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NASA Shared Services Center Service Delivery Guide

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NASA Conference Tracking System Service Delivery Guide

Responsible Office: Financial Management Division

RELEASED - Printed documents may be obsolete; validate prior to use.

Approved by

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Director, Service Delivery Directorate

December 18, 2012
Date

DOCUMENT HISTORY LOG

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Revision	2.0	12/18/2012	NCTS Enhancement V3 Updates

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NCTS Background

Introduction

The NASA Conference Tracking System (NCTS) Basic Version 1.0 was originally developed by eTouch under the direction of the Office of the Chief Financial Officer (OCFO). In 2009, the NASA Shared Services Center (NSSC) assumed responsibility for hosting and maintaining the application. At that time, the database structure and the existing historical data were transferred as-is to the NSSC production environment. The NSSC's service provider, CSC, converted the application to Adobe Cold Fusion software, which enabled a smoother incorporation into the NSSC environment. The overall look and feel was retained, although some enhancements were added to improve functionality. The Cold Fusion software is currently in use by the Agency and is now referred to as NCTS 2.0.

The original Congressional action required NCTS 1.0 and 2.0 to track certain aspects of NASA-sponsored conferences and foreign conferences. The Office of Management and Budget (OMB) Memorandum 12-12 was issued May 11, 2012, impending Congressional legislation and established new restrictions on NASA participation in conferences and requirements for tracking and reporting on conference participation. The new requirements encompass domestic conferences in addition to NASA-sponsored and foreign conferences.

The key Congressional and OMB requirements that drive the requested NCTS modifications are:

I. Initiate senior-level review and approval of all future conference expenses in excess of $100,000; and
II. Prohibit expenses in excess of $500,000 on a single conference, subject to a waiver.
III. Beginning Jan. 31, 2013, conference expenses in excess of $100,000 will be publicly displayed on the NASA website to include:

    a. The total conference expenses incurred by the Agency for the conference;
    b. Location of the conference;
    c. Date of the conference;
    d. Explanation of how the conference advanced the mission of the Agency;
    e. Total number of individuals whose travel expenses or other conference expenses were paid by the Agency; and

f. Copies of presentations.

On June 25, 2012, eight key proposals, in support of NASA's conference policy revisions, were recommended by the OCFO and approved by the Executive Council. While the Executive Council decision did not directly mandate changes to NCTS, the OCFO informed the Executive Council that the revisions to NCTS would likely prove key to the quick and efficient implementation of several processes. NCTS is essential to facilitate an Agency-level approval process over a generally decentralized framework (such as is present with NASA travel and procurement decisions).

NCTS will be the primary OCFO tool for identifying, planning and participating in conferences and providing planning information for tracking and public reporting. The OCFO will monitor NCTS data to identify conferences that require approvals based on estimated expenditures for those conferences. NCTS does not track actual costs of any kind. Independent of the NSSC and the NCTS, the OCFO and other Agencies/Centers will gather any desired cost data from the appropriate source(s) (e.g., SAP, Business Warehouse, FedTraveler, etc.) using the tools available to them.

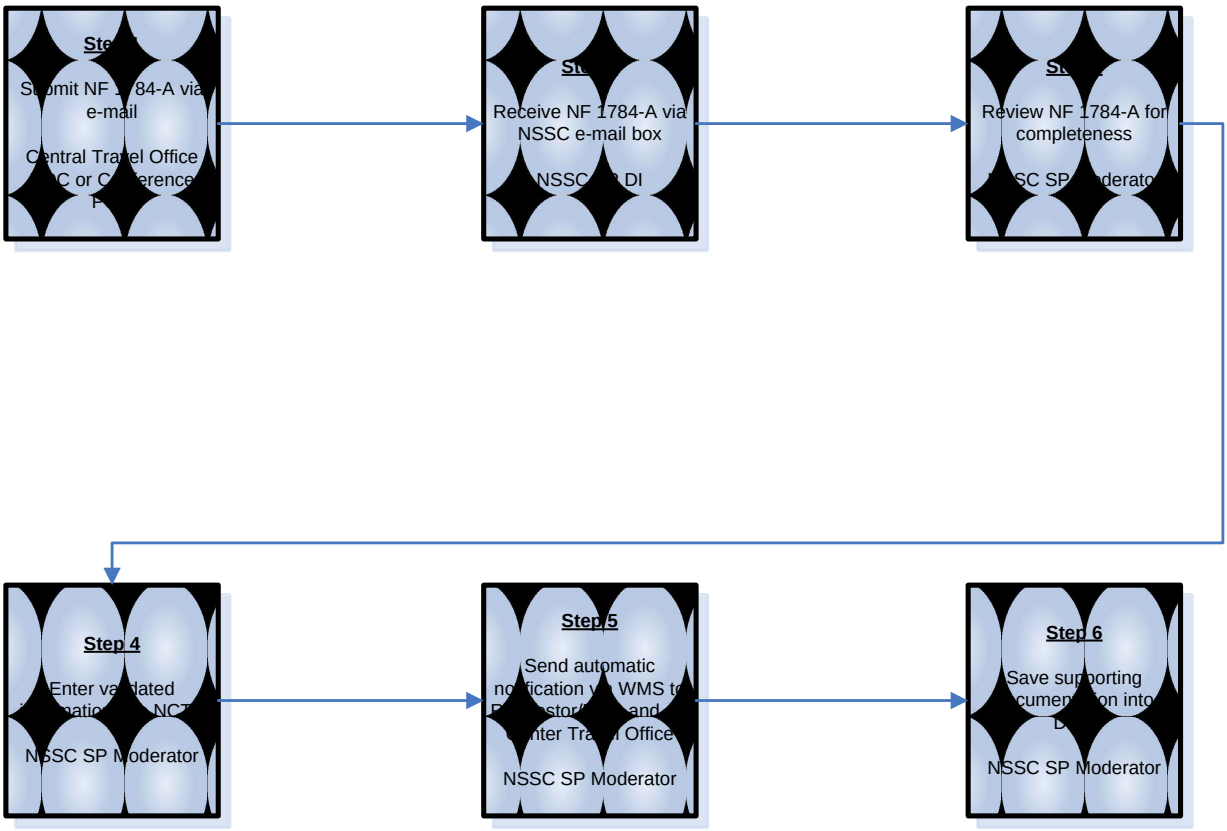
The data entered into NCTS will simply provide the amounts estimated by conference planners and/or attendees. Neither NCTS, nor the NSSC, as application host, will be responsible for validating, verifying or confirming any estimated cost data entered by conference attendees or Center Travel Offices. The policy being developed by OCFO will ensure that any necessary adjustments entered in NCTS and any supporting forms (e.g., NF-1784-A) submitted are properly filed with the NSSC.

The OMB and proposed Congressional requirements also include public reporting of any conference with total expenses in excess of $100,000. NCTS will not include a requirement to produce a public report, nor will the NSSC be responsible for generating or hosting such a report. The OCFO will use data it extracts from NCTS and the appropriate financial and travel systems, along with supplementary content (e.g., presenter presentations) to satisfy any reporting requirements.

The new tracking and reporting requirements specified by OMB and Congress in turn create new requirements for the NCTS application. The resulting changes will be packaged as NCTS 3.0. This document defines the requirements for that release and addresses new requirements (including components that need to change as a result of the new requirements). Unless specifically indicated as a function to be eliminated, all current functionality will be retained. New-user roles will not be required to support the new requirements for NCTS 3.0.

PROCESS 1 – NASA-Sponsored Conference Tracking

NASA Form (NF) 1784-A



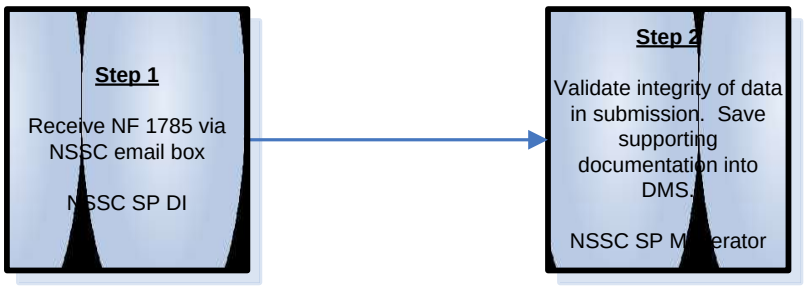
Roles & Responsibilities

Process 1 – NASA Sponsored Conference Tracking 1784-A		
Roles and Responsibilities	Action	Tips/Notes
<u>Step 1</u> **Center Travel Office or Conference Point of Contact (POC)** Submit NF 1784-A via email.	1. POC can download the NF 1784-A form. 2. Complete the NF 1784-A form. 3. Forward NF 1784-A form to the NSSC via email. **Output:** Determination of event made.	**Note:** NASA Electronic Forms website: http://nef.nasa.gov NF 1784-A also accessible at: www.nssc.nasa.gov Click on "Customer Service," then "Conference Reporting/Tracking" tab and scroll down to "Forms." NSSC email address: nssc@nasa.gov Fax: 1-866-779-6772
<u>Step 2</u> **NSSC Service Provider (SP) Document Imaging (DI)** Receive NF 1784-A via NSSC email box.	1. Form processed by Document Imaging (DI). 2. Document Management System (DMS) document created. 3. Work Management System (WMS) Service Request (SR) ticket created. **Output:** DI creates DMS document and WMS SR ticket.	**Note:** NSSC email address: nssc@nasa.gov Fax: 1-866-779-6772
<u>Step 3</u> **NSSC SP Moderator** Review NF 1784-A for completeness.	1. If 1784-A is complete, proceed to next step. 2. If 1784-A is incomplete: a. Send an email to POC with details of deficiencies. b. Add notes and attach email to WMS SR ticket to track. **Output:** Moderator reviews 1784-A for completeness.	

Process 1 – NASA Sponsored Conference Tracking 1784-A		
Roles and Responsibilities	Action	Tips/Notes
Step 4 **NSSC SP Moderator** Enter validated information into NCTS.	1. Log into NCTS and click "Add a Conference" tab. 2. Input the following information: a. Official Conference Name (from website), City, State, Country (if not United States), Start Date, End Date, Conference Sponsor Name and website link. b. Be sure to include any registration fees, the requester's name and email address and enter the number of seats available for lower and upper limit for attendees. 3. Enter notes in the "Notes" section. 4. When complete, click on "Add a Conference."	**Note:** NSSC Customer Contact Center website: nssccontactcenter@nasa.gov
Step 5 **NSSC SP Moderator** Send automatic notification to: Requestor/POC and cc: Center Travel Office POC.	1. On the WMS SR ticket, on the "CR&T" tab, complete the NCTS Number, Event Description, Date of NCTS Entry, and Center fields with information from the 1784-A form. 2. When complete, update TechDoc to include NCTS Conference Code. 3. Resolve WMS SR ticket. **Output:** Notification of NCTS identifier sent to Requestor/POC and cc: Center Travel Office POC.	The list is also accessible on the NCTS website on the "Download All Conferences" tab.
Step 6 **NSSC SP Moderator** Save supporting documentation into DMS.	1. Save supporting documentation to DMS to the following location: Financial Management (FM)/Conference Tracking and Reporting via www.nssc@nasa.gov. **Output:** Supporting documentation saved into DMS.	

PROCESS 2 – NASA Sponsored Conference Tracking

NASA Form (NF) 1785

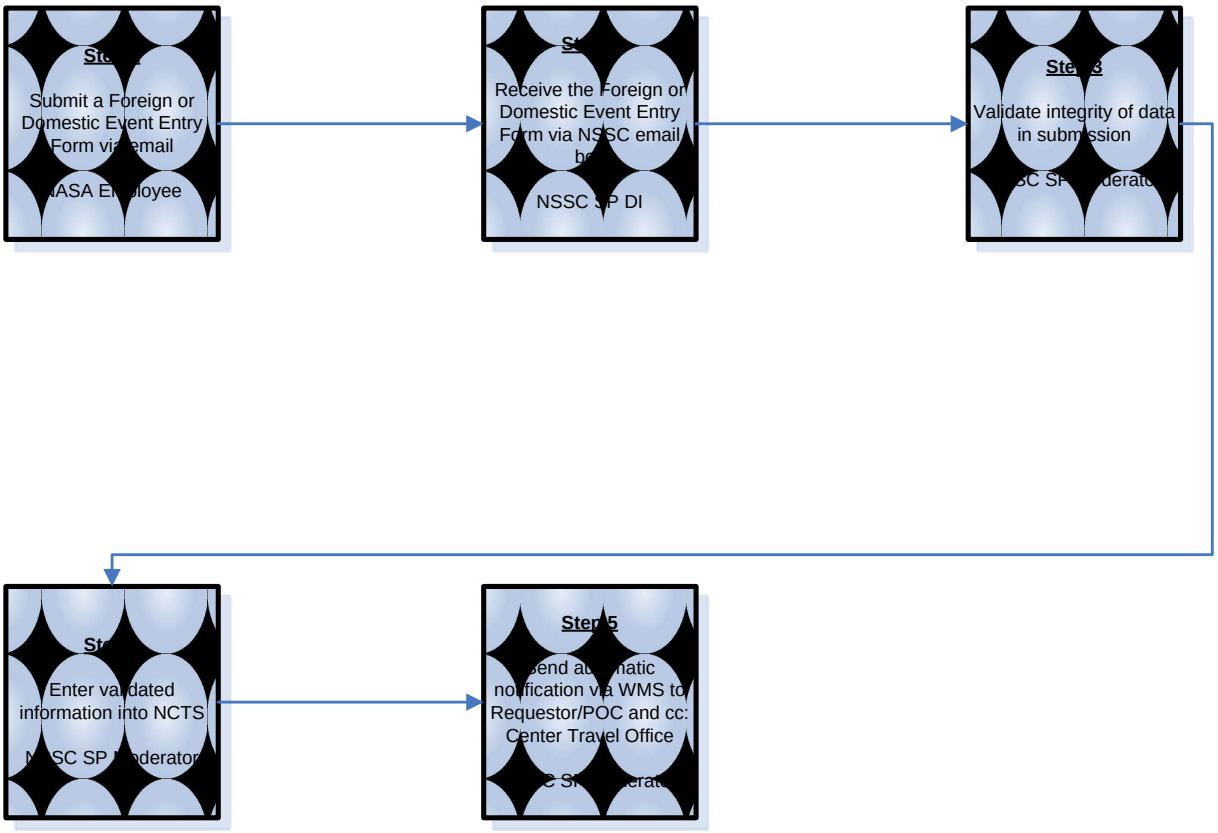


Roles & Responsibilities

Process 2 – NASA Sponsored Conference Tracking 1785		
Roles and Responsibilities	Action	Tips/Notes
Step 1 **NSSC SP DI** Receive NF 1785 via NSSC email box.	1. Form processed by DI. 2. DMS document created. 3. WMS SR ticket created. **Output:** DI creates DMS document and WMS SR ticket.	**Note:** NSSC email address: nssc@nasa.gov Fax: 1-866-779-6772
Step 2 **NSSC SP Moderator** Validate integrity of data in submission. Save supporting documentation into DMS.	1. Review 1785 for completeness. a. If complete: Save supporting documentation to DMS to following location: FM/Conference Tracking and Reporting. b. If incomplete: Send an email to POC with details of deficiencies. Add notes and attach email to WMS SR ticket to track. **Output:** Supporting documentation saved into DMS via nssc@nasa.gov.	

PROCESS 3 – Foreign and Domestic Conference Submission

Foreign and Domestic Conference

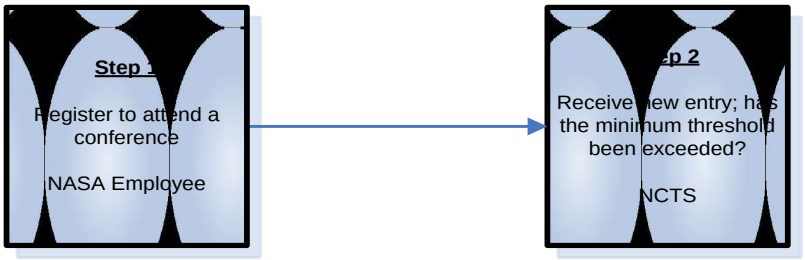


Roles & Responsibilities

Process 3 – Foreign and Domestic Conference Submission		
Roles and Responsibilities	Action	Tips/Notes
Step 1 **NASA Employee** Submit an Event Entry Form via email.	1. Go to NSSC's website and click the "Customer Service" link. 2. Click "Training/Conferences," then "Conference Tracking/Reporting" tab. 3. Scroll down to "Forms," and click "Foreign or Domestic Event Entry Form." 4. When the form is completed and the "Submit" button is clicked, the Event Entry Form is then forwarded to the NSSC via email. **Output:** Event Entry Form submitted to the NSSC.	**Note:** NSSC Customer Service website: www.nssc.nasa.gov
Step 2 **NSSC SP Moderator** Receive the Event Entry Form via NSSC email box.	1. Form processed by DI. 2. DMS document created. 3. WMS SR ticket created. **Output:** DI creates the DMS and WMS SR ticket.	**Note**: NSSC email address: nssc@nasa.gov Fax: 1-866-779-6772
Step 3 **NSSC SP Moderator** Validate integrity of data in submission.	1. If Event Entry Form is complete, proceed to next step. 2. If Event Entry Form is incomplete: a. Send an email to POC with details of deficiencies. b. Add notes and attach email to WMS SR ticket to track. **Output:** Moderator reviews Event Entry Form for completeness.	

Process 3 – Foreign and Domestic Conference Submission		
Roles and Responsibilities	Action	Tips/Notes
<u>Step 4</u> **NSSC SP Moderator** Enter validated information into NCTS.	1. Log into NCTS and click "Add a Conference." 2. Input the following information: a. Official Conference Name (from website), City, State, Country (if not United States), Start Date, End Date, Conference Sponsor Name and website link. b. Be sure to include any registration fees, the requester's name and email address and enter the number of seats available for lower and upper limit for attendees. 3. Enter notes in the "Notes" section. 4. When complete, click the "Add a Conference" icon. 5. To exit the "Add a Conference" field, click the "Back" icon. **Output:** Validated information entered into NCTS.	**Note:** Per NPR 9700 (Travel) Ch. 2, Foreign Conferences are limited to 50 attendees Agency-wide. For all conferences, enter **35** for Lower Threshold and **50** for Upper Threshold. An email notification will be created and sent by NCTS to NSSC Conference Reporting-NCTS mailbox as well as HQ Office of External Relations (OER) once number of attendees reaches 35. The number of attendees of foreign conferences is monitored by the OER at HQ.
<u>Step 5</u> **NSSC SP Moderator** Send automatic notification via WMS to Requestor/POC and cc: Center Travel Office POC.	1. On the WMS SR ticket, on the "CR&T" tab, complete the NCTS Number, Event Description, Date of NCTS Entry, and Center fields with information from the Foreign Event Entry Form. 2. Update TechDoc with the NCTS Conference Code. 3. Resolve WMS SR ticket. **Output:** Notification of NCTS Identifier sent to Requester/POC and cc: Center Travel Office POC.	**Note**: NSSC email address: nssc@nasa.gov Fax: 1-866-779-6772

PROCESS 4 – Conference Registration



Roles & Responsibilities

Process 4 – Conference Registration		
Roles and Responsibilities	Action	Tips/Notes
Step 1 **NASA Employee** Submit Conference Registration NCTS.	1. Go to NSSC's website and click "Customer Service," click "Training/Conferences," then on the "Conference Tracking/Reporting" tab, scroll down to "Tools," and click on "NASA Conference Tracking System" link. 2. The "Conference Records Search" page appears. 3. Enter the search criteria and click "Search" icon. 4. Click on the conference details from the search results. 5. Click on the "Register for Event" icon. 6. Enter the requested information. 7. Click the "Submit Request" icon. **Output:** Registration submitted.	**Note:** NSSC Customer Service website: www.nssc.nasa.gov
Step 2 **NCTS** Receive NASA Employee's Conference Registration.	1. NCTS will receive request and review threshold to see if seats available for the lower limit have been exceeded. a) If **Yes** – Set the status to "Pending;" Send email to NASA employee, Center Travel Office POC, OER and the NSSC. b) If **No** – Set the status to "Approved"; Send email to	NCTS website: http://ncts.nasa.gov

Process 4 – Conference Registration		
Roles and Responsibilities	Action	Tips/Notes
	NASA employee. **Output:** Conference Registration Entry.	

METRICS

Initiating Office/Entity	Deliverable (Output)	Receiving Office/Entity	Metric
Conference Tracking Moderator	Event entered into NCTS	Center POC, HQ, Requestor	

PRIVACY DATA

All participants involved must ensure protection of all data covered by the Privacy Act.

SYSTEM COMPONENTS

Existing Systems

IT System Title	IT System Description	Access Requirements	IT System Interfaces
Work Management System (WMS) (example: Remedy)	System used to track incoming documents to the NSSC; supports internal activities	User role at NSSC	N/A
Document Management System (DMS)	System for storing, reporting and documenting data	User role at NSSC	N/A
NASA Conference Tracking System (NCTS)	System for storing, reporting and documenting conferences	User role at NSSC	N/A
Worldwide Web		N/A	N/A
Systems, Application and Products in Data Processing (SAP) Business Warehouse (BW)	SAP information database (current as of Close of Business (COB) previous day). Located at Integrated Financial Management (IFM) Competency Center	User role at NSSC	SAP Graphic User Interface (GUI)
FedTraveler	System for processing, storing, reporting, and documenting Travel Authorizations and Vouchers	User role at NSSC	N/A
P-Card System	Log into SAP for purchase cards – part of Core Financial module. Located at IFM Competency Center	User role at NSSC	Web
SAP Core Financial	SAP Core Financial (SAP GUI for Windows desktop software), located at IFM Competency Center	User role at NSSC	SAP GUI

New Systems

IT System Title	IT System Description	Access Requirements	IT System Interfaces
Conference Reporting Database	System used to track and report foreign and NASA-Sponsored events	User role for NSSC	N/A

CUSTOMER CONTACT CENTER STRATEGY

Each activity requires a clearly defined contact center strategy, which answers the question, “Who will answer the call and handle the request?" and defines the escalation parameters for the activity. Because of the varied nature of the NSSC's activities and volume of transactions, each activity has a unique contact center strategy. Refer to the NASA Shared Services Center Customer Contact Center Service Delivery Guide (3.5.1) for the contact center strategy for the activity.

APPENDIX

Appendix A - Acronyms

COB	Close of Business
CR&T	Conference Reporting and Tracking
DI	Document Imaging
DMS	Document Management System
FM	Financial Management
GUI	Graphic User Interface
HQ	Headquarters
IFM	Integrated Financial Management
NASA	National Aeronautics and Space Administration
NCTS	NASA Conference Tracking System
NID	NASA Interim Directive
NPR	NASA Procedural Requirement
NSSC	NASA Shared Services Center
OCFO	Office of the Chief Financial Officer
OER	Office of External Relations
OMB	Office of Management and Budget
POC	Point of Contact
PY	Program Year
SAP	Systems, Application, and Products in Data Processing
SATERN	System for Administration, Training, and Educational Resources at NASA
SR	Service Request
SP	Service Provider
WMS	Work Management System