.0	20.0	21.0
Guide Type	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	18.0	19.0	20.0	21.0

5) OR choose one of the phasing algorithm buttons.

Straight-Line **Straight-Line: Each month has the same usage.**

Ramp-Up **Ramp-Up: Usage increases each month.**

Ramp-Down **Ramp-Down: Usage decreases each month.**

User-Defined **User-Defined: Applies the percentage of the annual Usage defined in** User-Defined % (Phase)

Where can I see the output?

Projects Phase Output Layout

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

Guide Type	OG Type	BA	NASA Org		WBS element		Network	Network activity	OCT - $	NOV - $	DEC - $	JAN - $	FEB - $	MAR - $	APR - $	MA
INGUIDE	#	22	226000	SPACE DIRECTORATE	22-101-46-03	A Mams	#	#	87.975	96.772	105.570	114.367	123.165	131.962	140.759	149
INGUIDE	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	87.975	96.772	105.570	114.367	123.165	131.962	140.759	149
Guide Type	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	87.975	96.772	105.570	114.367	123.165	131.962	140.759	149

1) **Click the Projects $ (Phase) 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.
BA	Business Area (Center number)
NASA Org	The directorate or division.
WBS Element	The WBS element of the subscribing project
Network	The Network # of the subscribing project (or "#" if unused)
Network Activity	The Network Activity # of the subscribing project (or "#" if unused).
OCT-SEP $	The subscription amount in $ per month.

To use the User-Defined % Phase Algorithm

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

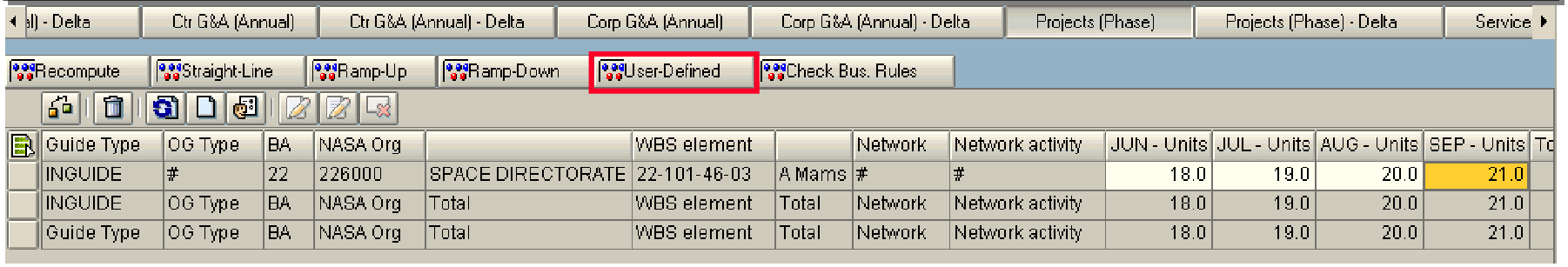
ols (Phase) | Service Pools (Phase) - Delta | Ctr G&A (Phase) | Ctr G&A (Phase) - Delta | Corp G&A (Phase) | Corp G&A (Phase) - Delta | User-Defined % (Phase)

	OCT - %	NOV - %	DEC - %	JAN - %	FEB - %	MAR - %	APR - %	MAY - %	JUN - %	JUL - %	AUG - %	SEP - %
Phasing: Projects	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Phasing: Svc Pools	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Phasing: Ctr G&A	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Phasing: Corp G&A	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

1) In the Header Area, ensure the fiscal year is set to the fiscal year you want to phase.
2) Scroll to the right until you see the User Defined % (Phase) button.
3) Click the User Defined % (Phase) – User-Defined button. The user-defined input area will open.
4) Enter the percentages you want to phase with.
5) Click the Projects (Phase) button

To use the User-Defined % Phase Algorithm

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



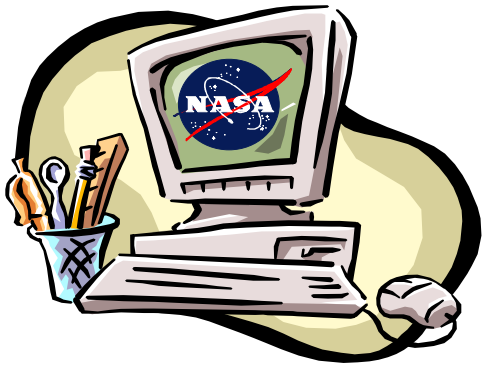
Guide Type	OG Type	BA	NASA Org		WBS element		Network	Network activity	JUN - Units	JUL - Units	AUG - Units	SEP - Units	To
INGUIDE	#	22	226000	SPACE DIRECTORATE	22-101-46-03	A Mams	#	#	18.0	19.0	20.0	21.0	
INGUIDE	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	18.0	19.0	20.0	21.0	
Guide Type	OG Type	BA	NASA Org	Total	WBS element	Total	Network	Network activity	18.0	19.0	20.0	21.0	

6) **Click the User-Defined button to apply the percentages you just entered.**
7) **Press recompute to update totals.**

Exercise: Requesting FTEs

<u>Monthly Phasing Scenario</u>: You are a Service Pool Estimator for the Ames Research Center (ARC). During the Initial Phasing Plan and the Phasing Plan Update exercises, you are responsible for estimating the monthly usage fo Sub-Pool services for the twelve months of the operating year.

Using your exercise handout, go to ***Service Pool Estimator: Monthly Phasing Scenario (Page 2 -steps 1-13)***



End of Course Content

Review Objectives & Expectations

- Individuals should now be able to:

  - ✓ Plan Service sub-pool capacity and rates
  - ✓ Prepare revenue plans for service sub-pools
  - ✓ Access and manipulate the service pool reports
  - ✓ Explain the system overview how it is integrated
  - ✓ Explain the business context for using the system
  - ✓ Explain the roles that are in the class

Congratulations!

Training Course Feedback

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