

NASA Shared Services Center

NSSC ServiceNow – PR - Training Metrics and Utilization

3.3.1.1 Federal Acquisition Certification in Contracting (FAC-C) Program

Document Version V.2

Date Last Modified 10/01/2020

Reference: Contract Attachment I-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:**Brief Description:**

Each month, NSSC SP Procurement – 1102 FAC-C reports the number of application assistance completed by NASA Center. The actions include 1102 FAC-C applications. Additionally, the report includes cumulative totals reported for the fiscal year beginning Oct 1st through Sep 30th by NASA Center.

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics – PR-Procurement Training - PR – GS-1102 Training Program Packages Prepared on Time (I-3 3.3.1.1)
Utilization - PR-Procurement Training - PR – GS-1102 Packages Prepared On Time – 95%
Performance Analytics - PR – GS-1102 Training Program Packages Prepared on Time (I-3 3.3.1.1)

Note: See Appendix A – Work Instructions

If applicable:

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change: TBD

Description of Change: The NSSC no longer processes 1102 and FAC-C Packages but does have applicable roles and responsibilities to create and complete posting of NASA sponsored SATERN Courses

Contract Modification: NexGen Attachment J1 PWS - 3.3.1.1 Federal Acquisition Certification in Contracting (FAC-C)

Impact to existing Metrics/Utilization/Transactions: Minimal impact

REPORTING SUMMARY :

Suggested Report Title for Metric and Utilization:	I.3_FA_PWS Element_Metric: N/A
Global Setting: Y/N	Yes
Functional Area:	Procurement
PWS Section:	I.1 - 3.3.1.1 Federal Acquisition Certification in Contracting (FAC-C)
Performance Area:	P & U - Internal - PR Dashboard - Training
SO/SME	
TYPE: SLI/PM/OTHER	N/A
Dependencies or impacts on other Areas/ Functional Areas:	N/A
I-3 Reportable	Yes
Contract Modification	TBD
SN Story Number/Date Submitted	SNow User SNow User STRY0309235 dated 3/2/18
SN PA Story/Date Submitted	
Approval – CS/SP	
Metrics Team Review	
Metric I-3	3.3.1.1 - 95% of FAC-C applications data shall be accurately updated in Agency FAC-C electronic record within 10 business days of notice of employee data changes.
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template

Metrics and Utilization

Category: 'FAC-C Program';

SubCategory: 'CONTINUOUS LEARNING HOURS' or 'COURSE REGISTRATION' or 'OTHER' or 'RECERTIFICATION';

STATUS: 'Closed Complete' and NOT 'Cancelled';

Days in WIP: Count number of Status = 'Work in Progress' days minus 'Pending' days to 'Closed Complete' date;

Start Condition: Upon PRC Ticket is 'Created' with SubCategory = 'CONTINUOUS LEARNING HOURS' or 'COURSE REGISTRATION' or 'OTHER' or 'RECERTIFICATION' and Status = 'Work in Progress';

Pause Condition: When Status = 'Pending';

FD Form: 'PR – FAC';

End Condition: Where FD Selection FAC-C tab checkbox(es) are checked with auto-date stamp for 'FAC-C Course Registration' and/or 'FAC-C Course Coordination' and/or 'FAC-C CON/CLP Training Course' and/or 'FAC-C CON/CLP Course Participant' and PRC Ticket Status = 'Closed Complete';

End Condition: PRC Ticket Status = 'Closed Complete' and NOT 'Cancelled';

Exclusion Criteria: PRC is NOT 'Cancelled' or 'Closed Incomplete';

Met Criteria: Completed within 10 business days after Customer submits request for assistance (PRC ticket Create);

SLA: 95% Met

Report: 'FAC-C PRC' Assistance Ticket Completed on Time shows a stacked bar chart by Center (Location) filter condition created on last month (between first and last day of month)

REPORT REQUIREMENTS: METRICS AND UTILIZATION

Name of Report	
Report Content	<p>Category: 'FAC-C Program'; SubCategory: 'CONTINUOUS LEARNING HOURS' or 'COURSE REGISTRATION' or 'OTHER' or 'RECERTIFICATION'; STATUS: 'Closed Complete' and NOT 'Cancelled'; Days in WIP: Count number of Status = 'Work in Progress' days minus 'Pending' days to 'Closed Complete' date; Start Condition: Upon PRC Ticket is 'Created' with SubCategory = 'CONTINUOUS LEARNING HOURS' or 'COURSE REGISTRATION' or 'OTHER' or 'RECERTIFICATION' and Status = 'Work in Progress'; Pause Condition: When Status = 'Pending'; FD Form: 'PR - FAC'; End Condition: Where FD Selection FAC-C tab checkbox(es) are checked with auto-date stamp for 'FAC-C Course Registration' and/or 'FAC-C Course Coordination' and/or 'FAC-C CON/CLP Training Course' and/or 'FAC-C CON/CLP Course Participant' and PRC Ticket Status = 'Closed Complete'; End Condition: PRC Ticket Status = 'Closed Complete' and NOT 'Cancelled'; Exclusion Criteria: PRC is NOT 'Cancelled' or 'Closed Incomplete'; Met Criteria: Completed within 10 business days after Customer submits request for assistance (PRC ticket Create); SLA: 95% Met Report: 'FAC-C PRC' Assistance Ticket Completed on Time shows a stacked bar chart by Center (Location) filter condition created on last month (between first and last day of month) Days in WIP Closed Assignment Group Assigned to Short Description Work Notes FD Form - FAC-C tab</p>
Input Parameters	<p>1) Category = 'FAC-C Program' 2) SubCategory = 'CONTINUOUS LEARNING HOURS' or 'COURSE REGISTRATION' or 'OTHER' or 'RECERTIFICATION' 3) Location = Center Abbrev. 4) Contact = 'Customer'</p>

	<p>5) Created = Date Ticket Created</p> <p>6) Status = 'Closed Complete'</p> <p>7) Closed = Date Ticket Status = 'Closed Complete'</p> <p>8) Number of Days = Days in WIP (Work in Progress)</p> <p>9) Assignment Group = 'PR – FAC-C L2'</p> <p>10) Short Description = Brief Description of Assistance provided to Customer</p> <p>11) Work Notes = More In-depth Description of Assistance provided to Customer</p> <p>12) FD Form – FAC-C tab where checkbox(es) are checked for type of assistance provided</p>
Output Parameters	<p>P&U Training Stoplight Scores Monthly – PR – GS-1102 Packages Prepared On Time – 95%</p> <p>Reflects greenlight scores if met Metrics and redlight if not met.</p> <p>PR-Procurement Training – P&U and Performance Analytics - PR – GS-1102 Training Program Packages Prepared on Time (I-3 3.3.1.1) counts by month.</p>

ServiceNow Data – Metric Definition Template Performance Analytics

Story Dependency: Metrics and Utilization Story Number

Name of Report: PR – GS-1102 Training Program Packages Prepared on Time (I-3 3.3.1.1) Placement / Location: on the Internal and External dashboards

Internal

Dashboard Name: P & U - Internal - PR Dashboard

Dashboard Group: PR

Dashboard Tab: Training

External2 – N/A

Dashboard Name:

Dashboard Group:

Dashboard Tab:

Data Source Table

Name of Analytic on Internal Dashboard: PR – GS-1102 Training Program Packages Prepared on Time (I-3 3.3.1.1)

Name of Analytic on External Dashboard: N/A

Dates to show trend: Created on Last Month

Frequency: Monthly

SLI Formula: 95% of Application Packages processed within 10 days WIP.

Met:

Not/Met:

Conditions:

Definition Name

SLI or PM Percentage Calculation:

If the metric calculation is \Rightarrow 95%, PM is met

If the metric calculation is $<$ 95%, the PM is not met

Stoplight is displayed at the top of the top of the Analytic

Type of Visualization:

Bar Graph – Displays Count for the Month

Y-axis should show the percentage on the left and the counts on the right

Breakdown: Center & Met/Not Met

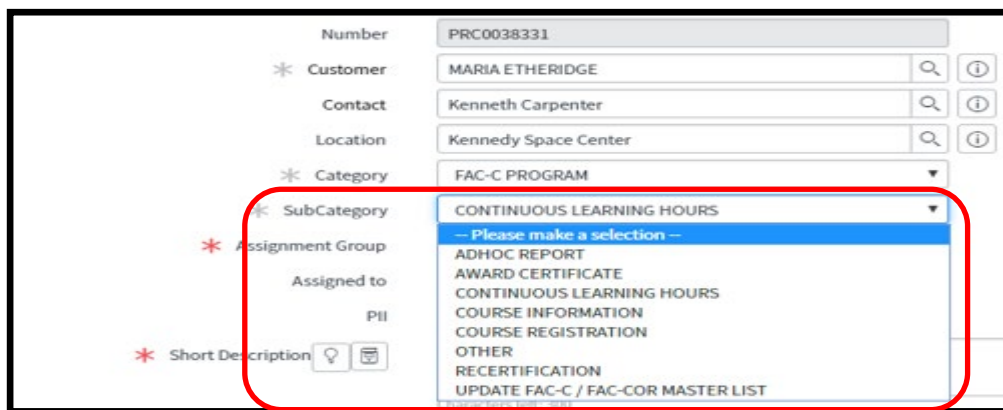
Add a threshold line (for the SLI)

Hover Over Information: - SLI or PM definition

APPENDIX A: PROCESS WORK INSTRUCTIONS

1. In the 'Procurement Case' (PRC Number Ticket), complete the fields as follows (note that * means required field):

- 1) *Customer – change to the person's name you are assisting. Don't forget to check which Center they are from so you choose the correct person. For example, John Smith may have a large number of variations and same middle initial;
- 2) Contact – should be same as the *Customer;
- 3) Location – NASA Center they are located/employed (this field should auto-populate from the *Customer field but if not, make sure you choose the correct Center);
- 4) *Category – choose 'FAC-C Program' (includes 1102) used in this example or 'FAC-COR Program';
- 5) *SubCategory – choose 1 of 8 for the type of assistance you are providing from the drop-down – for this example we chose 'CONTINUOUS LEARNING HOURS':



The screenshot shows a ServiceNow form for a Procurement Case. The fields are as follows:

- Number: PRC0038331
- * Customer: MARIA ETHERIDGE
- Contact: Kenneth Carpenter
- Location: Kennedy Space Center
- * Category: FAC-C PROGRAM
- * SubCategory: CONTINUOUS LEARNING HOURS (dropdown menu is open showing options: ADHOC REPORT, AWARD CERTIFICATE, CONTINUOUS LEARNING HOURS, COURSE INFORMATION, COURSE REGISTRATION, OTHER, RECERTIFICATION, UPDATE FAC-C / FAC-COR MASTER LIST)
- * Assignment Group: (empty)
- Assigned to: (empty)
- PII: (empty)
- * Short Description: (empty)

- 6) *Assignment Group – Choose 'PR – FAC C L2' for Category = FAC C Program or 'PR – FAC COR L2' for Category = FAC COR Program;
- 7) Assigned to – Your Name;
- 8) *Short Description – place a brief description of what you are assisting the customer with;
- 9) Description – not required, but you can also copy and paste the *Short Description in this field;
- 10) Additional Comments – not required;
- 11) * Work notes - copy and paste the *Short Description along with additional information to further identify what was done for the customer;
- 12) FD Selection – choose 'PR – FAC' from the drop-down;
- 13) Status – change to 'Pending' if waiting on information and 'Work in Progress' if working the request; when all has been completed, change Status to 'Closed Complete';

14) Choose 'Create FD' button at lower left bottom of ticket or upper-right hand corner to create the Functional Detail tab;

The screenshot shows the 'Procurement Case - PRC0038331' form. In the top right corner, there are buttons for 'Submit', 'Create FD' (highlighted with a red box), 'Create User', and 'Save'. The form contains various fields for customer information, category, and description. The 'Short Description' and 'Description' fields contain text about a continuous learning program for a carpenter.

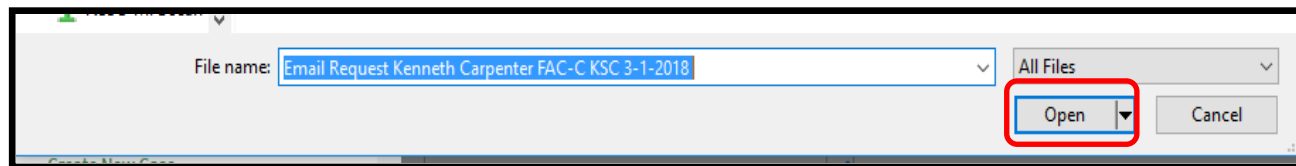
2. After choosing 'Create FD', on the 'FAC-C' tab select the appropriate reason:

The screenshot shows the 'PR FAC - FD0001003' form. The 'FAC-C' tab is selected. Under the 'FAC-C' section, there are several checkboxes for reasons: 'FAC-C Course Registration' (checked), 'FAC-C Course Coordination', 'FAC-C Certificate Issued', 'FAC-C HQ / Agency Reporting Request', 'FAC-C Other Reporting Request', 'FAC-C Database Update', 'FAC-C CON/CLP Training Course' (checked), and 'FAC-C CON/CLP Course Participant'. To the right, there are date fields for 'FAC-C Registration Date' (2018-03-01), 'FAC-C Course Training Date' (2018-03-01), and 'FAC-C Course Participant Date'.

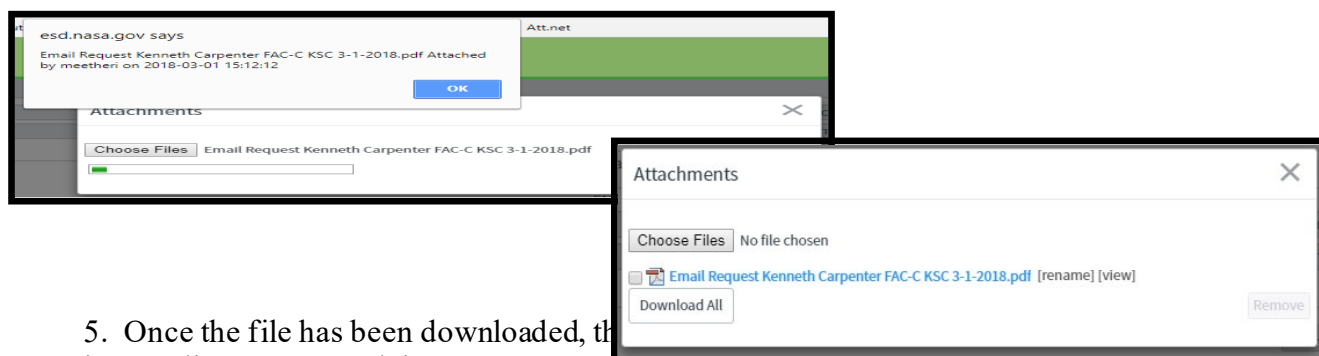
3. Attach any emails or documentation to the ticket by clicking on the 'paper clip' in the upper right hand corner of the ticket, then on Attachments, choose 'Choose Files':

The screenshot shows the 'Attachments' dialog box. The 'Choose Files' button is highlighted with a red box. The dialog box also shows 'No file chosen' and a close button (X). In the background, the 'PR FAC - FD0001003' form is visible, with the 'paper clip' icon in the top right corner highlighted with a red box.

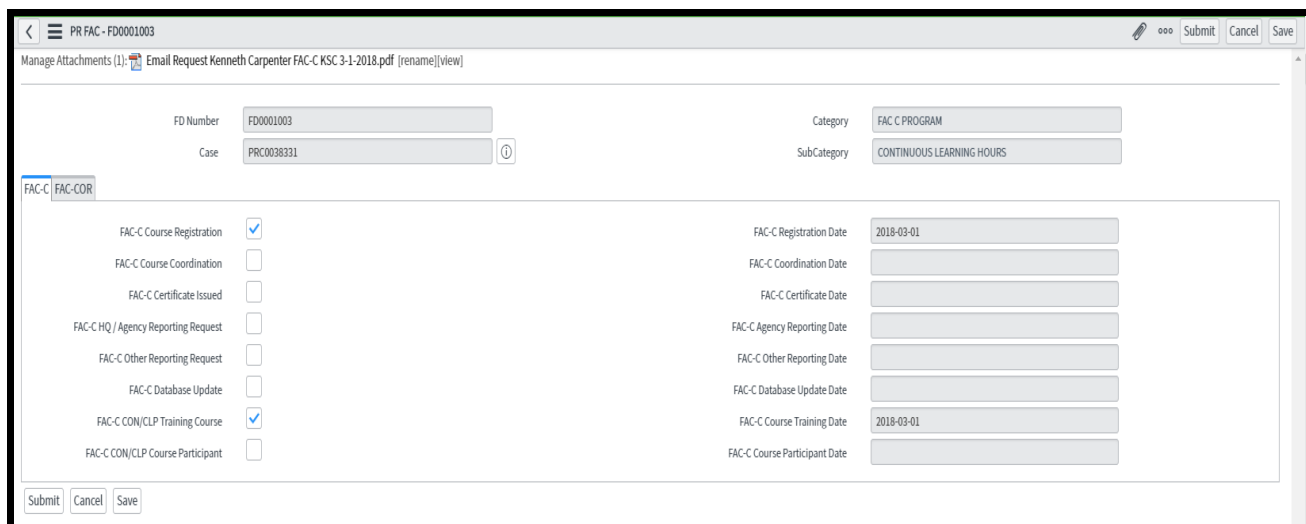
4. File name: Place email or document on your desktop after naming appropriately and choose 'Open':



You will receive a message that the file was attached to the ticket, on the 'esd.nasa.gov says' choose 'OK' and choose 'Download All';



5. Once the file has been downloaded, the in 'Pending' or 'Work in Progress', make sure that when completed, you change the Status to 'Closed Complete';



6. The previous example was for FAC-C assistance request, so follow the same steps as in 1 – 3 (including all the fields completed) with the exception that you will choose Category = 'FAC-COR Program' and choose 'Create FD':

Procurement Case - PRC0038334

Number: PRC0038334

* Customer: Todd Peterson

Contact: Todd Peterson

Location: Glenn Research Center

* Category: FAC-COR PROGRAM

* SubCategory: OTHER

* Assignment Group: PR - FAC-COR L2

Assigned to: MARIA ETHERIDGE

PII: ☐

* Short Description: Other Assistance Todd Peterson, GRC COR assisted with application submission. (Characters left: 223)

Description: Other - assisted Todd Peterson, GRC COR assisted with application submission. (Characters left: 3623)

Additional comments: (Characters left: 4000)

* Work notes: Other - assisted Todd Peterson, GRC COR did not submit his application correctly for his CLP Training. Sent him an email referring him to his immediate supervisor for assistance and approval. (Characters left: 3688)

FD Selection: -- None --

Status: Pending

* Pending Reason: Approval

* Priority: 2 - High

Age of Case: (empty)

Days in WIP: (empty)

Opened by: MARIA ETHERIDGE

Opened: 2018-03-01 15:23:49

Watch list: (empty)

Buttons: Submit, Create FD, Create User, Save

7. After choosing 'Create FD', on the FAC-COR tab select the appropriate reason, attach any emails or documentation to the ticket and choose 'Save'; remember to go back to the PRC ticket 'Status' to update keep in 'Pending' if incomplete, 'Work in Progress' if you are able to work the ticket or 'Closed Complete':

PR FAC - FD0001004

Manage Attachments (1): Email Request Todd Peterson FAC-COR App 3-1-2018.pdf [(rename)][view]

FD Number: FD0001004

Case: PRC0038334

Category: FAC COR PROGRAM

SubCategory: OTHER

FAC-C

FAC-COR

FAC-COR Course Registration: ☐

FAC-COR Course Coordination: ☒

FAC-COR Course Completion: ☐

FAC-COR Track Learning Points: ☐

FAC-COR Certificate Issued: ☐

FAC-COR Recertification / CE Reporting Request: ☐

FAC-COR Other Reporting Request: ☐

FAC-COR Registration Date: 2018-03-01

FAC-COR Coordination Date: 2018-03-01

FAC-COR Completion Date: (empty)

FAC-COR Learning Points Date: (empty)

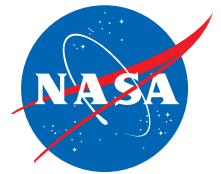
FAC-COR Certificate Issued Date: (empty)

FAC-COR Recertification Date: (empty)

FAC-COR Other Reporting Date: (empty)

Buttons: Submit, Cancel, Save

APPENDIX B: SERVICE NOW USER STORIES



NASA Shared Services Center

NSSC ServiceNow – PR - Training Metrics and Utilization Federal Acquisition Certification for Contracting Officer's Representative (FAC- COR) Program

Document Version V.2

Date Last Modified 10/01/2020

Reference: Contract Attachment I-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:**Brief Description:**

Each month, NSSC SP Procurement –FAC-COR reports the number of application assistance completed by NASA Center. The actions include FAC-COR applications. Additionally, the report includes cumulative totals reported for the fiscal year beginning Oct 1st through Sep 30th by NASA Center.

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics – PR-Procurement Training - FAC-COR Program Course Completion Packages Completed on Time (I-3 3.3.1.2)
Utilization - PR-Procurement Training - FAC-COR Program Course Completion Packages Completed on Time (I-3 3.3.1.2)
Performance Analytics - PR - FAC-COR - Course Package Completed on Time - 95%

Note: See Appendix A – Work Instructions

If applicable:

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change: TBD

Description of Change: The NSSC no longer processes FAC-COR Packages, but does complete posting of COR Certification upon completion of a COR Basic Training Course

Contract Modification: NexGen Attachment I1 PWS - 3.3.1.2 Federal Acquisition Certification for Contracting Officer's Representative (FAC- COR) Program

Impact to existing Metrics/Utilization/Transactions: Minimal impact

REPORTING SUMMARY :

Suggested Report Title for Metric and Utilization:	I.3_FA_PWS Element_Metric: N/A
Global Setting: Y/N	Yes
Functional Area:	Procurement
PWS Section:	I.1 - 3.3.1.2 Federal Acquisition Certification for Contracting Officer's Representative (FAC- COR) Program
Performance Area:	P & U - Internal - PR Dashboard - Training
SO/SME	
TYPE: SLI/PM/OTHER	N/A
Dependencies or impacts on other Areas/ Functional Areas:	N/A
I-3 Reportable	Yes
Contract Modification	TBD
SN Story Number/Date Submitted	SNow User STRY0309243 dated 3/2/18
SN PA Story/Date Submitted	
Approval – CS/SP	
Metrics Team Review	
Metric I-3	3.3.1.2 - 95% of FAC-COR training course completion records data shall be accurately updated in Agency FAC-COR electronic record within 10 business days of notice of employee data changes.
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template

Metrics and Utilization

Category: 'FAC-COR Program';

SubCategory: 'CONTINUOUS LEARNING HOURS' or 'COURSE REGISTRATION' or 'OTHER' or 'RECERTIFICATION';

STATUS: 'Closed Complete' and NOT 'Cancelled';

Days in WIP: Count number of Status = 'Work in Progress' days minus 'Pending' days to 'Closed Complete' date;

Start Condition: Upon PRC Ticket is 'Created' with SubCategory = 'CONTINUOUS LEARNING HOURS' or 'COURSE REGISTRATION' or 'OTHER' or 'RECERTIFICATION' and Status = 'Work in Progress';

Pause Condition: When Status = 'Pending';

FD Form: 'PR – FAC';

End Condition: Where FD Selection FAC-COR tab checkbox(es) are checked with auto-date stamp for 'FAC-COR Course Registration' and/or 'FAC-COR Course Coordination' and/or 'FAC-COR Course Completion' and/or 'FAC-COR Track Learning Points' and/or 'FAC-COR Certificate Issued' And/or 'FAC-COR Recertification / CE Reporting Request' and

PRC Ticket Status = 'Closed Complete';

End Condition: PRC Ticket Status = 'Closed Complete' and NOT 'Cancelled';

Exclusion Criteria: PRC is NOT 'Cancelled' or 'Closed Incomplete';

Met Criteria: Completed within 10 business days after Customer submits request for assistance (PRC ticket Create);

SLA: 95% Met

Report: 'FAC-COR' PRC Assistance Ticket Completed on Time shows a stacked bar chart by Center (Location) filter condition created on last month

REPORT REQUIREMENTS: METRICS AND UTILIZATION	
Name of Report	
Report Content	<p>Chart: Days in WIP (Work in Progress) by Center</p> <p>Summary: Count FAC-COR Program' Tickets for SubCategory = 'CONTINUOUS LEARNING HOURS' or 'COURSE REGISTRATION' or 'OTHER' or 'RECERTIFICATION' for New Applications or Updating/Revising Existing for NASA Customer</p> <p>Detail: PRC Number Category Subcategory Center = Location Contact Created Status Number of Days = Age of Case Days in WIP Closed Assignment Group Assigned to Short Description Work Notes FD Form - FAC-COR tab</p>
Input Parameters	<p>1) Category = 'FAC-COR Program'</p> <p>2) SubCategory = 'CONTINUOUS LEARNING HOURS' or 'COURSE REGISTRATION' or 'OTHER' or 'RECERTIFICATION'</p> <p>3) Location = Center Abbrev.</p> <p>4) Contact = 'Customer'</p>

	<p>5) Created = Date Ticket Created</p> <p>6) Status = 'Closed Complete'</p> <p>7) Closed = Date Ticket Status = 'Closed Complete'</p> <p>8) Number of Days = Days in WIP (Work in Progress)</p> <p>9) Assignment Group = 'PR - FAC-COR L2'</p> <p>10) Short Description = Brief Description of Assistance provided to Customer</p> <p>11) Work Notes = More Indepth Description of Assistance provided to Customer</p> <p>12) FD Form -FAC-COR tab where checkbox(es) are checked for type of assistance provided</p>
Output Parameters	<p>P&U Training Stoplight Scores Monthly - PR - FAC-COR - Course Package Completed on Time - 95%</p> <p>Reflect greenlight scores if met Metrics and redlight if not met.</p> <p>PR-Procurement Training - P&U and Performance Analytics - FAC-COR Program Course Completion Packages Completed on Time (I-3 3.3.1.2) output count of package completed by month.</p>

ServiceNow Data – Metric Definition Template Performance Analytics

Story Dependency: Metrics and Utilization Story Number

Name of Report: FAC-COR Program Course Completion Packages Completed on Time (I-3 3.3.1.2)

Placement / Location: on the Internal and External dashboards

Internal

Dashboard Name: P & U - Internal - PR Dashboard

Dashboard Group: PR

Dashboard Tab: Training

External2 – N/A

Dashboard Name:

Dashboard Group:

Dashboard Tab:

Data Source Table

Name of Analytic on Internal Dashboard: FAC-COR Program Course Completion Packages Completed on Time (I-3 3.3.1.2)

Name of Analytic on External Dashboard: N/A

Dates to show trend: Created on Last Month

Frequency: Monthly

SLI Formula: 95% of Application Packages processed within 10 days WIP.

Met:

Not/Met:

Conditions:

Definition Name

SLI or PM Percentage Calculation:

If the metric calculation is \Rightarrow 95%, PM is met

If the metric calculation is $<$ 95%, the PM is not met

Stoplight is displayed at the top of the top of the Analytic

Type of Visualization:

Bar Graph – Displays Count for the Month

Y-axis should show the percentage on the left and the counts on the right

Breakdown: Center & Met/Not Met

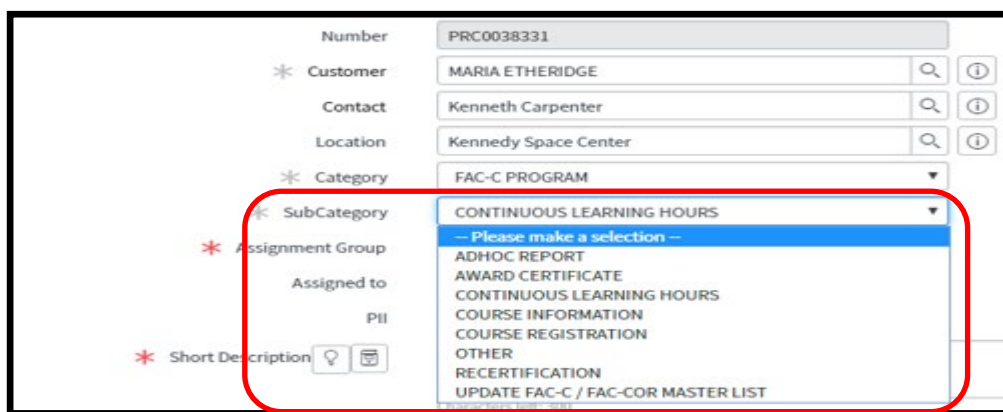
Add a threshold line (for the SLI)

Hover Over Information: - SLI or PM definition

APPENDIX A: PROCESS WORK INSTRUCTIONS

1. In the 'Procurement Case' (PRC Number Ticket), complete the fields as follows (note that * means required field):

- 1) *Customer – change to the person's name you are assisting. Don't forget to check which Center they are from so you choose the correct person. For example, John Smith may have a large number of variations and same middle initial;
- 2) Contact – should be same as the *Customer;
- 3) Location – NASA Center they are located/employed (this field should auto-populate from the *Customer field but if not, make sure you choose the correct Center);
- 4) *Category – choose 'FAC-C Program' (includes 1102) used in this example or 'FAC-COR Program';
- 5) *SubCategory – choose 1 of 8 for the type of assistance you are providing from the drop-down – for this example we chose 'CONTINUOUS LEARNING HOURS':



The screenshot shows a ServiceNow form for a Procurement Case. The fields are as follows:

- Number: PRC0038331
- * Customer: MARIA ETHERIDGE
- Contact: Kenneth Carpenter
- Location: Kennedy Space Center
- * Category: FAC-C PROGRAM
- * SubCategory: CONTINUOUS LEARNING HOURS (The dropdown menu is open, showing options: -- Please make a selection --, ADHOC REPORT, AWARD CERTIFICATE, CONTINUOUS LEARNING HOURS, COURSE INFORMATION, COURSE REGISTRATION, OTHER, RECERTIFICATION, UPDATE FAC-C / FAC-COR MASTER LIST)
- * Assignment Group: (Empty)
- Assigned to: (Empty)
- PII: (Empty)
- * Short Description: (Empty)

- 6) *Assignment Group – Choose 'PR – FAC C L2' for Category = FAC C Program or 'PR – FAC COR L2' for Category = FAC COR Program;
- 7) Assigned to – Your Name;
- 8) *Short Description – place a brief description of what you are assisting the customer with;
- 9) Description – not required, but you can also copy and paste the *Short Description in this field;
- 10) Additional Comments – not required;
- 11) * Work notes - copy and paste the *Short Description along with additional information to further identify what was done for the customer;
- 12) FD Selection – choose 'PR – FAC' from the drop-down;
- 13) Status – change to 'Pending' if waiting on information and 'Work in Progress' if working the request; when all has been completed, change Status to 'Closed Complete';

14) Choose 'Create FD' button at lower left bottom of ticket or upper-right hand corner to create the Functional Detail tab;

The screenshot shows the 'Procurement Case - PRC0038331' form. In the top right corner, there are buttons for 'Submit', 'Create FD' (highlighted with a red box), 'Create User', and 'Save'. The form contains various fields for customer information, category, subcategory, and description. The 'Short Description' and 'Description' fields contain text about a continuous learning program for a carpenter.

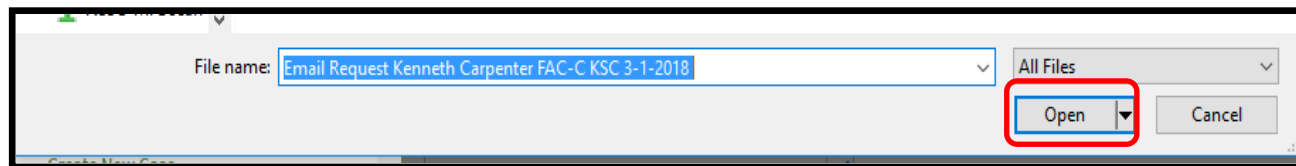
2. After choosing 'Create FD', on the 'FAC-C' tab select the appropriate reason:

The screenshot shows the 'PR FAC - FD0001003' form. The 'FAC-C' tab is selected. Under the 'FAC-C' section, there are several checkboxes for reasons: 'FAC-C Course Registration' (checked), 'FAC-C Course Coordination', 'FAC-C Certificate Issued', 'FAC-C HQ / Agency Reporting Request', 'FAC-C Other Reporting Request', 'FAC-C Database Update', 'FAC-C CON/CLP Training Course' (checked), and 'FAC-C CON/CLP Course Participant'. To the right, there are date fields for 'FAC-C Registration Date' (2018-03-01), 'FAC-C Coordination Date', 'FAC-C Certificate Date', 'FAC-C Agency Reporting Date', 'FAC-C Other Reporting Date', 'FAC-C Database Update Date', 'FAC-C Course Training Date' (2018-03-01), and 'FAC-C Course Participant Date'.

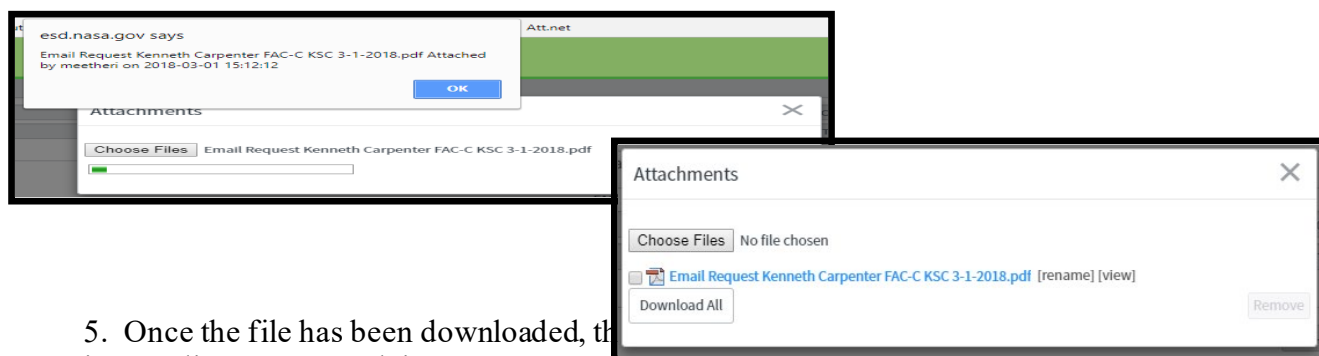
3. Attach any emails or documentation to the ticket by clicking on the 'paper clip' in the upper right hand corner of the ticket, then on Attachments, choose 'Choose Files':

The screenshot shows the 'Attachments' dialog box. The 'Choose Files' button is highlighted with a red box. The dialog box also shows 'No file chosen' and a close button (X). In the background, the 'PR FAC - FD0001003' form is visible, with the 'paper clip' icon in the top right corner highlighted with a red box.

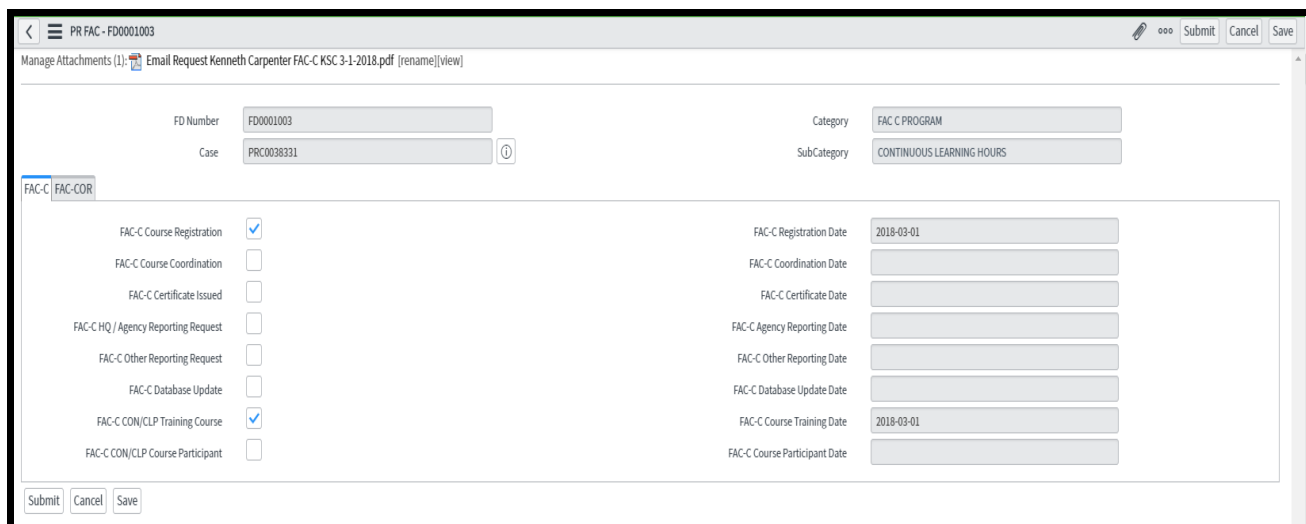
4. File name: Place email or document on your desktop after naming appropriately and choose 'Open':



You will receive a message that the file was attached to the ticket, on the 'esd.nasa.gov' says' choose 'OK' and choose 'Download All';



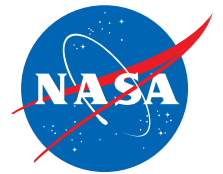
5. Once the file has been downloaded, the in 'Pending' or 'Work in Progress', make sure that when completed, you change the Status to 'Closed Complete';



6. The previous example was for FAC-C assistance request, so follow the same steps as in 1 – 3 (including all the fields completed) with the exception that you will choose Category = 'FAC-COR Program' and choose 'Create FD':

7. After choosing 'Create FD', on the FAC-COR tab select the appropriate reason, attach any emails or documentation to the ticket and choose 'Save'; remember to go back to the PRC ticket 'Status' to update keep in 'Pending' if incomplete, 'Work in Progress' if you are able to work the ticket or 'Closed Complete':

APPENDIX B: SERVICE NOW USER STORIES



NASA Shared Services Center

NSSC ServiceNow – PR - Grants (P&U - Internal PR - Dashboard)

Document Version V.2

Date Last Modified 10/01/2020

Reference: Contract Attachment I-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:**Brief Description:**

Each month, NSSC SP Procurement - Grants and Cooperative Agreements reports the number of actions performed by NASA Center. The actions include:

Grant Award Packages Prepared on Time

Additionally, the report includes cumulative totals reported for the fiscal year beginning Oct 1st through Sep 30th by NASA Center.

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics

PR –Award Packages Prepared on Time (I-3 3.3.2.1), PR Metric - Unsolicited Grant Award Packages Prepared On Time (I-3 3.3.2.2) and PR Metric - Award Augmentations Prepared On Time (I-3 3.3.2.1)

Note: See Appendix A – Work Instructions

If applicable:

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change: Current

Description of Change: Remove/Omit PR Metric - Award Augmentations Prepared On Time I-3 3.3.2.1 'Funding - Augmentations' and 'Funding - Extensions/Increases' supplements which will be included in 'PR – Grant Funding Supplement Prepared on Time (I-3 3.3.2.2)'

Contract Modification:

Impact to existing Metrics/Utilization/Transactions: Removes the 'PR – GRANT Augmentations Prepared On Time 90%' from the Internal and External Dashboards and Analytics and adds them to PR –SUPPLEMENT – Funding Prepped on Time – 90%.

REPORTING SUMMARY :

Suggested Report Title for Transaction:	I.17 _PR_PWS Element _Transaction: Grant Awards
Global Setting: Y/N	Yes
Functional Area:	PR
PWS Section:	I-1_PWS_3.3.2.1_Grant_Awards
Performance Area:	Grant Awards
SO/SME	
Contract Modification	
SN Transaction Story/Date Submitted	
Approval – CS/SP	
Metrics Team Review	
Service Definition I-17	
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template Transactions

Acceptance Criteria: Count WIP (Work in Progress) Days for the reporting month where Tasks Short Description = 'Package Processing' and Assignment Group = 'PR – PROCESSING L2'; Created Date minus 'Pending' or 'Pending CS Approval' Days and Award Date IS NOT EMPTY

Placement / Location:

Dashboard: P & U - Internal – PR Dashboard

Dashboard Tab: Grants

Dashboard Group: Performance And Utilization – 'PR Metric - Award Packages Prepared On Time I-3 3.3.2.1', 'PR Metric - Unsolicited Grant Award Packages Prepared On Time I-3 3.3.2.2' and 'PR – Award Augmentations Prepared On Time (I-3 3.3.2.1)'

PA Dashboard & Tab Target

- A. Dashboard(s) P & U - Internal - Overall / P & U - Overall (Both internal & External) – PR Dashboard (External)
- B. Tab: Grants

Data Source Table: Metric [metric_instance] - 'PR Metric - Award Packages Prepared On Time I-3 3.3.2.1', 'PR Metric - Unsolicited Grant Award Packages Prepared On Time I-3 3.3.2.2' and 'PR – Award Augmentations Prepared On Time (I-3 3.3.2.1)'

Name of Analytic: 'PR - GRANT - Award Packages Prepared On Time - 90%', 'PR - GRANT - Unsolicited Award Packages Prepared On Time - 90%' and 'PR - GRANT - Award Augmentations Prepared On Time - 90%'

Dates to show trend: Monthly

Frequency: Monthly

Existing Reports: 'PR Metric - Award Packages Prepared On Time I-3 3.3.2.1', 'PR Metric - Unsolicited Grant Award Packages Prepared On Time I-3 3.3.2.2', 'PR – Award Augmentations Prepared On Time (I-3 3.3.2.1)' and 'PR – Award Augmentations Prepared On Time (I-3 3.3.2.1)'

Filters:

All of these conditions must be met:

Definition is

Center abbrv is PGroup Field

Metric Date on Last Month

Award Date is not null

Grant Procurement Tasks 'CS Approval' Task is 'Resolved'

Transaction Count by Center and Award Date is within Last Month

Type of Visualization (Added Hover Over Information: Transaction Count):

Bar Graph – Displays Count for the Month

ServiceNow Data – SAMPLE Transactions

Acceptance Criteria:

(See Page 4 and 5 of 10)

Placement / Location:

Dashboard:

Dashboard Tab:

Dashboard Group: Performance And Utilization - Internal (Both Internal & External)

PA Dashboard & Tab Target

A. Dashboard(s) P & U - Internal - Overall / P & U - Overall (Both internal & External)

B. Tab: NSSC Transactions

Data Source Table: Metric [metric instance]

Name of Analytic:

Dates to show trend: Created on Last Month

Frequency: Monthly

Existing Reports:

Filters:

All of these conditions must be met:

Center abbrev is

Metric Date on Last Month

Transaction Count

Type of Visualization:

Bar Graph – Displays Count for the Month

Added Hover Over Information: Transaction Count

REPORT REQUIREMENTS: Transactions

Story Dependency	
Name of Report	PR Metric - Award Packages Prepared On Time I-3 3.3.2.1, PR Metric - Unsolicited Grant Award Packages Prepared On Time I-3 3.3.2.2 and PR – Award Augmentations Prepared On Time (J- 3 3.3.2.1)
NSSC Billing Element	Combines counts for Award Packages Prepared On Time I-3 3.3.2.1, PR Metric - Unsolicited Grant Award Packages Prepared On Time I-3 3.3.2.2 and PR – Award Augmentations Prepared On Time (I-3 3.3.2.1)
Billing Element	Transactional Service: 3.3.2.1 Grant Awards
Report Content	Count Work in progress (WIP) processing days for completed Basic Award Packages by Center and Reporting Month
Input Parameters	<p>1) SubCategory = 'GRANTS AGREEMENTS AWARDS'</p> <p>2) Procurement Tasks:</p> <p>a) Status = 'Closed' or 'Resolved'</p> <p>b) Short Description = 'Package Processing' and 'CS Approval'</p> <p>c) Assignment Group = 'PR – PROCESSING L2' and 'PR – CS APPROVE L3'</p> <p>3) Center = PGroup (Center Abbreviation)</p> <p>4) Grant No.:</p> <p>a) Unique Number if SubCategory = 'GRANTS AGREEMENTS AWARDS'</p> <p>5) Award Date and Supplement Award Date is NOT EMPTY and is between 1st and last day of the reporting month</p>
Output Parameters	<p>Validate that the Grants Agreement packages has been updated with the following criteria:</p> <p>Category = GRANTS AGREEMENTS AWARDS</p> <p>Calendar Used = calendar Days</p> <p>Start Condition: When the task with the assigned group PR-Processing L2 is created with SubCategory GRANTS AGREEMENTS AWARDS and status is changed to WIP.</p> <p>Pause Condition: All open Tasks are in Pending status</p> <p>End Condition: Award date is populated</p> <p>Exclusion Criteria: Case is Closed Incomplete or Package Processing Task is Cancelled</p> <p>Met Criteria: Completed within 29 calendar days of receipt of a</p>

	<p>complete Technical Package</p> <p>SLA: 90% Met</p> <p>Report for "PR Metric - Award Packages Prepared On Time I-3 3.3.2.1", "PR Metric - Unsolicited Grant Award Packages Prepared On Time I-3 3.3.2.2" and "PR – Award Augmentations Prepared On Time (J- 3 3.3.2.1)"</p> <p>_____NEW_____</p> <p>Shows a Met/Not Met stacked bar chart by Center[P-Group]</p> <p>If Center[PGroup] is DFRC, combine with AFRC. The output will be AFRC</p> <p>'Award Date' is 'between' 1st day and last of day of the reporting month</p> <p>NOTES: This is an existing "Global" report: Grants Agreement packages were prepared in accordance with I-3 (3.3.2.1)</p> <p>NOTE: Clock Starts Metric Count beginning at 2359 hours the day Award Date is populated.</p>
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If there are variations in the Utilization and Transactions, please provide justification/business rules:

Description of Change: Remove/Omit PR Metric - Award Augmentations Prepared On Time I-3 3.3.2.1 'Funding - Augmentations' and 'Funding – Extensions/Increases' supplements which will be included in 'PR – Grant Funding Supplement Prepared on Time (I-3 3.3.2.2)'

Contract Modification:

Impact to existing Metrics/Utilization/Transactions: Removes the 'PR – GRANT Augmentations Prepared On Time 90%' from the Internal and External Dashboards and Analytics and adds them to PR –SUPPLEMENT – Funding Prepped on Time – 90%.

APPENDIX A: PROCESS WORK INSTRUCTIONS

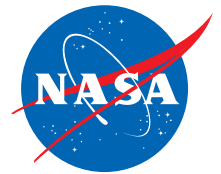
(See Page 4 and 5 of 10)

APPENDIX B: SERVICE NOW USER STORIES

Will create Story to Remove/Omit PR Metric - Award Augmentations Prepared On Time I-3 3.3.2.1 'Funding - Augmentations' and 'Funding – Extensions/Increases' supplements which will be included in 'PR – Grant Funding Supplement Prepared on Time (I-3 3.3.2.2)'

Contract Modification:

Impact to existing Metrics/Utilization/Transactions: Removes the 'PR – GRANT Augmentations Prepared On Time 90%' from the Internal and External Dashboards and Analytics and adds them to PR –SUPPLEMENT – Funding Prepped on Time – 90%.



NASA Shared Services Center

NSSC ServiceNow – PR – Grants
PR – Grant Augmentations, Supplement Admin and
Funding
(P&U Internal - PR - Dashboard)

Document Version	V.2
Date Last Modified	10/01/2020

Reference: Contract Attachment I-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:**Brief Description:**

Each month, NSSC SP Procurement - Grants and Cooperative Agreements reports the number of actions performed by NASA Center. The actions include:

- 1) Funding Supplements (Transactions) includes all Funding Supplements - Augmentations, Increases, Extensions and De-obligations
- 2) Administrative Supplements

Additionally, the report includes cumulative totals reported for the fiscal year beginning Oct 1st through Sep 30th by NASA Center.

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics

Note: See Appendix A – Work Instructions

If applicable:

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change: Current

Description of Change: Funding Supplements (Transactions) includes - Funding, Augmentations, Increases, Extensions, Increase and De-obligation Supplements

Contract Modification:

Impact to existing Metrics/Utilization/Transactions: Removes the 'PR – GRANT Augmentations Prepared On Time 90%' from the Internal Grant Award counts on Dashboards and Analytics.

REPORTING SUMMARY :

Suggested Report Title for Transaction:	I.17 _FA_PWS Element _Transaction: 3.3.2.2_Grant_Administration
Global Setting: Y/N	Yes
Functional Area:	PR
PWS Section:	I-1_PWS_3.3.2.2_Grant_Administration
Performance Area:	Grant Funding (includes Augmentations) and Administrative Supplements
SO/SME	
Contract Modification	
SN Transaction Story/Date Submitted	
Approval – CS/SP	
Metrics Team Review	
Service Definition I-17	
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template Transactions

Acceptance Criteria: Count WIP (Work in Progress) Days for the reporting month where Supplement Tasks Short Description = 'Package Processing' and Assignment Group = 'PR – PROCESSING L2'; Supplement Form Number Created Date minus 'Pending' or 'Pending CS Approval' Days and Supplement Award Date IS NOT EMPTY

Placement / Location:

Dashboard: P & U - Internal – PR Dashboard

Dashboard Tab: Grants

Dashboard Group: Performance And Utilization – 'PR – Award Augmentations Prepared On Time (I-3 3.3.2.1)', 'PR – Grant Funding Supplement Prepared On Time (I-3 3.3.2.2)' and 'PR – Admin Supplements Prepared For Contracting Signature On Time (I-3 3.3.2.2)'.

PA Dashboard & Tab Target

- A. Dashboard(s) P & U - Internal - Overall / P & U - Overall (Both internal & External) – PR Dashboard (External)
- B. Tab: PR Transactions

Data Source Table: Metric [metric instance] - 'PR – Award Augmentations Prepared On Time (I-3 3.3.2.1)', 'PR – Grant Funding Supplement Prepared On Time (I-3 3.3.2.2)' and 'PR – Admin Supplements Prepared For Contracting Signature On Time (I-3 3.3.2.2)'.

Name of Analytic: 'PR-GRANT – Award Augmentations Prepared On Time – 90%', PR – SUPPLEMENT – Admin Prepped for Signature on Time – 90%' and PR – SUPPLEMENT – Funding Prepped on Time – 90%'

Dates to show trend: Monthly

Frequency: Monthly

Existing Reports: 'PR – Award Augmentations Prepared On Time (I-3 3.3.2.1)', 'PR – Grant Funding Supplement Prepared On Time (I-3 3.3.2.2)' and 'PR – Admin Supplements Prepared For Contracting Signature On Time (I-3 3.3.2.2)'.

Filters:

All of these conditions must be met:

Definition is

Center abbrev is PGroup Field

Metric Date on Last Month

Supplement Award Date is not null

Grant Supplement Tasks 'CS Approval' Task is 'Resolved'

Transaction Count by Center and Supplement Award Date is within Last Month

Type of Visualization:

Bar Graph – Displays Count for the Month

Added Hover Over Information: Transaction Count

ServiceNow Data – SAMPLE Transactions

Acceptance Criteria:

(See Page 4 and 5 of 10)

Placement / Location:

Dashboard:

Dashboard Tab:

Dashboard Group: Performance And Utilization - Internal (Both Internal & External)

PA Dashboard & Tab Target

A. Dashboard(s) P & U - Internal - Overall / P & U - Overall (Both internal & External)

B. Tab: NSSC Transactions

Data Source Table: Metric [metric instance]

Name of Analytic:

Dates to show trend: Created on Last Month

Frequency: Monthly

Existing Reports:

Filters:

All of these conditions must be met:

Center abbrev is

Metric Date on Last Month

Transaction Count

Type of Visualization:

Bar Graph – Displays Count for the Month

Added Hover Over Information: Transaction Count

REPORT REQUIREMENTS: Transactions	
Story Dependency	
Name of Report	'PR – Award Augmentations Prepared On Time (I-3 3.3.2.1)', 'PR – Grant Funding Supplement Prepared On Time (I-3 3.3.2.2)' and 'PR – Admin Supplements Prepared For Contracting Signature On Time (I-3 3.3.2.2)'.
NSSC Billing Element	'PR – Award Augmentations Prepared On Time (I-3 3.3.2.1)', 'PR – Grant Funding Supplement Prepared On Time (I-3 3.3.2.2)' and 'PR – Admin Supplements Prepared For Contracting Signature On Time (I-3 3.3.2.2)'.
Contractor Billing Element	Transactional Service: 3.3.2.2 Grant Admin – Supplements/Year
Report Content	For Supplement (Type) contains 'Funding', count WIP (Work in Progress) Days for the reporting month where Supplement Tasks Short Description = 'Package Processing' and Assignment Group = 'PR – PROCESSING L2'; Supplement Form Number Created Date minus 'Pending' or 'Pending CS Approval' Days and Supplement Award Date IS NOT EMPTY
Input Parameters	<p>1) PR Grant Supplements = Supplement Number and FD Number are activated upon 'New'</p> <p>2) Supplement Created Date</p> <p>3) Supplement Procurement Tasks:</p> <p>a) Status = 'Resolved'</p> <p>b) Short Description = 'Package Processing' and 'CS Approval'</p> <p>c) Assignment Group = 'PR – PROCESSING L2' and 'PR – CS APPROVE L3'</p> <p>4) Center = PGroup (Center Abbreviation)</p> <p>5) Supplement Status = Approved/Awarded</p> <p>6) Grant No. = Grant No. (Unique Number)</p> <p>7) Supplement No. = is populated</p> <p>8) Supplement (Type):</p> <p>a) Funding</p> <p>b) Admin</p> <p>9) Supplement Award Date = is NOT EMPTY/NULL and is between 1st and last day of the reporting month</p>

<p>Output Parameters</p>	<p>Validate the existing 'PR – Award Augmentations Prepared On Time (I-3 3.3.2.1)', 'PR – Grant Funding Supplement Prepared On Time (I-3 3.3.2.2)' and 'PR – Admin Supplements Prepared For Contracting Signature On Time (I-3 3.3.2.2)' have the following criteria:</p> <p>Supplement Task Category = GRANTS AGREEMENTS AWARDS</p> <p>Supplement Task Subcategory = contains 'FUNDING' or 'ADMINISTRATIVE'</p> <p>FD Form = PR Grant Supplements</p> <p>Calendar Used = Calendar Days</p> <p>Start Condition = When the Task is created where SubCategory contains 'FUNDING' or 'ADMINISTRATIVE' and Status is Changed to WIP (Work in Progress)</p> <p>Pause Condition = Open Task is in Pending status</p> <p>End Condition = Supplement 'CS Approval' Task is Resolved and Supplement Award Date field (information tab) is Populated</p> <p>Calculated When: Supplement 'CS Approval' Task is Resolved and Supplement Award Date field (information tab) is Populated</p> <p>Exclusion Criteria = Case is Closed Incomplete or Package Processing Task is Cancelled</p> <p>Met Criteria = Award Date is populated less Package Processing Task create date less Pending Days in pending status within 14 calendar days of receipt of a complete Package</p> <p>Not Met Criteria = Award Date is populated less Package Processing Task create date less Pending Days in pending status greater than 14 calendar days of receipt of a complete Package</p> <p>Performance Standard = 90% Met</p> <p>Combined Report for 'PR Metric - Grant Funding Supplement Prepared On Time (I-3 3.3.2.2)', 'PR – Award Augmentations Prepared On Time (I-3 3.3.2.1)' and 'PR – Admin Supplements Prepared For Contracting Signature On Time (I-3 3.3.2.2)'.</p> <p>Shows a Met/Not Met stacked bar chart by Center[P-Group]</p> <p>If Center[PGroup] is DFRC, combine with AFRC. The output on Report will be AFRC</p> <p>'Supplement Award Date' is 'between' 1st day and last of day of the reporting month</p> <p>NOTE: Clock Starts Metric Count beginning at 2359 hours the day Supplement Award Date is populated.</p>
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If there are variations in the Utilization and Transactions, please provide justification/business rules:

Description of Change: Funding Supplements (Transactions) includes - Funding, Augmentations, Increases, Extensions, Increase and De-obligation Supplements

Contract Modification:

Impact to existing Metrics/Utilization/Transactions: Removes the 'PR – GRANT Augmentations Prepared On Time 90%' from the Internal Grant Award counts on Dashboards and Analytics.

APPENDIX A: PROCESS WORK INSTRUCTIONS

(see pages 7 and 8 of 11)

APPENDIX B: SERVICE NOW USER STORIES

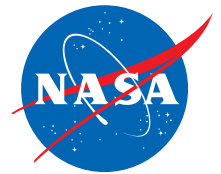
Will create Story to do the following:

Description of Change: Funding Supplements (Transactions) includes - Funding, Augmentations, Increases, Extensions, Increase and De-obligation Supplements

Contract Modification:

Impact to existing Metrics/Utilization/Transactions: Removes the 'PR – GRANT Augmentations Prepared On Time 90%' from the Internal Grant Award counts on Dashboards and Analytics.

PR – Grant Augmentations are subject to 21 day Work-in-Progress Met or Not Met Metrics but should be included in Grants Admin Transaction Counts.



NASA Shared Services Center

NSSC ServiceNow – PR – Grants
PR – Grant Augmentations, Supplement Admin and
Funding
(P&U Internal - PR - Dashboard)

Document Version	V.2
Date Last Modified	10/01/2020

Reference: Contract Attachment I-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:**Brief Description:**

Each month, NSSC SP Procurement - Grants and Cooperative Agreements reports the number of actions performed by NASA Center. The actions include:

- 1) Funding Supplements (Transactions) includes all Funding Supplements - Augmentations, Increases, Extensions and De-obligations
- 2) Administrative Supplements

Additionally, the report includes cumulative totals reported for the fiscal year beginning Oct 1st through Sep 30th by NASA Center.

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics

Note: See Appendix A – Work Instructions

If applicable:

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change: Current

Description of Change: Funding Supplements (Transactions) includes - Funding, Augmentations, Increases, Extensions, Increase and De-obligation Supplements

Contract Modification:

Impact to existing Metrics/Utilization/Transactions: Removes the 'PR – GRANT Augmentations Prepared On Time 90%' from the Internal Grant Award counts on Dashboards and Analytics.

REPORTING SUMMARY :

Suggested Report Title for Transaction:	I.17 _FA_PWS Element _Transaction: 3.3.2.2_Grant_Administration
Global Setting: Y/N	Yes
Functional Area:	PR
PWS Section:	I-1_PWS_3.3.2.2_Grant_Administration
Performance Area:	Grant Funding (includes Augmentations) and Administrative Supplements
SO/SME	
Contract Modification	
SN Transaction Story/Date Submitted	
Approval – CS/SP	
Metrics Team Review	
Service Definition I-17	
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template Transactions

Acceptance Criteria: Count WIP (Work in Progress) Days for the reporting month where Supplement Tasks Short Description = 'Package Processing' and Assignment Group = 'PR – PROCESSING L2'; Supplement Form Number Created Date minus 'Pending' or 'Pending CS Approval' Days and Supplement Award Date IS NOT EMPTY

Placement / Location:

Dashboard: P & U - Internal – PR Dashboard

Dashboard Tab: Grants

Dashboard Group: Performance And Utilization – 'PR – Award Augmentations Prepared On Time (J-3 3.3.2.1)', 'PR – Grant Funding Supplement Prepared On Time (J-3 3.3.2.2)' and 'PR – Admin Supplements Prepared For Contracting Signature On Time (J-3 3.3.2.2)'.

PA Dashboard & Tab Target

- A. Dashboard(s) P & U - Internal - Overall / P & U - Overall (Both internal & External) – PR Dashboard (External)
- B. Tab: PR Transactions

Data Source Table: Metric [metric_instance] - 'PR – Award Augmentations Prepared On Time (J-3 3.3.2.1)', 'PR – Grant Funding Supplement Prepared On Time (J-3 3.3.2.2)' and 'PR – Admin Supplements Prepared For Contracting Signature On Time (J-3 3.3.2.2)'.

Name of Analytic: 'PR-GRANT – Award Augmentations Prepared On Time – 90%', PR – SUPPLEMENT – Admin Prepped for Signature on Time – 90%' and PR – SUPPLEMENT – Funding Prepped on Time – 90%'

Dates to show trend: Monthly

Frequency: Monthly

Existing Reports: 'PR – Award Augmentations Prepared On Time (J-3 3.3.2.1)', 'PR – Grant Funding Supplement Prepared On Time (J-3 3.3.2.2)' and 'PR – Admin Supplements Prepared For Contracting Signature On Time (J-3 3.3.2.2)'.

Filters:

All of these conditions must be met:

Definition is

Center abbrev is PGroup Field

Metric Date on Last Month

Supplement Award Date is not null

Grant Supplement Tasks 'CS Approval' Task is 'Resolved'

Transaction Count by Center and Supplement Award Date is within Last Month

Type of Visualization:

Bar Graph – Displays Count for the Month

Added Hover Over Information: Transaction Count

ServiceNow Data – SAMPLE Transactions

Acceptance Criteria:

(See Page 4 and 5 of 10)

Placement / Location:

Dashboard:

Dashboard Tab:

Dashboard Group: Performance And Utilization - Internal (Both Internal & External)

PA Dashboard & Tab Target

A. Dashboard(s) P & U - Internal - Overall / P & U - Overall (Both internal & External)

B. Tab: NSSC Transactions

Data Source Table: Metric [metric instance]

Name of Analytic:

Dates to show trend: Created on Last Month

Frequency: Monthly

Existing Reports:

Filters:

All of these conditions must be met:

Center abbrev is

Metric Date on Last Month

Transaction Count

Type of Visualization:

Bar Graph – Displays Count for the Month

Added Hover Over Information: Transaction Count

REPORT REQUIREMENTS: Transactions	
Story Dependency	
Name of Report	'PR – Award Augmentations Prepared On Time (I-3 3.3.2.1)', 'PR – Grant Funding Supplement Prepared On Time (I-3 3.3.2.2)' and 'PR – Admin Supplements Prepared For Contracting Signature On Time (I-3 3.3.2.2)'.
NSSC Billing Element	'PR – Award Augmentations Prepared On Time (I-3 3.3.2.1)', 'PR – Grant Funding Supplement Prepared On Time (I-3 3.3.2.2)' and 'PR – Admin Supplements Prepared For Contracting Signature On Time (J-3 3.3.2.2)'.
Billing Element	Transactional Service: 3.3.2.2 Grant Admin – Supplements/Year
Report Content	For Supplement (Type) contains 'Funding', count WIP (Work in Progress) Days for the reporting month where Supplement Tasks Short Description = 'Package Processing' and Assignment Group = 'PR – PROCESSING L2'; Supplement Form Number Created Date minus 'Pending' or 'Pending CS Approval' Days and Supplement Award Date IS NOT EMPTY
Input Parameters	<p>1) PR Grant Supplements = Supplement Number and FD Number are activated upon 'New'</p> <p>2) Supplement Created Date</p> <p>3) Supplement Procurement Tasks:</p> <ul style="list-style-type: none"> a) Status = 'Resolved' b) Short Description = 'Package Processing' and 'CS Approval' c) Assignment Group = 'PR – PROCESSING L2' and 'PR – CS APPROVE L3' <p>4) Center = PGroup (Center Abbreviation)</p> <p>5) Supplement Status = Approved/Awarded</p> <p>6) Grant No. = Grant No. (Unique Number)</p> <p>7) Supplement No. = is populated</p> <p>8) Supplement (Type):</p> <ul style="list-style-type: none"> a) Funding b) Admin <p>9) Supplement Award Date = is NOT EMPTY/NULL and is between 1st and last day of the reporting month</p>

<p>Output Parameters</p>	<p>Validate the existing 'PR – Award Augmentations Prepared On Time (I-3 3.3.2.1)', 'PR – Grant Funding Supplement Prepared On Time (I-3 3.3.2.2)' and 'PR – Admin Supplements Prepared For Contracting Signature On Time (I-3 3.3.2.2)' have the following criteria:</p> <p>Supplement Task Category = GRANTS AGREEMENTS AWARDS</p> <p>Supplement Task Subcategory = contains 'FUNDING' or 'ADMINISTRATIVE'</p> <p>FD Form = PR Grant Supplements</p> <p>Calendar Used = Calendar Days</p> <p>Start Condition = When the Task is created where SubCategory contains 'FUNDING' or 'ADMINISTRATIVE' and Status is Changed to WIP (Work in Progress)</p> <p>Pause Condition = Open Task is in Pending status</p> <p>End Condition = Supplement 'CS Approval' Task is Resolved and Supplement Award Date field (information tab) is Populated</p> <p>Calculated When: Supplement 'CS Approval' Task is Resolved and Supplement Award Date field (information tab) is Populated</p> <p>Exclusion Criteria = Case is Closed Incomplete or Package Processing Task is Cancelled</p> <p>Met Criteria = Award Date is populated less Package Processing Task create date less Pending Days in pending status within 14 calendar days of receipt of a complete Package</p> <p>Not Met Criteria = Award Date is populated less Package Processing Task create date less Pending Days in pending status greater than 14 calendar days of receipt of a complete Package</p> <p>Performance Standard = 90% Met</p> <p>Combined Report for 'PR Metric - Grant Funding Supplement Prepared On Time (J-3 3.3.2.2)', 'PR – Award Augmentations Prepared On Time (I-3 3.3.2.1)' and 'PR – Admin Supplements Prepared For Contracting Signature On Time (I-3 3.3.2.2)'.</p> <p>Shows a Met/Not Met stacked bar chart by Center[P-Group]</p> <p>If Center[PGroup] is DFRC, combine with AFRC. The output on Report will be AFRC</p> <p>'Supplement Award Date' is 'between' 1st day and last of day of the reporting month</p> <p>NOTE: Clock Starts Metric Count beginning at 2359 hours the day Supplement Award Date is populated.</p>
---------------------------------	--

If there are variations in the Utilization and Transactions, please provide justification/business rules:

Description of Change: Funding Supplements (Transactions) includes - Funding, Augmentations, Increases, Extensions, Increase and De-obligation Supplements

Contract Modification:

Impact to existing Metrics/Utilization/Transactions: Removes the 'PR – GRANT Augmentations Prepared On Time 90%' from the Internal Grant Award counts on Dashboards and Analytics.

APPENDIX A: PROCESS WORK INSTRUCTIONS

(see pages 7 and 8 of 11)

APPENDIX B: SERVICE NOW USER STORIES

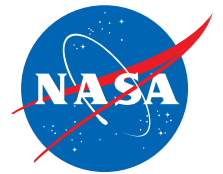
Will create Story to do the following:

Description of Change: Funding Supplements (Transactions) includes - Funding, Augmentations, Increases, Extensions, Increase and De-obligation Supplements

Contract Modification:

Impact to existing Metrics/Utilization/Transactions: Removes the 'PR – GRANT Augmentations Prepared On Time 90%' from the Internal Grant Award counts on Dashboards and Analytics.

PR – Grant Augmentations are subject to 21 day Work-in-Progress Met or Not Met Metrics but should be included in Grants Admin Transaction Counts.



NASA Shared Services Center

**NSSC ServiceNow – PR – Grant Awards –
Unsolicited and Other Non-competitive Awards
(P&U - Internal PR - Dashboard)**

Document Version V.2

Date Last Modified 10/01/2020

Reference: Contract Attachment I-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:**Brief Description:**

Each month, NSSC SP Procurement - Grants and Cooperative Agreements reports the number of actions performed by NASA Center. The actions include:

Grant Award Packages Prepared on Time

Additionally, the report includes cumulative totals reported for the fiscal year beginning Oct 1st through Sep 30th by NASA Center.

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics

PR Metric - Unsolicited Grant Award Packages Prepared On Time (I-3 3.3.2.2)

Note: See Appendix A – Work Instructions

If applicable:

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change:

Description of Change:

Contract Modification:

Impact to existing Metrics/Utilization/Transactions:

REPORTING SUMMARY :

Suggested Report Title for Transaction:	I.17 _PR_PWS Element _Transaction: Grant Awards
Global Setting: Y/N	Yes
Functional Area:	PR
PWS Section:	I-1_PWS_3.3.2.1_Grant_Awards
Performance Area:	Grant Awards
SO/SME	Lisa Oliver, Maria Etheridge
Contract Modification	
SN Transaction Story/Date Submitted	
Approval – CS/SP	
Metrics Team Review	
Service Definition I-17	
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template Transactions

Acceptance Criteria: Count WIP (Work in Progress) Days for the reporting month where Tasks Short Description = 'Package Processing' and Assignment Group = 'PR – PROCESSING L2'; Created Date minus 'Pending' or 'Pending CS Approval' Days and Award Date IS NOT EMPTY

Placement / Location:

Dashboard: P & U - Internal – PR Dashboard

Dashboard Tab: Grants

Dashboard Group: Performance And Utilization – 'PR Metric - Unsolicited Grant Award Packages Prepared On Time I-3 3.3.2.2'

PA Dashboard & Tab Target

A. Dashboard(s) P & U - Internal - Overall / P & U - Overall (Both internal & External) – PR Dashboard (External)

B. Tab: Grants

Data Source Table: Metric [metric instance] - 'PR Metric - Unsolicited Grant Award Packages Prepared On Time I-3 3.3.2.2'

Name of Analytic: 'PR - GRANT - Unsolicited Award Packages Prepared On Time - 90%'

Dates to show trend: Monthly

Frequency: Monthly

Existing Reports: 'PR Metric - Unsolicited Grant Award Packages Prepared On Time I-3 3.3.2.2'

Filters:

All of these conditions must be met:

Definition is

Center abbrev is PGroup Field

Metric Date on Last Month

Award Date is not null

Grant Procurement Tasks 'CS Approval' Task is 'Resolved'

Transaction Count by Center and Award Date is within Last Month

Type of Visualization (Added Hover Over Information: Transaction Count):

Bar Graph – Displays Count for the Month

ServiceNow Data – SAMPLE Transactions

Acceptance Criteria:

(See Page 4 and 5 of 10)

Placement / Location:

Dashboard:

Dashboard Tab:

Dashboard Group: Performance And Utilization - Internal (Both Internal & External)

PA Dashboard & Tab Target

A. Dashboard(s) P & U - Internal - Overall / P & U - Overall (Both internal & External)

B. Tab: NSSC Transactions

Data Source Table: Metric [metric instance]

Name of Analytic:

Dates to show trend: Created on Last Month

Frequency: Monthly

Existing Reports:

Filters:

All of these conditions must be met:

Center abbrev is

Metric Date on Last Month

Transaction Count

Type of Visualization:

Bar Graph – Displays Count for the Month

Added Hover Over Information: Transaction Count

REPORT REQUIREMENTS: Transactions	
Story Dependency	
Name of Report	PR Metric - Unsolicited Grant Award Packages Prepared On Time I-3 3.3.2.2
NSSC Billing Element	PR Metric - Unsolicited Grant Award Packages Prepared On Time I-3 3.3.2.2
Contractor Billing Element	Transactional Service: 3.3.2.1 Grant Awards
Report Content	Count Work in progress (WIP) processing days for completed Basic Award Packages by Center and Reporting Month
Input Parameters	<p>1) SubCategory = 'GRANTS AGREEMENTS AWARDS'</p> <p>2) Proposal Type = 'Unsolicited' or 'Single Source'</p> <p>3) Procurement Tasks:</p> <p>a) Status = 'Closed' or 'Resolved'</p> <p>b) Short Description = 'Package Processing' and 'CS Approval'</p> <p>c) Assignment Group = 'PR – PROCESSING L2' and 'PR – CS APPROVE L3'</p> <p>4) Center = PGroup (Center Abbreviation)</p> <p>5) Grant No.:</p> <p>a) Unique Number if SubCategory = 'GRANTS AGREEMENTS AWARDS'</p> <p>6) Award Date and Supplement Award Date is NOT EMPTY and is between 1st and last day of the reporting month</p>
Output Parameters	<p>Validate that the Grants Agreement packages has been updated with the following criteria:</p> <p>Category = GRANTS AGREEMENTS AWARDS</p> <p>Calendar Used = calendar Days</p> <p>Start Condition: When the task with the assigned group PR-Processing L2 is created with SubCategory GRANTS AGREEMENTS AWARDS and status is changed to WIP.</p> <p>Pause Condition: All open Tasks are in Pending status</p> <p>End Condition: Award date is populated</p> <p>Exclusion Criteria: Case is Closed Incomplete or Package Processing Task is Cancelled</p> <p>Met Criteria: Completed within 29 calendar days of receipt of a complete Technical Package</p> <p>SLA: 90% Met</p>

	<p>Report for "PR Metric - Unsolicited Grant Award Packages Prepared On Time I-3 3.3.2.2"</p> <p>_____NEW_____</p> <p>Shows a Met/Not Met stacked bar chart by Center[P-Group]</p> <p>If Center [PGroup] is DFRC, combine with AFRC. The output will be AFRC</p> <p>'Award Date' is 'between' 1st day and last of day of the reporting month</p> <p>NOTES: This is an existing "Global" report: Grants Agreement packages were prepared in accordance with I-3 (3.3.2.1)</p> <p>NOTE: Clock Starts Metric Count beginning at 2359 hours the day Award Date is populated.</p>
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If there are variations in the Utilization and Transactions, please provide justification/business rules:

Description of Change:

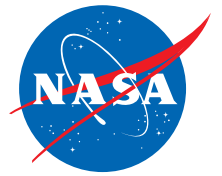
Contract Modification:

Impact to existing Metrics/Utilization/Transactions:

APPENDIX A: PROCESS WORK INSTRUCTIONS

(See Page 4 and 5 of 10)

APPENDIX B: SERVICE NOW USER STORIES



NASA Shared Services Center

NSSC ServiceNow – FPDS-NG Metrics and Utilization PR – Grants and Agreements Requirements

Document Version	V.2
Date Last Modified	10/01/2020

Reference: Contract Attachment I-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:**Brief Description:**

Each month, NSSC SP Procurement – Grants and Agreements creates a record reporting the number of Awards and Supplements completed to the FPDS (Federal Procurement Data System) by NASA Center within 2 business days after the NSSC Grant Officer signed, obligating the document (makes award). Additionally, the report includes cumulative totals reported for the fiscal year beginning Oct 1st through Sep 30th by NASA Center.

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics: 'PR – GRANT – FPDS Entries for Basics – Next Generation – 90%' and 'PR – SUPPLEMENT - FPDS Entries – Next Generation – 90%'
Utilization: 'PR-Grant Basic Federal Procurement Data System – Next Generation (I-3 3.3.3.2)

Performance Analytics: 'P&U EXT – FPDS Entry Basic – Next Gen – Last Month' and 'P&U INT – FPDS Entry Basic – Next Gen – Monthly'

Note: See Appendix A – Work Instructions

If applicable:

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change:

Description of Change:

Contract Modification:

Impact to existing Metrics/Utilization/Transactions:

REPORTING SUMMARY :

Suggested Report Title for Metric and Utilization:	I.3_FA_PWS Element_Metric: 3.3.2 Entering obligations and FPDS data into procurement and finance systems
Global Setting: Y/N	Yes
Functional Area:	Procurement – Grants and Cooperative Agreements
PWS Section:	I1 PWS 3.3.2.1 Grant Awards
Performance Area:	
SO/SME	
TYPE: SLI/PM/OTHER	
Dependencies or impacts on other Areas/ Functional Areas:	None
I-3 Reportable	Yes
Contract Modification	N/A
SN Story Number/Date Submitted	SNow User Story – STRY0304442 and STRY0317066
SN PA Story/Date Submitted	3/26/2018
Approval – CS/SP	
Metrics Team Review	
Metric I-3	90% of FPDS entries completed accurately within 2 business days from receipt of CO-signed obligating document.
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template

Metrics and Utilization

Create new metric report titled: PR-Grant Basic Federal Procurement Data System – Next Generation (FPDS-NG) (I-3 3.3.3.2) or PR-Grant Supplements Federal Procurement Data System – Next Generation (FPDS-NG) (I-3 3.3.2.2)

Report Output: Met/Not Met stacked bar chart sorted my Met-Not Met

Calendar: NSSC Metric Business Days

Applies To: Resolve/FPDS-NG task created with a Category of Grants Agreements Awards using Grants FD Form

Start Condition: When CS Approve task is resolved by CS Approve - L3

Pause Condition: Status = Pending

End Condition: When the Resolve/FPDS-NG task is resolved with the assignment group PR – Post-Award L2, Category-Grants Agreements Awards and a Subcategory- Grants Agreements Awards

Calculation: Measures 90% Resolve/FPDS-NG task completed within 2 business days

Trigger is when CS Approve L3 task is resolved

Example of Metric Definition: METRICS AND UTILIZATION**HR - Classification - Classifications completed on time (I-3 - 3.2.15)**

Definition Name = HR - Classification Completed on Time

Description on metric definition:

1. APPLIES TO:
 - a. HR Cases
 - b. Category CLASSIFICATION
 - c. Subcategory of NEW PD
2. CALENDAR USED: NSSC Metric Days (excludes weekends, federal holidays and NSSC down days)
3. TRIGGER/START CONDITION: Metric record should be created when the date field "Classification Completed" is populated on the FD "New PD" tab
4. PAUSE CRITERIA: NONE
5. EXCLUSION CRITERIA:
 - a. If no Functional Detail exists, it is excluded from the report.
 - b. If the Case is status is Closed Incomplete, it is excluded from the report.
6. MET CONDITION: less than 31 business days between Case Opened and "Classification Completed" date
7. FILTER CONDITION: This report should have a filter condition that default to metric date during ("on") the last month; users should be able to change the report to use a "between" date range.
8. Additional Criteria:
 - a. Metric Date will be set to the "Classification Completed" date
 - b. One metric record per Case.
 - c. Metric value should be set to 1
 - d. Re-fire metric if subcategory or "Classification Completed" date field change value

Field Values:

Sub Doc: FD record this metric was calculated against

Calculated Age: WIP time in days based on schedule

Start: Date case was opened

End: Date in 'Classification Completed' field on the FD

Metric Date: Date in 'Classification Completed' field on the FD

Metric Start: Date case was opened

Pending Duration: Pending time of case

Business Duration: Total time case was active

Duration: Full time of metric calculation, not counting schedule

Additional Scripts:

Business rule on u_hr_case with same title as this metric that will mark metrics excluded if case is closed incomplete. (Also handled by Exclude Metric on HR Case Incomplete)

REPORT REQUIREMENTS: METRICS AND UTILIZATION			
Name of Report	PR-Grant Basic Federal Procurement Data System – Next Generation (FPDS-NG) (I-3 3.3.3.2) and PR-Grant Supplements Federal Procurement Data System – Next Generation (FPDS-NG) (I-3 3.3.2.2)		
Report Content	<p>Chart: WIP (Work in Progress) Days by Center</p> <p>Summary: Basic Awards and Supplements input in FPDS during the reporting month</p> <p>Detail: Pgroup (Center) Grant No. Grant Approval Status Grant Status Search Status Award Date or Supplement Award Date SubCategory Procurement Tasks or Supplement Procurement Tasks Status - Procurement Tasks or Supplement Procurement Tasks Short Description - Procurement Tasks or Supplement Procurement Tasks Assignment Group - Procurement Tasks or Supplement Procurement Tasks Total Pending Days Total WIP (Work in Progress) Days</p>		
Input Parameters	<p>1) SubCategory =</p> <table><tr><td>AUGMENTATION SUPPLEMENT</td></tr><tr><td>AWARD CLOSEOUT</td></tr></table>	AUGMENTATION SUPPLEMENT	AWARD CLOSEOUT
AUGMENTATION SUPPLEMENT			
AWARD CLOSEOUT			

	<table><tr><td>EXTERNAL SUPPLEMENT</td></tr><tr><td>FUNDING SUPPLEMENT</td></tr><tr><td>GRANTS AGREEMENTS AWARDS</td></tr><tr><td>INCREASE SUPPLEMENT</td></tr><tr><td>INTERNAL SUPPLEMENT</td></tr><tr><td>NCE SUPPLEMENT</td></tr></table> <p>2) Procurement Tasks or Supplement Procurement Tasks: a) Status = 'Closed' or 'Resolved' but not 'Cancelled' b) Short Description = '*CS Approval' and '*Resolve/FPDS-NG' c) Assignment Group – 1) 'PR - CS APPROVE L3' and 2) 'PR – POST-AWARD L2' 3) Center = PGroup (Center Abbreviation) 4) Grant No.: a) Unique Number if SubCategory = 'GRANTS AGREEMENTS AWARDS' b) Grant No. and Supplement No. if SubCategory = 'AUGMENTATION SUPPLEMENT' 5) Award Date and Supplement Award Date is NOT EMPTY and is between 1st and last day of the reporting month 6) Days in WIP – Count Work in Progress Days minus Pending Days for Short Description = '*Resolve/FPDS-NG' and Assignment Group = 'PR – POST-AWARD L2'</p>	EXTERNAL SUPPLEMENT	FUNDING SUPPLEMENT	GRANTS AGREEMENTS AWARDS	INCREASE SUPPLEMENT	INTERNAL SUPPLEMENT	NCE SUPPLEMENT
EXTERNAL SUPPLEMENT							
FUNDING SUPPLEMENT							
GRANTS AGREEMENTS AWARDS							
INCREASE SUPPLEMENT							
INTERNAL SUPPLEMENT							
NCE SUPPLEMENT							
Output Parameters	<p>Metric report titled: PR-Grant Basic Federal Procurement Data System – Next Generation (FPDS-NG) (I-3 3.3.3.2) or PR-Grant Supplements Federal Procurement Data System – Next Generation (FPDS-NG) (I-3 3.3.2.2)</p> <p>Report Output: Met/Not Met stacked bar chart sorted by Met-Not Met</p> <p>Calendar: NSSC Metric Business Days</p> <p>Applies To: Resolve/FPDS-NG task created with a Category of Grants Agreements Awards using Grants FD Form</p> <p>Start Condition: When CS Approve task is resolved by CS Approve - L3</p> <p>Pause Condition: Status = Pending</p> <p>End Condition: When the Resolve/FPDS-NG task is resolved with the assignment group PR – Post-Award L2, Category-Grants Agreements Awards and a Subcategory- Grants Agreements Awards</p> <p>Calculation: Measures 90% Resolve/FPDS-NG task completed within 2 business days</p> <p>Trigger is when CS Approve L3 task is resolved</p>						

ServiceNow Data – Metric Definition Template Performance Analytics

Story Dependency: Metrics and Utilization Story Number

Name of Report: PR – GRANT – FPDS Entries for Basics – Next Generation – 90% and
PR – SUPPLEMENT – FPDS Entries – Next Generation – 90%

Placement / Location: on the Internal and External dashboards

Internal: ‘PR-Grant Basic Federal Procurement Data System – Next Generation (FPDS-NG) (I-3 3.3.3.2)’ and ‘PR-Grant Supplements Federal Procurement Data System – Next Generation (FPDS-NG) (I-3 3.3.2.2)’

Dashboard Name: P&U Internal – PR Dashboard

Dashboard Group: Procurement

Dashboard Tab: Grants

External: N/A

Dashboard Name:

Dashboard Group:

Dashboard Tab:

Data Source Table:

Name of Analytic on Internal Dashboard: ‘P&U EXT – FPDS Entry Basic – Next Gen – Last Month’ and ‘P&U INT – FPDS Entry Basic – Next Gen – Monthly’

Name of Analytic on External Dashboard: N/A

Dates to show trend: Created on Last Month

Frequency: Monthly

SLI Formula: 90% of FPDS entries completed accurately within 2 business days from receipt of CO-signed obligating document.

Met: Stoplight Green

Not/Met: Stoplight Red

Conditions:

Definition Name

SLI or PM Percentage Calculation:

If the metric calculation is \Rightarrow 90%, the SLI or PM is met

If the metric calculation is $<$ 10%, the SLI or PM is not met

Stoplight is displayed at the top of the top of the Analytic - Yes

Type of Visualization:

Bar Graph – Displays Count for the Month

Y-axis should show the percentage on the left and the counts on the right

Breakdown: Center & Met/Not Met
Add a threshold line (for the SLI)

Hover Over Information: - SLI or PM definition

APPENDIX A: PROCESS WORK INSTRUCTIONS

1) FPDS Work Instructions

Once CS Approve task is resolved this will trigger the Resolve/FPDS-NG task in Service Now.

Resolve/FPDS task is assigned.

Tasks for Grant Supplements Task ... Audit History

Tasks for Grant Supplements Task

New

Go to

Grant No.

Search

1

to 5 of 5

Procurement Tasks

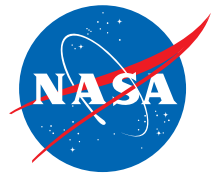
		Grant No. ▲	Status	Priority	Short Description	Number	Pgroup	Assigned to
<input type="checkbox"/>	i	80NSSC17K0564	Resolved	4 - Low	PRGSU0055875: Receiving - 80NSSC17K0564 P00001- FUNDING	PRT0325073	HQ - GXA/2010-G	Daniel Rainey
<input type="checkbox"/>	i	80NSSC17K0564	Resolved	1 - Critical	PRGSU0055875: Package Processing - 4200655637 - FUNDING - 42006545637	PRT0325616	HQ - GXA/2010-G	Rachel Stallings
<input type="checkbox"/>	i	80NSSC17K0564	Resolved	4 - Low	PRGSU0055875: Package Prep - 80NSSC17K0564 P00001- FUNDING	PRT0325075	HQ - GXA/2010-G	Jeri Allison
<input type="checkbox"/>	i	80NSSC17K0564	New	4 - Low	PRGSU0055875: Resolve/FPDS-NG	PRT0326978	HQ - GXA/2010-G	Tanya Malley
<input type="checkbox"/>	i	80NSSC17K0564	Resolved	4 - Low	PRGSU0055875: CS Approval - FUNDING - 80NSSC17K0564 P001 - 4200655637	PRT0326844	HQ - GXA/2010-G	JAMES HIBBS

Once the SP has completed FPDS they go into Service Now- update work notes- FPDS complete. Then go to Status-click on Resolved

Procurement Task - PRT0326978		Follow	Update	Create FD	Create Us
Number	PRT0326978	FD Selection	-- None --		
Case	PRC0029593	Status	Resolved		
Functional Detail	FDPGR0018607	Priority	4 - Low		
Supplement Form Number	PRGSU0055875	Watch list	<input type="checkbox"/> <input type="checkbox"/>		
* Customer	Daniel Rainey				
Contact					
* Category	GRANTS AGREEMENTS AWARDS				
* SubCategory	FUNDING SUPPLEMENT				
* Assignment Group	PR - POST-AWARD L2				
Assigned to	Tanya Malley				
Grant No.	80NSSC17K0564	Pgroup	HQ - GXA/2010-G		
Supplement No.	P00001				

This will trigger the distribution task.

APPENDIX B: SERVICE NOW USER STORIES



NASA Shared Services Center

NSSC ServiceNow – PR - Grant Closeout Transactions (P&U External and Internal Dashboards and Analytics)

Document Version	V.2
Date Last Modified	10/01/2020

Reference: Contract Attachment I-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:**Brief Description:**

Each month, NSSC SP Procurement – Grants and Agreements reports to the NSSC Closeout team, awards that have expired (period of performance (POP) end date has ended). Additionally, the report includes cumulative totals reported for the fiscal year beginning Oct 1st through Sep 30th by NASA Center.

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics

PR – GRANT – Transfer to Closeout – Next Generation – 90%

Note: See Appendix A – Work Instructions

If applicable: N/A

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change:

Description of Change:

Contract Modification:

Impact to existing Metrics/Utilization/Transactions:

REPORTING SUMMARY :

Suggested Report Title for Transaction:	I.17 _FA_PWS Element _Transaction:
Global Setting: Y/N	Yes
Functional Area:	PR
PWS Section:	I-1_PWS_3.3.2.2_Grant_Administration
Performance Area:	PR - Grants Transfer to Closeout
SO/SME	
Contract Modification	
SN Transaction Story/Date Submitted	
Approval – CS/SP	
Metrics Team Review	
Service Definition I-17	
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template Transactions

Acceptance Criteria:

Placement / Location:

- Dashboard: P & U - Internal – PR Dashboard

- Dashboard Tab: Closeout

- Dashboard Group: Performance And Utilization – ‘PR – Grant Transfer to Closeout (J-3 3.3.3.2)’

PA Dashboard & Tab Target

- A. Dashboard(s) P & U - Internal - Overall / P & U - Overall (Both internal & External) – PR Dashboard (External)

- B. Tab: PR Transactions

Data Source Table: Metric [metric_instance] - ‘PR – Grant Transfer to Closeout (I-3 3.3.3.2)’

Name of Analytic: ‘PR – GRANT – Transfer to Closeout – Next Generation – 90%’

Dates to show trend: Monthly

Frequency: Monthly

Existing Reports: ‘PR – Grant Transfer to Closeout (J- 3 3.3.3.2)’

Filters:

All of these conditions must be met:

Definition is

- Center abbrev is PGroup Field

- Metric Date on Last Month

- POP End Date is expired

- Grant Closeout button is checked

- Closeout Date/Time is Last Month

Transaction Count by Center and Closeout Date/Time is within Last Month

Type of Visualization:

- Bar Graph – Displays Count for the Month

Added Hover Over Information: Transaction Count

ServiceNow Data – SAMPLE Transactions

Acceptance Criteria:
(See Page 4 of 9)

Placement / Location:

Dashboard:

Dashboard Tab:

Dashboard Group: Performance And Utilization - Internal (Both Internal & External)

PA Dashboard & Tab Target

A. Dashboard(s) P & U - Internal - Overall / P & U - Overall (Both internal & External)

B. Tab: NSSC Transactions

Data Source Table: Metric [metric_instance]

Name of Analytic:

Dates to show trend: Created on Last Month

Frequency: Monthly

Existing Reports:

Filters:

All of these conditions must be met:

Center abbrev is

Metric Date on Last Month

Transaction Count

Type of Visualization:

Bar Graph – Displays Count for the Month

Added Hover Over Information: Transaction Count

REPORT REQUIREMENTS: Transactions	
Story Dependency	
Name of Report	PR – GRANT – Transfer to Closeout – Next Generation – 90%
NSSC Billing Element	PR – Grant Transfer to Closeout – Next Generation (I-3 3.3.3.2) Metric Report
Contractor Billing Element	PR – Grant Transfer to Closeout – Next Generation (I-3 3.3.3.2) Metric Report
Report Content	ServiceNow Ticket - POP End Date is expired, Grant Closeout button is checked which populates the Closeout Date/Time field and count by PGroup for Last Month
Input Parameters	1) Grant FD – Award Report tab 2) Pgroup (Center) 3) Grant No. (Unique Identifier) 4) POP End Date – has expired on or around report run 5) Transfer to Closeout = Yes for Checkbox 6) Date Transferred to Closeout
Output Parameters	PR – Grant Transfer to Closeout – Next Generation (I-3 3.3.3.2) Metric Report Report Output: Met/Not Met stacked bar chart sorted by Met-Not Met Calendar: 30 Calendar Days Applies To: Functional Details(FD) for with the Category of Grants Agreements Awards Start Condition: When Grant Pop End Date in the Award Report Tab is = today. End Condition: When "Transfer to Closeout" checkbox is CHECKED on the Grants and Agreements FD Information tab and Date Transferred to Closeout is populated Exclusion: : When "Transfer to Closeout" checkbox is UNCHECKED on the Grants and Agreements FD information tab Calculation: Measures 90% of files transferred within 30 calendar days of the physical completion date.

If there are variations in the Utilization and Transactions, please provide justification/business rules:

APPENDIX A: PROCESS WORK INSTRUCTIONS

APPENDIX B: SERVICE NOW USER STORIES



NASA Shared Services Center

NSSC ServiceNow – Procurement Metrics and Utilization SBIR/STTR Phase III

Document Version	V.2
Date Last Modified	10/01/2020

Reference: Contract Attachment I-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:**Brief Description:**

Each month, NSSC SP Procurement – SBIR/STTRs reports the number of actions performed by NASA Center. The actions include 1) New Awards (Phase I, II, III and CRPs) awarded, 2) Bi-Lateral Modifications (Funding or Administrative) and Uni-lateral Modifications (Funding or Administrative). Additionally, the report includes cumulative totals reported for the fiscal year beginning Oct 1st through Sep 30th by NASA Center. This document covers Phase III Awards.

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics

Utilization

Performance Analytics

Note: See Appendix A – Work Instructions

If applicable:

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change:

Description of Change:

Contract Modification:

Impact to existing Metrics/Utilization/Transactions: Unknown

REPORTING SUMMARY :

Suggested Report Title for Metric and Utilization:	I.3_FA_PWS Element Metric: 3.3.3.1 NASA SBIR/STTR lead times for new awards (Phase III)
Global Setting: Y/N	Yes
Functional Area:	Procurement
PWS Section:	I1 3.3.3 SBIR/STTR Contracts
Performance Area:	
SO/SME	
TYPE: SLI/PM/OTHER	
Dependencies or impacts on other Areas/ Functional Areas:	
I-3 Reportable	3.3.3.1 NASA SBIR/STTR lead times for new awards (Phase III)
Contract Modification	
SN Story Number/Date Submitted	STRY0305531 dated 2/26/2018
SN PA Story/Date Submitted	
Approval – CS/SP	
Metrics Team Review	
Metric I-3	90% of award packages prepared within 60 calendar days of receipt of a complete requirements package.
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template

Metrics and Utilization

Applies To: Tasks with Category SBIR / STTR and SubCategory PHASE III

Trigger: Package Processing Task is created with SubCategory PHASE III and status is changed to WIP

Pause Condition: All open Tasks are in Pending status

End Condition: CS Approval Task is resolved and "Award Date" is populated

Met Criteria: The Award Date from the FD PR SBIR information tab is within 60 calendar days after receipt of a complete package.

Exclusion Criteria: CS Approval Task is Cancelled, Case is Closed Incomplete, Showstopper per CS or there is a value selected in the Exclusion Reason drop-down box on the Functional Detail

SLA: 90%

Filter condition created on last month

Report "PR Metric - SBIR/STTR Phase III Awards Completed On Time I-3 3.3.3.1"

Shows stacked bar chart of Met/Not Met by Center (using the FD Center)

REPORT REQUIREMENTS: METRICS AND UTILIZATION	
Name of Report	PR – SBIR/STTR Phase II Awards Completed on Time (I-3 3.3.3.1)
Report Content	<p>Chart: WIP (Work in Progress) Days by Center</p> <p>Summary: Phase III Awarded Contracts completed during the reporting month</p> <p>Detail: Center Contract No. Award Date or Modification Award Date SubCategory Modification No. Transaction Type (Modifications) Opened or Modification Form Number.Created Procurement Tasks or Modification Procurement Tasks Status - Procurement Tasks or Modification Procurement Tasks Short Description - Procurement Tasks or Modification Procurement Tasks Assignment Group - Procurement Tasks or Modification Procurement Tasks Total Pending Days Total WIP (Work in Progress) Days</p>

	Total Procurement Days
Input Parameters	<p>1) SubCategory = PHASE III</p> <p>2) Procurement Tasks or Modification Procurement Tasks:</p> <ul style="list-style-type: none"> a) Status = 'Closed' or 'Resolved' b) Short Description = 'Package Processing' and 'CS Approval' c) Assignment Group = 'PR – PROCESSING L2' and 'PR – CS APPROVE L3' <p>3) Center = Center Abbrev.</p> <p>4) Contract No.:</p> <ul style="list-style-type: none"> a) Unique Number b) Contract No. and Mod. No. (not duplicate) <p>5) Award Date is NOT EMPTY and is between 1st and last day of the reporting month</p>
Output Parameters	<p>Applies To: Tasks with Category SBIR / STTR and SubCategory PHASE III</p> <p>Calendar Used: Calendar Days</p> <p>Start Condition: Package Processing Task is created with SubCategory PHASE III status is changed to WIP</p> <p>Pause Condition: All open Tasks are in Pending status</p> <p>End Condition: CS Approval Task is resolved and award date is completed</p> <p>Exclusion Criteria: Case Closed Incomplete, CS Approval Task is Cancelled or there is a value selected in the Exclusion Reason dropdown box on the Functional Detail</p> <p>Met Criteria: The award date on the FD is within 60 calendar days of receipt of a complete package (between the tasks).</p> <p>Performance Standard: 90%</p> <p>Report "PR Metric - SBIR/STTR Phase III Awards Prepared On Time I-3 3.3.3.1" shows stacked bar chart of Met/Not Met by Center (using the FD Center)</p>

	Filter condition created on last month
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ServiceNow Data – Metric Definition Template Performance Analytics

Story Dependency: Metrics and Utilization Story Number

Name of Report: PR – SBIR/STTR – Phase III Awards Completed On Time – 90% and PR – SBIR/STTR – Phase III Awards Prepared On Time (I-3 3.3.3.1)

Placement / Location: on the Internal and External dashboards

Internal

Dashboard Name: P & U – Internal – PR Dashboard

Dashboard Group: PR (Procurement)

Dashboard Tab: SBIR/STTR

External

Dashboard Name:

Dashboard Group:

Dashboard Tab:

Data Source Table:

Name of Analytic on Internal Dashboard: PR – SBIR/STTR – Phase III Awards Completed On Time – 90%

Name of Analytic on External Dashboard:

Dates to show trend: Created on Last Month

Frequency: Monthly

SLI Formula: 90% of award packages prepared within 60 calendar days of receipt of a complete requirements package.

Met: Greenlight

Not/Met: Redlight

Conditions:

Definition Name

SLI or PM Percentage Calculation:

If the metric calculation is $\geq 90\%$, the SLI or PM is met

If the metric calculation is $< 10\%$, the SLI or PM is not met

Stoplight is displayed at the top of the top of the Analytic

Type of Visualization:

Bar Graph – Displays Count for the Month

Y-axis should show the percentage on the left and the counts on the right

Breakdown: Center & Met/Not Met

Add a threshold line (for the SLI)

Hover Over Information: - SLI or PM definition

APPENDIX A: PROCESS WORK INSTRUCTIONS

1) New Awards and Modifications Backup from ServiceNow Instructions

Small Business
Innovation Research/
Small Business
Technology Transfer

I, II, & III

NSSC Procurement SBIR/STTR
ServiceNow Monthly Metrics Reporting

Procurement
Work
Instruction
02/27/2018

Each month, SBIR/STTR New Awards (Phases I, II & III et. al) and Bi-lateral and Uni-lateral Funding and Administrative Modifications are to be reported from ServiceNow.

New Awards:

AWARDED NEW AWARDS BY CALENDAR MONTH

In ServiceNow Self-Service, choose Reports and 'View/Run', choose 'All' and locate the 'AWARDED NEW AWARDS BY CALENDAR MONTH'

The screenshot shows the NASA Shared Services Center interface. On the left, a sidebar lists various reports under the 'Reports' category. The 'View / Run' option is circled in red. The main area displays a table of reports with columns for 'Type', 'Title', 'Table', 'Created by', and 'Last modified'. The report 'AWARDED NEW AWARDS BY CALENDAR MONTH' is highlighted with a red circle and a red underline.

Type	Title	Table	Created by	Last modified
★	AWARDED BY FISCAL YEAR (ALL NEW AWARD TYPES)	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-11-03 15:54:21
★	AWARDED CRP BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:15:32
★	AWARDED MODS BY CALENDAR MONTH	PR SBIR Mods [u_pr_sbir_mods]	doubr	2018-01-02 11:54:21
★	AWARDED MODS BY FISCAL YEAR	PR SBIR Mods [u_pr_sbir_mods]	doubr	2017-07-11 13:14:38
★	<u>AWARDED NEW AWARDS BY CALENDAR MONTH</u>	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2018-02-27 14:53:54
★	AWARDED PHASE I BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:13:57
★	AWARDED PHASE II BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:13:09
★	AWARDED PHASE III BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:12:15
★	Contract Specialist Dashboard Maria Etheridge	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-05-14 21:20:18
★	Contract Specialist Dashboard Annette Zeiderman	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-05-14 21:02:27

- Change date range to first of the month and last of the month respectively:

The screenshot shows the ServiceNow filter interface. At the top, there are buttons for "Add Filter Condition", "Add 'OR' Clause", and "Add Sort Field". Below these, a section titled "All of these conditions must be met" contains three filter conditions:

- Award Date: at or after 2018-02-01
- Contract Number: starts with NNX17
- Contract Number: starts with 80NSSC

Below the filter conditions, there is a section titled "Order results by the following fields" with a single condition: Award Date: z to a.

- Run
- Export Data "Right Click Columns"

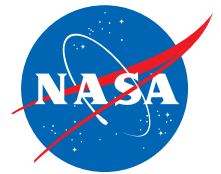
The screenshot shows a table view titled "FD PR SBIR Contracts". The table has columns: FD Number, Case, Category, SubCategory, Contract Number, Firm Name, and Proposal Title. A right-click context menu is open over the "Firm Name" column, showing options: Sort (a to z), Sort (z to a), Bar Chart, Pie Chart, and Export. The "Export" option is highlighted, and a sub-menu is open showing options: Excel (.xlsx), CSV, and PDF.

- Pivot data by SubCategory (Filters) and Center (Rows) and Number (Values)

The screenshot shows an Excel PivotTable. The data is organized by SubCategory (Filters) and Center (Rows). The values are the count of FD Number.

SubCategory	Center	Count of FD Number
SBIR/STTR	Goddard Space Flight Center	1
	Johnson Space Center	1
	Marshall Space Flight Center	1
	Grand Total	3

APPENDIX B: SERVICE NOW USER STORIES



NASA Shared Services Center

NSSC ServiceNow – Procurement Metrics and Utilization SBIR/STTR Phase I

Document Version	V.2
Date Last Modified	10/01/2020

Reference: Contract Attachment I-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:**Brief Description:**

Each month, NSSC SP Procurement – SBIR/STTRs reports the number of actions performed by NASA Center. The actions include 1) New Awards (Phase I, II, III and CRPs) awarded, 2) Bi-Lateral Modifications (Funding or Administrative) and Uni-lateral Modifications (Funding or Administrative). Additionally, the report includes cumulative totals reported for the fiscal year beginning Oct 1st through Sep 30th by NASA Center. This document covers Phase I Awards.

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics

Utilization

Performance Analytics

Note: See Appendix A – Work Instructions

If applicable:

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change: TBD

Description of Change: Need to change % for Met and Not Met Criteria
ServiceNow reflects 95% whereas the NexGen I-3 3.3.3.1 reflects 90%

Contract Modification: ServiceNow needs updating to reflect correct %

Impact to existing Metrics/Utilization/Transactions: Unknown

REPORTING SUMMARY :

Suggested Report Title for Metric and Utilization:	I.3_FA_PWS Element Metric: 3.3.3.1 NASA SBIR/STTR lead times for new awards (Phase I)
Global Setting: Y/N	Yes
Functional Area:	Procurement
PWS Section:	I1 3.3.3 SBIR/STTR Contracts
Performance Area:	
SO/SME	
TYPE: SLI/PM/OTHER	
Dependencies or impacts on other Areas/ Functional Areas:	
I-3 Reportable	3.3.3.1 NASA SBIR/STTR lead times for new awards (Phase I)
Contract Modification	
SN Story Number/Date Submitted	STRY0305512 dated 2/26/2018
SN PA Story/Date Submitted	
Approval – CS/SP	
Metrics Team Review	
Metric I-3	90% of the new awards made within the award schedule prescribed by the SBIR PMO and approved by SBA.
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template

Metrics and Utilization

Applies To: Tasks with Category SBIR / STTR and SubCategory PHASE I

Trigger: Package Processing Task is created with SubCategory PHASE I and status is changed to WIP

Pause Condition: All open Tasks are in Pending status

End Condition: CS Approval Task is resolved and "award date" is populated

Met Criteria: The Award Date from the FD PR SBIR information tab is before or on the SBIR PMO/SBA Award Schedule date on the Functional Detail

Exclusion Criteria: CS Approval Task is Cancelled, Case is Closed Incomplete, Showstopper per CS or there is a value selected in the Exclusion Reason drop-down box on the Functional Detail

SLA: 90%

Report "PR Metric - SBIR/STTR Phase I Awards Completed On Time I-3 3.3.3.1"

Shows stacked bar chart of Met/Not Met by Center (from the FD)

Filter condition created on last month

REPORT REQUIREMENTS: METRICS AND UTILIZATION

Name of Report	PR – SBIR/STTR Phase I Awards Completed on Time (I-3 3.3.3.1)
Report Content	<p>Chart: WIP (Work in Progress) Days by Center</p> <p>Summary: Phase I Awarded Contracts completed during the reporting month</p> <p>Detail: Center Contract No. Award Date or Modification Award Date SubCategory Modification No. Transaction Type (Modifications) Opened or Modification Form Number.Created Procurement Tasks or Modification Procurement Tasks Status - Procurement Tasks or Modification Procurement Tasks Short Description - Procurement Tasks or Modification Procurement Tasks Assignment Group - Procurement Tasks or Modification Procurement Tasks Total Pending Days Total WIP (Work in Progress) Days Total Procurement Days</p>
Input Parameters	<p>1) SubCategory = PHASE I</p> <p>2) Procurement Tasks or Modification Procurement Tasks: a) Status = 'Closed' or 'Resolved' b) Short Description = 'Package Processing' and 'CS Approval'</p>

	<p>c) Assignment Group = 'PR – PROCESSING L2' and 'PR – CS APPROVE L3'</p> <p>3) Center = Center Abbrev.</p> <p>4) Contract No.:</p> <ul style="list-style-type: none">a) Unique Numberb) Contract No. and Mod. No. (not duplicate) <p>5) Award Date is NOT EMPTY and is between 1st and last day of the reporting month</p>
Output Parameters	<p>Applies To: Tasks with Category SBIR / STTR and SubCategory PHASE I</p> <p>Trigger: Package Processing Task is created with SubCategory PHASE I and status is changed to WIP</p> <p>Pause Condition: All open Tasks are in Pending status</p> <p>End Condition: CS Approval Task is resolved and "award date" is populated</p> <p>Met Criteria: The Award Date from the FD PR SBIR information tab is before or on the SBIR PMO / SBA Award Schedule date on the Functional Detail</p> <p>Exclusion Criteria: CS Approval Task is Cancelled, Case is Closed Incomplete, Showstopper per CS or there is a value selected in the Exclusion Reason drop-down box on the Functional Detail</p> <p>SLA: 90%</p> <p>Report "PR Metric - SBIR/STTR Phase I Awards Completed On Time I-3 3.3.3.1"</p> <p>Shows stacked bar chart of Met/Not Met by Center (from the FD)</p> <p>Filter condition created on last month</p>

ServiceNow Data – Metric Definition Template Performance Analytics

Story Dependency: Metrics and Utilization Story Number

Name of Report: P&U EXT PR SBIR/STTR Phase I Awards Completed on Time – Last Month and P&U EXT PR SBIR/STTR Phase I Awards Completed on Time – Met - Last Month and J17 – 3.3.3.1 – PR – SBIR/STTR Phase I

Placement / Location: on the Internal and External dashboards

Internal

Dashboard Name: P & U – Internal – PR Dashboard

Dashboard Group: PR (Procurement)

Dashboard Tab: SBIR/STTR

External

Dashboard Name: P & U - PR Dashboard

Dashboard Group: PR (Procurement)

Dashboard Tab: PR Service Level Indicators and SBIR/STTR

Data Source Table: PR – SBIR/STTR – Phase I Awards Completed On Time – 95%

Name of Analytic on Internal Dashboard: PR – SBIR/STTR – Phase I Awards Completed On Time – 90%

Name of Analytic on External Dashboard: PR – SBIR/STTR – Phase I Awards Completed On Time – 90%

Dates to show trend: Created on Last Month

Frequency: Monthly

SLI Formula: 90% of the new awards made within the award schedule prescribed by the SBIR PMO and approved by SBA.

Met: Greenlight

Not/Met: Redlight

Conditions:

Definition Name

SLI or PM Percentage Calculation:

If the metric calculation is \Rightarrow 90%, the SLI or PM is met

If the metric calculation is $<$ 10%, the SLI or PM is not met

Stoplight is displayed at the top of the top of the Analytic

Type of Visualization:

Bar Graph – Displays Count for the Month

Y-axis should show the percentage on the left and the counts on the right

Breakdown: Center & Met/Not Met
Add a threshold line (for the SLI)

Hover Over Information: - SLI or PM definition

APPENDIX A: PROCESS WORK INSTRUCTIONS

1) New Awards and Modifications Backup from ServiceNow Instructions

Small Business
Innovation Research/
Small Business
Technology Transfer

I, II, & III

NSSC Procurement SBIR/STTR
ServiceNow Monthly Metrics Reporting

Procurement
Work
Instruction
02/27/2018

Each month, SBIR/STTR New Awards (Phases I, II & III et. al) and Bi-lateral and Uni-lateral Funding and Administrative Modifications are to be reported from ServiceNow.

New Awards:

AWARDED NEW AWARDS BY CALENDAR MONTH

In ServiceNow Self-Service, choose Reports and 'View/Run', choose 'All' and locate the 'AWARDED NEW AWARDS BY CALENDAR MONTH'

The screenshot shows the NASA Shared Services Center interface. On the left, a sidebar contains a 'Filter navigator' and a list of reports. The 'View / Run' option is circled in red. The main area displays a table of reports with columns for Type, Title, Table, Created by, and Last modified. The report 'AWARDED NEW AWARDS BY CALENDAR MONTH' is highlighted with a red underline.

Type	Title	Table	Created by	Last modified
AWARDED BY FISCAL YEAR (ALL NEW AWARD TYPES)	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-11-03 15:54:21	
AWARDED CRP BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:15:32	
AWARDED MODS BY CALENDAR MONTH	PR SBIR Mods [u_pr_sbir_mods]	doubr	2018-01-02 11:54:21	
AWARDED MODS BY FISCAL YEAR	PR SBIR Mods [u_pr_sbir_mods]	doubr	2017-07-11 13:14:38	
<u>AWARDED NEW AWARDS BY CALENDAR MONTH</u>	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2018-02-27 14:53:54	
AWARDED PHASE I BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:13:57	
AWARDED PHASE II BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:13:09	
AWARDED PHASE III BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:12:15	
Contract Specialist Dashboard Maria Etheridge	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-05-14 21:20:18	
Contract Specialist Dashboard Annette Zeiderman	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-05-14 21:02:27	

- Change date range to first of the month and last of the month respectively:

Filter Criteria Configuration:

- Buttons: Add Filter Condition, Add "OR" Clause, Add Sort Field
- Condition 1: Award Date at or after 2018-02-01
- Condition 2: Contract Number starts with NNX17
- Condition 3: Award Date at or before 2018-02-28
- Sort: Award Date z to a

- Run
- Export Data "Right Click Columns"

Table: FD PR SBIR Contracts

FD Number	Case	Category	SubCategory	Contract Number	Firm Name	Proposal Title
FDPSB0004111	PRC0036902	SBIR/STTR	PHASE III	80NSSC18P0775	CFD Research	2018
FDPSB0004112	PRC0036903	SBIR/STTR	PHASE III	80NSSC18C0016	Advanced Syst Technologies,	2018
FDPSB0004104	PRC0035443	SBIR/STTR	PHASE III	80NSSC18P0728	Emergent Spa Inc	2018

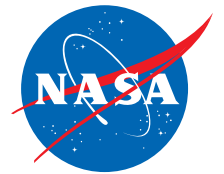
- Pivot data by SubCategory (Filters) and Center (Rows) and Number (Values)

PivotTable Fields:

- Filters: SubCategory
- Rows: Center
- Values: Count of FD Number

SubCategory	Center	Count of FD Number
Goddard Space Flight Center	SBIR/STTR	1
	PHASE III	1
	Advanced	1
Johnson Space Center	SBIR/STTR	1
	PHASE III	1
	Advanced	1
Marshall Space Flight Center	SBIR/STTR	1
	PHASE III	1
	Advanced	1
Grand Total		3

APPENDIX B: SERVICE NOW USER STORIES



NASA Shared Services Center

NSSC ServiceNow – Procurement Metrics and Utilization SBIR/STTR Phase II

Document Version	V.2
Date Last Modified	10/01/2020

Reference: Contract Attachment I-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:**Brief Description:**

Each month, NSSC SP Procurement – SBIR/STTRs reports the number of actions performed by NASA Center. The actions include 1) New Awards (Phase I, II, III and CRPs) awarded, 2) Bi-Lateral Modifications (Funding or Administrative) and Uni-lateral Modifications (Funding or Administrative). Additionally, the report includes cumulative totals reported for the fiscal year beginning Oct 1st through Sep 30th by NASA Center. This document covers Phase II Awards.

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics

Utilization

Performance Analytics

Note: See Appendix A – Work Instructions

If applicable:

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change:

Description of Change:

Contract Modification:

Impact to existing Metrics/Utilization/Transactions:

REPORTING SUMMARY :

Suggested Report Title for Metric and Utilization:	I.3_FA_PWS Element Metric: 3.3.3.1 NASA SBIR/STTR lead times for new awards (Phase II)
Global Setting: Y/N	Yes
Functional Area:	Procurement
PWS Section:	I1 3.3.3 SBIR/STTR Contracts
Performance Area:	
SO/SME	
TYPE: SLI/PM/OTHER	
Dependencies or impacts on other Areas/ Functional Areas:	
I-3 Reportable	3.3.3.1 NASA SBIR/STTR lead times for new awards (Phase II)
Contract Modification	
SN Story Number/Date Submitted	STRY0305524 dated 2/26/2018
SN PA Story/Date Submitted	
Approval – CS/SP	
Metrics Team Review	
Metric I-3	90% of the new awards made within the award schedule prescribed by the SBIR PMO and approved by SBA.
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template

Metrics and Utilization

Applies To: Tasks with Category SBIR / STTR and SubCategory PHASE II

Trigger: Package Processing Task is created with SubCategory PHASE II and status is changed to WIP

Pause Condition: All open Tasks are in Pending status

End Condition: CS Approval Task is resolved and "award date" is populated

Met Criteria: The Award Date from the FD PR SBIR information tab is before or on the SBIR PMO / SBA Award Schedule date on the Functional Detail

Exclusion Criteria: CS Approval Task is Cancelled, Case is Closed Incomplete, Showstopper per CS or there is a value selected in the Exclusion Reason drop-down box on the Functional Detail

SLA: 90%

Filter condition created on last month

Report "PR Metric - SBIR/STTR Phase II Awards Completed On Time I-3 3.3.3.1"

Shows stacked bar chart of Met/Not Met by Center (using the FD Center)

REPORT REQUIREMENTS: METRICS AND UTILIZATION

Name of Report	PR – SBIR/STTR Phase II Awards Completed on Time (I-3 3.3.3.1)
Report Content	<p>Chart: WIP (Work in Progress) Days by Center</p> <p>Summary: Phase II Awarded Contracts completed during the reporting month</p> <p>Detail: Center Contract No. Award Date or Modification Award Date SubCategory Modification No. Transaction Type (Modifications) Opened or Modification Form Number.Created Procurement Tasks or Modification Procurement Tasks Status - Procurement Tasks or Modification Procurement Tasks Short Description - Procurement Tasks or Modification Procurement Tasks Assignment Group - Procurement Tasks or Modification Procurement Tasks Total Pending Days Total WIP (Work in Progress) Days Total Procurement Days</p>
Input Parameters	<p>1) SubCategory = PHASE II</p> <p>2) Procurement Tasks or Modification Procurement Tasks: a) Status = 'Closed' or 'Resolved' b) Short Description = 'Package Processing' and 'CS Approval'</p>

	<p>c) Assignment Group = 'PR – PROCESSING L2' and 'PR – CS APPROVE L3'</p> <p>3) Center = Center Abbrev.</p> <p>4) Contract No.:</p> <ul style="list-style-type: none"> a) Unique Number b) Contract No. and Mod. No. (not duplicate) <p>5) Award Date is NOT EMPTY and is between 1st and last day of the reporting month</p>
Output Parameters	<p>Applies To: Tasks with Category SBIR / STTR and SubCategory PHASE II</p> <p>Trigger: Package Processing Task is created with SubCategory PHASE II and status is changed to WIP</p> <p>Pause Condition: All open Tasks are in Pending status</p> <p>End Condition: CS Approval Task is resolved and "award date" is populated</p> <p>Met Criteria: The Award Date from the FD PR SBIR information tab is before or on the SBIR PMO / SBA Award Schedule date on the Functional Detail</p> <p>Exclusion Criteria: CS Approval Task is Cancelled, Case is Closed Incomplete, Showstopper per CS or there is a value selected in the Exclusion Reason drop-down box on the Functional Detail</p> <p>SLA: 90%</p> <p>Report "PR Metric - SBIR/STTR Phase II Awards Completed On Time J-3 3.3.3.1"</p> <p>Shows stacked bar chart of Met/Not Met by Center (from the FD)</p> <p>Filter condition created on last month</p>

ServiceNow Data – Metric Definition Template Performance Analytics

Story Dependency: Metrics and Utilization Story Number

Name of Report:

Placement / Location: on the Internal and External dashboards

Internal

Dashboard Name: P & U – Internal – PR Dashboard

Dashboard Group: PR (Procurement)

Dashboard Tab: SBIR/STTR

External

Dashboard Name:

Dashboard Group:

Dashboard Tab:

Data Source Table:

Name of Analytic on Internal Dashboard: PR – SBIR/STTR – Phase II Awards Completed
On Time – 90%

Name of Analytic on External Dashboard:

Dates to show trend: Created on Last Month

Frequency: Monthly

SLI Formula: 90% of the new awards made within the award schedule prescribed by the
SBIR PMO and approved by SBA.

Met: Greenlight

Not/Met: Redlight

Conditions:

Definition Name

SLI or PM Percentage Calculation:

If the metric calculation is \Rightarrow 90%, the SLI or PM is met

If the metric calculation is $<$ 10%, the SLI or PM is not met

Stoplight is displayed at the top of the top of the Analytic

Type of Visualization:

Bar Graph – Displays Count for the Month

Y-axis should show the percentage on the left and the counts on the right

Breakdown: Center & Met/Not Met

Add a threshold line (for the SLI)

Hover Over Information: - SLI or PM definition

APPENDIX A: PROCESS WORK INSTRUCTIONS

1) New Awards and Modifications Backup from ServiceNow Instructions

Small Business
Innovation Research/
Small Business
Technology Transfer

I, II, & III

NSSC Procurement SBIR/STTR
ServiceNow Monthly Metrics Reporting

Procurement
Work
Instruction
02/27/2018

Each month, SBIR/STTR New Awards (Phases I, II & III et. al) and Bi-lateral and Uni-lateral Funding and Administrative Modifications are to be reported from ServiceNow.

New Awards:

AWARDED NEW AWARDS BY CALENDAR MONTH

In ServiceNow Self-Service, choose Reports and 'View/Run', choose 'All' and locate the 'AWARDED NEW AWARDS BY CALENDAR MONTH'

The screenshot shows the NASA Shared Services Center ServiceNow interface. The left sidebar contains a 'Filter navigator' and a list of reports. The main area displays a table of reports with columns: Type, Title, Table, Created by, and Last modified. The report 'AWARDED NEW AWARDS BY CALENDAR MONTH' is highlighted with a red circle and a red underline.

Type	Title	Table	Created by	Last modified
Report	AWARDED BY FISCAL YEAR (ALL NEW AWARD TYPES)	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-11-03 15:54:21
Report	AWARDED CRP BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:15:32
Report	AWARDED MODS BY CALENDAR MONTH	PR SBIR Mods [u_pr_sbir_mods]	doubr	2018-01-02 11:54:21
Report	AWARDED MODS BY FISCAL YEAR	PR SBIR Mods [u_pr_sbir_mods]	doubr	2017-07-11 13:14:38
Report	<u>AWARDED NEW AWARDS BY CALENDAR MONTH</u>	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2018-02-27 14:53:54
Report	AWARDED PHASE I BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:13:57
Report	AWARDED PHASE II BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:13:09
Report	AWARDED PHASE III BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:12:15
Report	Contract Specialist Dashboard Maria Etheridge	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-05-14 21:20:18
Report	Contract Specialist Dashboard Annette Zeiderman	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-05-14 21:02:27

- Change date range to first of the month and last of the month respectively:

Filter Criteria Configuration:

- All of these conditions must be met:**
 - Award Date at or after 2018-02-01
 - Contract Number starts with NNX17
 - or Contract Number starts with 80NSSC
 - Award Date at or before 2018-02-28
- Order results by the following fields:**
 - Award Date z to a

- Run
- Export Data "Right Click Columns"

FD PR SBIR Contracts Table:

FD Number	Case	Category	SubCategory	Contract Number	Firm Name	Proposal Title
FDPSB0004111	PRC0036902	SBIR/STTR	PHASE III	80NSSC18P0775	CFD Research	2018
FDPSB0004112	PRC0036903	SBIR/STTR	PHASE III	80NSSC18C0016	Advanced Syst Technologies,	2018
FDPSB0004104	PRC0035443	SBIR/STTR	PHASE III	80NSSC18P0728	Emergent Spa Inc	2018

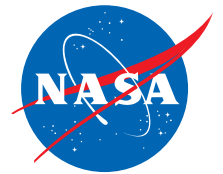
- Pivot data by SubCategory (Filters) and Center (Rows) and Number (Values)

PivotTable Fields:

- Choose fields to add to report:**
 - ☒ FD Number
 - ☐ Case
 - ☐ Category
 - ☒ SubCategory
 - ☐ Contract Number
 - ☐ Firm Name
 - ☐ Proposal Title
 - ☐ Award Date
 - ☒ Center
 - ☐ Contracting Officer
 - ☐ Contract Specialist
- Drag fields between areas below:**
 - Filters:** SubCategory
 - Columns:**
 - Rows:** Center
 - Values:** Count of FD ...

SubCategory	Center	Count of FD Number
PHASE III	Goddard Space Flight Center	1
	Johnson Space Center	1
	Marshall Space Flight Center	1
Grand Total		3

APPENDIX B: SERVICE NOW USER STORIES



NASA Shared Services Center

NSSC ServiceNow – Procurement Metrics and Utilization Bilateral SBIR/STTR Modifications

Document Version	V.2
Date Last Modified	10/01/2020

Reference: Contract Attachment I-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:**Brief Description:**

Each month, NSSC SP Procurement – SBIR/STTRs reports the number of actions performed by NASA Center. The actions include 1) New Awards (Phase I, II, III and CRPs) awarded, 2) Bi-Lateral Modifications (Funding or Administrative) and Uni-lateral Modifications (Funding or Administrative). Additionally, the report includes cumulative totals reported for the fiscal year beginning Oct 1st through Sep 30th by NASA Center. This document covers Bilateral SBIR/STTR Modifications.

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics
Utilization
Performance Analytics

Note: See Appendix A – Work Instructions

If applicable:

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change:

Description of Change:

Contract Modification:

Impact to existing Metrics/Utilization/Transactions:

REPORTING SUMMARY :

Suggested Report Title for Metric and Utilization:	I-3_FA_PWS Element Metric: J3 3.3.3.2 Bilateral SBIR/STTR Modifications
Global Setting: Y/N	Yes
Functional Area:	Procurement
PWS Section:	I1 - 3.3.1 NASA Procurement Programs Support
Performance Area:	I1 - 3.3.3.2 SBIR/STTR Administration
SO/SME	
TYPE: SLI/PM/OTHER	
Dependencies or impacts on other Areas/ Functional Areas:	N/A
I-3 Reportable	I3 3.3.3.2 Bilateral SBIR/STTR Modifications
Contract Modification	TBD
SN Story Number/Date Submitted	SNOW User STRY0305557 - PR Metric - Bilateral SBIR/STTR Admin Modifications Prepared On Time I-3 3.3.3.2 and SNOW User STRY0305550 PR Metric - Bilateral SBIR/STTR Funding Modifications Prepared On Time I-3 3.3.3.2
SN PA Story/Date Submitted	
Approval – CS/SP	
Metrics Team Review	
Metric I-3	I3 3.3.3.2 Bilateral SBIR/STTR Modifications
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template

Metrics and Utilization

PR Metric - Bilateral SBIR/STTR Admin Modifications Prepared On Time I-3 3.3.3.2 and PR Metric - Bilateral SBIR/STTR Funding Modifications Prepared On Time I-3 3.3.3.2

Applies To:

SBIR/STTR Modifications

Category: Category SBIR / STTR

FD Form: PR SBIR Mods / Information tab

Field: "Transaction Type" = FUNDING MOD – BILATERAL or ADMIN MOD – BILATERAL

Calendar Used: Calendar Days

Start Condition: Modification - Package Processing Task is created with "Transaction Type" = FUNDING MOD - BILATERAL or ADMIN MOD – BILATERAL and status is changed to WIP

Pause Condition: All open Tasks are in Pending status

End Condition: Modification - CS Approval Task is resolved and "modification award date" is populated

Exclusion Criteria: Case Closed Incomplete, CS Approval Task is Cancelled or there is a value selected in the Exclusion Reason dropdown box on the Functional Detail

Met Criteria: The award date on the MOD FD is within 21 calendar days of receipt of complete requirements package.

Performance Standard: 90%

Report "PR - Bilateral SBIR/STTR Funding Modifications Prepared On Time (I-3 3.3.3.2)" or "PR - Bilateral SBIR/STTR Admin Modifications Prepared On Time (I-3 3.3.3.2)" shows stacked bar chart of Met/Not Met by Center (using FD Center)

Filter condition created on last month

REPORT REQUIREMENTS: METRICS AND UTILIZATION	
Name of Report	PR - Bilateral SBIR/STTR Funding Modifications Prepared On Time (I-3 3.3.3.2)" or "PR - Bilateral SBIR/STTR Admin Modifications Prepared On Time (I-3 3.3.3.2)
Report Content	<p>Chart: WIP (Work in Progress) Days by Center</p> <p>Summary: ADMIN MOD – BILATERAL and FUNDING MOD – BILATERAL completed during the reporting Month</p> <p>Detail: Center Abbrev. Contract No. Modification Award Date Opened (Modification Form Create Date) POP End Date Procurement Tasks (Modification Form) Status (Modification Procurement Tasks) Assignment Group (Modification Procurement Tasks) Total Pending Days Total WIP (Work in Progress) Days Total Procurement Days</p>
Input Parameters	<p>1) Transaction Type = 'ADMIN MOD – BILATERAL' or 'FUNDING MOD – BILATERAL'</p> <p>2) Modification Procurement Tasks: a) Status = 'Closed' or 'Resolved' b) Short Description = 'Package Processing' and 'CS Approval' c) Assignment Group = 'PR – PROCESSING L2' and 'PR – CS APPROVE L3'</p> <p>3) Center = Center Abbreviation 4) Contract No. = Grant No. 5) Modification No. = where contract can have more than one Modification processed in a reporting month 6) Modification Award Date = is NOT EMPTY and is between 1st and last day of the reporting month</p>

Output Parameters	<p>Applies To:</p> <p>SBIR/STTR Modifications</p> <p>Category: Category SBIR / STTR</p> <p>FD Form: PR SBIR Mods / Information tab</p> <p>Field: "Transaction Type" = FUNDING MOD - BILATERAL or ADMIN MOD - BILATERAL</p> <p>Calendar Used: Calendar Days</p> <p>Start Condition: Modification - Package Processing Task is created with "Transaction Type" = FUNDING MOD - BILATERAL or ADMIN MOD - BILATERAL and status is changed to WIP</p> <p>Pause Condition: All open Tasks are in Pending status</p> <p>End Condition: Modification - CS Approval Task is resolved and "modification award date" is populated</p> <p>Exclusion Criteria: Case Closed Incomplete, CS Approval Task is Cancelled or there is a value selected in the Exclusion Reason dropdown box on the Functional Detail</p> <p>Met Criteria: The award date on the MOD FD is within 21 calendar days of receipt of complete requirements package.</p> <p>Performance Standard: 90%</p> <p>Report "PR - Bilateral SBIR/STTR Funding Modifications Prepared On Time (I-3 3.3.3.2)" or "PR - Bilateral SBIR/STTR Admin Modifications Prepared On Time (I-3 3.3.3.2)" shows stacked bar chart of Met/Not Met by Center (using FD Center)</p> <p>Filter condition created on last month</p>
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ServiceNow Data – Metric Definition Template Performance Analytics

Story Dependency: Metrics and Utilization Story Number

Name of Report: SNow User STRY0305557 - PR Metric - Bilateral SBIR/STTR Admin
Modifications Prepared On Time I-3 3.3.3.2 and SNow User STRY0305550 PR Metric -
Bilateral SBIR/STTR Funding Modifications Prepared On Time I-3 3.3.3.2

Placement / Location: on the Internal and External dashboards

Dashboard Name: P & U – Internal – PR Dashboard

Dashboard Group: PR (Procurement)

Dashboard Tab: SBIR/STTR

External:

Dashboard Name:

Dashboard Group:

Dashboard Tab:

Data Source Table

Name of Analytic on Internal Dashboard: PR – SBIR/STTR - Bilateral Funding Mods
Prepared On Time – 90% or PR – SBIR/STTR - Bilateral Admin Mods Prepared On Time
– 90%

Name of Analytic on External Dashboard:

Dates to show trend: Created on Last Month

Frequency: Monthly

SLI Formula: 90% of bilateral modifications prepared for Contracting Officer's signature
within 21 calendar days of receipt of complete requirements package.

Met: Greenlight

Not/Met: Redlight

Conditions:

Definition Name

SLI or PM Percentage Calculation:

If the metric calculation is $\geq 90\%$, the SLI or PM is met

If the metric calculation is $< 90\%$, the SLI or PM is not met

Stoplight is displayed at the top of the top of the Analytic

Type of Visualization:

Bar Graph – Displays Count for the Month

Y-axis should show the percentage on the left and the counts on the right

Breakdown: Center & Met/Not Met

Add a threshold line (for the SLI)

Hover Over Information: - SLI or PM definition

APPENDIX A: PROCESS WORK INSTRUCTIONS

1) New Awards and Modifications Backup from ServiceNow Instructions

Small Business
Innovation Research/
Small Business
Technology Transfer

I, II, & III

NSSC Procurement SBIR/STTR
ServiceNow Monthly Metrics Reporting

Procurement
Work
Instruction
02/27/2018

Each month, SBIR/STTR New Awards (Phases I, II & III et. al) and Bi-lateral and Uni-lateral Funding and Administrative Modifications are to be reported from ServiceNow.

New Awards:

AWARDED NEW AWARDS BY CALENDAR MONTH

In ServiceNow Self-Service, choose Reports and 'View/Run', choose 'All' and locate the 'AWARDED NEW AWARDS BY CALENDAR MONTH'

The screenshot displays the NASA Shared Services Center ServiceNow interface. On the left, a sidebar menu lists various reports and tools. The 'View / Run' option is circled in red. The main content area shows a list of reports with columns for Type, Title, Table, Created by, and Last modified. The report 'AWARDED NEW AWARDS BY CALENDAR MONTH' is highlighted with a red underline.

Type	Title	Table	Created by	Last modified
Report	AWARDED BY FISCAL YEAR (ALL NEW AWARD TYPES)	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-11-03 15:54:21
Report	AWARDED CRP BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:15:32
Report	AWARDED MODS BY CALENDAR MONTH	PR SBIR Mods [u_pr_sbir_mods]	doubr	2018-01-02 11:54:21
Report	AWARDED MODS BY FISCAL YEAR	PR SBIR Mods [u_pr_sbir_mods]	doubr	2017-07-11 13:14:38
Report	<u>AWARDED NEW AWARDS BY CALENDAR MONTH</u>	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2018-02-27 14:53:54
Report	AWARDED PHASE I BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:13:57
Report	AWARDED PHASE II BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:13:09
Report	AWARDED PHASE III BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:12:15
Report	Contract Specialist Dashboard Maria Etheridge	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-05-14 21:20:18
Report	Contract Specialist Dashboard Annette Zeiderman	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-05-14 21:02:27

- Change date range to first of the month and last of the month respectively:

The screenshot shows the ServiceNow filter interface. At the top, there are buttons for "Add Filter Condition", "Add 'OR' Clause", and "Add Sort Field". Below these, a section titled "All of these conditions must be met" contains three filter conditions:

- Award Date: at or after 2018-02-01
- Contract Number: starts with NNX17
- Contract Number: starts with 80NSSC

Below the filter conditions, there is a section titled "Order results by the following fields" with a single condition: Award Date: z to a.

- Run
- Export Data "Right Click Columns"

The screenshot shows a table view titled "FD PR SBIR Contracts". The table has columns: FD Number, Case, Category, SubCategory, Contract Number, Firm Name, and Proposal Title. A right-click context menu is open over the "Firm Name" column, showing options: Sort (a to z), Sort (z to a), Bar Chart, Pie Chart, and Export. The "Export" option is highlighted, and a sub-menu is open showing options: Excel (.xlsx), CSV, and PDF.

- Pivot data by SubCategory (Filters) and Center (Rows) and Number (Values)

The screenshot shows an Excel PivotTable. The data is organized by SubCategory (Filters) and Center (Rows). The values are the count of FD Number.

SubCategory	Center	Count of FD Number
SBIR/STTR	Goddard Space Flight Center	1
	Johnson Space Center	1
	Marshall Space Flight Center	1
	Grand Total	3

- Log data on Monthly Metrics Spreadsheet (the Subcategory will need to be selected if you have multiple award types in a given month)

PHASE III AWARDS									Metric Status for Month	
Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Met Metrics	Not Met
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
1	0	0	0	0	0	0	0	0	1	0
1	0	0	0	0	0	0	0	0	1	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
1	0	0	0	0	0	0	0	0	1	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	3	0
33%	0%	0%	0%	0%	0%	0%	0%	100%		

2) Sample Report - FY 2018 - January 2018 SBIR-STTR Metrics

PHASE I AWARDS														Metric Status for Month	
Center	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Met Metrics	Not Met
ARFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ARC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GRC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
JSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
KSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
LaRC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
MSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NMD/JPL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%		
PHASE II AWARDS														Metric Status for Month	
Center	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Met Metrics	Not Met
ARFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ARC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GRC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
JSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
KSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
LaRC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
MSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NMD/JPL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%		
PHASE III AWARDS														Metric Status for Month	
Center	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Met Metrics	Not Met
ARFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ARC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GRC	0	0	1	0	0	0	0	0	0	0	0	0	1	0	0
GSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
JSC	0	0	0	1	0	0	0	0	0	0	0	0	1	0	0
KSC	0	0	0	1	0	0	0	0	0	0	0	0	1	0	0
LaRC	1	0	0	0	0	0	0	0	0	0	0	0	1	0	0
MSFC	0	0	1	1	0	0	0	0	0	0	0	0	2	0	0
NMD/JPL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	1	0	2	3	0	0	0	0	0	0	0	0	6	3	0
	17%	0%	33%	50%	0%	0%	0%	0%	0%	0%	0%	0%	100%		
PHASE CRP AWARDS														Metric Status for Month	
Center	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Met Metrics	Not Met
ARFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ARC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GRC	0	2	0	0	0	0	0	0	0	0	0	0	2	0	0
GSFC	1	0	1	0	0	0	0	0	0	0	0	0	2	0	0
JSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
KSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
LaRC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
MSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NMD/JPL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	1	2	1	0	0	0	0	0	0	0	0	0	4	0	0
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%		

SBIR-STTR Awards January 2018
SBIR-STTR Mods January 2018
Basic Awards Data
Modifications Data
Sheet1

BI-LATERAL FUNDING MODIFICATIONS														Metric Status for Month	
Center	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Met Metric	Not Met
ARFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ARC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GRC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
JSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
KSC	0	0	1	0	0	0	0	0	0	0	0	0	1	0	0
LSRC	0	1	1	0	0	0	0	0	0	0	0	0	2	0	0
MSFC	0	0	0	1	0	0	0	0	0	0	0	0	1	0	0
NMO/UPL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	0	1	2	1	0	0	0	0	0	0	0	0	4	1	0
	0%	25%	50%	25%	0%	0%	0%	0%	0%	0%	0%	0%	100%		

PHASE IIE, IIX, CRP - BI-LATERAL FUNDING MODIFICATIONS														Metric Status for Month	
Center	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Met Metric	Not Met
ARFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ARC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GRC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
JSC	0	0	1	0	0	0	0	0	0	0	0	0	1	0	0
KSC	0	0	0	1	0	0	0	0	0	0	0	0	1	0	0
LSRC	2	0	0	0	0	0	0	0	0	0	0	0	2	0	0
MSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NMO/UPL	1	0	0	1	0	0	0	0	0	0	0	0	2	1	0
SSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	3	0	1	2	0	0	0	0	0	0	0	0	6	2	0
	50%	0%	17%	33%	0%	0%	0%	0%	0%	0%	0%	0%	100%		

ADMINISTRATIVE MODIFICATIONS														Metric Status for Month	
Center	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Met Metric	Not Met
ARFC	0	2	1	1	0	0	0	0	0	0	0	0	4	1	0
ARC	0	4	4	4	0	0	0	0	0	0	0	0	12	4	0
GRC	8	8	6	9	0	0	0	0	0	0	0	0	31	9	0
GSFC	8	3	5	4	0	0	0	0	0	0	0	0	20	4	0
JSC	3	3	3	2	0	0	0	0	0	0	0	0	11	2	0
KSC	0	2	2	1	0	0	0	0	0	0	0	0	5	1	0
LSRC	9	6	8	5	0	0	0	0	0	0	0	0	28	5	0
MSFC	0	3	2	5	0	0	0	0	0	0	0	0	10	5	0
NMO/UPL	7	3	3	2	0	0	0	0	0	0	0	0	15	2	0
SSC	0	1	0	3	0	0	0	0	0	0	0	0	4	3	0
TOTAL	35	35	34	36	0	0	0	0	0	0	0	0	140	36	0
	25%	25%	24%	26%	0%	0%	0%	0%	0%	0%	0%	0%	100%		

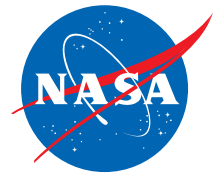
SBIR-STTR Awards January 2018

SBIR-STTR Mods January 2018

Basic Awards Data

Modifications Data

APPENDIX B: SERVICE NOW USER STORIES



NASA Shared Services Center

NSSC ServiceNow – Procurement Metrics and Utilization Unilateral SBIR/STTR Funding Modifications

Document Version V.2

Date Last Modified 10/01/2020

Reference: Contract Attachment I-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:**Brief Description:**

Each month, NSSC SP Procurement – SBIR/STTRs reports the number of actions performed by NASA Center. The actions include 1) New Awards (Phase I, II, III and CRPs) awarded, 2) Bi-Lateral Modifications (Funding or Administrative) and Uni-lateral Modifications (Funding or Administrative). Additionally, the report includes cumulative totals reported for the fiscal year beginning Oct 1st through Sep 30th by NASA Center. This document covers Unilateral SBIR/STTR Funding Modifications.

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics
Utilization
Performance Analytics

Note: See Appendix A – Work Instructions

If applicable:

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change: TBD

Description of Change: Need to add Unilateral SBIR/STTR Admin Mods since the current J3 does not include them.

Contract Modification: NexGen Attachment I3 3.3.3.2

Impact to existing Metrics/Utilization/Transactions: N/A

REPORTING SUMMARY :

Suggested Report Title for Metric and Utilization:	I.3_FA_PWS Element Metric: J3 3.3.3.2 Unilateral SBIR/STTR Funding Modifications
Global Setting: Y/N	Yes
Functional Area:	Procurement
PWS Section:	I1 - 3.3.1 NASA Procurement Programs Support
Performance Area:	I1 - 3.3.3.2 SBIR/STTR Administration
SO/SME	
TYPE: SLI/PM/OTHER	
Dependencies or impacts on other Areas/ Functional Areas:	N/A
I-3 Reportable	I3 3.3.3.2 Unilateral SBIR/STTR Funding Modifications
Contract Modification	TBD
SN Story Number/Date Submitted	SNow User STRY0305544 - PR Metric - Unilateral SBIR/STTR Admin Modifications Prepared On Time I-3 3.3.3.2 and SNow User STRY0305539 - PR Metric - Unilateral SBIR/STTR Funding Modifications Prepared On Time I-3 3.3.3.2
SN PA Story/Date Submitted	
Approval – CS/SP	
Metrics Team Review	
Metric I-3	I-3 3.3.3.2 - PR Metric - Unilateral SBIR/STTR Admin Modifications Prepared On Time and PR Metric - Unilateral SBIR/STTR Funding Modifications Prepared On Time
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template

Metrics and Utilization

PR Metric - Unilateral SBIR/STTR Funding Modifications Prepared On Time

Applies To: SBIR/STTR Modifications

Category: Category SBIR / STTR

AC

FD Form: PR SBIR Mods / Information tab

Field: "Transaction Type" = FUNDING MOD – UNILATERAL or ADMIN MOD - UNILATERAL

Calendar Used: Calendar Days

Start Condition: Modification - Package Processing Task is created with "Transaction Type" = FUNDING MOD - UNILATERAL or ADMIN MOD - UNILATERAL and status is changed to WIP

Pause Condition: All open Tasks are in Pending status (cases don't go into pending)

End Condition: Modification - CS Approval Task is resolved and "modification award date" is populated

Exclusion Criteria: Case Closed Incomplete, CS Approval Task is cancelled or there is a value selected in the Exclusion Reason dropdown box on the Functional Detail

Met Criteria: The award date on the MOD FD is within 14 calendar days of receipt of complete funding package.

Stacked met/not met

Report filter condition: date created on last month

Performance Standard: 90%

Report "PR Metric - Unilateral SBIR/STTR Funding Mods Prepared On Time I-3 3.3.3.2" or "PR Metric - Unilateral SBIR/STTR Admin Mods Prepared On Time I-3 3.3.3.2" shows stacked bar chart of Met/Not Met by Center (using FD Center)

REPORT REQUIREMENTS: METRICS AND UTILIZATION	
Name of Report	PR – Unilateral SBIR/STTR Funding Modifications Prepared On Time (I-3 3.3.3.2)
Report Content	<p>Chart: WIP (Work in Progress) Days by Center</p> <p>Summary: ADMIN MOD – UNILATERAL and FUNDING MOD – UNILATERAL completed during the reporting Month</p> <p>Detail: Center Abbrev. Contract No. Modification Award Date Opened (Modification Form Create Date) POP End Date Procurement Tasks (Modification Form) Status (Modification Procurement Tasks) Assignment Group (Modification Procurement Tasks) Total Pending Days Total WIP (Work in Progress) Days Total Procurement Days</p>
Input Parameters	<p>1) Transaction Type = 'ADMIN MOD – UNILATERAL' or 'FUNDING MOD – UNILATERAL'</p> <p>2) Modification Procurement Tasks: a) Status = 'Closed' or 'Resolved' b) Short Description = 'Package Processing' and 'CS Approval' c) Assignment Group = 'PR – PROCESSING L2' and 'PR – CS APPROVE L3'</p> <p>3) Center = Center Abbreviation 4) Contract No. = Grant No. 5) Modification No. = where contract can have more than one Modification processed in a reporting month 6) Modification Award Date = is NOT EMPTY and is between 1st and last day of the reporting month</p>

**Output
Parameters**

Applies To: SBIR/STTR Modifications

Category: Category SBIR / STTR

AC

FD Form: PR SBIR Mods / Information tab

Field: "Transaction Type" = FUNDING MOD – UNILATERAL or ADMIN MOD – UNILATERAL

Calendar Used: Calendar Days

Start Condition: Modification - Package Processing Task is created with "Transaction Type" = FUNDING MOD - UNILATERAL or ADMIN MOD – UNILATERAL and status is changed to WIP

Pause Condition: All open Tasks are in Pending status (cases don't go into pending)

End Condition: Modification - CS Approval Task is resolved and "modification award date" is populated

Exclusion Criteria: Case Closed Incomplete, CS Approval Task is Cancelled or there is a value selected in the Exclusion Reason dropdown box on the Functional Detail

Met Criteria: The award date on the MOD FD is within 14 calendar days of receipt of complete funding package.

stacked met/not met

report filter condition: date created on last month

Performance Standard: 90%

Report "PR Metric - Unilateral SBIR/STTR Funding Mods Prepared On Time I-3 3.3.3.2" or "PR Metric - Unilateral SBIR/STTR Admin Mods Prepared On Time I-3 3.3.3.2" shows stacked bar chart of Met/Not Met by Center (using FD Center)

ServiceNow Data – Metric Definition Template Performance Analytics

Story Dependency: Metrics and Utilization Story Number

Name of Report: STRY0305544 - PR Metric - Unilateral SBIR/STTR Admin Modifications

Prepared On Time I-3 3.3.3.2 and STRY0305539 - PR Metric - Unilateral SBIR/STTR

Funding Modifications Prepared On Time I-3 3.3.3.2

Placement / Location: on the Internal and External dashboards

Dashboard Name: P & U – Internal – PR Dashboard

Dashboard Group: PR (Procurement)

Dashboard Tab: SBIR/STTR

External:

Dashboard Name:

Dashboard Group:

Dashboard Tab:

Data Source Table

Name of Analytic on Internal Dashboard: PR – SBIR/STTR Unilateral Funding Mods

Prepared On Time – 90% and PR – SBIR/STTR Unilateral Admin Mods Prepared On Time – 90%

Name of Analytic on External Dashboard:

Dates to show trend: Created on Last Month

Frequency: Monthly

SLI Formula: 90% of incremental funding modifications prepared for Contracting Officer's signature within 14 calendar days of receipt of funding document.

Met: Greenlight

Not/Met: Redlight

Conditions:

Definition Name

SLI or PM Percentage Calculation:

If the metric calculation is \Rightarrow 90%, the SLI or PM is met

If the metric calculation is $<$ 10%, the SLI or PM is not met

Stoplight is displayed at the top of the top of the Analytic

Type of Visualization:

Bar Graph – Displays Count for the Month

Y-axis should show the percentage on the left and the counts on the right

Breakdown: Center & Met/Not Met

Add a threshold line (for the SLI)

Hover Over Information: - SLI or PM definition

APPENDIX A: PROCESS WORK INSTRUCTIONS

1) New Awards and Modifications Backup from ServiceNow Instructions

Small Business
Innovation Research/
Small Business
Technology Transfer

I, II, & III

NSSC Procurement SBIR/STTR
ServiceNow Monthly Metrics Reporting

Procurement
Work
Instruction
02/27/2018

Each month, SBIR/STTR New Awards (Phases I, II & III et. al) and Bi-lateral and Uni-lateral Funding and Administrative Modifications are to be reported from ServiceNow.

New Awards:

AWARDED NEW AWARDS BY CALENDAR MONTH

In ServiceNow Self-Service, choose Reports and 'View/Run', choose 'All' and locate the 'AWARDED NEW AWARDS BY CALENDAR MONTH'

The screenshot displays the NASA Shared Services Center ServiceNow interface. On the left, a sidebar menu lists various reports and tools. The 'View / Run' option at the bottom of the sidebar is circled in red. The main content area shows a list of reports under the 'Reports' tab. The report titled 'AWARDED NEW AWARDS BY CALENDAR MONTH' is highlighted with a red underline. The table below lists several reports, including 'AWARDED BY FISCAL YEAR (ALL NEW AWARD TYPES)', 'AWARDED CRP BY FISCAL YEAR', 'AWARDED MODS BY CALENDAR MONTH', 'AWARDED MODS BY FISCAL YEAR', 'AWARDED NEW AWARDS BY CALENDAR MONTH', 'AWARDED PHASE I BY FISCAL YEAR', 'AWARDED PHASE II BY FISCAL YEAR', 'AWARDED PHASE III BY FISCAL YEAR', 'Contract Specialist Dashboard Maria Etheridge', and 'Contract Specialist Dashboard Annette Zeiderman'.

Type	Title	Table	Created by	Last modified
★	AWARDED BY FISCAL YEAR (ALL NEW AWARD TYPES)	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-11-03 15:54:21
★	AWARDED CRP BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:15:32
★	AWARDED MODS BY CALENDAR MONTH	PR SBIR Mods [u_pr_sbir_mods]	doubr	2018-01-02 11:54:21
★	AWARDED MODS BY FISCAL YEAR	PR SBIR Mods [u_pr_sbir_mods]	doubr	2017-07-11 13:14:38
★	<u>AWARDED NEW AWARDS BY CALENDAR MONTH</u>	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2018-02-27 14:53:54
★	AWARDED PHASE I BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:13:57
★	AWARDED PHASE II BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:13:09
★	AWARDED PHASE III BY FISCAL YEAR	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-07-11 13:12:15
★	Contract Specialist Dashboard Maria Etheridge	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-05-14 21:20:18
★	Contract Specialist Dashboard Annette Zeiderman	FD PR SBIR Contracts [u_fd_pr_sbir_contracts]	doubr	2017-05-14 21:02:27

- Change date range to first of the month and last of the month respectively:

Filter Criteria Configuration:

- All of these conditions must be met:**
 - Award Date at or after 2018-02-01
 - Contract Number starts with NNX17
 - or Contract Number starts with 80NSSC
 - Award Date at or before 2018-02-28
- Order results by the following fields:**
 - Award Date z to a

- Run
- Export Data "Right Click Columns"

FD PR SBIR Contracts

FD Number	Case	Category	SubCategory	Contract Number	Firm Name	Proposal Title
FDPSB0004111	PRC0036902	SBIR/STTR	PHASE III	80NSSC18P0775	CFD Research	2018
FDPSB0004112	PRC0036903	SBIR/STTR	PHASE III	80NSSC18C0016	Advanced Syst Technologies,	2018
FDPSB0004104	PRC0035443	SBIR/STTR	PHASE III	80NSSC18P0728	Emergent Spa Inc	2018

- Pivot data by SubCategory (Filters) and Center (Rows) and Number (Values)

PivotTable Fields

Choose fields to add to report:

- ☒ FD Number
- ☐ Case
- ☐ Category
- ☒ SubCategory
- ☐ Contract Number
- ☐ Firm Name
- ☐ Proposal Title
- ☐ Award Date
- ☒ Center
- ☐ Contracting Officer
- ☐ Contract Specialist

Drag fields between areas below:

Filters: SubCategory

Rows: Center

Values: Count of FD ...

SubCategory	Count of FD Number
Goddard Space Flight Center	1
Johnson Space Center	1
Marshall Space Flight Center	1
Grand Total	3

- Log data on Monthly Metrics Spreadsheet (the Subcategory will need to be selected if you have multiple award types in a given month)

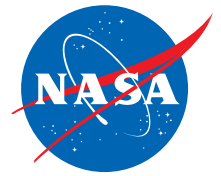
PHASE III AWARDS									Metric Status for Month	
Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Met Metrics	Not Met
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
1	0	0	0	0	0	0	0	0	1	0
1	0	0	0	0	0	0	0	0	1	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
1	0	0	0	0	0	0	0	0	1	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	3	0
33%	0%	0%	0%	0%	0%	0%	0%	100%		

2) Sample Report - FY 2018 - January 2018 SBIR-STTR Metrics

PHASE I AWARDS														Metric Status for Month	
Center	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Met Metrics	Not Met
ARFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ARC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GRC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
JSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
KSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
LaRC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
MSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NMD/JPL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%		
PHASE II AWARDS														Metric Status for Month	
Center	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Met Metrics	Not Met
ARFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ARC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GRC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
JSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
KSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
LaRC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
MSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NMD/JPL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%		
PHASE III AWARDS														Metric Status for Month	
Center	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Met Metrics	Not Met
ARFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ARC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GRC	0	0	0	1	0	0	0	0	0	0	0	0	1	0	0
GSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
JSC	0	0	0	1	0	0	0	0	0	0	0	0	1	0	0
KSC	0	0	0	1	0	0	0	0	0	0	0	0	1	0	0
LaRC	1	0	0	0	0	0	0	0	0	0	0	0	1	0	0
MSFC	0	0	1	1	0	0	0	0	0	0	0	0	2	0	0
NMD/JPL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	1	0	2	3	0	0	0	0	0	0	0	0	6	3	0
	17%	0%	33%	50%	0%	0%	0%	0%	0%	0%	0%	0%	100%		
PHASE CRP AWARDS														Metric Status for Month	
Center	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Met Metrics	Not Met
ARFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ARC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GRC	0	2	0	0	0	0	0	0	0	0	0	0	2	0	0
GSFC	1	0	1	0	0	0	0	0	0	0	0	0	2	0	0
JSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
KSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
LaRC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
MSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NMD/JPL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	1	2	1	0	0	0	0	0	0	0	0	0	4	0	0
	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%		

BI-LATERAL FUNDING MODIFICATIONS														Metric Status for Month		
Center	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Met	Metric	Not Met
ARFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ARC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GRC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
JSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
KSC	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0
LARC	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0
MSFC	0	0	0	1	0	0	0	0	0	0	0	0	0	1	0	0
NMO/UPL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	0	1	2	1	0	0	0	0	0	0	0	0	4	1	0	0
	0%	25%	50%	25%	0%	0%	0%	0%	0%	0%	0%	0%	0%			100%
PHASE III, IIX, CRP - BI-LATERAL FUNDING MODIFICATIONS														Metric Status for Month		
Center	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Met	Metric	Not Met
ARFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ARC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GRC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
JSC	0	0	1	0	0	0	0	0	0	0	0	0	1	0	0	0
KSC	0	0	0	1	0	0	0	0	0	0	0	0	1	1	0	0
LARC	2	0	0	0	0	0	0	0	0	0	0	0	2	0	0	0
MSFC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NMO/UPL	1	0	0	1	0	0	0	0	0	0	0	0	2	1	0	0
SSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	3	0	1	2	0	0	0	0	0	0	0	0	6	2	0	0
	50%	0%	17%	33%	0%	0%	0%	0%	0%	0%	0%	0%	0%			100%
ADMINISTRATIVE MODIFICATIONS														Metric Status for Month		
Center	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Total	Met	Metric	Not Met
ARFC	0	2	1	1	0	0	0	0	0	0	0	0	4	1	0	0
ARC	0	4	4	4	0	0	0	0	0	0	0	0	12	4	0	0
GRC	8	8	6	9	0	0	0	0	0	0	0	0	31	9	0	0
GSFC	8	3	5	4	0	0	0	0	0	0	0	0	20	4	0	0
JSC	3	3	3	2	0	0	0	0	0	0	0	0	11	2	0	0
KSC	0	2	2	1	0	0	0	0	0	0	0	0	5	1	0	0
LARC	9	6	8	5	0	0	0	0	0	0	0	0	28	5	0	0
MSFC	0	3	2	5	0	0	0	0	0	0	0	0	10	5	0	0
NMO/UPL	7	3	3	2	0	0	0	0	0	0	0	0	15	2	0	0
SSC	0	1	0	3	0	0	0	0	0	0	0	0	4	3	0	0
TOTAL	35	35	34	36	0	0	0	0	0	0	0	0	140	36	0	0
	25%	25%	24%	26%	0%	0%	0%	0%	0%	0%	0%	0%	0%			100%
SBIR-STTR Awards January 2018														Basic Awards Data		
SBIR-STTR Mods January 2018														Modifications Data		

APPENDIX B: SERVICE NOW USER STORIES



NASA Shared Services Center

NSSC ServiceNow – Procurement FPDS-NG Metrics and Utilization SBIR/STTRs

Document Version	V.2
Date Last Modified	10/01/2020

Reference: Contract Attachment I-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:**Brief Description:**

Each month, NSSC SP Procurement – SBIR/STTRs creates a record reporting the number of Awards and Modifications completed to the FPDS (Federal Procurement Data System) by NASA Center within 2 business days after the NSSC Contracting Officer signed, obligating the document (makes award). Additionally, the report includes cumulative totals reported for the fiscal year beginning Oct 1st through Sep 30th by NASA Center.

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics: 'PR – SBIR/STTR – FPDS – Next Generation – 90%' and 'PR – SBIR/STTR – FPDS Mods – Next Generation – 90%'

Utilization: 'PR – SBIR/STTR – Federal Procurement Data System – Next Generation (I-3.3.3.3)' and 'PR – SBIR/STTR Mods – Federal Procurement Data System – Next Generation (I3.3.3.3)'

Performance Analytics: 'P&U EXT PR SBIR/STTR FPDS – Nex Gen – Last Month' and 'P&U EXT PR SBIR/STTR FPDS – Nex Gen Met – Last Month'

Note: See Appendix A – Work Instructions

If applicable: N/A

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change:

Description of Change:

Contract Modification:

Impact to existing Metrics/Utilization/Transactions:

REPORTING SUMMARY :

Suggested Report Title for Metric and Utilization:	I.3_FA_PWS Element_Metric: 3.3.3 Entering obligations and FPDS data into procurement and finance systems
Global Setting: Y/N	Yes
Functional Area:	Procurement
PWS Section:	I1 3.3.3.1 SBIR/STTRs
Performance Area:	
SO/SME	
TYPE: SLI/PM/OTHER	
Dependencies or impacts on other Areas/ Functional Areas:	
I-3 Reportable	Yes
Contract Modification	
SN Story Number/Date Submitted	SNow User Story – STRY0304444 and SNow User Story – STRY0317105 dated 3/26/2018
SN PA Story/Date Submitted	
Approval – CS/SP	
Metrics Team Review	
Metric I-3	3.3.3 - 90% of FPDS entries completed accurately within 2 business days from receipt of CO-signed obligating document.
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template

Metrics and Utilization

Metric report titled: PR-SBIR Basic Federal Procurement Data System – Next Generation (FPDS-NG) (I-3 3.3.3.3) and PR-SBIR/STTR Modifications Federal Procurement Data System – Next Generation (FPDS-NG) (I-3.3.3.3)

Report Output: Met/Not Met stacked bar chart sorted by Met-Not Met by Center

Calendar: NSSC Metric Business Days

Applies To: Resolve/FPDS-NG task created with a Category of SBIR / STTR SubCategory PHASE I, PHASE II, PHASE III, or CRP or Modification

Start Condition: When CS Approve task is resolved by CS Approve - L3

Pause Condition: Status = 'Pending *'

End Condition: When the Resolve/FPDS-NG task is resolved with the assignment group PR – Post-Award L2, Category-Grants Agreements Awards and a Subcategory- Grants Agreements Awards

Calculation: Measures 90% Resolve/FPDS-NG task completed within 2 business days

Trigger is when CS Approve L3 task is resolved

Example of Metric Definition: METRICS AND UTILIZATION**HR - Classification - Classifications completed on time (I-3 - 3.2.15)**

Definition Name = HR - Classification Completed on Time

Description on metric definition:

1. APPLIES TO:
 - a. HR Cases
 - b. Category CLASSIFICATION
 - c. Subcategory of NEW PD
2. CALENDAR USED: NSSC Metric Days (excludes weekends, federal holidays and NSSC down days)
3. TRIGGER/START CONDITION: Metric record should be created when the date field "Classification Completed" is populated on the FD "New PD" tab
4. PAUSE CRITERIA: NONE
5. EXCLUSION CRITERIA:
 - a. If no Functional Detail exists, it is excluded from the report.
 - b. If the Case is status is Closed Incomplete, it is excluded from the report.
6. MET CONDITION: less than 31 business days between Case Opened and "Classification Completed" date
7. FILTER CONDITION: This report should have a filter condition that default to metric date during ("on") the last month; users should be able to change the report to use a "between" date range.
8. Additional Criteria:
 - a. Metric Date will be set to the "Classification Completed" date
 - b. One metric record per Case.
 - c. Metric value should be set to 1
 - d. Re-fire metric if subcategory or "Classification Completed" date field change value

Field Values:

Sub Doc: FD record this metric was calculated against

Calculated Age: WIP time in days based on schedule

Start: Date case was opened

End: Date in 'Classification Completed' field on the FD

Metric Date: Date in 'Classification Completed' field on the FD

Metric Start: Date case was opened

Pending Duration: Pending time of case

Business Duration: Total time case was active

Duration: Full time of metric calculation, not counting schedule

Additional Scripts:

Business rule on u_hr_case with same title as this metric that will mark metrics excluded if case is closed incomplete. (Also handled by Exclude Metric on HR Case Incomplete)

REPORT REQUIREMENTS: METRICS AND UTILIZATION	
Name of Report	
Report Content	<p>Chart: WIP (Work in Progress) Days by Center</p> <p>Summary: New Awards and Modifications input in FPDS during the reporting month</p> <p>Detail: Center Contract No. and Modification No. (if applicable) Award Date or Modification Award Date Procurement Tasks or Modification Procurement Tasks Status - Procurement Tasks or Supplement Procurement Tasks Short Description - Procurement Tasks or Supplement Procurement Tasks Assignment Group - Procurement Tasks or Supplement Procurement Tasks</p> <p>Total Pending Days Total WIP (Work in Progress) Days</p>
Input Parameters	<p>1) SubCategory = CRP PHASE I PHASE II PHASE III</p>

	<p>2) Procurement Tasks or Modification Procurement Tasks:</p> <p>a) Status = 'Closed' or 'Resolved' and NOT 'Cancelled'</p> <p>b) Short Description = '*CS Approval' and '*Resolve/FPDS-NG'</p> <p>c) Assignment Group = 'PR – PROCESSING L2' and 'PR – CS APPROVE L3'</p> <p>3) Center = Center Abbrev.</p> <p>4) Contract No.:</p> <p>a) Unique Number</p> <p>b) Contract No. and Mod. No. (not duplicate)</p> <p>5) Award Date is NOT EMPTY and is between 1st and last day of the reporting month</p>
Output Parameters	<p>Metric report titled: PR-SBIR Basic Federal Procurement Data System – Next Generation (FPDS-NG) (I-3 3.3.3.3) and PR-SBIR/STTR Modifications Federal Procurement Data System – Next Generation (FPDS-NG) (I-3.3.3.3)</p> <p>Report Output: Met/Not Met stacked bar chart sorted by Met-Not Met by Center</p> <p>Calendar: NSSC Metric Business Days</p> <p>Applies To: Resolve/FPDS-NG task created with a Category of SBIR / STTR SubCategory PHASE I, PHASE II, PHASE III, or CRP or Modification</p> <p>Start Condition: When CS Approve task is resolved by CS Approve - L3</p> <p>Pause Condition: Status = 'Pending *'</p> <p>End Condition: When the Resolve/FPDS-NG task is resolved with the assignment group PR – Post-Award L2, Category-Grants Agreements Awards and a Subcategory- Grants Agreements Awards</p> <p>Calculation: Measures 90% Resolve/FPDS-NG task completed within 2 business days</p> <p>Trigger is when CS Approve L3 task is resolved</p>

ServiceNow Data – Metric Definition Template Performance Analytics

Story Dependency: Metrics and Utilization Story Number

Name of Report: 'PR – SBIR/STTR – Federal Procurement Data System – Next Generation (I-3.3.3.3)' and 'PR – SBIR/STTR Mods – Federal Procurement Data System – Next Generation (I3.3.3.3)'

Placement / Location: on the Internal and External dashboards

Internal

Dashboard Name: P & U - Internal – PR Dashboard

Dashboard Group: Procurement

Dashboard Tab: SBIR/STTR

External – N/A

Dashboard Name:

Dashboard Group:

Dashboard Tab:

Data Source Table

Name of Analytic on Internal Dashboard: 'P&U EXT PR SBIR/STTR FPDS – Nex Gen – Last Month' and 'P&U EXT PR SBIR/STTR FPDS – Nex Gen Met – Last Month'

Name of Analytic on External Dashboard:

Dates to show trend: Created on Last Month

Frequency: Monthly

SLI Formula: 3.3.3 - 90% of FPDS entries completed accurately within 2 business days from receipt of CO-signed obligating document.

Met: Greenlight

Not/Met: Redlight

Conditions:

Definition Name

SLI or PM Percentage Calculation:

If the metric calculation is $\geq 90\%$, the SLI or PM is met

If the metric calculation is $< 10\%$, the SLI or PM is not met

Stoplight is displayed at the top of the top of the Analytic

Type of Visualization:

Bar Graph – Displays Count for the Month

Y-axis should show the percentage on the left and the counts on the right

Breakdown: Center & Met/Not Met

Add a threshold line (for the SLI)

Hover Over Information: - SLI or PM definition

APPENDIX A: PROCESS WORK INSTRUCTIONS

See pages 6 and 7 of 11 for ServiceNow input fields.

APPENDIX B: SERVICE NOW USER STORIES



NASA Shared Services Center

**NSSC ServiceNow – PR – SBIR/STTR
Closeout Transactions
(P&U External & Internal Dashboards & Analytics)**

Document Version V.2

Date Last Modified 10/01/2020

Reference: Contract Attachment I-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:**Brief Description:**

Each month, NSSC SP Procurement – SBIR/STTRs reports to the NSSC Closeout team, awards that have expired (period of performance (POP) end date has ended) and the final deliverable invoice has been received by the NSSC. Additionally, the report includes cumulative totals reported for the fiscal year beginning Oct 1st through Sep 30th by NASA Center.

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics

PR – SBIR/STTR – Transfer to Closeout – Next Generation – 90%

Note: See Appendix A – Work Instructions

If applicable:

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change: Current

Description of Change: Change the Service Level Indicator or Performance Standard description for SBIR/STTRs on the NexGen Contract to read as follows:

From: 90% of files transferred within 30 calendar days of the physical completion date.

To: 90% of files transferred within 30 calendar days after receipt of the final invoice.

Contract Modification:

Impact to existing Metrics/Utilization/Transactions:

REPORTING SUMMARY :

Suggested Report Title for Transaction:	I.17 _FA_PWS Element _Transaction:
Global Setting: Y/N	Yes
Functional Area:	PR
PWS Section:	I-1_PWS_3.3.2.2_SBIR/STTR Administration
Performance Area:	PR – SBIR/STTR
SO/SME	
Contract Modification	
SN Transaction Story/Date Submitted	
Approval – CS/SP	
Metrics Team Review	
Service Definition I-17	
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template Transactions

Acceptance Criteria:

Placement / Location:

Dashboard: P & U - Internal – PR Dashboard

Dashboard Tab: Closeout

Dashboard Group: Performance And Utilization – ‘PR – SBIR/STTR Transfer to Closeout (I-3 3.3.3.3)’

PA Dashboard & Tab Target

A. Dashboard(s) P & U - Internal - Overall / P & U - Overall (Both internal & External) – PR Dashboard (External)

B. Tab: PR Transactions

Data Source Table: Metric [metric_instance] - ‘PR – SBIR/STTR Transfer to Closeout (I-3 3.3.3.3)’

Name of Analytic: ‘PR – SBIR/STTR – Transfer to Closeout – Next Generation – 90%’
Dates to show trend: Monthly

Frequency: Monthly

Existing Reports: ‘PR – SBIR/STTR Transfer to Closeout (I-3 3.3.3.3)’

Filters:

All of these conditions must be met:

Definition is

Center Name is abbreviated for reports

Metric Date on Last Month

POP End Date is expired

Final Payment button is checked

Final Payment Date is populated

Sent to Closeout button is checked

Sent to Closeout Date/Time is Last Month

Transaction Count by Center and Sent to Closeout Date/Time is within Last Month

Type of Visualization:

Bar Graph – Displays Count for the Month

Added Hover Over Information: Transaction Count

ServiceNow Data – SAMPLE Transactions

Acceptance Criteria:
(See Page 4 of 8)

Placement / Location:

Dashboard:

Dashboard Tab:

Dashboard Group: Performance And Utilization - Internal (Both Internal & External)

PA Dashboard & Tab Target

A. Dashboard(s) P & U - Internal - Overall / P & U - Overall (Both internal & External)

B. Tab: NSSC Transactions

Data Source Table: Metric [metric_instance]

Name of Analytic:

Dates to show trend: Created on Last Month

Frequency: Monthly

Existing Reports:

Filters:

All of these conditions must be met:

Center abbrev is

Metric Date on Last Month

Transaction Count

Type of Visualization:

Bar Graph – Displays Count for the Month

Added Hover Over Information: Transaction Count

REPORT REQUIREMENTS: Transactions	
Story Dependency	
Name of Report	PR – SBIR/STTR – Transfer to Closeout – Next Generation – 90%
NSSC Billing Element	‘PR – SBIR/STTR Transfer to Closeout (I-3 3.3.3.3)’
Contractor Billing Element	‘PR – SBIR/STTR Transfer to Closeout (I-3 3.3.3.3)’
Report Content	ServiceNow Ticket - POP End Date is expired, Sent to Closeout button is checked which populates the Sent to Closeout Date/Time field and count by Center field abbreviated
Input Parameters	1) SBIR/STTR FD – Information tab 2) Center 3) Contract Number (Unique Identifier) 4) POP End Date – has expired on or around report run 5) Final Payment Checkbox = True for checked 6) Final Payment Date is populated 7) Sent to Closeout = Yes for Checkbox checked 8) Sent to Closeout Date is populated
Output Parameters	PR – SBIR/STTR Transfer to Closeout (I-3 3.3.3.3) Report Output: Met/Not Met stacked bar chart sorted by Met-Not Met Calendar: 30 Calendar Days Applies To: Functional Details(FD) with the Category of SBIR/STTR Start Condition: When the pop end date on the SBIR/STTR FD information tab and when the "Final Payment" checkbox is checked and Final Payment Date is populated on the SBIR/STTR FD information tab. End Condition: when "Sent to Closeout" checkbox is marked on the SBIR/STTR FD information tab. Exceptions: Final Payment checkbox and/or Sent to Closeout checkbox are unchecked. Calculation: Measures 90% of files transferred within 30 calendar days of the physical completion date.

If there are variations in the Utilization and Transactions, please provide justification/business rules:

APPENDIX A: PROCESS WORK INSTRUCTIONS

APPENDIX B: SERVICE NOW USER STORIES



NASA Shared Services Center

NSSC ServiceNow – Procurement Metrics and Utilization Simplified Acquisition FPDS-NG

Document Version V.2

Date Last Modified 10/01/2020

Reference: Contract Attachment I-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:**Brief Description:**

Each month, NSSC SP Procurement – SAT creates a record reporting the number of Awards and Modifications completed to the FPDS (Federal Procurement Data System) by NASA Center within 2 business days after the NSSC Contracting Officer signed, obligating the document (makes award). Additionally, the report includes cumulative totals reported for the fiscal year beginning Oct 1st through Sep 30th by NASA Center.

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics
Utilization
Performance Analytics

Note: See Appendix A – Work Instructions

If applicable:

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change:

Description of Change:

Contract Modification:

Impact to existing Metrics/Utilization/Transactions:

REPORTING SUMMARY :

Suggested Report Title for Metric and Utilization:	I.3_FA_PWS Element_Metric: 3.3.15 Entering obligations and FPDS data into procurement and finance systems
Global Setting: Y/N	Yes
Functional Area:	Procurement
PWS Section:	PWS 3.3.15
Performance Area:	
TYPE: SLI/PM/OTHER	
Dependencies or impacts on other Areas/ Functional Areas:	
I-3 Reportable	3.3.15
Contract Modification	
SN Story Number/Date Submitted	SNow User Story – STRY0258836 and SNow User Story – STRY0341687 dated 4/11/2018
SN PA Story/Date Submitted	
Approval – CS/SP	
Metrics Team Review	
Metric I-3	90% of FPDS entries completed accurately within 2 business days from receipt of CO-signed obligating document.
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template Metrics and Utilization

Applies To:

Metric report titled: Federal Procurement Data System – Next Generation (FPDS-NG) (I-3 3.3.7)

Report Output: Met/Not Met stacked bar chart sorted by Met-Not Met

Calendar: NSSC Metric Business Days

Applies To: FPDS task and Stage FPDS Entry created with a SATMR Ticket

Trigger: FPDS Entry Stage and FPDS task is 'Closed Complete' with the assignment group PR – SAT Post-Award Admin L2

Pause Condition: Stage and Task State/Status = 'Pending'

Calculation: Measures 90% FPDS task and Stage 9 is completed within 2 business days minus Pending days

Trigger is when CO Review Stage and Task is resolved, Award Date is populated

Example of Metric Definition: METRICS AND UTILIZATION**HR - Classification - Classifications completed on time (I-3 - 3.2.15)**

Definition Name = HR - Classification Completed on Time

Description on metric definition:

1. APPLIES TO:
 - a. HR Cases
 - b. Category CLASSIFICATION
 - c. Subcategory of NEW PD
2. CALENDAR USED: NSSC Metric Days (excludes weekends, federal holidays and NSSC down days)
3. TRIGGER/START CONDITION: Metric record should be created when the date field "Classification Completed" is populated on the FD "New PD" tab
4. PAUSE CRITERIA: NONE
5. EXCLUSION CRITERIA:
 - a. If no Functional Detail exists, it is excluded from the report.
 - b. If the Case is status is Closed Incomplete, it is excluded from the report.
6. MET CONDITION: less than 31 business days between Case Opened and "Classification Completed" date
7. FILTER CONDITION: This report should have a filter condition that default to metric date during ("on") the last month; users should be able to change the report to use a "between" date range.
8. Additional Criteria:
 - a. Metric Date will be set to the "Classification Completed" date
 - b. One metric record per Case.
 - c. Metric value should be set to 1
 - d. Re-fire metric if subcategory or "Classification Completed" date field change value

Field Values:

Sub Doc: FD record this metric was calculated against

Calculated Age: WIP time in days based on schedule

Start: Date case was opened

End: Date in 'Classification Completed' field on the FD

Metric Date: Date in 'Classification Completed' field on the FD

Metric Start: Date case was opened

Pending Duration: Pending time of case

Business Duration: Total time case was active

Duration: Full time of metric calculation, not counting schedule

Additional Scripts:

Business rule on u_hr_case with same title as this metric that will mark metrics excluded if case is closed incomplete. (Also handled by Exclude Metric on HR Case Incomplete)

REPORT REQUIREMENTS: METRICS AND UTILIZATION	
Name of Report	Federal Procurement Data System – Next Generation (FPDS-NG) (I-3 3.3.7) Metric Report
Report Content	<p>Chart: WIP (Work in Progress) Days by Center minus Pending Summary: Count new ELMT and SAT Awards, with or without Synopsis completed during the reporting month.</p> <p>Detail: Request Item (RITM #) Number (SATPC #) or (SATMR#) SAT Award Order # Center Award Date CO Review Stage Distribution Stage FPDS Entry Stage FPDS Task Stage Status</p>
Input Parameters	<ol style="list-style-type: none"> 1) SAT Award Order # = Unique Number 2) Center = Center Abbrev 3) CO Review Stage and Distribution Stage are 'Is Completed' 4) FPDS Entry status = 'Is completed' 5) Date FPDS Entry Stage 'Is Completed'
Output Parameters	<p>Applies To: Create new metric report titled: Federal Procurement Data System – Next</p>

	<p>Generation (FPDS-NG) (I-3 3.3.7)</p> <p>Report Output: Met/Not Met stacked bar chart sorted my Met-Not Met</p> <p>Calendar: NSSC Metric Business Days</p> <p>Applies To: FPDS task and Stage FPDS Entry created with a SATMR Ticket</p> <p>Trigger: FPDS Entry Stage and FPDS task is 'Closed Complete' with the assignment group PR – SAT Post-Award Admin L2</p> <p>Pause Condition: Stage and Task State/Status = 'Pending'</p> <p>Calculation: Measures 90% FPDS task and Stage 9 is completed within 2 business days minus Pending days</p> <p>Trigger is when CO Review Stage and Task is resolved, Award Date is populated</p>
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ServiceNow Data – Metric Definition Template Performance Analytics

Story Dependency: Metrics and Utilization Story Number

Name of Report: Federal Procurement Data System – Next Generation (FPDS-NG) (I-3
3.3.7) Metric Report

Placement / Location: on the Internal and External dashboards

Internal

Dashboard Name:

Dashboard Group:

Dashboard Tab:

External

Dashboard Name:

Dashboard Group:

Dashboard Tab:

Data Source Table

Name of Analytic on Internal Dashboard:

Name of Analytic on External Dashboard:

Dates to show trend: Created on Last Month

Frequency: Monthly

SLI Formula: 90% of FPDS entries completed accurately within 2 business days from
receipt of CO-signed obligating document.

Met: Greenlight

Not/Met: Redlight

Conditions:

Definition Name

SLI or PM Percentage Calculation:

If the metric calculation is \Rightarrow 90%, the SLI or PM is met

If the metric calculation is $<$ 10%, the SLI or PM is not met

Stoplight is displayed at the top of the top of the Analytic

Type of Visualization:

Bar Graph – Displays Count for the Month

Y-axis should show the percentage on the left and the counts on the right

Breakdown: Center & Met/Not Met

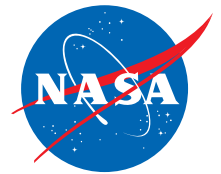
Add a threshold line (for the SLI)

Hover Over Information: - SLI or PM definition

APPENDIX A: PROCESS WORK INSTRUCTIONS

(see page 4 of 10)

APPENDIX B: SERVICE NOW USER STORIES



NASA Shared Services Center

NSSC ServiceNow – PR – SAT (Simplified Acquisition Threshold) Closeout Transactions

(P&U External and Internal Dashboards and Analytics)

Document Version V.2

Date Last Modified 10/01/2020

Reference: Contract Attachment J-26 Business Rules

NASA Shared Services Center
Building 1111, Jerry Hlass Road
Stennis Space Center, MS 39529

OVERVIEW:**Brief Description:**

Each month, NSSC SP Procurement – SAT reports to the NSSC Closeout team, awards that have expired (period of performance (POP) end date has ended) and final invoice has been approved for payment by the NSSC. Additionally, the report includes cumulative totals reported for the fiscal year beginning Oct 1st through Sep 30th by NASA Center.

The following ServiceNow Business Rules outline the requirements in order to process the report data requirements and also provides the supporting information/documentation for validation/verification purposes which allow for:

Metrics

SAT - Transfer to Closeout Contractor – (I-3 3.3) Metric Report

Note: See Appendix A – Work Instructions

If applicable:

If this is being updated as the result of a Change, please provide the following information:

Effective Date of Change: Current

Description of Change: Change the Service Level Indicator or Performance Standard description for SBIR/STTRs on the NexGen Contract to read as follows:

From: 90% of files transferred within 30 calendar days of the physical completion date.

To: 90% of files transferred within 30 calendar days after approval of the payment of the final invoice.

Contract Modification:

Impact to existing Metrics/Utilization/Transactions: Yes

REPORTING SUMMARY :

Suggested Report Title for Transaction:	I.17 _FA_PWS Element _Transaction:
Global Setting: Y/N	Yes
Functional Area:	PR
PWS Section:	N/A
Performance Area:	PR – SAT (Simplified Acquisition Threshold)
SO/SME	
Contract Modification	
SN Transaction Story/Date Submitted	
Approval – CS/SP	
Metrics Team Review	
Service Definition I-17	
Tech Doc Location/Date Archived	

ServiceNow Data – Metric Definition Template Transactions

Acceptance Criteria:

Placement / Location:

- Dashboard: P & U - Internal – PR Dashboard

- Dashboard Tab: Closeout

- Dashboard Group: Performance And Utilization – ‘SAT - Transfer to Closeout Contractor – (J-I 3.3) Metric Report’

PA Dashboard & Tab Target

- A. Dashboard(s) P & U - Internal - Overall / P & U - Overall (Both internal & External) – PR Dashboard (External)

- B. Tab: PR Transactions

Data Source Table: Metric [metric_instance] - ‘SAT - Transfer to Closeout Contractor – (J-3 3.3.7) Metric Report’

Name of Analytic: N/A

Dates to show trend: Monthly

Frequency: Monthly

Existing Reports: ‘SAT - Transfer to Closeout Contractor – (J-3 3.3.7) Metric Report’

Filters:

All of these conditions must be met:

Definition is

- Center Abbrev

- Metric Date on Last Month

- Order End Date is expired

- Stage 12 – Sent to Closeout is ‘Is Completed’

- Stage 12 – Closeout Closed On date is populated

Transaction Count by Center Abbrev and Closeout Closed On date is within Last Month

Type of Visualization:

- Bar Graph – Displays Count for the Month

Added Hover Over Information: Transaction Count

ServiceNow Data – SAMPLE Transactions

Acceptance Criteria:
(See Page 4 of 8)

Placement / Location:

Dashboard:

Dashboard Tab:

Dashboard Group: Performance And Utilization - Internal (Both Internal & External)

PA Dashboard & Tab Target

A. Dashboard(s) P & U - Internal - Overall / P & U - Overall (Both internal & External)

B. Tab: NSSC Transactions

Data Source Table: Metric [metric_instance]

Name of Analytic:

Dates to show trend: Created on Last Month

Frequency: Monthly

Existing Reports:

Filters:

All of these conditions must be met:

Center abbrev is

Metric Date on Last Month

Transaction Count

Type of Visualization:

Bar Graph – Displays Count for the Month

Added Hover Over Information: Transaction Count

REPORT REQUIREMENTS: Transactions	
Story Dependency	
Name of Report	
NSSC Billing Element	'SAT - Transfer to Closeout Contractor – (I-3 3.3) Metric Report'
GDIT Billing Element	'SAT - Transfer to Closeout Contractor – (I-3 3.3) Metric Report'
Report Content	ServiceNow Ticket – Order End Date is expired, Stage 12 – Sent to Closeout is 'Is Completed' and Stage 12 – Closeout Closed On date is populated and count by Center Abbrev for Last Month
Input Parameters	1) SATPC Ticket 2) Ticket Information tab - Center Abbrev 3) SAT Award Order # (Unique Identifier) 4) Order End Date – has expired on or around report run 5) Stage 12 – 'Sent to Closeout' status = 'Is Completed' 6) Stage 12 – 'Closeout Closed On' date is populated
Output Parameters	SAT - Transfer to Closeout Contractor – (I-3 3.3) Metric Report Applies To: Report Output: Met/Not Met stacked bar chart sorted by Met-Not Met Calendar: NSSC Metric Business Days Applies To: SATPC Ticket – 'Order End Date' and 'Stage 12 – Sent to Closeout' Trigger: 'Order End Date' is expired, Stage 12 – 'Sent to Closeout' field status 'Is Completed' and 'Closeout Closed On' date is populated Pause Condition: Stage 12 – 'Sent to Closeout' = Pending Exclusion: Stage 12 – 'Sent to Closeout' = 'Is Cancelled' Calculation: Measures 90% Stage Closeout task and Stage 12 is completed within 30 calendar days minus Pending days

If there are variations in the Utilization and Transactions, please provide justification/business rules:

APPENDIX A: PROCESS WORK INSTRUCTIONS

APPENDIX B: SERVICE NOW USER STORIES