



Workforce Integrated Management System (WIMS) User Training

July 23, Aug 3-12, 2004



Agenda

- **Overview**
- **System Support and Admin**
- **Sessions**
- **WIMS Modules**
 - CAPS
 - PRLS
 - **WPS**
 - AWARE
- **WPS Demonstration**
- **Q&A**



Overview

Why WIMS?

- In full cost it is essential to relate every employee/position including Workforce (WF) Competencies to a Program, Service Pool, G&A, or Corp. G&A effort
- Need to tactically and strategically (POP years) assess the Center's Human Capital by Program/Project by Organization by WF Competency
- Need a set of documentation that links Program/Project requirements to WF allocations – Demand driven



Why WIMS?

Continued

- Need to capture “Transition” FTE by name and WF Competencies for current year and execution year and by WF Competencies in the out years
- Need to show WF plans vs. actuals by name, FTE, and WF Competencies
- Need to document WF allocations at a level that is appropriate and consistent with “good” planning practices for integration of Program/ Project plans with Budget Formulation (POP planning)



WIMS Functionality

- Single source for all WF planning, management and analysis data for the Center and Agency.
- Provides essential WF data to Center and Agency management in order to make better WF staffing and management decisions



WIMS Modules

Complement Allocation Planning System (CAPS)

- Multiyear, two digit org level with FTP and OTFTP guidelines

Program/Project Requirements Library System (PRLS)

- Single location and universal format for technical, budget and schedule requirements for all work to be performed at Center

Workforce Planning System (WPS)

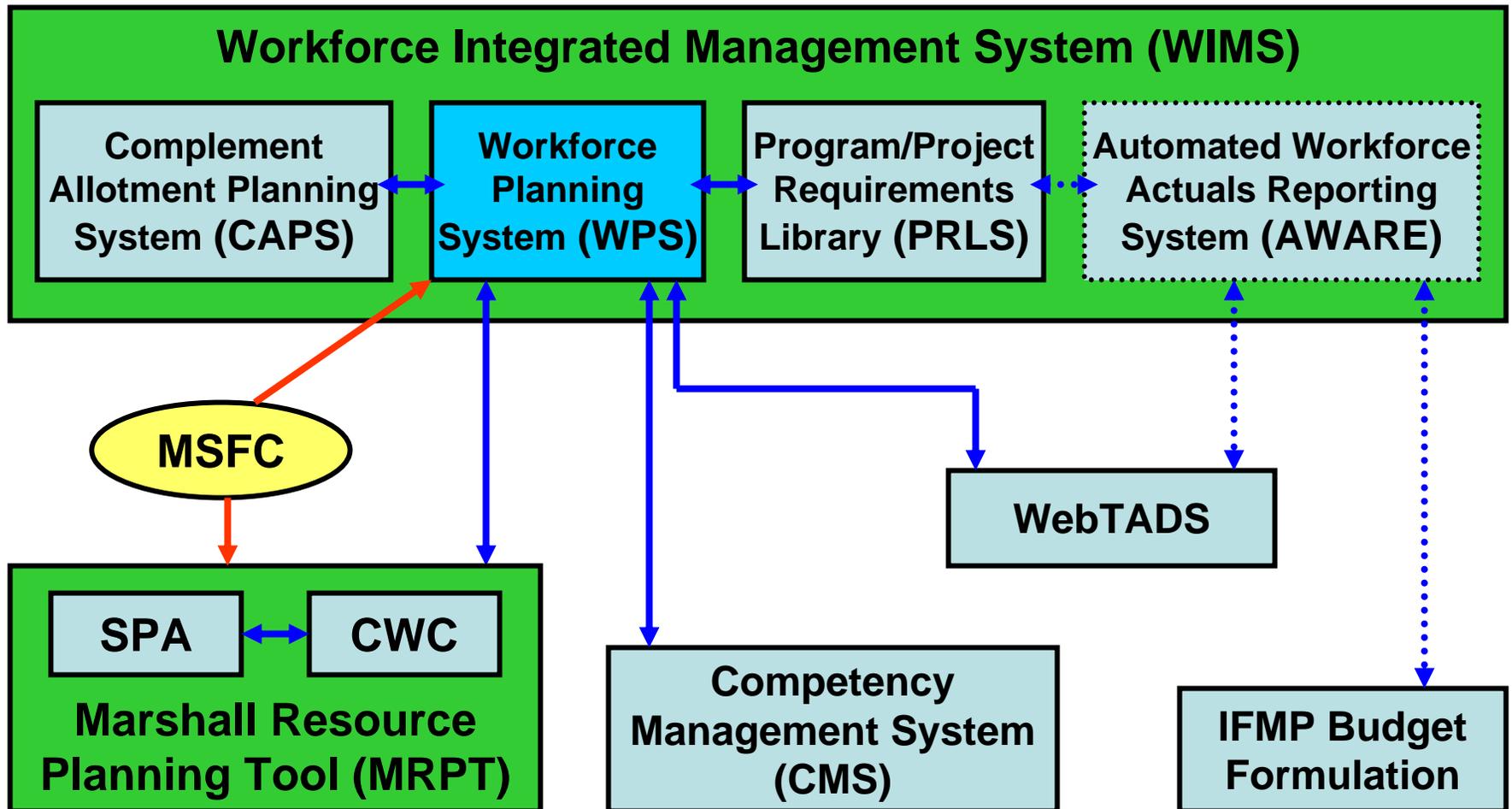
- Coupled with PRLS and CMS to plan and allocate WF based on requirements and workforce competencies
- WF planned in detail (by name); WF Competency; and FTE level for current and execution years. WF planned at WF Competency FTE level for outyears

Automated Workforce Actuals Reporting System (AWARE)

- WF actuals reporting tool utilizing raw T&A data from WebTADS
- Made as consistent as possible with BW
- Reports combine WF Competencies and actuals



WIMS Architecture





WIMS Now...

	JUL	AUG	SEP
WIMS User Execution Year 05 (EY05) CS FTE By Name Planning		7/23 – 8/16	
HCO Review of WIMS Data		8/17-20	
Open Supporting/Performing EY05 CWC, FTE Phasing		8/18 – 9/13	
Update SPA FY05-10 per OMB WBS approval/funded allocations		7/15 – 9/13	
SPA 06-10 Data Upload to WIMS			9/14–17
WIMS User Review & Tweak EY05 to match CWC			9/20–24
HCO Review of WIMS Data			9/27–30
WIMS CMS Dataset 5 Extract Ready			9/30



WIMS Additional Functionality

- Ability to add HQ Org. Level Codes, assign to WBS numbers and report by HQ Org. Level
- Ability to plan at any necessary WBS level (3, 5, 7... digit)
- Ability to maintain a record of prior planning through “sessions”
- Ability to automatically roll to new POP year
- Ability to refresh Employee and WF Competency data and have plans automatically adjusted for changes (NPPS/FPPS & CMS Dataset 2)
- Screens and reports are downloadable to Excel
- Automated feed to Agency CMS (dataset 5)
- IFMP - BF data compatibility
- Ability to support “continuous planning” (Project Requirements & WF)



When To Use WIMS

- **“Continuously!”** – Coming to a PC near you!
- **CAPS** is used to initialize POP planning to set Org ceilings and then is revised based on results of POP planning
- **PRLS** is used to initialize the WF requirements (quantify demand) to support POP planning. Used to document execution year plans (like old TA's). Should be kept current to reflect latest set of requirements.
- **WPS** is used to support POP planning and during the year Dynamic reallocation / revisions of WF plans
- **AWARE** should be used to continuously monitor WF actuals (Hours, FTE) in relation to the WF plans by org, person, or project.



Workforce Planning Business Rules

- Found under the WIMS Help Menu
- Very important to follow Business Rules because they will:
 - Help ensure consistency in planning from Org to Org and Program/Project to Program/Project
 - Facilitate WF planning by answering many of the questions that have been raised in the past
 - Help adhere to the principles of Full Cost

The screenshot shows the WIMS Management System interface. The top navigation bar includes links for [Main Menu](#), [WPS Menu](#), [Change Password](#), [System Feedback](#), [WIMS Help](#), and [Logout](#). A red arrow points to the [WIMS Help](#) link. Below the navigation bar, the left sidebar contains links for [LaRC Business Rules](#), [MSFC Business Rules](#), [Execution Year Planning System C](#), and [Planning Code Definitions](#). A red arrow points to the [MSFC Business Rules](#) link. The main content area displays the [MSFC Civil Service Workforce Planning Business Rules](#) page, which includes a section for [Program/Project Requirements Document \(PRD\) – Requirements to be documented via MRPT – SPA/CWC](#) and a list of bullet points detailing the requirements and documentation process.



Workforce Planning Business Rules

- Program/Project Requirements Document (PRD) – Requirements to be documented via MRPT – SPA/CWC
- All programs/projects including Corp. G&A projects, Service Pool, and G&A sponsored initiatives requesting Center workforce must provide a description of the work and resource allocations via the MRPT SPA/CWC.
- PRDs are used to document the process of developing program/project requirements:
 - POP Session 1 documents Requesting/Sponsoring Org's initial request, Subsequent POP Sessions document intermediate negotiations and final agreements (milestones, workforce, and facility needs)
 - Requesting/Sponsoring Organizations are responsible for ensuring PRDs are kept current during the process and loaded into system
 - Supporting/Performing Organizations are responsible for initiating negotiations for required changes with Requesting/Sponsoring Organizations



Workforce Planning Business Rules

Workforce Planning

General Business Rules:

- All orgs must use WPS to plan workforce for FY05. It will also be the planning tool for the upcoming POP 05 **07** (includes CY-05 changes, EY-06 and POP-07 to 11).
- Workforce may be allocated to G&A, Program/Project, or Service Pools
- **Plan only your organization**
- Plan by name, by workforce competency in CY and EY and by workforce competency in out years
- **Plan everybody in your org for EY. If an employee has moved from your org but is still showing up in your roster, plan that employee utilizing a WBS provided by their new organization**
- Use your org complement in the out years as a planning guide
- **Add New Employees to your org only for approved and funded positions (indicate the position title in the New Employee notes field)**
- Plan every CS up to 1 FTE. If employee is Part-time perm, plan that employee up to the agreed upon level of support. If an employee is planning to separate during the year, plan him/her for the portion of the FTE that employee will use
- Org. Managers (at the MSFC “4 digit” level) are responsible for ensuring all subordinate organizations have fully planned their staff



Workforce Planning Business Rules

Workforce Planning

General Business Rules (Con't)

- Term employees are planned just like permanent CS employees
- Org managers plan all required onsite contractors and onsite government personnel to the program/project they will be supporting – by Work Years of Effort (WYE) – not name or competency. The plan in WIMS will be at total levels. MRPT CWC/SPA will be the planning tool for contractor details.
- You may only plan workforce to the WBS / activity / Cost center codes provided. (See document entitled “Planning Code Definitions” for further detail)

Specific Business Rules:

- Plan FTE doing work that is directly associated with the accomplishment of program/project milestones against the associated WBS
- Employees that are on detail to other Centers are planned to either the approving Center project supporting the detail or to that employees orgs Indirect Account. The Center detailing that employee out will plan these employees.
- Service Pool FTE's that are maintaining a capability (Facility Safety Heads/Coordinators, Admin/Business Operations functions, etc.) for their respective Org are planned to the respective Orgs Service Pool WBS



Workforce Planning Business Rules

Workforce Planning

Specific Business Rules (Cont'd):

- Org. Managers are planned to either direct project codes or the respective Indirect (Pool) WBS as authorized
- CS employees on developmental assignments (SESCDP, full-time study, fellowships, etc.) should be planned to the appropriate G&A cost center
- TBD - Co-op/student trainees are planned by the orgs in which they reside.
- TBD – (MSFC evaluating utilization of Service Activity function) - Plan FTE supporting Service Activities directly to the appropriate Service Activity WBS. Do not plan them to a specific project WBS. The FTE planned to the Service Activity will be planned directly to the program/project WBS by the Service Activity manager based on requirements/consumption
- Plan FTE that will be writing proposals/advocacy packages to the Bid and Proposal (B&P) G&A cost center
- Plan an anticipated winning percentage of proposed FTEs that are on submitted proposals to the “Code Y, S, U, or T Anticipated Proposal Based” WBS. It is unrealistic to expect to win 100 % of the FTE proposed. You should forecast what you expect to win and plan them to the appropriate account



Workforce Planning Business Rules

Workforce Planning

Specific Business Rules (Cont'd):

- FTE that are not allocated to either a Program/project WBS, Corporate G&A WBS, Service pool WBS or G&A Cost Center are planned to a Center “Transition” or “Unfunded Capacity” account.

WF Competency Assignment Business Rules:

- For each CS employee in Current and Execution Year, select the primary workforce competency required to accomplish the work associated with the corresponding WBS or Cost center code to which the employee is planned.
 - Each position’s WF competencies have been assigned based on the latest revision in WPS from the CMS database
 - You must select one and only one workforce competency per employee per WBS. You may choose any workforce competency in that employee’s portfolio
 - New employees are planned the same way
 - Workforce competencies are not assigned to On-site Contractors or other agency government employees



WIMS Systems Admin/Support



System Administration and Support

- **Getting Access to WIMS**
 - Org POC sends e-mail to Susan Gentile/Mack Vann requesting WIMS access
 - WIMS Administrators will verify user org, NASA e-mail and account privileges
 - WIMS Administrators will e-mail new user account information (ID & temporary **non-blank** password)
 - New user logs on and changes password
 - New user account ready
- <https://wims.nasa.gov>



System Administration and Support

- How/where to get help
 - Scrolling Message

Workforce Integrated Management System (WIMS)

News

No WIMS News Bulletins Today

Marshall Space Flight Center (07/22/04):
FY05 Workforce Planning By Name is Open!

[Main Menu](#) | [WPS Menu](#) | [Change Password](#) | [System Feedback](#) | [WIMS Help](#) | [Logout](#)

OPEN POP 06, FY: 2004, Session 1 (Fiscal Year 05 WF Planning)
Organizational Execution Year Planning (05)

- System down time (emailed to POC's and in Scrolling Message)
 - Problems in WIMS: Help Desk > MSFC Admin > LaRC
 - General Business Rules or WF Planning Questions:
Org WIMS POC > HCO & Budget Office
 - General Comments/Suggestions (feedback module)



System Administration and Support

- General Comments/Suggestions (feedback module)



[Main Menu](#) | [Change Password](#) | [System Feedback](#) | [WIMS Help](#) | [Logout](#)

Feedback

Please DO NOT enter errors in the feedback form. Errors in the system should be emailed to [ConITS Development Team](#).

The NASA Official of the WIMS site welcome your comments, questions and suggestions for improvement.

All of the fields highlighted in blue and prefixed with (R) are required and must contain a valid entry before WIMS will accept your submission.

(R) Name:

(R) E-mail Address, LaRC Post Office Account:
@larc.nasa.gov

Please reply No reply necessary

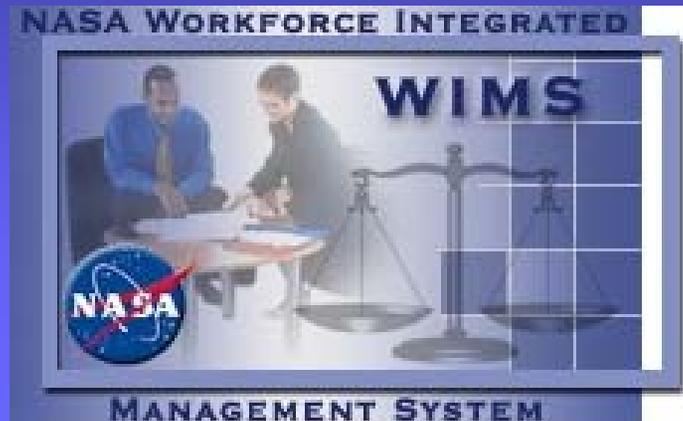
(R) Comment or Question:

Your overall impression of this system is:
 Excellent Very Good Good Fair Poor

Please give us Feedback!!!
This is important
To us and we do listen.



Indicate if you would like a response
To your feedback.



WIMS Sessions



Sessions

- Multiple Sessions may be initiated within a POP cycle.
- Each POP starts with Session 1
- Each Session contains a freeze of **all** files for reporting and gap analysis.
- Each time a Session is generated it starts as exact copy of prior Session
- Only the most recent Session can be modified

Open

- Session data is “updatable” for all users with update privileges
- Generally used to allow CY, EY and POP planning changes

Frozen

- Session data is “report only” for all users.
- Generally used to freeze the session for download to MRPT or BF

Open Restricted

- Session data is “view/report only” for all users except Admins
- Generally used to make “executive” changes like WBS modifications



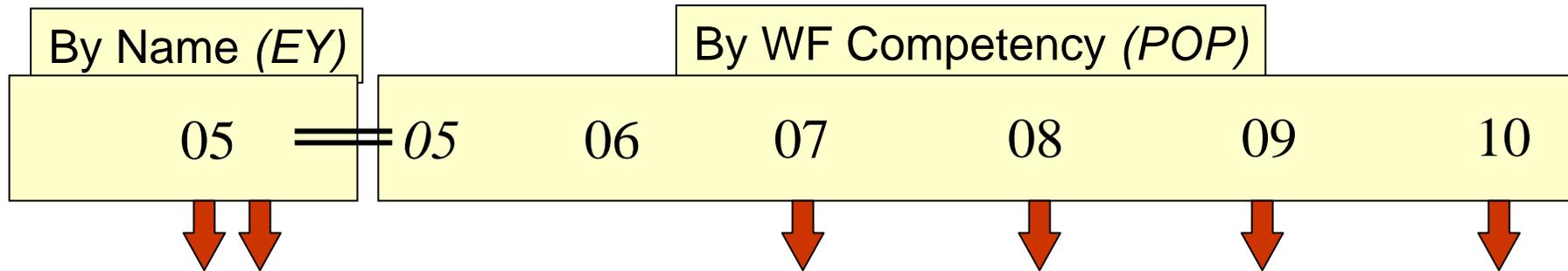
Refresh

- Admin. may initiate an employee and WF Competency refresh when a Session is opened
- Refresh takes most recent NPPS data and CMS Dataset 2 (Position Portfolio) and loads them into WIMS; all CY and EY plans will be adjusted accordingly
- Exceptions: When an employee has “separated” they will not be removed from CY but will from EY
- When “Refresh” is initiated, WIMS will not be accessible until refresh is complete (max 24 hrs.)
- Once “Refresh” is complete – emails are sent to POC’s notifying them of the WPS planning changes that occurred (i.e., “Employee A” moved from one org to another, etc.)
- WPS report 12 can be run against any Session to display refresh changes that occurred

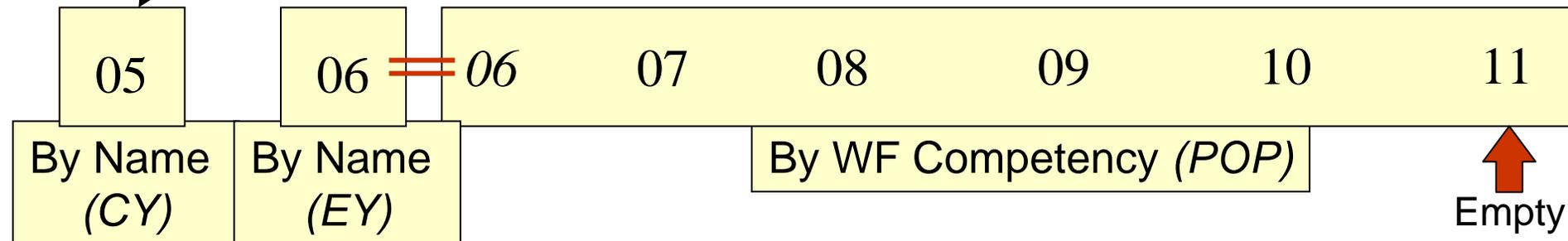


Roll-down process for new POP

POP 04 06



POP 05 07



- 06 (by WF Comp.) from previous POP will still be “viewable” from new POP EY Driver Screen



WIMS – WPS Demo



Workforce Planning System

WPS Reports

- WPS Contains 12 Reports
 - 7 Org. reports
 - 5 Summary/Status reports
- Report flexibility
 - Downloadable to Excel
 - Wildcard
 - Multiple sorting features
 - Totaling determined by first sort (report 4)
 - Printing (download to excel)