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NASA Shared Services Center

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NASA Shared Services Center Process Work Instruction

NSPWI-3000-0007 Revision 0010

Effective Date: December 16, 2021
Expiration Date: December 16, 2022

Development of Information Materials

- FOR NSSC INTERNAL USE ONLY -

Responsible Office: Human Resources Services Division

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Revision	0004	August 7, 2013	<ul style="list-style-type: none"> Updated content Removed Proprietary information from footer Update and format text
Revision	0005	August 5, 2014	<ul style="list-style-type: none"> Removed logo Updated document to new format Provide new number
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Revision	0007	August 1, 2018	<ul style="list-style-type: none"> Updated format Updated Document History Log Effective Date column to spell out dates Updated to reflect SDG changes, new contract language, and steps and information throughout

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Status (Basic/Revision/ Cancelled)	Document Version	Effective Date	Description of Change
Revision	0008	September 29, 2020	<ul style="list-style-type: none"> • In the Document History Log, corrected the Document Version number in previous revision from 007 to 0007. • Removed ServiceNow Task information. • Updated Office of Human Capital Management (OHCM) to Office of the Chief Human Capital Officer (OCHCO). • Updated 3.1, References Used in the Preparation of This Guide. • Updated/clarified 4.0, Process. • Updated Appendix E, Instructions for Submitting Request for Development of Information Materials Team to Perform Work. • Added Appendix K, Document Control Number. Also added references to it throughout, as appropriate. • Added Appendix L, TechDoc Guidance.
Revision	0009	December 22, 2020	<ul style="list-style-type: none"> • Updated process steps and templates to reflect final approval obtained directly from requester unless printing costs involved. • Updated internal document references to include links to the referenced information. • Clarified several areas. • Updated paragraph 3.2, References Used to Develop Information Materials. • Updated Appendix L, TechDoc Guidance.

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Status (Basic/Revision/ Cancelled)	Document Version	Effective Date	Description of Change
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			<p>Perform Work. Included information and instructions for creating Cases for internal process documents. Added introductory information, a heading for paragraph E.1, Instructions for Submitting Request for Support, and a heading and instructions for paragraph E.2, Instructions for Submitting Case for Internal Team Products.</p> <ul style="list-style-type: none"> • Added paragraph F.10, Working in ServiceNow – Collecting Metrics and Utilization Data for Weekly Report Team Lead Provides to Service Owner. • Updated Appendix G, Instructions for Reviewing and Updating Knowledge Articles (KAs) in ServiceNow, to remove the old procedures and add the Knowledge Management Team contact information.

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1.0 Purpose

The National Aeronautics and Space Administration (NASA) Shared Services Center (NSSC) Development of Information Materials Team develops informational materials relating to a variety of Agency Human Resources (HR) programs. The NSSC Service Provider (SP) creates informational materials to meet the needs of the targeted audiences such as subject matter staff, NASA employees, and/or the general public. The purpose of this document is to provide the NSSC(SP) Development of Information Materials Team with detailed process instructions.

The HR subject matter areas include, but are not limited to: Benefits, Pay, Leave, Awards and Recognition, Senior Executive Service (SES), Drug Testing, Staffing and Recruitment, Personnel Action Processing, and Employee Development.

Materials developed are used to support various subject matter areas, initiatives, and requirements. The NSSC obtains approval for informational material content from the relevant NSSC and NASA staff before release to interested NASA and customer parties. The NSSC may develop content for communication/training tools such as:

- a. User Instruction Manuals
- b. Employee Informational Materials
- c. Troubleshooting Documents
- d. Web Site Content
- e. Desk Guides
- f. Training Manuals
- g. Brochures
- h. Recruitment Tools
- i. Letter and E-mail Templates
- j. Presentations
- k. Newsletters

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Team References

For brevity, this desk guide does not always spell out the team name. Since the document is meant for NSSC(SP) Human Resources Development of Information Materials Team members, any references to NSSC(SP), Lead, Service Owner, the team, etc. are for this team. References to NSSC(CS) are for our Government counterparts. References to any other divisions, teams, supervisors, etc. will specifically identify the intended division, team, etc.

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2.0 Authority

None

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3.0 Applicable Documents and References

3.1 References Used in the Preparation of This Guide

Regulations and standards govern the Development of Information Materials process. The following references were used in the preparation of the Process Work Instruction (PWI):

- a. NASA Communications Review System
- b. NASA Communications Review System Communications Materials Review Charter
- c. NASA Online Directives Information System (NODIS)
(<http://nodis3.gsfc.nasa.gov/>)
- d. NASA Privacy Statement, Disclaimer, and Accessibility Certification
- e. NASA Shared Services Center Development of Information Materials Service Delivery Guide
- f. NASA Style Guide
- g. NSSC Customer Satisfaction and Communication Office NSSC Style Guide
- h. NSSC Knowledge Management Process for IT Infrastructure Integrated Program (I3P)/Center Knowledge Authoring Subject Matter Experts (SMEs);
NSCG-2800-0009
- i. NSSC Responsiveness Program Procedures
- j. United States (U.S.) Government Publishing Office Style Manual
(<https://www.govinfo.gov/collection/gpo-style-manual>)
- k. U.S. Office of Personnel Management (OPM) Human Resources Flexibilities and Authorities in the Federal Government

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3.2 References Used to Develop Information Materials

Regulations relating to styles, standards, references, and writing that are specific to the Development of Information Materials products may differ from other team resources. Each entry contains the document name, location, and other helpful information, as available.

The following references are arranged in the order to be used:

a. NASA Style Guide:

Location:

- Visit <http://communications.nasa.gov>.
- In the left navigation pane, click the **NASA Comm Policies & Guidelines** link.
- Under the **NASA Communications Guidelines** section, click the **NASA Graphics Style Guide** link.

Refer to the document for document style standards, which includes strict requirements for the use of the NASA logo (also known as the meatball).

b. NASA Procedural Requirements (NPR) 1450.10, NASA Correspondence Management and Communications Standards and Style:

1. Location:

- Visit the NODIS page at: [http://nodis3.gsfc.nasa.gov/main lib.html](http://nodis3.gsfc.nasa.gov/main_lib.html).
- Click the **1000-1999 Organization and Administration** link.
- Locate and click the **NPR 1450.10** link.

2. Refer to the NPR 1450.10 for all communications materials, other than Public Affairs communications (electronic or hard copy).

3. Refer to the NPR 1450.10 for several helpful appendices, including: Compound Words, Capitalization of Frequently Used Words at NASA, and Acronyms.

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c. U.S. Government Publishing Office Style Manual:

1. Location: <https://www.govinfo.gov/collection/gpo-style-manual>, then click the most recent year.
2. Refer to the manual for anything not found in the previous two documents listed. Most everything needed will be found in the first three documents.

d. NODIS Library: http://nodis3.gsfc.nasa.gov/main_lib.html.

e. NSSC Strategic Integration and Communication Web page:

1. Location: <https://internal.nssc.nasa.gov/sic>.
2. The site contains:
 - Communication Resources
 - Templates
3. Be aware of the When and How usage of the NSSC styles and standards. The NSSC Style Guide is for use only on internal NSSC communications and does not apply to most of this team's products.

f. NASA Stylebook and Office of Communications Manual:

1. Location:
 - Visit the NASA Office of Communications page at: <http://communications.nasa.gov>.
 - In the left navigation pane, click the **NASA Comm Policies & Guidelines** link.
 - Under the **NASA Communications Guidelines** section, click the **NASA Stylebook and Office of Communications Manual** link.
2. Refer to the document for social media standards, guidance, and terminology.

g. NSSC Public-facing Pages:

1. NSSC Public-facing Home Page Location: <https://www.nasa.gov/centers/nssc>.

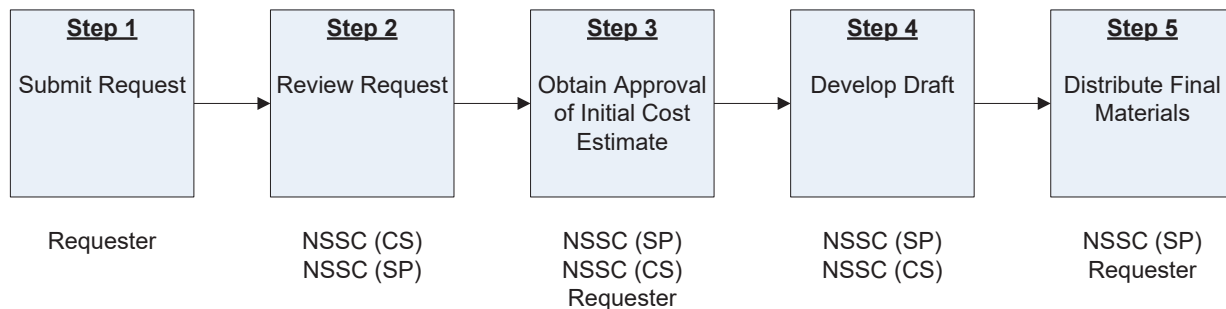
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2. NSSC Public-facing HR Home Page Location:
<https://www.nasa.gov/centers/nssc/hr>.
- h. NSSC Development of Information Materials Page:
 1. Location:
<https://nasa.sharepoint.com/sites/nssc/SitePages/DevelopmentofInformationMaterials.aspx>.
 2. This page is only available within the NASA firewall.
- i. NSSC Development of Information Materials Web Form:
 1. Location: www.nssc.nasa.gov/infomaterialrequest. (If the link does not open properly, copy and paste into your browser address bar.)
 2. Chrome and Firefox are the preferred browsers.

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4.0 Process

This section includes the process steps for the Development of Information Materials work. This section is divided into subparagraphs that align with steps in the team's Service Delivery Guide (SDG) as shown in the following high-level flowchart:



Important: The team's process instructions may reference ServiceNow, the NSSC's work tracking system. However, the team's detailed instructions for using ServiceNow are found in Appendix F, Instructions for Working in ServiceNow.

4.1 Step 1 – Submit Request

The Requester submits a request for support. The following high-level steps are included for reference only:

- Requester determines the need for materials. Requester may be outside NSSC or may be NSSC(CS) or NSSC(SP) personnel.
- Requester submits a request for assistance. Refer to [Appendix E, Instructions for Submitting Request for Development of Information Materials Team to Perform Work](#).

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4.2 Step 2 – Review Request

NSSC(CS) and NSSC(SP) both perform review actions in this step.

4.2.1 NSSC(CS) Reviews Request

NSSC(CS) reviews, analyzes, and approves the request using their internal procedures. The following high-level steps are included for reference only:

- Receive the ServiceNow Case notification.
- Using **Chrome**, open and log into **ServiceNow** (<https://esd.nasa.gov/>).
- Locate and open the new Case.
- Review the request to determine if it is reasonable and is not redundant with other available materials.
 - If the request is for redundant materials, NSSC(CS) may contact the Requester, NSSC(CS) Point of Contact (POC), or the Office of the Chief Human Capital Officer (OCHCO) (formerly the Office of Human Capital Management (OHCM)) to determine viability.
 - If the request is Center specific or received from the Center level, review to determine if Agency-wide distribution would be more beneficial to the Agency.
 - If the request is approved, NSSC(CS) forwards to NSSC(SP) using NSSC(CS) procedures. In general, NSSC(CS) indicates approval in the **Work notes** field, and changes the **Assignment Group** field to the **HR - DEV OF INFO MATERIALS L2** option.

4.2.2 NSSC(SP) Reviews Request

1. After NSSC(CS) approves request and assigns to NSSC(SP), the NSSC(SP) Lead or Service Owner uses the instructions in paragraph [F.2, Working in ServiceNow – NSSC\(SP\) Lead Assigns Case to Team Member](#).
2. The assigned team member analyzes the request for the following elements:
 - Scope
 - Resources required
 - Clear and complete requirements
 - Audience

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- Content
- Branding
- Preferred working method of Requester (e.g., Track Changes for formatting, interim drafts, etc.)
- Delivery method
- Deadlines
- Etc.

If the request is Center specific or received from the Center level, review to determine if Agency-wide distribution would be more beneficial to the Agency. Note that if the request is not initially identified as Center specific and NSSC(SP) discovers it, NSSC(SP) contacts Lead/Service Owner to discuss.

Determine if the product is to be printed.

- If the product is to be printed, proceed to [paragraph 4.3, Step 3 – Obtain Approval of Initial Cost Estimate](#).
- If the product is not to be printed, proceed to [paragraph 4.4, Step 4 – Develop Draft](#).

4.3 Step 3 – Obtain Approval of Initial Cost Estimate

When a product needs to be printed, we only use GPO-approved vendors and the applicable GPO process.

- If the materials to be printed have not yet been developed, obtain an Initial Cost Estimate and get approvals before the materials are developed. This ensures that labor hours are not spent developing a product that the customer later determines is too expensive to print and does not need it for electronic distribution.
- If the materials to be printed have already been developed, use the Initial Cost Estimate steps to obtain a final cost. All approvals must be obtained, but you only need to go through the approvals once for materials that are ready to be printed.
- If a product is going to be distributed electronically regardless of the cost of printing, development may begin before bids are received. This generally occurs when a customer is not sure if the product will be printed, is not sure of the quantity, or if the product starts out as electronic only and is later printed.

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Note: The requirement for obtaining an Initial Cost Estimate only applies to the Development of Information Materials Team per NSSC(CS) requirements and team processes. It is not a Federal or Government Publishing Office (GPO) requirement. It does not apply to other NSSC teams. Therefore, it is necessary to explain our process requires this Initial Cost Estimate to printer vendors and GPO when discussing details of our projects.

4.3.1 NSSC(SP) Determines Which GPO Purchasing Process to Use

Use the following steps to determine which GPO purchasing process to use:

1. Review anticipated project specifications and previous project costs for similar items.

Note: Purchases on a SPA are limited to \$10,000. Over that, an SF 1 must be sent to GPO for bidding. If you anticipate the cost to be under \$10,000, but the bids are returned for over that amount, you must then move to the SF 1 process.

2. Do you anticipate the cost to be under \$10,000?
 - a. If you anticipate the cost to be under \$10,000, proceed to [paragraph 4.3.2, NSSC\(SP\) Uses SPA Process to Obtain Initial Cost Estimate](#).
 - b. If you anticipate the cost to be \$10,000 or more, skip to [paragraph 4.3.3, NSSC\(SP\) Uses SF 1 Process to Obtain Initial Cost Estimate](#).

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4.3.2 NSSC(SP) Uses SPA Process to Obtain Initial Cost Estimate

If you anticipate the printing cost to be under \$10,000, refer to [Appendix H, Purchasing Printed Materials Using GPO SPA Process](#), and use the following steps:

1. Fill out a Simplified Purchase Agreement (SPA) Work Order Form 4044 with all print specifications. Refer to [paragraph H.3, Write the SPA](#), for specific requirements and helpful information.
2. Make a duplicate SPA for each printing company being contacted for cost estimates, adding the specific print company information for each company.

Note: Confirm the number of SPA bid requests conforms to established NSSC, NASA, and GPO requirements. Orders for \$2,499.99 and less (contractor price) only require one bid if the quote is fair and reasonable. Per GPO requirements, ALL orders of \$2,500 and over MUST have three solicitations for bids.

3. Contact each company's POC before sending the request to ensure the print company is available and willing to receive a print order through the SPA process. Note that this is a good practice, but is not a requirement of the process.
4. Send draft SPAs to Lead or Service Owner for review. Refer to [Appendix H, Purchasing Printed Materials Using GPO SPA Process](#), for the e-mail template.
5. Receive the reviewed SPAs, and make needed changes.
6. E-mail the SPA Work Order form to each printing company. Refer to [Appendix H, Purchasing Printed Materials Using GPO SPA Process](#), for the e-mail template.
 - E-mails and conversations with printing companies should be documented and retained in ServiceNow.
 - Bid amounts received from the printing companies should not be copied into ServiceNow. However, e-mail messages and other details about the responses from the companies should be copied into ServiceNow.
 - All e-mails and conversations related to the request for bids must be sent to BMO for them to provide to GPO when a SPA is authorized. All e-mails and conversations (related to everything for the project) must be documented thoroughly per GPO requirements. These additional items

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may have to be sent to GPO if any questions arise from GPO or with product issues. Due to these requirements and to avoid any misunderstandings, it is always a good practice to follow up phone conversations with an e-mail detailing what was discussed.

7. Receive bid.

- If receiving more than one bid, determine which printing company can best fulfill the print requirements. If the lowest bidder is not selected, a justification must be written and concurrence received from the Service Owner or Lead. The written justification must be kept with the team's records and provided to the Business Management Office (BMO) when requesting approval to print.
- If submitted more than one bid request, but not all vendors replied, that must also be documented, kept with the team's records, and provided to the BMO when requesting approval to print.
- If the bids are returned for \$10,000 (contractor price) or more, you must then move to the SF 1 process. The SPA process cannot be used for purchases of \$10,000 or more.

8. Skip to [paragraph 4.3.4, NSSC\(SP\) Requests Approval of Initial Cost Estimate](#).

4.3.3 NSSC(SP) Uses SF 1 Process to Obtain Initial Cost Estimate

If you anticipate the printing cost to be \$10,000 or more, refer to [Appendix I, Purchasing Printed Materials Using GPO SF 1 Process](#), and use the following steps:

1. Fill out an SF 1 with all required information.
2. Send draft SF 1 to Lead or Service Owner for review. Refer to [Appendix I, Purchasing Printed Materials Using GPO SF 1 Process](#), for the e-mail template.
3. Receive the reviewed SF 1, and make needed changes.
4. Send the SF 1 to BMO for a number and signature. Refer to [Appendix I, Purchasing Printed Materials Using GPO SF 1 Process](#), for the e-mail template.
5. Receive a copy of BMO's e-mail to GPO with the signed SF 1.
6. Work with GPO, as needed, to fully define requirements and obtain the bid.

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7. Proceed to paragraph 4.3.4, NSSC(SP) Requests Approval of Initial Cost Estimate.

4.3.4 NSSC(SP) Requests Approval of Initial Cost Estimate

1. Send an e-mail to NSSC(CS) requesting approval on the Initial Cost Estimate. Refer to [Appendix H, Purchasing Printed Materials Using GPO SPA Process](#), for the e-mail template.
2. Proceed to paragraph 4.3.5, NSSC(CS) and Requester Approve Initial Cost Estimate.

4.3.5 NSSC(CS) and Requester Approve Initial Cost Estimate

NSSC(CS) reviews, approves, and forwards the Initial Cost Estimate using their internal procedures. The following high-level steps are included for reference only:

- Receive the e-mail.
- Review the Initial Cost Estimate.
- Accept the Initial Cost Estimate, add a line to the e-mail message, and forward the estimate to the requester with a request for approval to proceed.

Note: If NSSC(CS) has questions about the Initial Cost Estimate, NSSC(CS) contacts the Development of Information Materials Team for additional information.

The Requester reviews the Initial Cost Estimate and replies. The following high-level steps are included for reference only:

- Receive the e-mail.
- Review the Initial Cost Estimate.
- Reply to all on the e-mail from NSSC(CS), and indicate approval to begin work.

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Note: If the Requester has questions about the Initial Cost Estimate, the requester either contacts NSSC(CS) or replies to all on the e-mail with a request for additional information.

NSSC(CS) replies to all parties listed in the original e-mail from NSSC(SP) Development of Information Materials POC and indicates approval to proceed.

Note: The step is not needed if the Development of Information Materials Team is copied on all approvals.

4.3.6 NSSC(SP) Obtains Prime Contractor Approval of Initial Cost Estimate

After receiving NSSC(CS) and Requester approval of the Initial Cost Estimate, you must also obtain approval per requirements of the prime contractor, General Dynamics Information Technology. These additional approvals ensure that the NSSC(SP) HR Service Office Manager and the General Dynamics Information Technology contract and billing offices approve the purchase is within the approved contract and budget.

Note that we are requesting approval for 15% over the Initial Cost Estimate so that if there are minor unanticipated changes to the cost, we only have to obtain NSSC(CS), Requester, and NSSC(SP) HR Service Office Manager approval, not all of the General Dynamics Information Technology approvals again. If any change of cost exceeds the 15%, all approvals are required.

- a. Send the request for approval. Refer to [Appendix H, Purchasing Printed Materials Using GPO SPA Process](#), for the e-mail template. We have not used the SF 1 purchasing process since the prime contractor started requiring additional approvals. If this occurs, work with BMO to determine if the process is the same.
- b. Keep track of the approvals, saving in the ServiceNow Case Work notes as you receive them. Follow up with Robert Murray, if needed, to obtain General Dynamics Information Technology personnel approvals.

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4.4 Step 4 – Develop Draft

NSSC(SP) develops the draft product with the coordination of the Requester as well as SMEs, if applicable. The product will usually go through at least a few drafts, with some going through numerous drafts to fully develop the product. After the product is fully developed and changes completed, final approvals are obtained.

Important: Use the following job aid to assist you in developing your document:
[NSDIM-3000-0066, Job Aid: Document Development Checklist for the NSSC\(SP\) HR Development of Information Materials Team](#)

4.4.1 NSSC(SP) Develops Drafts

Develop the draft product, ensuring all product requirements are met (e.g., template, format, grammar, punctuation, style, etc.).

Download and use the following: [NSDIM-3000-0066, Job Aid: Document Development Checklist for the NSSC\(SP\) HR Development of Information Materials Team](#).

In addition, refer to the following appendices in this document for additional guidance:

- [Appendix B, Job Aids, Templates, References, and Resources](#).
- [Appendix C, Section 508 Accessibility Information](#).

4.4.2 NSSC(SP) Obtains Requester Approval of Initial Product:

NSSC(SP) and Requester perform actions in this step.

1. NSSC(SP) completes the following steps:
 - a. Send an e-mail to the Requester with the latest draft document attached in the Requester's desired format. Be sure to copy your Team SME, Lead, and Service Owner.
 - The documents are generally delivered in the native file format, but may be delivered in other formats, as appropriate. Note that graphics files are usually delivered in PDF format, and some products (e.g., letter and e-mail templates) are only delivered in Word format.

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- The e-mail should indicate the draft contains all the edits/changes as requested/discussed and it is ready for final draft review by all who need to review. For NSSC products, request that the NSSC(SP) and NSSC(CS) POCs obtain their team/leadership approval, if needed, including Amy Alexander for letter, e-mail, and memo templates. This ensures all interested parties have an opportunity to review prior to finalization.
- The e-mail should also indicate to the Requester that if the draft is approved, the Development of Information Materials Team POC will finalize the document and send through NSSC(CS) Oversight to the Requester for final official approval.

Sample e-mail message that should be customized as needed:

[CC for Most Products: Carrie Pohto, Jean Schmidt]

[CC for Drug Testing Products: Carrie Pohto, Jean Schmidt, Cherie Carlson (NSSC(CS) Drug Testing Oversight)]

[CC for SATERN Job Aids: Carrie Pohto, Jean Schmidt, Gloria O'Rourke (NSSC(CS) SATERN Technical POC), Patrick Maier (NSSC(CS) Training Administration Oversight)]

[Subject: For Review: Title]

Dear [Name],

Attached you will find [Draft # of Title of Document].

The document is ready for your review.

NEXT STEPS:

1. [To Development of Information Materials Team member preparing the e-mail, select the applicable option, customize, delete other options, remove highlights, and delete brackets and this note.]

[For Word files:]

Please review, marking any changes/questions in Track Changes. (The changes are visible from the "Review" tab with the "All Markup" option selected.)

[For PowerPoint files:]

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Please review, marking any changes/questions using the Comment feature. (The changes are visible from the “Review” tab with the “Show Comments” option selected.)

[For Graphics files:]

Please review. Please reply to all with your changes/questions identified in your e-mail response.

[For ALL files:]

IMPORTANT: Please do not use Office 365 OneDrive or Teams or any of the other collaboration tools to mark this document up. We have had significant trouble with those platforms not actually saving the Track Changes – the markups disappear and we cannot determine what was changed, causing a great delay in reviewing. This is a known issue for MS Teams.

2. If you need me to clean it up before you get additional approvals, reply to all with your review, and I will clean it up and return to you.
3. [To Development of Information Materials Team member preparing the e-mail, select the applicable option, customize, delete other options, remove highlights, and delete brackets and this note.]

[When sending to NSSC(SP):] Obtain all needed approvals from your team and leadership, as well as NSSC(CS), if needed. [Amy Alexander has previously required that she review all letter, e-mail, and memo templates. If she needs to review, please have her review while we are still in draft stage.]

OR

[When sending to NSSC(CS):] Obtain all needed approvals from your team and leadership, as well as NSSC(SP) and OCHCO, if needed. [Amy Alexander has previously required that she review all letter, e-mail, and memo templates. If she needs to review, please have her review while we are still in draft stage.]

OR

[When sending to OCHCO:] Obtain all needed approvals from your team and leadership as well as any NSSC or Center Points of Contact (POCs).

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4. After all draft reviews are complete, return to me. I will finalize and deliver to you for final official approval.

Please let me know if you have any questions/concerns.

Thanks,

[Signature Block]

- b. Update ServiceNow:
 - a. Add notes to the **Work Notes** field, including any conversations, actions, and a copy of e-mails.
 - b. Change the **Status** field to the **Pending** option and the **Audit/Review** suboption.
2. The Requester completes the following steps:
 - a. Review the product, obtaining all needed approvals.
 - b. Indicate approval and/or changes in a reply e-mail.
3. NSSC(SP) opens the ServiceNow Case and updates the **Work Notes** field.

4.4.3 Make Requested Changes

NSSC(SP) completes the following:

1. Review the returned product, makes any/all changes requested, and (if needed) returns a new draft to the Requester to ensure required changes and draft approvals are completed.
2. When all draft approvals are received and Requester is ready for the final product, open the ServiceNow Case Functional Detail, check the **Obtain Requester Approval of Initial Product** option, and add a note.
3. Proceed to paragraph 4.4.4, Obtain Final Approval.

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4.4.4 Obtain Final Approval

NSSC(SP), NSSC(CS), and the Requester perform actions in this step.

1. NSSC(SP) completes the following steps:
 - a. Finalize the product and prepare the product for delivery, including:
 - Ensuring the document control number and date are placed on the document, as appropriate. Refer to [Appendix K, Document Control Number](#), for instructions and information on obtaining the number.
 - Preparing the correct formats of the document. Some products are delivered in the native file and PDF format. Letter and e-mail templates are only delivered in Word format. Graphic files are only delivered in PDF format unless the customer requests the graphics files also be delivered.
 - b. If the product is to be printed, verify the final costs with the printing company based on the approved draft document.
 - c. In the ServiceNow Case, open the **Functional Detail** and locate the **Type of Request** field:
 - If the **Other Product** option (i.e., is something we are developing for NSSC, outside the HR deliverables) is selected, proceed to item 1d.
 - If the **HR Deliverable** option is selected, the product is **not** to be printed, and it is **not** a SATERN job aid, proceed to item 1e.
 - If the **HR Deliverable** option is selected, the product is not to be printed, and it **is** a SATERN job aid, proceed to item 1f.
 - If the **HR Deliverable** option is selected and the product **will** incur printing costs, proceed to item 1g.
 - d. If the product is an “Other Product,” e-mail the Requester with the final product, and request approval.
 - e. If the product is an “HR Deliverable” product that is **not** being printed and is **not** a SATERN job aid, e-mail the final document to the Requester for

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approval. The e-mail should include whatever information in the following is applicable to the project:

TO: Requester

CC: Deirdre Wolverton, NSSC(CS) Oversight, Carrie Pohto, Jean Schmidt, and any other team members if needed

SUBJECT: Approval Needed - Final Document for **Title** – HRC#####

Dear **RequesterName**,

This message contains the following final document for your approval:

Title

This document is not being printed, so there are no printing costs associated with it.

Attached **are**/is the following **files/file**:

File Name	Description
File Name .docx	MS Word version of the final document.
File Name .pdf	Acrobat version of the final document with a full scan completed and passed for accessibility requirements. If distributed or posted, we recommend using the PDF so that the format and pagination are correct.

Please review the attached **files/file**. Once you have reviewed and accepted, please reply to all parties with either comments or acceptance.

[To the Development of Information Materials Team member preparing this e-mail, this is a note for most documents. Delete the other if this one is used, and delete this note.] **Note:** After you have approved the files, please be sure to provide the PDF to the appropriate groups if you wish to have it uploaded to the Web.

[To the Development of Information Materials Team member preparing this e-mail, this is a note for e-mail templates to be uploaded into a system. Delete the other if this one is used, and delete this note.] **Note:** After you have approved the files, please be sure to provide the document to the appropriate groups for uploading into the system.

Thanks,

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[Signature Block]

- f. If the product is an “HR Deliverable” product that is **not** being printed and **is** a SATERN job aid, e-mail the final document to NSSC(CS) for approval. The e-mail should include whatever information in the following is applicable to the project:

TO: Patrick Maier (NSSC(CS) Training Administration Oversight)

CC: Carrie Pohto, Jean Schmidt, Deirdre Wolverton (NSSC(CS) Oversight), Document Requester, Dave Leggett (NSSC(SP) HRIS Service Owner, Heath Laprarie (NSSC(SP) HRIS SATERN Admin Lead), Gloria O’Rourke (NSSC(CS) SATERN Technical POC), and any other team members if needed

SUBJECT: Approval Needed - Final Document for **Title** – HRC#####

Dear Patrick,

This message contains the following final document for your approval:

Title

This document is not being printed, so there are no printing costs associated with it.

Attached **are**/is the following **files/file**:

File Name	Description
File Name .docx	MS Word version of the final document.
File Name .pdf	Acrobat version of the final document with a full scan completed and passed for accessibility requirements. If distributed or posted, we recommend using the PDF so that the format and pagination are correct.

Please review the attached **files**/file. Once you have reviewed and accepted, please reply to all parties with either comments or acceptance.

Note for SATERN Job Aids: Reminder that the document Requester or NSSC(CS) Training Administration Oversight sends the final PDF file to the NSSC Customer Contact Center with a request to create a Case to request posting of the job aid to <https://satern.nasa.gov/> in the Resources section.

Thanks,

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[Signature Block]

- g. If the product is an “HR Deliverable” product that **includes a print cost**, e-mail the final document and final cost information to NSSC(CS) for approval.

Important: All products that include any printing costs must go through NSSC(CS) Oversight for final approval so NSSC(CS) can track spending.

The e-mail should include whatever information in the following is applicable to the project:

TO: Deirdre Wolverton, NSSC(CS)

CC: Carrie Pohto, Jean Schmidt, and any other team members if needed

SUBJECT: Approval Needed - Final Document for **Title** – HC#####

Dear Deirdre,

This message contains the following final document for approval by you and the Requester, **Name**:

Title

I have been working with the Requester on the development of this document throughout the draft and finalization process.

Attached are the following files:

File Name	Description
File Name .docx	MS Word version of the final document.
File Name .pdf	Acrobat version of the final document with a full scan completed and passed for accessibility requirements.

The cost is as follows:

Quantity	Description	Price

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Please review the cost and attached files. Once you have reviewed and accepted, please forward to **Name** for final review and acceptance.

Please reply to all parties with either comments or acceptance so we can all stay updated on the progress.

Note to the Requester: After you have approved the files, please be sure to provide the PDF to the appropriate groups if you wish to have it uploaded to the Web.

Thanks,

[Signature Block]

2. NSSC(SP) opens the ServiceNow Case Functional Detail, checks the **Obtain Final printing Cost and Approval** option, adds a note, and saves the update.
3. NSSC(CS) reviews the final product and cost using their internal procedures. The following high-level steps are included for reference only:
 - Receive the e-mail titled Approval Needed - Final Document and Cost for Product Name – NSRXXXXXXX.
 - Review and accept the Final Document and Cost e-mail.
 - Forward the e-mail to the requester for comment and acceptance.
4. The Requester accepts the Final Document and Cost e-mail, and reviews the product/cost; indicating approval in a reply e-mail to all.
5. NSSC(CS) replies to all parties listed in the original e-mail from NSSC(SP), including the acceptance e-mail from the Requester.

Note: The step is not required if the requester replies to all with acceptance.

6. NSSC(SP) obtains final cost approval from the prime contractor. If the cost has not exceeded the extra 15 percent on the initial approval, only the NSSC(SP) Service Office Manager needs to provide approval.

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4.5 Step 5 – Distribute Final Materials

4.5.1 NSSC(SP) Produces and Distributes Materials

Important: The instructions in this paragraph apply to distributing materials, sometimes including getting files uploaded to TechDoc or other areas for Web accessibility. In addition to whatever uploading is required for distribution, you must ensure that files are uploaded to the team TechDoc folder structure for archive and retrieval purposes by the team. Those instructions are found in paragraph 4.5.2, NSSC(SP) Closes Out Work Request.

How products are distributed depends on the product. Use the following information to coordinate the reproduction (if needed) and delivery of the document according to the request:

1. If the final output is to be distributed electronically from the NSSC to the requester, it has already been completed in the e-mail delivery through the NSSC(CS) POC. Update the ServiceNow Case, and proceed to Paragraph 4.5.2, NSSC(SP) Closes out Work Request.
2. If the final output is to be distributed hard copy (including paper, banner, Compact Disc (CD) or Digital Video Disk (DVD) from NSSC, use the following steps:
 - a. Notify BMO of the approvals and request signed SPA. Refer to [Appendix H, Purchasing Printed Materials Using GPO SPA Process](#), for the e-mail template. If the product is to be printed using the SF 1 process, consult with BMO and your Lead or Service Owner regarding additional approvals.
 - b. Produce and package camera-ready artwork as required by the printing company.
 - c. Arrange to deliver the camera-ready artwork to the printing company.
 - d. Update ServiceNow, indicating the materials have been delivered to the printing company.

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- e. Receive notification from the printing company when an electronic proof is available for approval. Review for content, layout, size, and color. Provide approval/changes.
- f. Update ServiceNow, indicating the team member has approved an electronic proof of the product.
- g. Receive notification from the printing company when a hard copy proof is available for approval. The hard copy proof will usually consist of a blueline proof (for alignment) and a color proof (for color checking).
- h. Visit the printing company's location for a press check, if possible, or arrange for other quality check options.
- i. Ensure the printing company has fulfilled the quality measures as stated on the SPA (e.g., High quality reproduction; color or black and white; free of spots, streaks, and creases; pages collated properly and pages in correct order, facing correct direction; pages included in each final packet; and packets stapled correctly).
- j. Update ServiceNow, indicating the team member has approved a proof of the final product. (Do this for each proof reviewed and approved. Include all notes from phone calls (who, what, where, when) and copies of e-mails.)
- k. Coordinate advance notification of completion of job so random quality checks or press checks can be done, if possible.
- l. Update ServiceNow, indicating the team member has performed random quality checks or press checks.
- m. Coordinate timely completion by printing company according to the original SPA.
- n. Update ServiceNow, indicating when the printing company has completed duplication.
- o. Coordinate shipping and delivery of the final reproduced material per the requester's delivery output instructions, which may include arranging for a third-party shipper.

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- p. Update ServiceNow, indicating shipping information, including: date and time of shipping; carrier; tracking number; promised delivery date; time; address; and other pertinent information.
 - q. Update the ServiceNow Case, and proceed to Paragraph 4.5.2, NSSC(SP) Closes out Work Request.
 3. If in unusual circumstances, the hard copy duplication is to be done by the Centers or others outside the NSSC:
 - a. In general, if another office is handling reproduction of materials, the requester will provide requirements and receive the electronic files for printing. If the requester advises you to work directly with other POCs, contact the POCs for reproduction requirements.
 - b. Complete the following updates in ServiceNow:
 - Indicate who was contacted.
 - Copy or attach requirements from the Center.
 - c. Produce camera-ready artwork as required by the POCs (Duplication company).
 - d. Arrange to deliver the camera-ready artwork to the proper POCs. The delivery is normally done through e-mail or NASA's Large File Transfer.
 - e. Complete the following updates in ServiceNow:
 - Indicate the date the camera-ready artwork was shipped or delivered, carrier, and other pertinent information.
 - Contact each POC to ensure receipt of the package.
 - f. Complete the following updates in ServiceNow:
 - Indicate the date the POCs received the artwork.
 - g. Update the ServiceNow Case, and proceed to Paragraph 4.5.2, NSSC(SP) Closes out Work Request.
 4. If the final output is to be posted on a Web page by OCHCO, the requester generally provides the files to the OCHCO Web POC. If the requester asks you to provide to the OCHCO Web POC, request POC information, coordinate delivery of needed files, and notify requester when you have provided the files.

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Update the ServiceNow Case, and proceed to Paragraph 4.5.2, NSSC(SP) Closes out Work Request.

5. If the final output is to be posted on a Web page by the NSSC:
 - a. If the product is a **SATERN job aid**, the requester or NSSC(CS) Training Administration Oversight sends the final PDF file to the NSSC Customer Contact Center with a request to create a Case to request posting of the job aid to saturn.nasa.gov in the Resources section. Update the ServiceNow Case, and proceed to Paragraph 4.5.2, NSSC(SP) Closes out Work Request.
 - b. If the product is the **SATERN Guidelines for Developing SATERN Job Aids** or either of the **SATERN Job Aids Templates**, after approvals, ensure you request NSSC(CS) oversight uploads the file(s) to TechDoc in the oversight's Web link location. After NSSC(CS) uploads, verify that the links to those documents in the Guidelines document work. Update the ServiceNow Case, and proceed to Paragraph 4.5.2, NSSC(SP) Closes out Work Request.
 - c. If the requester is an NSSC employee, the requester generally works with NSSC(CS) oversight to have the NSSC(CS) oversight upload the file to TechDoc in the oversight's Web link location. If the document is an updated version of a previously uploaded document, wherever the link was previously used should automatically pull the updated document. If the document is a new document that has not been previously uploaded by NSSC(CS) oversight, NSSC(CS) oversight provides the Web link to the requester, and the requester submits the Web link through the appropriate NSSC IT process for creating a new link on the NSSC page. Update the ServiceNow Case, and proceed to Paragraph 4.5.2, NSSC(SP) Closes out Work Request.

Proceed to Paragraph 4.5.2, NSSC(SP) Closes Out Work Request.

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4.5.2 NSSC(SP) Closes Out Work Request

Use the following steps to upload the final files to TechDoc and close out the work request:

1. Upload the final files to TechDoc using the instructions in Appendix L, TechDoc Guidance.
2. Ensure e-mails, letters, or other information critical to the requirements or final product is included in the ServiceNow Case.
3. Update ServiceNow:
 - a. Indicate the materials have been uploaded to TechDoc or the location.
 - b. In the **Functional Detail**, if the Type of Request field is **HR Deliverable Product**, complete applicable items, ensuring the following fields are correctly filled:
 - Negotiated Due Date
 - Materials Distributed Date
 - Customer Approval Required
 - Final Product Approved by Customer
 - c. Change the **Case Status** field to the **Closed Complete** option.
 - d. Log correct information in the **Work notes** field.
 - e. Click the **Save** button.

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5.0 – Objective

To ensure NSSC develops informational materials relating to a variety of Agency HR programs. The NSSC(SP) will create informational materials to meet the needs of the targeted audiences; such as, subject matter staff, NASA employees, and/or the general public. The NSSC(SP) will ensure products are accurate, clear, standardized, and adhere to NASA styles/standards.

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6.0 – Roles and Responsibilities

6.1 Requester Responsibilities

The Requester is responsible for the following:

- a. Determining the need for materials.
- b. Accessing, completing, and submitting the Request form.
- c. Receiving, approving, and forwarding the Initial Cost Estimate.
- d. Accepting the draft.
- e. Reviewing the product and indicating approval and/or changes.
- f. Accepting the Final Document and Cost e-mail.
- g. Reviewing the product/cost and indicating approval.
- h. Providing the NSSC(CS) Web link to the appropriate Web team for posting, as needed.

6.2 NSSC(CS) Responsibilities

NSSC(CS) is responsible the following:

- a. Receiving the ServiceNow Case notification.
- b. Reviewing, approving, and reassigning the ServiceNow Case.
- c. Receiving, reviewing, and forwarding Initial Cost Estimate.
- d. Replying to each party listed in original e-mail.
- e. Accepting the initial draft and forwarding the e-mail to Requester.
- f. Receiving the e-mail, accepting the Final Cost and Document e-mail, and forwarding the e mail to the Requester.
- g. Saving the final document to the NSSC(CS) TechDoc location for Web posting, if needed, and providing the Requester with the access link.

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6.3 NSSC(SP) Responsibilities

NSSC(SP) is responsible for the following:

- a. Working the ServiceNow Case, including receiving and opening the ServiceNow Case notification, completing updates in ServiceNow, and closing when completed.
- b. Determining the scope of the project.
- c. Determining the final outcome of the materials.
- d. Drafting content and designing layout with graphics.
- e. Ensuring project conforms to NSSC and NASA regulations, is well written, consistent, logical, clear, and accurate.
- f. Making and returning changes requested during the project development.
- g. Finalizing and delivering the product as requested and per all procedures.
- h. Complying with all NASA, NSSC, and GPO printing requirements, including:
 - Obtaining Initial Cost Estimates.
 - Verifying the final costs.
 - Forwarding all costs to NSSC(CS) for approval.
- i. Coordinating with the Information Technology Web Developer POC, if needed.
- j. Posting PDF and native versions of materials to TechDoc as appropriate.
- k. Ensuring critical information is included in ServiceNow Case.

6.4 Web Developer POC Responsibilities

The Web developer is responsible for posting to the Web and coordinating with Centers.

6.5 Center Responsibilities

The Center is responsible for posting the material to the Web site, if needed.

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7.0 – Records

All records will be maintained in accordance with NASA Procedural Requirements (NPR) 1441.1, NASA Records Management Program Requirements, and NASA Policy Directive (NPD) 1440.6, NASA Records Management. Records for development of information materials are listed on the NSSC Master Records Index (MRI) under NASA Records Retention Schedule (NRRS) Sch. 1 (86) (B) (2).

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8.0 – Cancellation/Supersession of Previous Documents

This document supersedes NSPWI-3000-0007, NSSC Development of Information Materials Process Work Instruction, Revision 0009.

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Appendix A – Acronym List

The acronyms and meanings in this appendix are for those that appear in this Work Instruction. When developing documents/projects, refer to the following:

- [NSREF-3000-0688, Job Aid: Acronyms & Abbreviations that Frequently Require Correcting in Documents](#)
- [NSDIM-3000-0057, Job Aid: Glossary for NSSC\(SP\) HR Development of Information Materials Team](#)

Acronym	Meaning
BMO	Business Management Office
CD	Compact Disc
CMR	Communication Management Review
CS	Civil Servant
DI	Document Imaging
DVD	Digital Video Disk
FD	Functional Detail
GPO	Government Publishing Office
HQ	Headquarters
HR	Human Resources
I3P	IT Infrastructure Integrated Program
IT	Information Technology
NASA	National Aeronautics and Space Administration
NODIS	NASA Online Directives Information System
NPR	NASA Procedural Requirements

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Acronym	Meaning
NSR	NSSC Service Request
NSSC	NASA Shared Services Center
OCHCO	Office of the Chief Human Capital Officer (formerly OHCM)
OHCM	Office of Human Capital Management (transitioned to OCHCO October 2018)
OPM	Office of Personnel Management
PDF	Portable Document Format
POC	Point of Contact
PWI	Process Work Instruction
SDG	Service Delivery Guide
SDNS	Standardized Document Numbering System
SES	Senior Executive Service
SME	Subject Matter Expert
SP	Service Provider
SPA	Simplified Purchase Agreement
U.S.	United States

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Appendix B – Job Aids, Templates, References, and Resources

This appendix provides information on references and resources to assist in all areas of the Development of Information Materials function.

Note: There are resources that are available to all NSSC HR personnel in the resources document on our team webpage or at [NSDIM-3000-0061, Job Aid: Resources for NSSC\(SP\) HR Document Development](#). In addition to those, this appendix includes information only used by our team and not included in that resources document.

The following are included in this appendix:

- [B.1, Instructions for NSSC HR Personnel to Access Our Team Resources](#)
- [B.2, General Resources](#)
- [B.3, Service Delivery Guide \(SDG\) Templates and Resources](#)
- [B.4, Work Instruction Templates and Resources](#)
- [B.5, Letter, E-mail, and Memo Templates and Resources](#)
- [B.6, Star Banner Templates and Resources](#)

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B.1 Instructions for NSSC HR Personnel to Access Our Team Resources

When any NSSC(SP) or NSSC(CS) HR team member contacts you for any of the resources available in our **Job Aid: Resources for NSSC(SP) HR Document Development**, use the e-mail template in this paragraph to provide the individual with instructions for locating the job aid.

Note: The **Job Aid: Resources for NSSC(SP) HR Document Development** is released for NSSC personnel access. If you receive a request from OCHCO or other Centers, you will need to download the file and e-mail to that customer.

SUBJECT: Instructions for Locating Document Development Resources from the Development of Information Materials Team

Dear [Name],

The Development of Information Materials Team has templates and other resources that may assist you in developing your document. To locate a list of resources and related links, use the following instructions:

- Visit the “**NSSC Development of Information Materials Web page**” at: <https://nasa.sharepoint.com/sites/nssc/SitePages/DevelopmentofInformationMaterials.aspx>.
- Click the “**Job Aid: Resources for NSSC(SP) HR Document Development**” link.

Please access that link each time you need any of the resources so you get the latest updates.

If you need any assistance with the resources, please let me know.

Thanks!

[Signature Block]

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B.2 General Resources

General Resources Item	Description	Location & Links (Embedded in Document Number and Title & Long Link)
TechDoc	Archive of Delivered Documents and Products	<ul style="list-style-type: none"> Access the NSSC Internal site (https://nasa.sharepoint.com/sites/nssc/). Click the NSSC Employees link. Click the TechDoc link. Access the following folder: /HR/Development_of_Informational_Materials
NSREF-3000-0688 Job Aid: Acronyms & Abbreviations that Frequently Require Correcting in Documents	Not all NASA acronyms are included, but this document identifies common typos/corrections.	NSREF-3000-0688, Job Aid: Acronyms & Abbreviations that Frequently Require Correcting in Documents https://dm.nssc.nasa.gov/servlet/dm.web.Fetch?did=5975066&rev=\$latest
NSDIM-3000-0057 Job Aid: Glossary for NSSC(SP) HR Development of Information Materials Team	This document contains helpful information on terms, especially those that are rapidly changing in the OCHCO community.	NSDIM-3000-0057, Job Aid: Glossary for NSSC(SP) HR Development of Information Materials Team https://dm.nssc.nasa.gov/servlet/dm.web.Fetch?did=6346660&rev=\$latest
Graphics Resources	Links to and locations of Graphics resources, including: <ul style="list-style-type: none"> Agency Honor Awards Medals Center Photo Resources 	<ul style="list-style-type: none"> Access TechDoc. Access the following folder: /HR/Development_of_Informational_Materials/Resources_and_Job_Aids/Graphics_Resources

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General Resources Item	Description	Location & Links (Embedded in Document Number and Title & Long Link)
How To's and Helpful Information	<ul style="list-style-type: none"> • Uploading files to printer vendors • Capturing screen grabs without SnagIt • Using Track Changes • Software needed for team • Packaging and saving graphics files • Printing and shipping order information 	<ul style="list-style-type: none"> • Access TechDoc. • Access the following folder: /HR/Development_of_Informational_Materials/Resources_and_Job_Aids/How_To's_and_Helpful_Information
Section 508 Resources	<ul style="list-style-type: none"> • Introduction to Section 508 Compliance for our team • Adding metadata to Word files 	<ul style="list-style-type: none"> • Access TechDoc. • Access the following folder: /HR/Development_of_Informational_Materials/Resources_and_Job_Aids/Section 508 Resources
NSDIM-3000-0061 Job Aid: Resources for NSSC(SP) HR Document Development	<p>This document contains links to resources that may be helpful to NSSC(SP) HR personnel when developing documents.</p> <p>In addition to uploading updates to TechDoc, a copy of the PDF of this document is maintained in the following location for HR teams to access: N:\SP Human Resources\Document Development Resources</p>	<p>NSDIM-3000-0061, Job Aid: Resources for NSSC(SP) HR Document Development</p> <p>https://dm.nssc.nasa.gov/servlet/dm.web.Fetch?did=6431851&rev=\$latest</p>

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B.3 Service Delivery Guide (SDG) Templates and Resources

The SDG is NASA's vehicle for letting the SP company, SP teams, and CS customers know the high-level processes associated with that function. The SDG is initially created as a function comes on board the NSSC, then updated as needed or scheduled.

Important: The current contract requires the SP team update the SDG within 2 weeks of an approved process change. Additionally, the SDGs have a 3-year review period, so if no changes have occurred within that time, the SDG must be reviewed and updated prior to expiration. This is a required contract deliverable.

When working on our team SDG or assisting other teams with locating resources to update theirs, it is helpful to know the general process, how to locate the latest Word version for updating, and what resources will help you or the other teams in updating or developing an SDG.

Note: For instructions on locating the currently published SDG, locating the latest Word version, and other helpful resources, refer to [NSDIM-3000-0061, Job Aid: Resources for NSSC\(SP\) HR Document Development](#). Since we update these as requirements change and questions are raised, please **always** go to the job aid and open the resources from there.

General Process for Updating an SDG

Since our SDG was initially created in 2006, we are now only performing updates, not creating a new one. The following is our general process:

1. When the SDG needs to be reviewed or updated, check with your Service Owner and Lead to ensure that nobody else has started reviewing or updating.
 - a. If someone is already working on it, provide your recommendations to that person.
 - b. If nobody is working on the update, proceed to Step 2.

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2. Create a folder on the team shared drive and notify your Service Owner and Lead that you are setting up your working files/folders, identifying the location. This ensures they can access it if you are out of the office. Your working folder should be created here:
N:\SP Human Resources\DevOfInfoMaterials\WorkInstructions SDGs & Other HowToDocs\SDG
3. Locate the current official Word version of the SDG and download it for updating. Do not locate an old version of the Word file from team folders since there is no way of knowing if that was changed prior to official uploading. Refer to the following document for locating the Word file: [NSDIM-3000-0069, Job Aid: Locating Published Service Delivery Guide and Updating Tips for NSSC\(SP\) HR Teams.](#)
4. Download the resources in paragraph B.2.2, Resources for Updating and Creating an SDG.
5. To ensure all steps in the update are completed, use [NSREF-3000-0684, Job Aid: Checklist for Formatting and Editing NSSC HR SDGs for the NSSC\(SP\) HR Development of Information Materials Team.](#)
6. Submit your updated draft (with Track Changes) to your SME/Lead/Service Owner for review. Request all changes in Track Changes.
7. Receive your SME/Lead/Service Owner's review. Review to address any items needed.
8. Submit your updated draft to your NSSC(CS) counterpart for review. Request all changes in Track Changes.
9. Receive your NSSC(CS) counterpart's review. Review, address any outstanding items. Coordinate additional drafts with your SME/Lead/Service Owner/NSSC(CS) counterpart.
10. When all changes are completed and approved by SP and CS, update the Document History Log, accept changes, and prepare final draft for technical edit.
11. Send final draft to SME/Lead/Service Owner, requesting a technical edit using Track Changes.
12. Address any/all technical edits.
13. Finalize document, ensuring checklist is followed.

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14. Deliver to SME/Lead/Service Owner. The Service Owner completes a final check, then submits the Word and PDF versions to the Service Office Manager with the approval form. The Service Office Manager forwards the Word and PDF versions with the approval form to the NSSC HR Director, Office of the Chief Human Capital Officer.
15. The NSSC HR Director, Office of the Chief Human Capital Officer, provides approval signatures on the document and the approval form, then forwards to Document Management per the NSSC(CS) process.
16. When notified that the SDG has been uploaded to TechDoc, verify that the PDF and Word files are uploaded. Use the instructions in the following document to check both: [NSDIM-3000-0069, Job Aid: Locating Published Service Delivery Guide and Updating Tips for NSSC\(SP\) HR Teams](#)

If either are not as you expect, notify your Service Owner and Lead for assistance.

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B.4 Work Instruction Templates and Resources

The Work Instruction (i.e., this document) is for the NSSC(SP) functional team. It includes detailed procedures for the team processes. It also contains links to job aids that supplement the Work Instruction.

Important: The current contract requires the SP team update the Work Instruction within 2 weeks of an approved process change. Additionally, the Work Instructions have a 1-year review period, so if no changes have occurred within that time, the Work Instruction must be reviewed and updated prior to expiration. This is a required contract deliverable.

Note that before the NSSC adopted the formal use of Work Instructions, the team developed and used a Desk Guide that included the detailed procedures. Now that the Work Instruction is a contractual requirement, we are no longer using the Desk Guide.

When working on our team Work Instruction or assisting other teams with locating resources to update theirs, it is helpful to know the general process, how to locate the latest Word version for updating, and what resources will help you or the other teams in updating or developing a Work Instruction.

Note: For instructions on locating the currently published Work Instruction, locating the latest Word version, and other helpful resources, refer to [NSDIM-3000-0061, Job Aid: Resources for NSSC\(SP\) HR Document Development](#). Since we update these as requirements change and questions are raised, please **always** go to the job aid and open the resources from there.

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General Process for Updating a Work Instruction

Since our Work Instruction was initially created in 2006, we are now only performing updates, not creating a new one. The following is our general process:

1. When the Work Instruction needs to be reviewed or updated, check with your Service Owner and Lead to ensure that nobody else has started reviewing or updating.
 - a. If someone is already working on it, provide your recommendations to that person.
 - b. If nobody is working on the update, proceed to Step 2.
2. Create a folder on the team shared drive and notify your Service Owner and Lead that you are setting up your working files/folders, identifying the location. This ensures they can access it if you are out of the office. Your working folder should be created in the following location:
N:\SP Human Resources\DevOfInfoMaterials\WorkInstructions SDGs & Other HowToDocs\Work Instruction
3. Locate the current official Word version of the document and download it for updating. Do not locate an old version of the Word file from team folders since there is no way of knowing if that was changed prior to official uploading. Refer to the following document for locating the Word file: [NSDIM-3000-0068, Job Aid: Locating Published Work Instruction and Updating Tips for NSSC\(SP\) HR Teams](#).
4. Download the resources in paragraph B.3.2, Resources for Updating and Creating a Work Instruction.
5. Make all changes in Track Changes.
6. Submit your updated draft (with Track Changes) to your SME/Lead/Service Owner for review. Request all changes in Track Changes.
7. Receive your SME/Lead/Service Owner's review. Review to address any items needed.
8. When all changes are completed and approved by your SME/Lead/Service Owner, update the Document History Log, accept changes, and prepare final draft for technical edit.

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9. Send final draft to SME/Lead/Service Owner, requesting a technical edit using Track Changes.
10. Address any/all technical edits.
11. Finalize document.
12. Deliver to SME/Lead/Service Owner. The Service Owner completes a final check, then submits the Word and PDF versions to the Service Office Manager. The Service Office Manager signs and submits to Document Management for uploading.
13. When notified that the Work Instruction has been uploaded to TechDoc, verify the PDF and the Word files are uploaded. Use the instructions in the following document: [NSDIM-3000-0068, Job Aid: Locating Published Work Instruction and Updating Tips for NSSC\(SP\) HR Teams](#).

If either are not as you expect, notify your Service Owner and Lead for assistance.

B.5 Letter, E-mail, and Memo Templates and Resources

Letter and e-mail templates were developed for use by the NSSC(SP) HR teams. NASA and NSSC styles/standards are followed and 508 compliance features are included.

Note: To locate links to letter, e-mail, and memo templates and other helpful resources, refer to [NSDIM-3000-0061, Job Aid: Resources for NSSC\(SP\) HR Document Development](#). Since we update these as requirements change and questions are raised, please **always** go to the job aid and open the resources from there.

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B.6 Star Banner Templates and Resources

The Star Banner Template is for HR Web content that the content owner wants easily viewable on the Web as well as easy to print for anyone wishing to print the information. The templates have been used for NSSC and OCHCO content.

Note: To locate links to Star Banner templates and other helpful resources, refer to [NSDIM-3000-0061, Job Aid: Resources for NSSC\(SP\) HR Document Development](#). Since we update these as requirements change and questions are raised, please **always** go to the job aid and open the resources from there.

Updates to Star Banner Templates:

- If template changes or updates are needed, make them in the Blank (no graphic) Layout.
- Then use copies of the updated Blank Layout to add the star banners for each of the ones with graphics.
- Do not just update the Blank Layout and the one star banner you are working. They all need to be updated if a style or template update is made so everyone has access to the same styles and features.

New Star Banner Templates:

- If you need a template for a team/topic that does not yet have a template, work with the Team Graphic Artist to get the new graphic, then add that graphic to a copy of the latest Blank Layout to create your new star banner template.
- The new one will need to be uploaded to TechDoc, the team notified, and the list of templates updated in [NSDIM-3000-0061, Job Aid: Resources for NSSC\(SP\) HR Document Development](#).

Since we update these as requirements change and questions are raised, please **always** go to the resources job aid and open the resources from there.

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Appendix C – Section 508 Accessibility Information

Section 508 compliance applies not only to software and hardware, but also to documentation and other materials developed by and for Federal agencies.

a. NASA Resources:

- Section 508 Web Page:
https://www.nasa.gov/accessibility/section508/sec508_overview.html

b. United States Access Board Resources:

- Information on the Final Rule:
 - United States Access Board Overview of the Final Rule Web Page
<https://www.access-board.gov/guidelines-and-standards/communications-and-it/about-the-ict-refresh/overview-of-the-final-rule>
 - United States Access Board Final Rule Web Page
<https://www.access-board.gov/guidelines-and-standards/communications-and-it/about-the-ict-refresh/final-rule>

c. General Services Administration (GSA) Section 508 Site:

- Location: <https://www.section508.gov/create>
- This site contains instructions, checklists, and videos related to 508 compliance for digital products.

d. RGB to Hexadecimal Color Conversion Using RapidTables Site:

<http://www.rapidtables.com/convert/color/rgb-to-hex.htm>

e. WebAIM Color Contrast Checker: <http://webaim.org/resources/contrastchecker/>

f. NSSC(SP) HR Development of Information Materials Resources:

- [NSREF-3000-0671, Job Aid: Introduction to Section 508 Compliance for Development of Information Materials Team Documents:](https://dm.nssc.nasa.gov/servlet/dm.web.Fetch?did=5934184&gen=$latest)
[https://dm.nssc.nasa.gov/servlet/dm.web.Fetch?did=5934184&gen=\\$latest](https://dm.nssc.nasa.gov/servlet/dm.web.Fetch?did=5934184&gen=$latest)
- [NSREF-3000-0672, Job Aid: Adding Metadata to Word Files for NSSC\(SP\) HR Development of Information Materials Team:](https://dm.nssc.nasa.gov/servlet/dm.web.Fetch?did=5934325&rev=$latest)
[https://dm.nssc.nasa.gov/servlet/dm.web.Fetch?did=5934325&rev=\\$latest](https://dm.nssc.nasa.gov/servlet/dm.web.Fetch?did=5934325&rev=$latest)

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Appendix D – Instructions for Accessing Archived Legacy Remedy Records

This appendix provides instructions for accessing the archived legacy Remedy records. Remedy was the original work tracking system used by the NSSC. It was replaced by ServiceNow in 2015.

Important: NSSC is working to eliminate the Remedy records, so these will not be available indefinitely.

D.1 Accessing All Archived Legacy Remedy Records for Team

To access all of our team's archived Remedy records, use the following steps:

1. Access TechDoc. (From the [NSSC Employees webpage](#), click the **TechDoc** link.)
2. Navigate to the following location:
[Root/NSSC INTERNAL LIBRARY/SOD – Support Operations Directorate/IRD – Information Resources Division/Information Management \(IM\)/FY Quarterly Records Destructions \(keep 6 years\)/2021 E-Destructions/Remedy Legacy Tickets for years 2006-2015/HR DIM Work Activity](#)
3. Open the folder for the desired year.
4. Open the file for the desired ticket.

D.2 Accessing a Specific Archived Legacy Remedy Record for Team

To search for a specific archived Remedy record, use the following steps:

1. Access TechDoc. (From the [NSSC Employees webpage](#), click the **TechDoc** link.)
2. Click the **Advanced Search** link.
3. If you have the NSR #, you can use a wildcard asterisk (*) in the **Number** field or with the name of the customer in the **Title** field.
4. In the **Doc Type** field, select the **LRR – Legacy Remedy Records – Closed Records Migrated from Remedy** option.

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5. Click the **OK** button.
6. From the search results, open the desired record.

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Appendix E – Instructions for Submitting Request for Development of Information Materials Team to Perform Work

The vast majority of our work should come through the official method of submitting the request through the team web request form. This ensures that the work is approved by NSSC(CS) prior to our team working on it, as required. However, the only exception to this requirement is for items that our team works on related to our internal processes. Our NSSC(CS) counterpart approved the use of our work tracking system (currently ServiceNow) to track the work we perform updating our team's Work Instruction, creating and updating job aids for our team's process, updating our team's SDG, etc. Notice that this specifically refers to our internal procedures for items we develop that are either contract deliverables (e.g., SDG, Work Instruction) or are to capture our working processes. It does not refer to any work we perform in support of other teams for their similar products.

Use the applicable instructions:

- For instructions on submitting a request through the team web request form, refer to paragraph [E.1, Instructions for Submitting Request for Support](#).
- For instructions on submitting a request for our internal procedures, refer to paragraph [E.2, Instructions for Submitting Case for Internal Team Product](#).

E.1 Instructions for Submitting Request for Support

When a customer requests information on how to submit a request for support, advise the customer to submit a separate request for each product/document. Even if the customer is an NSSC employee, these instructions should be used so that the Case and Functional Detail are correctly created for our process.

Important: If a customer sends a request directly through ServiceNow (without using the form), notify your SME/Lead/Service Owner. Cases need to go through NSSC(CS) for approval to work, the Functional Detail will need to be added, and the Case assigned. Additionally, our NSSC(CS) counterpart does not get notified of Cases awaiting approval if the Functional Detail is not in the Case, which could result in a Case not being worked in a timely manner.

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The following e-mail template can be sent to the customer, customizing as needed:

SUBJECT: Instructions for Submitting Web Request Form for Development of Information Materials Team Assistance

Dear **Name**,

Thank you for contacting us to support your project. To submit your request through our web form:

1. Please use Chrome or Firefox and visit the NSSC Development of Information Materials webpage at <https://nasa.sharepoint.com/sites/nssc/SitePages/DevelopmentofInformationMaterials.aspx>. (If the link does not open properly, copy and paste into your browser address bar.)
2. Under the "Request Development of Information Materials Support" heading, click the "Click Here to Request" link.
3. Complete the form. Note that the "Submitter/Requestor Information" and the "Definition and Project Background" are the only required fields.
4. If you have files ready to send to us, please attach them to the request by clicking the "Add attachments" paperclip link.
5. Click the "Submit" button.

After you submit your request, our Government counterpart will review the request and forward to us for action. At that time, we will contact you to discuss your requirements further.

If you need any assistance with submitting this request, please let me know.

Thanks!

Your Signature Block

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E.2 Instructions for Submitting Case for Internal Team Product

When an internal team procedure document (e.g., SDG, Work Instruction, job aid) needs to be developed or updated, a separate Case is created for each product/document using the steps in this paragraph. Things to note about this type of Case:

- These Cases will not be submitted through NSSC(CS) for approval of the Case itself or of the product.
- This method is **NOT** to be used for anything that should be captured in metrics reports.
- These Cases **will** show up on the ServiceNow report pulled each month to identify which projects you worked for the purpose of monthly performance reviews.

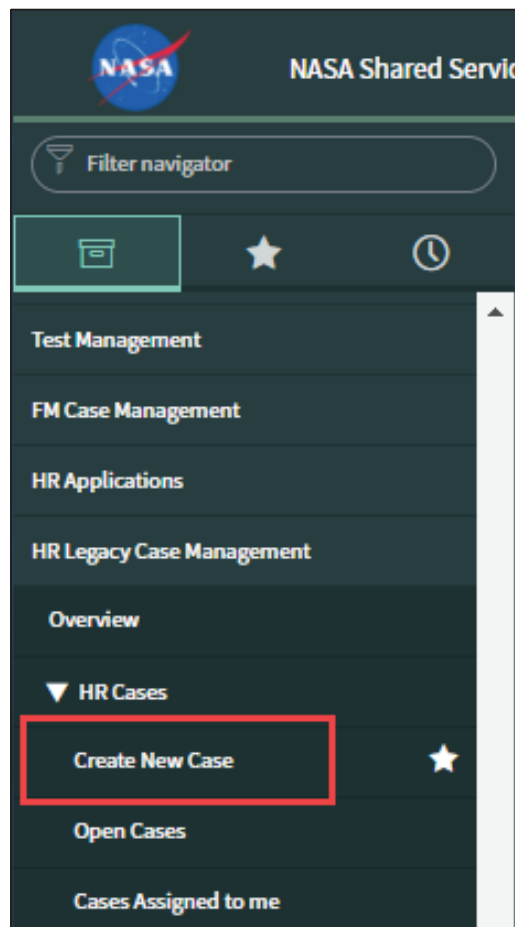
Important: When this method is used, your Lead will generally submit the Case. However, if you are submitting, be sure you do **not** use the team web request form. If you have questions, contact your Lead.

To create the Case, use the following steps:

1. Notify your Lead of the project and that you need a Case created. Your Lead will either create the Case for you or advise you to continue with these steps to create the Case yourself. Discuss with your Lead who will be assigned to the project if you are not the appropriate person.
2. To open ServiceNow:
 - a. Open the NSSC Employees page at https://nasa.sharepoint.com/sites/nssc/SitePages/NSSC_Employees_.aspx.
 - b. Click the **ServiceNow** link.

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3. In the left navigation pane, under the **HR Legacy Case Management** heading and the **HR Cases** subheading, click the **Create New Case** link as shown in the following figure:



4. Complete the Case fields:
 - a. **Customer:** This should generally be the team Lead. For projects that the Lead is assigned to work the project, the Service Owner is the Customer.
 - b. **Category:** Select the **DEV OF INFO MATERIALS** option.
 - c. **SubCategory:** After the Category is selected, this automatically populates with the **DEV OF INFO MATERIALS** option. Leave that option selected.

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Note: When this method of tracking internal documents was approved by our NSSC(CS) counterpart in 2021, it was agreed that this suboption would indicate these types of documents for Cases going forward.

- d. **Assignment Group:** Select the **HR - DEV OF INFO MATERIALS L2** option. Remember, this type of work is not sent through NSSC(CS) for approval, so we change the field to our team's group.
- e. **Assigned to:** Select yourself or the appropriate person on the team. The team member assigned to complete the project should not be the Customer.
- f. **Short Description:** This field should be created using the normal styles used for this field as follows:

HR - DEV OF INFO MAT – [Document Number, if available], [Title]
(Due: [Month D, YYYY])

- g. **Work notes:** Type applicable work notes. The following is a sample entry:

Opening this Case to be able to track the progress on this product. This is an internal product, not requested through our normal team form and not falling in the requirements for metrics and utilization.

SubCategory remains as DEV OF INFO MATERIALS. Assigned to self.
Created Short Description per our style. Changed Status to Work In Progress.

- 5. Click the **Save** button.
- 6. Create the Functional Detail (FD):
 - a. **FD Selection:** Select the **HR – HDIM** option.
 - b. Click the **Create FD** button.
 - c. In the **Functional Details** tab, click the FD link.

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- d. In the **Type of Request** field, select the **Other Product** option. This ensures that the product is NOT included in metrics reports.

Important: In the FD, do **NOT** complete the other metrics-related fields (i.e., dates and customer approvals) at any time in the life of this Case.

- e. Click the **Update** button. You are returned to the main Case.
- f. **Work notes:** Type applicable work notes. The following is a normal entry for this point in the Case:

Created Functional Detail. Changed Type of Request to Other Product.

7. Click the **Save** button. The Case is now created.

Note: These Cases must be kept updated as you work them.

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Appendix F – Instructions for Working in ServiceNow

While working on the project, NSSC(SP) completes a series of steps in ServiceNow. Since the projects can span a long period of time, for ease of following where you are in the ServiceNow steps, this paragraph is divided into the following:

- [F.1, Working in ServiceNow – NSSC\(SP\) Returns an Incorrectly Assigned Case](#)
- [F.2, Working in ServiceNow – NSSC\(SP\) Lead Assigns Case to Team Member](#)
- [F.3, Working in ServiceNow – NSSC\(SP\) Reviews Request Details](#)
- [F.4, Working in ServiceNow – NSSC\(SP\) Contacts Customer for Additional Details](#)
- [F.5, Working in ServiceNow – NSSC\(SP\) Develops and Completes Product](#)
- [F.6, Working in ServiceNow – NSSC\(SP\) Closes Case](#)
- [F.7, Working in ServiceNow – Relating Cases and Closing Duplicate Cases](#)
- [F.8, Working in ServiceNow – Running Metrics Reports](#)
- [F.9, Working in ServiceNow – Running Utilization Report](#)
- [F.10, Working in ServiceNow – Collecting Metrics and Utilization Data for Weekly Report Team Lead Provides to Service Owner](#)

F.1 Working in ServiceNow – NSSC(SP) Returns an Incorrectly Assigned Case

The Lead/SME, as Gatekeeper, will generally discover an incorrectly assigned Case before the team sees it. If the Case is incorrectly assigned to our team, the SME/Lead/Service Owner will generally handle returning the Case. However, any team member can perform the function if needed.

To return a Case that was incorrectly assigned to the team, complete the following:

1. If a Case is assigned directly to you or you otherwise discover a Case has been incorrectly assigned to the Development of Information Materials Team, contact your SME/Lead/Service Owner to discuss and validate that it is actually an incorrectly assigned Case.
2. Review the Case to determine how many people at the NSSC have been in contact/communication with the customer. For one NSSC business rule regarding customer service and responsiveness, when a customer contacts the NSSC, the customer should not be transferred more than twice to discuss/get resolution on the issue. Even if it is not our team's work, if we are

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the third person/team the customer has communicated with regarding this Case, we must find the resolution from the appropriate SME and communicate the resolution to the customer. This does not mean that we do the other team's work; we just communicate to the customer and stop sending the customer all over the NSSC. Obtain assistance from your Service Owner/Lead and refer to the [NSSC Responsiveness Program Procedures](#) in the **Transferred Help Desk Cases** section. (While this document specifically references Help Desk/call Cases, the expectation applies on all types of Cases.) If we are not the third person/team to communicate with the customer, proceed to Step 3.

3. Review the Case to determine how it entered the NSSC (i.e., through the Customer Contact Center or Document Imaging). For one business rule regarding routing incorrectly assigned Cases back to the team that originated the Case, we do not reassign Cases directly to a particular team since links and attachments in the Case will not be filed properly in the other team's folder and may not be accessible to the other team. Additionally, the originating team may want to review their processes to ensure they can provide their team additional training, if needed.
4. If you believe you know the correct team, contact the Service Owner to advise of the incorrectly assigned Case and that you are returning it to the originating team for reassignment. This ensures the Service Owner is aware of the delay. If the Service Owner asks you to forward directly to the team or an individual on the team, advise that our process is to send back to the originating team for reassignment.
5. Contact the originating team POC to advise of the incorrectly assigned Case and that you are sending it back to them for forwarding to the correct team. If you have already discussed with a Service Owner, advise the POC of your conversation.
 - a. For Cases that need to be returned to the Customer Contact Center, when calling Rosa Hebert, NSSC(SP) Customer Contact Center POC, to advise of the incorrectly assigned Case, ask if she wants to pull it back or how she wants you to reassign it to her team.
 - b. For Cases that need to be returned to Document Imaging:
 - Change the **Category** to the **Document Imaging** option.
 - Change the **SubCategory** to the **Reroute** option.

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- Change the **Assignment Group** to the **DI – Misroute L2** option.
- In the **Work Notes** field, add an explanation and details of what occurred.
- Click the **Update** or **Save** button.

F.2 Working in ServiceNow – NSSC(SP) Lead Assigns Case to Team Member

The SME/Lead/Service Owner completes the following:

1. Receive notification of new Case being assigned to L2. Since there are so many notifications being sent for ServiceNow, it is highly recommended that you check the unassigned cases regularly.
2. Using **Chrome**, open **ServiceNow** (<https://esd.nasa.gov/console/>).
3. Locate Cases assigned to L2, but not yet assigned to an individual, using any of the following methods:
 - a. Check your **Open Dev of Info Mat – Status and Assignee** gauge to determine if there are any cases in the **(empty) Assigned to row**:

Open Dev of Info Mat - Status and Assignee				
Assigned to	Status			
	Requested	Pending	Work in Progress	Total
(empty)	1	16	0	16
Assigned to	0	0	1	2
Assigned to	0	4	3	7
Assigned to	0	28	5	33
Assigned to	0	0	2	2
Assigned to	0	1	3	4
Total	1	49	14	64

If you click the **(empty) Assigned row Total** link, the list of unassigned Cases opens. Note that all unassigned Cases are shown, including those not yet assigned to L2. Before taking any action, verify that the Case has been assigned to L2.

- b. Click your **Unassigned Dev L2 Cases** bookmark.

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- c. You may filter for active unassigned Cases assigned to L2 as shown in the following figure:

4. Click the **Case Number** link to open the Case:

Number	Category	Status	Short Description	Opened by	Opened	Customer	Assignment Group	Assigned to
HRC0004193	DEV OF INFO MATERIALS	Requested	HR - DEV OF INFO MAT - Drug-Free Workplace Program Update Brochure Copies	AutoCase User	2015-10-20 12:38:18 CDT	CUSTOMER NAME	HR - DEV OF INFO MATERIALS L2	Assignee Name
HRC0004195	DEV OF INFO MATERIALS	Requested	HR - DEV OF INFO MATERIALS - EXTERNAL	AutoCase User	2015-10-20 12:41:23 CDT	CUSTOMER NAME	HR - DEV OF INFO MATERIALS L2	

5. Locate and review information about the request in **all** of the following locations:
- Scroll down the screen to review the Work Notes.

Important: Verify that NSSC(CS) approved that we can work on the project. If the customer submitted the Case by creating it in ServiceNow (instead of the Web form) and assigned directly to us, it must be reassigned to NSSC(CS) for review and approval to work. Do that before moving forward.

- At the top of the Case window, open any attachments.
- At the bottom of the screen, click the **Links** tab, and click the **Document URL** link (if there is one).

Number	Case Number	Document Name	Document URL
LINKS0004782	HRC0004195	HR_DIM_RDIM	https://dm.nssc.nasa.gov/servlet/dm.web.Fetch?doc=HR_DIM_RDIM_126_10-20-2015_12.39.01&rev=Latest

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- d. At the bottom of the Case screen, click the **Functional Details** tab, then click the **FD Number** link. Review the Project Information in the Functional Detail.
6. If there are competing priorities, Lead and Service Owner may need to discuss who on the team has bandwidth to work on the project.
7. If there is a Functional Detail already in the Case, skip to the next step.
If there is no Functional Detail already in the Case, complete the following:
 - a. From the Case, in the **FD Selection** drop-down menu, select the **HR – HDIM** option.
 - b. Click the **Create FD** button, and the Functional Detail screen is displayed.

The screenshot displays the 'HR Task - HRT0004563' interface. At the top, there are buttons for 'Update', 'Create FD', 'Create User', and 'Save'. The 'FD Selection' dropdown is set to 'HR - HDIM'. The 'Status' is 'New' and 'Priority' is '4 - Low'. The 'Watch list' shows a lock icon and a user icon. The 'Short Description' is 'HRC0004195: HR - DEV OF INFO MAT - Drug-Free Workplace Program Random Selection Process Update Copies'. The 'Description' is 'HR - DEV OF INFO MATERIALS - EXTERNAL'. The 'Additional comments' and 'Work notes' sections are empty.

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8. Update the following Functional Detail Information tab fields:

a. **Type of Request:**

- Select the **HR Deliverable Product** option for all “normal” team products that are deliverables under the function of the Human Resources Services Division. If this option is selected, the Case is included in Metrics Reports.
- Select the **Request for Information** option for responses to requests for information, not deliverable products. If this option is selected, the Case is not included in Metrics Reports.
- Select the **Other Product** option for any work that falls outside the “normal” team support of our normal deliverables. These are other NSSC items we are allowed to do as time permits. Some examples include: Support of other HR Team SDGs, NSSC Name and Door Plates, P&U Graphics, IT Icons and Graphics, other NSSC division support, etc. If this option is selected, the Case is not included in Metrics Reports.

b. **Negotiated Due Date:**

- This is only filled if the Type of Request is HR Deliverable Product.
- If the Approximate Requested Deliver Date in the Project Information section is a date we can meet or if the Requester has already negotiated a delivery date with us, this field can be populated. Otherwise, leave this blank until you or the assigned team member negotiates a date.

c. **Customer Approval Required:** Click the check box only if the Type of Request is an HR Deliverable Product.

9. In the Functional Detail, click the **Update** button. Your changes to the Functional Detail are saved and you are returned to the Case.

10. Assign the Case and update the Case information:

- If not completed or correct, fill in the Customer's **Location**.
- In the **SubCategory** field, change to the appropriate option if needed.
- Select the **Assigned to** individual.

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- d. Complete the **Short Description** field.
 - All should have the following information before the title of the project:
HR – DEV OF INFO MAT –
 - If there is a due date or a requested date, include that at the end of the Short Description in parentheses.
- e. Review the **Description** field in case any information was added there.
- f. Complete the **Work notes** field. It should include:
Updated Functional Detail. Changed SubCategory to [X]. Assigned to [X]. Updated Short Description per our style.
- g. Click the **Save** button.

The screenshot shows the ServiceNow HR Case form for HRC0004195. The form is divided into several sections. At the top, there are buttons for 'Update', 'Create FD', 'Create User', and 'Save'. Below these are fields for 'Number' (HRC0004195), 'Customer' (CUSTOMER NAME), 'Contact', 'Location' (Customer's Location), 'Category' (DEV OF INFO MATERIALS), 'SubCategory' (EXTERNAL), 'Assignment Group' (HR - DEV OF INFO MATERIALS L2), 'Assigned to' (Assignee Name), and 'Parent'. To the right of these fields are dropdown menus for 'Status' (Requested), 'Priority' (4 - Low), 'Age of Case' (0), 'Days in WIP' (0), 'Opened by' (AutoCase User), 'Opened' (2015-10-20 12:41:23 CDT), and 'Watch list'. Below these fields is the 'Short Description' field, which contains the text 'HR - DEV OF INFO MAT - Drug-Free Workplace Program Random Selection Process Update Copies'. Below the 'Short Description' field is the 'Description' field, which is empty. Below the 'Description' field is the 'Additional comments' field, which is empty. Below the 'Additional comments' field is the 'Work notes' field, which contains the text 'Added Customer's Location. Changed Short Description. Assigned to Assignee Name'. Red callout boxes labeled a through g point to the following elements: a points to the 'Customer' field, b points to the 'SubCategory' field, c points to the 'Assigned to' field, d points to the 'Short Description' field, e points to the 'Description' field, f points to the 'Work notes' field, and g points to the 'Save' button.

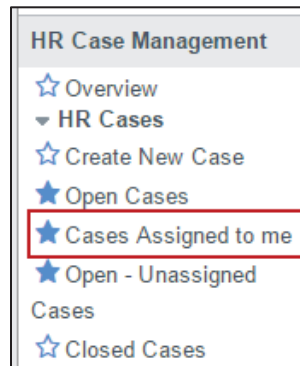
11. Return to Step 3, and if there are additional unassigned Cases, repeat these instructions.

F.3 Working in ServiceNow – NSSC(SP) Reviews Request Details

1. Receive notification of a new Case being assigned to you. Since there are so many notifications being sent for ServiceNow, it is highly recommended that you check for Cases regularly.
2. Open **Chrome**, then open **ServiceNow** (<https://esd.nasa.gov/console/>).
3. Locate all Cases assigned to you.

If you do not have other filters/links set up, in the ServiceNow filters in the left pane, click the **Cases Assigned to me** link:

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4. Click the **Case Number** link to open the Case:

HR Cases	New	Go to	Category		Q		<<	<	1	to 2 of 2	>	>>
All > Active = true > Category = DEV OF INFO MATERIALS > Assignment Group = HR - DEV OF INFO MATERIALS L2												
Q	Number	Category	Status	Short Description	Opened by	Opened	Customer	Assignment Group	Assigned to			
	HRC0004193	DEV OF INFO MATERIALS	Requested	HR - DEV OF INFO MAT - Drug-Free Workplace Program Update Brochure Copies	AutoCase User	2015-10-20 12:38:18 CDT	CUSTOMER NAME	HR - DEV OF INFO MATERIALS L2	Assignee Name			
	HRC0004195	DEV OF INFO MATERIALS	Requested	HR - DEV OF INFO MATERIALS - EXTERNAL	AutoCase User	2015-10-20 12:41:23 CDT	CUSTOMER NAME	HR - DEV OF INFO MATERIALS L2	Assignee Name			

HR Case - HRC0004195

Update Create FD Create User Save

Number

HRC0004195

* Customer

CUSTOMER NAME

Q

Contact

Q

Location

Customer's Location

Q

* Category

DEV OF INFO MATERIALS

* SubCategory

EXTERNAL

* Assignment Group

HR - DEV OF INFO MATERIALS L2

Q

Assigned to

Assignee Name

Q

Parent

Q

FD Selection

-- None --

Status

Requested

Priority

4 - Low

Age of Case

1

Days in WIP

1

Opened by

AutoCase User

Opened

2015-10-20 12:41:23 CDT

Watch list

* Short Description

HR - DEV OF INFO MAT - Drug-Free Workplace Program Random Selection Process Update Copies

Description

HR - DEV OF INFO MATERIALS - EXTERNAL

Additional comments

Work notes

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5. Change the Case **Status** field to the **Work in Progress** option, then click the **Save** button.

A screenshot of a web form interface. At the top, there are buttons for 'Update', 'Create', 'Delete User', and 'Save'. Below these buttons, there is a section for 'FD Selection' with a dropdown menu set to '- None -'. Below that, there is a 'Status' dropdown menu currently set to 'Work in Progress'. To the right of the 'Status' dropdown is a 'Priority' dropdown menu set to '4 - Low'. A red box labeled '1' highlights the 'Status' dropdown, and another red box labeled '2' highlights the 'Save' button.

6. Review the request and any other information in the Case:
 - a. Scroll down the screen to review the Work Notes for any instructions or requests.
 - b. If the customer submitted the request via NSSC Web form, there will be additional information in the Functional Detail. If the customer attached files, you will need to review and/or download them. Scroll to the bottom of the Case screen, click the **Links** tab, and click any other **Document URL** links. Links may also appear at the top of the Case window or the Functional Detail window. Review and/or save as needed.
7. Open the Functional Detail:
 - a. Scroll to the bottom of the Case page.
 - b. Click the **Functional Details** tab, then click the **FD Number** link.

A screenshot of a web application interface. At the top, there are tabs for 'Functional Details (1)', 'Links', 'Quality Controls', and 'Audit History (37)'. Below the tabs, there is a search bar and a 'Go to' dropdown menu. Below the search bar, there is a table with columns for 'FD Number', 'Class', and 'Case'. The first row in the table has 'FDHIM0001003' in the 'FD Number' column, 'FD HR Development of Information Materials' in the 'Class' column, and 'HRC0004195' in the 'Case' column. A red box labeled '1' highlights the 'FD Number' link, and another red box labeled '2' highlights the 'Links' tab.

A screenshot of the 'Functional Details' page for 'FDHIM0001003'. The page has a header with 'FD Number' and 'Case' fields. Below the header, there are tabs for 'Information' and 'Notes'. The 'Information' tab is selected. The page contains a list of tasks with checkboxes: 'Define Scope of Project', 'CMR Concept and Design Approval', 'Obtain Initial Cost Estimate', 'Obtain Approval', 'Develop Initial Product', 'Obtain Requester Approval of Initial Product', 'Make Requested Changes', 'Final Printing Cost Approved', '* Type of Request' (set to 'HR Deliverable Prod.'), 'Negotiated Due Date', 'Materials Distributed Date', 'Customer Approval Required' (checked), and 'Final Product Approved by Customer'. There are also input fields for 'Negotiated Due Date' and 'Materials Distributed Date'.

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8. Review the items related to the Metrics Report and Utilization Report. (This step provides you with information on what the fields mean. It is not yet time to take action.)

Important: It is your responsibility to review these fields and verify that the Type of Request and Customer Approval Required fields are correctly filled. If you have questions, please contact your Lead immediately to discuss. It is critical that these are filled properly so the Case is correctly counted in the reports when closed.

- a. The **Type of Request** field is populated by your Lead before the Case is assigned to you. If you have questions about what this field should indicate, contact your Lead/Service Owner. This field indicates:
- **HR Deliverable Product:** The product falls under the contract deliverables. The team Metrics Reports will be calculated for items that this option is selected. These will also appear on the team Utilization Report.
 - **Request for Information:** No product is developed, and the customer is asking a question or asking for information (e.g., “How do I request support from the Development of Information Materials team?” “Did you create this brochure that I need copied?”). This type of product is not included in the team Metrics Reports.
 - **Other Product:** The product does not fall under HR deliverables (e.g., NSSC Name Plates, printing items for another division or team because their plotter is broken, non-HR graphic support, internal team procedures, etc.). This type of product is not included in the team Metrics Reports.

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- b. The date fields are used to calculate the metric for "...finalized and distributed by the due date..." These fields are used when the product is an HR Deliverable Product. The date fields indicate:
- **Negotiated Due Date:**
 - The team member working the Case requests deadline information from the customer. This should indicate when the final product is due. Some products do not have firm deadlines, so this field may be blank when you receive the Case.
 - You should not promise any deliverables until you discuss the "requested" dates with your Lead/Service Owner to ensure the dates can be met.
 - If your workload or the team workload could impact the ability to deliver the product, the Lead/Service Owner will get involved with determining prioritization.
 - This field should be filled in as soon as a date is agreed upon by the customer, you, and your Lead/Service Owner, if needed.
 - This field can be changed as the customer's priorities change and as new dates are negotiated.
 - Dates are NOT required. Many of our products go through numerous revisions and reviews. In those instances, a date is not filled in this field until the Case is closed.
 - You **must** document the conversations and e-mails regarding the due dates in the **Case Work notes** field.
 - **Materials Distributed Date:**
 - This field is filled in only when the materials have been distributed according to the customer's request. So, if the deliverable requirement is to have the materials distributed in hard copy to the Centers, then this date is the last date that the last Center received the materials.
 - You **must** document in the **Case Work notes** field anything related to the distribution.
- c. The approval check boxes are used to calculate the metric for "...accurately produced in accordance with...requirements and...styles..." The approval boxes indicate:
- **Customer Approval Required:**
 - This box is selected when the product is an HR Deliverable Product. This will not be selected for other products such as the production and delivery of the NSSC Cube and Office Name Plates. Those items are printed per the weekly e-mail

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messages and are posted at each cube and office. No other approval is needed.

- In general, the Lead/Service Owner will check this box if customer approval is required for this product. If you have a question about this box being checked or not being checked, contact your Lead/Service Owner to discuss.
 - **Final Product Approved by Customer:**
 - This box is selected only after you have received all approvals from the customer on the final product and only for an item that is an HR Deliverable Product.
 - You **must** document in the **Case Work notes** field anything related to the approvals.
9. After you have reviewed all requirements, requests, and attachments, proceed to paragraph F.3, Working in ServiceNow – NSSC(SP) Contacts Customer for Additional Details.

F.4 Working in ServiceNow – NSSC(SP) Contacts Customer for Additional Details

After reviewing all the requirements and attachments in the Case, complete the following:

1. Contact the Customer (either by phone or e-mail).
 - a. Advise that the project has been approved for work and assigned to you.
 - b. Discuss the project with the Customer, if needed.
 - c. Obtain additional details, requirements, content, etc., if needed.
 - d. Request the desired due date for interim drafts and final project delivery. If the Customer requests a due date that is not clearly possible, advise the Customer that you will need to discuss this with your Service Owner/Lead to ensure we have the resources needed to meet the deadlines.
2. Update the **Case Work Notes** field with the details of your contact with the Customer.
3. Discuss any concerns/conflicts with your Service Owner/Lead.
4. If there are any deadline conflicts identified by your Service Owner/Lead, contact the Customer to discuss.
5. In the **Functional Detail**, complete the following:
 - a. **Define Scope of Project:** In the **Information** tab, click this check box. Then, in the **Notes** tab, type a description of the project scope. Since the check box does not populate any information in the notes, be sure to indicate what you are noting. (For example: The scope of this project is to...)

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- b. **Negotiated Due Date:** Only add this information if the date is set at this point. Also, be sure to update this date if the due date changes. In the **Information** tab, add the date. Then, in the **Notes** tab, either type a synopsis of the conversation with the Customer about the due date or copy and paste the e-mail.
6. Proceed to paragraph F.4, Working in ServiceNow – NSSC(SP) Develops and Completes Product.

F.5 Working in ServiceNow – NSSC(SP) Develops and Completes Product

Note: Be sure to change the Case **Status** field as the product status changes. Since the Status changes are different for each product, those are not being specifically identified in these steps.

After obtaining the details and deadlines for the Case, you begin working on the product. Since each product/project is different, not all of the Functional Detail elements are needed. The following shows the Functional Detail Information tab:

Information	Notes*
Define Scope of Project <input type="checkbox"/>	* Type of Request: HR Deliverable Product <input type="text"/>
CMR Concept and Design Approval <input type="checkbox"/>	Negotiated Due Date: <input type="text"/>
Obtain Initial Cost Estimate <input type="checkbox"/>	Materials Distributed Date: <input type="text"/>
Obtain Approval <input type="checkbox"/>	Customer Approval Required <input checked="" type="checkbox"/>
Develop Initial Product <input type="checkbox"/>	Final Product Approved by Customer <input type="checkbox"/>
Obtain Requester Approval of Initial Product <input type="checkbox"/>	
Make Requested Changes <input type="checkbox"/>	
Obtain Final Printing Cost Approval <input type="checkbox"/>	

Update Cancel Save

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Most of the elements in the Functional Detail Information tab are set up in the chronological order that you will complete them. The following describes when/if you use the elements as well as Work Note samples for your convenience:

Functional Detail Information Tab Element	Description	Sample Work Notes Entries
Define Scope of Project	<ul style="list-style-type: none"> This is always checked after confirming the project scope. After checking, add a note to the Notes tab describing the scope. 	<p>Sample for NSSC Nameplates:</p> <p>The Scope of the Project is to create and distribute NSSC nameplates for [Month] from the spreadsheets Kimberly sends during the month.</p> <p>Sample for NSSC Performance and Utilization Graphics:</p> <p>The Scope of the Project is to create the Performance and Utilization graphics for the month of [Month].</p> <p>Sample for Other Products:</p> <p>The Scope of the Project is to develop [identify product] in accordance with NASA and NSSC standards using [identify style/template requirements].</p>
CMR Concept and Design Approval	<ul style="list-style-type: none"> This is only used if there are graphic elements that are developed for the product. This is to be checked only after the graphic artist confirms that all NASA design requirements are met. 	<p>The graphic elements of the product meet all NASA Style Guide requirements.</p> <p>Note: If any elements do not meet the Style Guide requirements, it will have to be approved by the authority</p>

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Functional Detail Information Tab Element	Description	Sample Work Notes Entries
	<ul style="list-style-type: none"> After checking, add a note to the Notes tab indicating all graphic elements met all NASA design requirements. 	<p>identified in the Style Guide. If this occurs, make a note in the Case Notes field and include a copy of the e-mail message showing proof of approval. Also save a copy of the messages in the project's folder on the shared drive.</p>
Obtain Initial Cost Estimate	<ul style="list-style-type: none"> This is only used if the product is to be printed by a vendor. This is to be checked only after the Initial Cost Estimate is obtained from the vendors. When you send the request(s) for bid(s) to the vendor(s), be sure to copy and paste the message(s) you sent into either the Notes tab or into the main Case Work Notes field. After the request for bid is sent to each vendor, copy and paste the outgoing message into the Notes tab. After the Initial Cost Estimate is obtained from the vendors, check the box and add a note to the Notes tab indicating the bids were received. 	<p>Sample for the Outgoing Request for Bid:</p> <p>Sent [vendor name] the following request for bid:</p> <p>[Include a copy and paste of the outgoing message to the vendor.]</p> <p>Note: Be sure to save all of the messages to the vendors.</p> <p>Sample for Incoming Bids Received from Vendors:</p> <p>Received bid from [vendor name].</p> <p>[Include a copy and paste of the incoming message from the vendor, without the bid prices. This is just to show when they responded to the bid request.]</p> <p>Note: Be sure to save all of the messages from the vendors, including any "no bid" responses. If a vendor did not submit any response by the</p>

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Functional Detail Information Tab Element	Description	Sample Work Notes Entries
		<p>deadline, make a note of that as well.</p> <p>Important: In ServiceNow, we <u>only</u> include the NASA prices, not the vendor prices.</p>
Obtain Approval	<ul style="list-style-type: none"> This is only used when an Initial Cost Estimate is obtained. After checking, add a note to the Notes tab indicating approval was received. Also include a copy and paste of the approval e-mail. 	<p>Initial Cost Estimate approved:</p> <p>[Include a copy and paste of the approval e-mail(s).]</p>
Develop Initial Product	<ul style="list-style-type: none"> Most products will have drafts that you and the customer work through before the Customer is ready for you to finalize the product. All of these drafts are included in Develop Initial Product. You should include copies of your e-mail traffic related to the drafts as you deliver the drafts, but don't check the box during the drafts. Only check this box after the Customer is ready for you to finalize. NSSC Nameplates and NSSC Performance and Utilization Graphics do not go through draft phases, so this is checked when the work is completed. 	<p>Sample for NSSC Nameplates:</p> <p>Developed and distributed [#] nameplates in the month of [Month].</p> <p>Sample for NSSC Performance and Utilization Graphics:</p> <p>Delivered graphics to Customer.</p> <p>[Include a copy and paste of the outgoing e-mail.]</p> <p>Sample for Other Products:</p> <p>Delivered/Received Draft [#] to/from the Customer.</p> <p>[Include a copy and paste of the e-mails showing drafts being sent to the Customer]</p>

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Functional Detail Information Tab Element	Description	Sample Work Notes Entries
		and content/changes received from the Customer.]
Obtain Requester Approval of Initial Product	<ul style="list-style-type: none"> Only check this box after you receive approval from the Customer. 	<p>Received approval from Customer.</p> <p>[Include a copy and paste of the approval e-mail.]</p>
Make Requested Changes	<ul style="list-style-type: none"> Only check this box if the Customer requests changes to the document after finalizing. Include a copy and paste of the e-mails. 	
Obtain Final Printing Cost Approval	<ul style="list-style-type: none"> Only check this box after final cost approval is received (only if the product is being printed). Include a copy and paste of the e-mails. 	
Type of Request	<p>This field indicates:</p> <ul style="list-style-type: none"> HR Deliverable Product: The product falls under the contract deliverables. The team Metrics Report will be calculated for items that this option is selected. Request for Information: No product is developed, and the customer is asking a question or asking for information (e.g., "How do I request support from the Development of Information Materials team?" "Did you create this brochure that I need 	<p>This field is already populated before the Case is assigned to you.</p>

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Functional Detail Information Tab Element	Description	Sample Work Notes Entries
	<p>copied?”). The team Utilization Report will include these items.</p> <ul style="list-style-type: none"> • Other Product: The product does not fall under HR deliverables (e.g., NSSC Name Plates, printing items for another division or team because their plotter is broken, non-HR graphic support, etc.). The team Utilization Report will include these items. 	
Negotiated Due Date	<p>The date fields are used to calculate the metric for “...finalized and distributed by the due date...”</p> <ul style="list-style-type: none"> • The team member working the Case requests deadline information from the customer. This should include information on when initial/interim drafts are due as well as when the final product is due. • You should not promise any deliverables until you discuss the “requested” dates with your Service Owner/Lead to ensure the dates can be met. • If your workload or the team workload could impact the ability to deliver the product, the Service Owner will get involved with determining prioritization. • This field should be filled in as soon as a date is agreed upon 	<p>Discussed the project with [Name] today. Due to change of priorities, the deadline of this product has been changed from [Date] to [Date].</p> <p>OR</p> <p>Exchanged the following e-mails related to the due date:</p> <p>[Include e-mails.]</p>

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Functional Detail Information Tab Element	Description	Sample Work Notes Entries
	<p>by the customer, you, and your Service Owner/Lead, if needed.</p> <ul style="list-style-type: none"> This field can be changed as the customer's priorities change and as new dates are negotiated. You must document the conversations and e-mails regarding the due dates in the Case Work notes field. 	
Materials Distributed Date	<p>The date fields are used to calculate the metric for "...finalized and distributed by the due date..."</p> <ul style="list-style-type: none"> This field is filled in only when the materials have been distributed according to the customer's request. So, if the materials have to be distributed in hard copy to the Centers, then this date is the last date that the last Center received the materials. You must document in the Case Work notes field anything related to the distribution 	<p>Delivered the final product to the Customer.</p> <p>[Include copy and paste of related e-mails.]</p>
Customer Approval Required	<p>The approval check boxes are used to calculate the metric for "...accurately produced in accordance with...requirements and...styles..."</p> <ul style="list-style-type: none"> This box is selected when you need to get the customer's 	

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Functional Detail Information Tab Element	Description	Sample Work Notes Entries
	<p>approval on the deliverable. This will not be selected for the production and delivery of the NSSC Cube and Office Name Plates. Those items are printed per the weekly e-mail messages and are posted at each cube and office. No other approval is needed.</p> <ul style="list-style-type: none"> In general, the Service Owner will check this box if customer approval is required for this product. If you have a question about this box being checked or not being checked, contact your Service Owner/Lead to discuss. 	
Final Product Approved by Customer	<p>The approval check boxes are used to calculate the metric for "...accurately produced in accordance with...requirements and...styles..."</p> <ul style="list-style-type: none"> This box is selected only after you have received all approvals from the customer on the final product. You must document in the Case Work notes field anything related to the approvals. 	

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F.6 Working in ServiceNow – NSSC(SP) Closes Case

After all work is completed and all notes added into the ServiceNow Functional Detail and Case, you may Close the Case.

There are important things to know about how ServiceNow Functional Detail entries and Status selections affect our Metrics and Utilization Reports. The following is a screen shot of our Functional Detail Information tab:

- **Type of Request:**

- **HR Deliverable Product:** If this is selected, then when the Case is set to the Closed Complete or Closed Incomplete status, the Metrics Report will pull all of the Cases that are HR Deliverable Product and it will look to see if the materials were distributed on time and if the customer approved the final product. So, if this is the type of request, you must ensure that the dates and approval fields are properly filled out.
- **For any other type of request:** Even though they do not show up in the Metrics Report, they will show up in the Utilization Report. However, the dates and approval fields are currently not needed.

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- **Negotiated Due Date and Materials Distributed Date:**
 - If the Type of Request is HR Deliverable Product, these two fields **must** be completed.
 - If the Negotiated Due Date field is completed, the Materials Distributed Date **must** be completed.
- **Customer Approval Required and Final Product Approved by Customer:**
 - If the Type of Request is HR Deliverable Product, these two fields **must** be completed. The only exception is if the customer does **not** approve the final product, you would not check the box.
 - If the Customer Approval Required field is checked, the Final Product Approved by Customer must be checked if the customer approves. If the customer does not approve the final product, you **must** advise your Service Owner **and** Lead **before** Closing the Case.
- **Status:**
 - The Type of Request, date fields, and approval fields **must** be checked **before** you change the Status to Closed Complete or Closed Incomplete.

The following screen shows the Functional Detail with the metrics-related fields indicated:

The screenshot shows a web form with a left sidebar containing a list of tasks with checkboxes. The main area has a 'Type of Request' dropdown menu set to 'HR Deliverable Product'. Below this, there are four fields: 'Negotiated Due Date', 'Materials Distributed Date', 'Customer Approval Required' (checked), and 'Final Product Approved by Customer' (unchecked). A red box encloses these four fields, and a red callout bubble points to it with the text: 'If the Type of Request is HR Deliverable Product, these four fields are pulled for the Metrics Reports.'

Complete the following:

1. Open the Case in Chrome.
2. Review the **Case Work notes** entries, and be sure everything that needs to be included is included. Note that if the product is printed, the only prices that can be listed are the NASA prices that are sent to NSSC(CS) for approval.
3. At the bottom of the Case screen, click the **Functional Details** tab, then click to open the Functional Detail.
4. Review the Functional Detail, and be sure that all of the fields are filled, if appropriate.
 - a. Do **not** check any box if that item was not done or not needed.
 - b. Review the information at the top of paragraph F.6, Working in ServiceNow – NSSC(SP) Closes Case.

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- c. Ensure that the following five fields related to Metrics and Utilization Reports are completed correctly: Type of Request, Negotiated Due Date, Materials Distributed Date, Customer Approval Required, and Final Product Approved by Customer.
- d. In the **Notes** tab, add a Case Work Notes entry.

The following is a screen showing a completed Functional Detail (note some of the fields were not needed):

Information	Notes *
Define Scope of Project <input checked="" type="checkbox"/>	* Type of Request: HR Deliverable Product
CMR Concept and Design Approval <input type="checkbox"/>	Negotiated Due Date: 2020-12-02
Obtain Initial Cost Estimate <input type="checkbox"/>	Materials Distributed Date: 2020-12-02
Obtain Approval <input type="checkbox"/>	Customer Approval Required <input checked="" type="checkbox"/>
Develop Initial Product <input checked="" type="checkbox"/>	Final Product Approved by Customer <input checked="" type="checkbox"/>
Obtain Requester Approval of Initial Product <input checked="" type="checkbox"/>	
Make Requested Changes <input type="checkbox"/>	
Obtain Final Printing Cost Approval <input type="checkbox"/>	
Update	Cancel Save

5. Click the **Update** button to save your entries and go back to the Case.
6. Verify you are viewing the correct Case, and update the Case:
 - a. Change the **Status** field to the appropriate option:
 - **Closed Complete**: Use this option for projects that were completed.
 - **Closed Incomplete**: Use this option for projects that were not worked on before closing or were incomplete for some reason. Note that before selecting this option, check with your Service Owner/Lead to ensure this is appropriate.

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- b. Click the **Update** button. You are returned to your main screen, and this case is no longer shown in your list.

The screenshot shows the ServiceNow HR Case form for case HRC0004195. The form includes fields for Customer, Location, Category, SubCategory, Assignment Group, Assigned to, and Case. The Status is set to 'Closed Complete'. The 'Update' button is highlighted with a red box and labeled 'b'. A red arrow points to the 'Update' button.

F.7 Working in ServiceNow – Relating Cases and Closing Duplicate Cases

There are additional features in ServiceNow that we do not frequently use. The subparagraphs in this paragraph provide steps on how to relate Cases and how to close duplicate Cases. Ask your Lead or Service Owner if you have questions about using these features.

F.7.1 Relating Cases

We do not have specific business rules for our team regarding a requirement for relating Cases. For most products that work in conjunction with others for the same event/project, we have a standardized Short Description so a search will display all the similar products. However, if you need to relate a secondary Case to an initial Case, use the following steps:

1. Using **Chrome**, open **ServiceNow** (<https://esd.nasa.gov/console/>).
2. Locate the Case number of the initial Case associated with the project or customer.
3. Locate and open the secondary Case.
4. At the bottom of the Case, click to select the **Related To** tab.

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5. Click the **Edit** button.
6. In the **Collection** field, type the Case number of the initial Case (that you located in Step 1).
7. In the list under the Collection heading, click to select the desired Case number.
8. Click the **Add (>)** button. The Case number is displayed in the **Related To List** field on the right side of the screen.
9. Click the **Save** button.

F.7.2 Closing Duplicate Cases

When a customer sends in more than one inquiry or a Case is created with the same information requested, subsequent inquiries should be related to the original and handled as follows:

1. Relate the initial Case to the duplicate Case using the instructions in paragraph F.6.1, Relating Cases.
2. In the duplicate Case, complete the following:
 - a. Assign to yourself.
 - b. In the **Short Description** field, type: "Duplicate of Case #."
 - c. In the **Work notes** field, type: "Duplicate of Case #. Project will be worked through original Case."
 - d. From the **Status** drop-down menu, select the **Closed-Incomplete** option.

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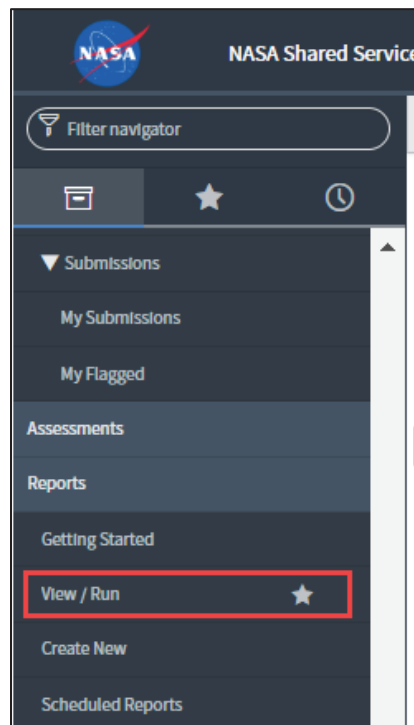
F.8 Working in ServiceNow – Running Metrics Reports

Please note that the ServiceNow Metrics Report are accurate beginning with the July 2016 data. For anything prior to that time period, please refer to the official deliverables.

Important: The team Metrics Reports are contract deliverables that are due monthly for the previous month.

Use the following steps to run the team Metrics Reports:

1. Using **Chrome**, open **ServiceNow** (<https://esd.nasa.gov/console/>).
2. In the left navigation pane, under the **Reports** heading, locate and click the **View/Run** option. (If your **Favorites** star is not filled next to your **View/Run** option, you can click it so that this option is displayed in your **Favorites** menu.)



At the top of the Reports screen, click the **All** button.

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In the **Search** field, copy and paste the desired report name:

HR - Information Materials Developed In Accordance With Customer Requirements (J3 3.2.1.6)

or

HR - Information Materials Finalized and Distributed On Time (J3 3.2.1.6)

Press the **Enter** key.

Click the report link. The results are displayed.

If desired, you can change the filter criteria and click the **Run** button to display those results.

To export the report results to a PDF file:

- In the **Save** drop-down menu, select the **Export to PDF** option.
- In the Export to PDF window, click the **Export** button.
- In the Export Complete window, click the **Download** button.
- The report download is either in your lower tray of ServiceNow or a Save As screen is displayed for you to save the exported report.

Repeat these steps if you wish to run the other report.

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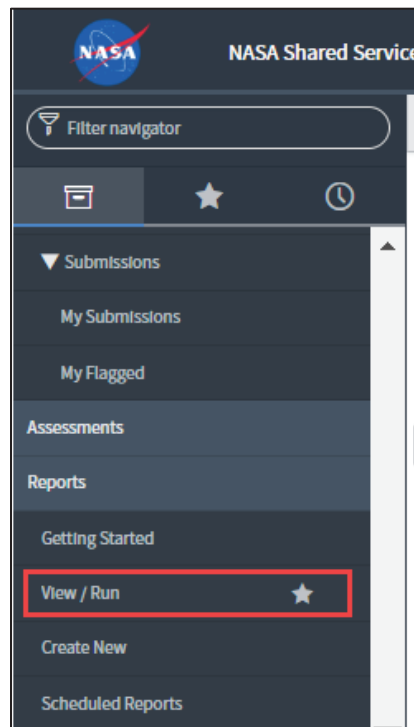
F.9 Working in ServiceNow – Running Utilization Report

Please note that we are still determining the beginning date of when the ServiceNow Utilization Report is accurate. Request assistance from your Lead or Service Owner for historical information.

Note: The team Utilization Report is not a contract deliverable and is not delivered to anyone. It assists with knowing total team workload and the types of projects being worked.

Use the following steps to run the team Utilization Report:

1. Using **Chrome**, open **ServiceNow** (<https://esd.nasa.gov/console/>).
2. In the left navigation pane, under the **Reports** heading, locate and click the **View/Run** option. (If your **Favorites** star is not filled next to your **View/Run** option, you can click it so that this option is displayed in your **Favorites** menu.)



3. At the top of the Reports screen, click the **All** button.

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4. In the **Search** field, copy and paste the following report name:

HR - Information Materials L2 Cases Closed Last Month

5. Press the **Enter** key. If the report link is not displayed, create filter criteria to match the following:

The screenshot shows the ServiceNow report builder interface. At the top, the report title is "HR - Information Materials L2 Cases Closed Last Month". Below the title, there are dropdowns for "Data" (Table), "Type" (List), and "Group by" (None). To the right, there are "Available" and "Selected" columns lists. The "Selected" list includes fields like Number, Short Description, Status, Opened, Closed, SubCategory, Customer, and Customer Location.Center Abbrev. Below these, there are buttons for "Add Filter Condition", "Add 'OR' Clause", and "Add Sort Field". The main area shows four filter conditions: "Category(category) is DEV OF INFO MATERIALS", "Assignment Group is HR - DEV OF INFO MATERIAL", "Status is Closed Complete", and "Closed on Last month". At the bottom right, there is a "Run" button. The bottom of the interface shows a table header with columns: Number, Short Description, Status, Opened, Closed, SubCategory, Customer, Center Abbrev, and Assigned to.

- a. Click the report link. The results are displayed.
- b. If desired, you can change the filter criteria and click the **Run** button to display those results.
- c. To export the report results to a PDF file:
 - a. In the **Save** drop-down menu, select the **Export to PDF** option.
 - b. In the Export to PDF window, click the **Export** button.
 - c. In the Export Complete window, click the **Download** button.
- d. The report download is either in your lower tray of ServiceNow or a Save As screen is displayed for you to save the exported report.

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F.10 Working in ServiceNow – Collecting Metrics and Utilization Data for Weekly Report Team Lead Provides to Service Owner

The team Lead provides the following section heading and table in the weekly report provided to the team Service Owner. When the Lead is out of the office, an alternate will provide this information. It is completed every week on Thursday and submitted to the Service Owner by the end of the day within the weekly report.

The following are the heading and table that are included in the Lead's weekly report, with placeholders for populating each week:

Metrics and Utilization/Transactions to Date this Month for Team:

Team	# Currently Open Cases	# Cases Closed This Month to Date	Quality Metric This Month to Date	Timeliness Metric This Month to Date
Development of Information Materials (LOE)	[#] ([#] are internal team products)	[#] ([#] count toward metrics)	[#]%	[#]%

Use the following instructions for gathering the information to populate the table:

1. # Currently Open Cases Column:
 - a. Select the **Open Dev Cases** option or filter for **Active is true** and **Category is DEV OF INFO MATERIALS**. Type that number in the column.
 - b. To determine which are internal team products, filter for the **SubCategory** of **DEV OF INFO MATERIALS**. Type that number in the applicable part of the column.
2. # Cases Closed This Month to Date Column:
 - a. For the total Cases:
 - i. Run the **HR - Information Materials L2 Cases Closed Last Month** report.
 - ii. Change the **Closed on** option from Last month to the **This month** option.
 - iii. Click the **Run** button. **CAUTION: Do NOT** click the Save button!!

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iv. Type that number in the column.

- b. To determine which count toward metrics, review the **Short Description** column and count the number of Cases that are HR-related products. Type that number in the applicable part of the column.

3. Quality Metric This Month to Date Column:

- a. Run the **HR - Information Materials Developed In Accordance With Customer Requirements (J3 3.2.1.6)** report.
- b. Change the **Created on** option from Last month to the **This month** option.
- c. Click the **Run** button. **CAUTION:** Do **NOT** click the Save button!!
- d. Type the percent met in the table column. If there are no Cases closed for this metric this month, type **N/A** in this column.

4. Timeliness Metric This Month to Date Column:

- a. Run the **HR - Information Materials Finalized and Distributed On Time (J3 3.2.1.6)** report.
- b. Change the **Created on** option from Last month to the **This month** option.
- c. Click the **Run** button. **CAUTION:** Do **NOT** click the Save button!!
- d. Type the percent met in the table column. If there are no Cases closed for this metric this month, type **N/A** in this column.

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Appendix G – Instructions for Reviewing and Updating Knowledge Articles (KAs) in ServiceNow

This appendix provides instructions for checking the team Knowledge Articles (KAs) in ServiceNow.

Note: In 2020, we were advised that the process for updating KAs is changing. We have not received documentation identifying the new process, so it is advisable to contact the Knowledge Management Team before beginning. For assistance and guidance on creating and updating a KA, contact nssc-knowledge-management@mail.nasa.gov.

G.1 General Information/Instruction

The following general information/instruction may be helpful when you are reviewing KAs:

- The general ServiceNow NSSC(SP) user access may not provide all views or details of all KAs. If you cannot locate a KA or cannot see all information in a KA, check with your Lead/Service Owner. They have the Knowledge Author role (in NAMS, the role is called NSSC HR Knowledge SME) that enables access to more information.
- If you cannot readily locate a KA, it may not be assigned to HR correctly. When the KAs were moved from the old Remedy system to ServiceNow in 2015, many of the KAs remained in the Enterprise Service Center (ESC) authoring group instead of being assigned to HR. That causes us to have difficulty locating those KAs. Notify your Lead/Service Owner, who may have to contact the CCC or ESD POC for assistance.

G.2 Frequency of KA Reviews

At a minimum, KAs should be reviewed:

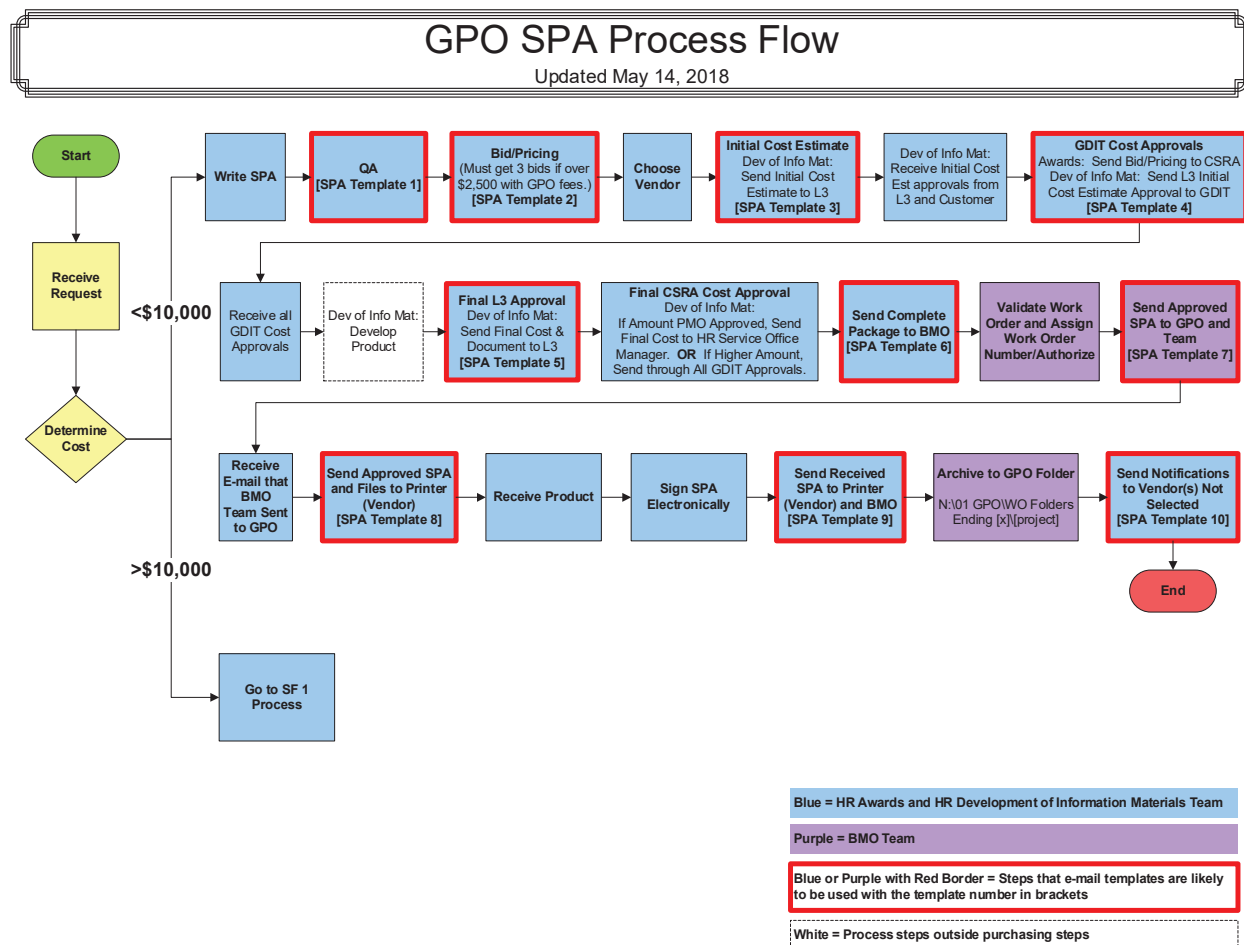
- Annually.
- Every time any procedure/process changes.
- Every time the SDG is updated.
- Every time the Work Instruction is updated.
- When notifications are sent for reviews.

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Appendix H – Purchasing Printed Materials Using GPO SPA Process

H.1 GPO SPA Process Flowchart

The process flowchart steps with red borders indicate team e-mail templates are available in the appropriate team's process documentation:



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H.2 Important E-mails

Please ensure your Outlook contacts are updated with the latest information. Also, please use the e-mail group names identified as follows so the whole team is referencing the same way:

- **GPO Group:**
 - Zachary D. Ball
 - Rhonda L. Brady
 - Troy A. Chivers
 - Marie H. Lizana
 - Marlena A. LaFontaine
 - Robert A. Murray
 - Carrie B. Pohto
 - Darryl Q. Rouse
 - Jean C. Schmidt
- **GPO Atlanta:**
 - infoatlanta@gpo.gov

H.3 Write the SPA

Each SPA must be written with the full details of the project, the correct contract and vendor information, and with other information we have determined ensures the print vendor understands our requirements. The following table provides the official location of the form and instructions as well as some of the elements to know, include, or verify:

Item	Details
GPO Simplified Purchase Agreement Work Order Form 4044	<p>Located:</p> <ul style="list-style-type: none"> • https://www.gpo.gov/how-to-work-with-us/agency/forms-and-standards • Under the Order Placement heading, click the 4044 – SPA Work Order link.
GPO Simplified Purchase Agreement Work Order Form 4044 Instructions	<p>Located:</p> <ul style="list-style-type: none"> • https://www.gpo.gov/how-to-work-with-us/agency/forms-and-standards • Under the Order Placement heading, click the 4044 – Instructions for SPA Work Order link.

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Item	Details
DEPARTMENT OR GOVERNMENT ESTABLISHMET	Required content: NASA/NSSC/CSRA
REQ. NO.	This number changes each FY. You must use the correct Requisition Number as provided by our Authorizing Official. If a purchase occurs near the end of an FY, have your Lead or Service Owner check with the General Dynamics Information Technology budget office to determine which FY information to use.
JACKET NO.	This number changes each FY. You must use the correct Jacket Number as provided by our Authorizing Official. If a purchase occurs near the end of an FY, have your Lead or Service Owner check with the General Dynamics Information Technology budget office to determine which FY information to use.
SPA NO.	Required content: 8405-M
WORK ORDER NO.	This is a unique number provided by the Authorizing Official. Each SPA has a different Work Order Number.
CONTRACTOR	<p>We can only use Contractors (printer vendors) who are listed on the Atlanta SPA Web site at: http://spa.gpo.gov.</p> <p>For User Name and Password information, refer to the GPO memo in the following location: N:\01 GPO\GPO SPA Vendor Search\Log In Information. Note that this information was provided by GPO for their agreement with the prime contractor, and is only for use by the NSSC(SP) personnel authorized to access it.</p>

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Item	Details
	<p>For helpful tips on using the GPO SPA Vendor Search, refer to the information in the following location: N:\01 GPO\GPO SPA Vendor Search.</p> <p>If there is a Contractor (printer vendor) you wish to use that has SPA approval in another region, provide that information to GPO Atlanta to see if we can use that vendor. If there is a Contractor (printer vendor) you wish to use who is not a current SPA-approved vendor, have them contact GPO Atlanta for assistance in getting approved.</p>
PURCHASE ORDER NO.	This is specific to the Contractor selected and is located on the Atlanta GPO SPA Vendor site Details record for that Contractor.
STATE CODE	This is specific to the Contractor selected and is located on the Atlanta GPO SPA Vendor site Details record for that Contractor.
CONTRACTOR'S CODE	This is specific to the Contractor selected and is located on the Atlanta GPO SPA Vendor site Details record for that Contractor.
BILLING ADDRESS CODE (BAC)	<p>Required content:</p> <p>7510-71</p>

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Item	Details
ADDITIONAL INFORMATION	<p>This section must include:</p> <p>SEE ADDITIONAL INFORMATION ON NEXT PAGES. PLEASE REVIEW ALL PAGES IN THIS FILE.</p> <p>For additional PROJECT information, contact:</p> <p>Carrie Pohto (228-813-6144) carrie.b.pohto@nasa.gov</p> <p>Jean Schmidt (228-813-6177) jean.c.schmidt@nasa.gov</p> <p>Graphics: Troy Chivers (228-813-6333) troy.a.chivers@nasa.gov</p> <p>For BILLING information, the Contractor should contact GPO. GPO can direct invoice payment questions to:</p> <p>Marlena LaFontaine: Phone: 228-813-6263; E-mail: marlena.a.lafontaine@NASA.gov</p>
SHIP/DELIVERY DATE	<p>Possible content to include:</p> <p>We have a quick turnaround with an indefinite delivery date to be provided. We will need very fast turnaround and overnight shipping/delivery to the NSSC. This project is anticipated to be needed by the middle of Month.</p>

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Item	Details
Other Information to Include	<p>Required content:</p> <ul style="list-style-type: none"> • INSIDE DELIVERY REQUIRED • If any electronic modifications are needed, please contact us so that we may make the changes needed. No additional funds are approved beyond the scope of this SPA. • All test prints, proofs, and final product must be delivered to NSSC, with inside delivery required. Proof must be approved prior to printing the order. Must include all shipping/delivery costs in the quote. <p>(If the final product is not to be delivered to the NSSC, modify statement to indicate test prints and proofs delivered to NSSC and final delivered to different address, with shipping addresses for both.)</p>

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Item	Details
Other Information to Include for Banners and Banner Stands	<p>Other Govt Furnished Materials: We currently own 4 "MediaScreen 1" units (frame part # 601-85218-GRY). We will send the units to Contractor to have the new graphics installed. Hardware with the new graphics and the old graphics must all be returned to us.</p> <p>Cover Paper: Expand International MediaScreen 1 Replacement Graphics to fit hardware we already own. Graphic must be 33 7/16" x 85 13/16" (graphic part # GP60185218-P1). NO BRAND OR SIZE SUBSTITUTIONS MAY BE MADE. Quality MUST be at least as high as provided in original 2011 order (Expand International order #1063401-00 on 6/9/11) or in the previous years' orders placed with Express Color. All materials and workmanship must be completed in accordance with standards to maintain our warranty with Expand International.</p> <p>Color of Cover Inks: Full color full bleed, printed on one side only.</p> <p>We anticipate 1 file that has the same background colors and overall design.</p> <p>OR</p> <p>There are 2 SEPARATE graphic files - the graphics are similar, but NOT exact (as shown on the next page of this file). Files generated using PhotoShop using a PC. Suggest printing from PC-based machine using native files. Fonts and graphics will be provided electronically. Adobe Acrobat (.pdf) file included for reference. Background files will also be included. If any electronic modifications are needed, please contact us so that we may make the changes needed. No additional funds are approved beyond the scope of this SPA. Expand International MUST be advised that NO additional funds are approved and that we should make any changes needed.</p>

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Item	Details
If you have to make a change to the SPA after it has been approved and submitted to the Contractor (printer vendor)	<p>If a change is required,</p> <ul style="list-style-type: none"> • Ensure you have e-mail authorizations documenting the reason for and approval of the change. The type of change will determine who needs to provide authorization. Get assistance from your Lead or Service Owner. • Print out the SPA that was signed by the Authorizing Official and sent to GPO. (Per GPO process, you will have to make the changes manually and will no longer be able to electronically sign this document.) • In pen, write "Revised" and the date at the top of the page. Then, mark a single line through the information that you are changing, write in the new information, then initial and date the change. It is important to still be able to see what was on the original, so one single strike through is needed. • Have the Authorizing Official initial and date each change. Have the Authorizing Official also mark through the Date Sent To Contractor field date and initial you both initial next to that change. • Have the Authorizing Official scan and e-mail to GPO, copying the NSSC GPO Group. • Forward that e-mail to the Contractor (printer vendor). • Retain the revised documents through the completion of the project. • When the product is received, you will have to sign and date the revised document, scan, and e-mail per the normal process.

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H.4 SPA Template 1: QA (prior to bid request)

Template Title: Request SPA QA Before Bid

TO: Team Lead

CC: n/a

Subject: Please QA SPA: **Title of Project**

Attachments: SPA

Dear XXX,

Attached is a Simplified Purchase Agreement (SPA) for you to QA prior to me submitting to vendors for bid.

Thanks,

Your signature block

H.5 SPA Template 2: Bid/Pricing

Template Title: Request Vendor Provide SPA Bid

TO: Vendor

CC: Internal Team Members, if Needed (Not GPO Group)

Subject: Request for SPA Quote: **Title of Project**

Attachments: SPA

Dear XXX,

Attached is a Simplified Purchase Agreement (SPA) for your consideration. Please provide a quote for the attached item on the enclosed SPA. Please note that it contains important information on all pages.

The quotes are due back NO LATER THAN: Day, Month D, YYYY.

If you have any questions, please contact me.

Thanks very much!

Your signature block

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H.6 SPA Template 3: Initial Cost Estimate

Template Title: Initial Cost Est to L3

To: NSSC(CS) Team Oversight, Deirdre Wolverton

CC: NSSC(SP) Team Service Owner, Carrie Pohto; Lead, Jean Schmidt; and any other team members needed

Subject: Approval Needed – Initial Cost Estimate for **Title of Project - HRC#####**

Dear Deirdre,

We have been requested to provide support to the **Title of Project. Name** is the Requester. Give any specifics about project that affect pricing (e.g., Requester asked that we provide multiple options, etc.). We have obtained the following Initial Cost Estimate:

Quantity	Description	Price

Please review this estimate. Once you have reviewed and accepted it, please forward to the Requester. Please reply to all parties so we can stay updated on the progress.

Thanks,

Your signature block

H.7 SPA Template 4: General Dynamics Information Technology Cost Approvals

Note:

The **Approved Estimate** is the NASA Cost.

The **Amount We Need PMO to Approve** is 15% more than the NASA Cost.

Template Title: Initial Cost Est to GDIT

To: NSSC(SP) HR Service Office Manager, Kellie Noel

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CC: NSSC(SP) Team Service Owner, Carrie Pohto
 NSSC(SP) Team Lead, Jean Schmidt
 and any other team members needed

Subject: EXPEDITE APPROVAL NEEDED – Initial Cost Estimate for **Title of Project - HC#####**

Attachments: (forwarded L3 and Customer approvals)

Kellie,

Per the General Dynamics Information Technology process for obtaining approvals on ODCs, I am sending this to you for approval and forwarding. Since this approval is for an Initial Cost Estimate that may change slightly before final printing, we are requesting approval from you, Tony, Sharon or Rhonda, Robert, and Bruce for 15% over the Initial Cost Estimate.

We have received customer approval on the following Initial Cost Estimate:

Purchase Type: GPO SPA

PWS/WBS Service: 3.2.1.6 Information Materials

Quantity: #

Product: Description

Approved Estimate: \$ (includes shipping to NSSC) (This is the NASA rate including GPO and contract burdens as calculated in the PMO "GPO-NASA Cost Estimator-REVISED 04.01.2016.xlsx")

Amount We Need PMO to Approve: Up to \$

Next Steps:

1. **Kellie:** Review and let me know if you have any questions.
2. **Kellie:** Copy all on this message and send to the following:

Tony Lisotta

Sharon Weema

Rhonda Brady

Bruce Moore (at Bruce.Moore@gdit.com)

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Robert Murray

Be sure to copy all on this original message so we are in the loop.

3. **Tony/Sharon or Rhonda/Bruce/Robert:** Reply to all providing approvals/questions.

Thanks,

Your signature block

H.8 SPA Template 5: Final L3 Approval

Template Title: Final Approval-Printing

To: NSSC(CS) Team Oversight, Deirdre Wolverton

CC: NSSC(SP) Team Service Owner, Carrie Pohto; Lead, Jean Schmidt; and any other team members needed

SUBJECT: Approval Needed - Final Document and Cost for **Title of Project - HRC###**

Dear Deirdre,

This message contains the final files for the **Title of Project** for approval by you and the Requester, **Name**. I have been working with the Requester on the development of this document throughout the draft and finalization process.

Attached are the following files:

File Name	Description
File Name .docx	MS Word version of the final document.
File Name .pdf	Acrobat version of the final document with a full scan completed and passed for accessibility requirements.

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The cost is as follows:

Quantity	Description	Price

Please review the cost and attached files. Once you have reviewed and accepted, please forward to **Name** for final review and acceptance.

Please reply to all parties with either comments or acceptance so we can all stay updated on the progress.

Thanks,

Your signature block

H.9 SPA Template 6: Send Complete Package to BMO

Template Title: Request BMO Sign & # SPA

Forward the BMO Response to the Initial Cost Estimate and Add this Info

TO: GPO Group

CC: n/a

Subject: WO # and Signature Needed – **Title of Project**

Attachments: SPA (with completed vendor cost), all requests for bids, all bid responses, and related files

BMO Team,

We are preparing the **Title of Project** for the printer. We confirmed the price and conditions are the same as for the Initial Cost Estimate. Give an explanation of why we selected the vendor (if not lowest bid), if there were unusual circumstances, and note if anyone did not respond. If you need anything else, please let me know.

Please validate, assign a Work Order Number, sign as Authorizing Signature, and return.

Thanks,

Your signature block

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H.10 SPA Template 7: Send Approved SPA to GPO and Team

Template Title: Signed SPA to GPO & Team

This template is for the BMO Team to send, so it is not included in this document.

H.11 SPA Template 8: Send Approved SPA and Files to Printer (Vendor)

Note that as soon as the BMO Team sends GPO the signed SPA authorizing the purchase, the Development of Information Materials Team is to forward the BMO Team e-mail to the printer vendor and begin the printing process.

Template Title: SPA & Files to Printer & BMO

TO: Vendor

CC: GPO Group

Subject: SPA - WO ##### - Title of Project

Attachments: SPA (and forward message from BMO Team to GPO)

Dear XXX,

Attached is the SPA Work Order for the above-named project, signed by our Authorizing Official. The files to be printed are attached/being uploaded to your site/being transferred to you through NASA's FTP site.

Let me know if you have any questions.

Thanks very much!

Your signature block

H.12 SPA Template 9: Send Received SPA to Printer (Vendor) and BMO

Template Title: Final Signed SPA to Printer & BMO

TO: Vendor

CC: GPO Atlanta, GPO Group

Subject: SPA Order Received - WO ##### - Title of Project

Attachments: SPA

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Dear XXX,

Attached is the SPA Work Order for the above-named project. We have signed that the order was received. Please follow your GPO process for invoicing.

Let me know if you have any questions.

Thanks very much!

Your signature block

H.13 SPA Template 10: Vendor(s) Not Selected Notifications

Template Title: Vendor Not Selected (Development of Information Materials Team)

TO: Vendor

CC: Team Lead

SUBJECT: Update – Title of Project

Dear XXX,

Thank you again for participating in the SPA bid process for the **Title of Project** project. I wanted to let you know that the project was awarded to a different vendor. I apologize for the delay in the decision-making process, but there are many factors involved in the approval of this project.

Again, we truly appreciate your responsiveness.

Thanks very much!

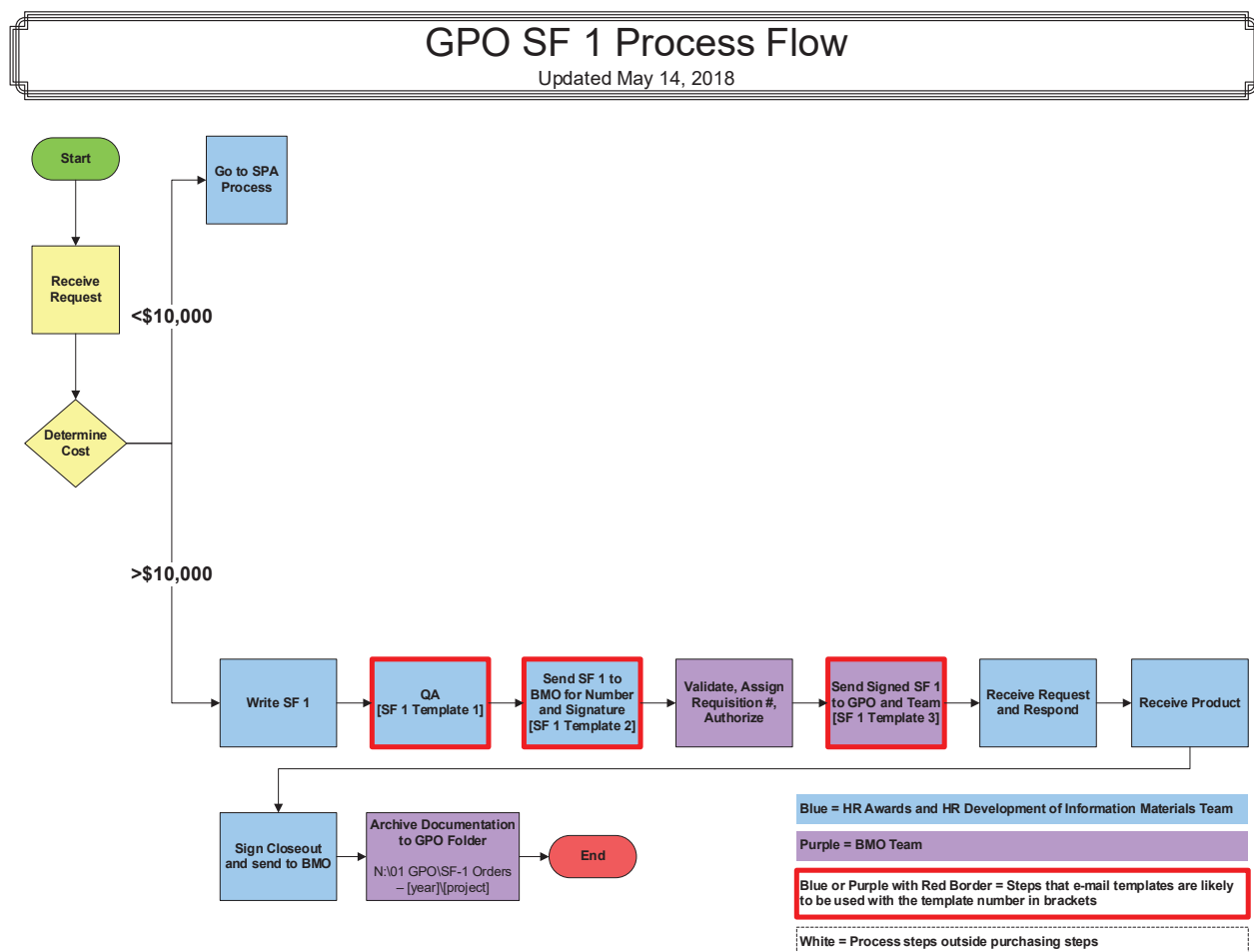
Your signature block

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Appendix I – Purchasing Printed Materials Using GPO SF 1 Process

I.1 GPO SF 1 Process Flowchart

The process flowchart steps with red borders indicate team e-mail templates are available in the appropriate team's process documentation:



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I.2 Important E-mails

Please ensure your Outlook contacts are updated with the latest information. Also, please use the e-mail group names identified as follows so the whole team is referencing the same way:

- **GPO Group:**
 - Zachary D. Ball
 - Rhonda L. Brady
 - Troy A. Chivers
 - Marie H. Lizana
 - Marlena A. LaFontaine
 - Robert A. Murray
 - Carrie B. Pohto
 - Darryl Q. Rouse
 - Jean C. Schmidt
- **GPO Atlanta:**
 - infoatlanta@gpo.gov

I.3 SF 1 Template 1: QA

Template Title: Request SF 1 QA

TO: Team Lead

CC: n/a

Subject: Please QA SF 1: **Title of Project**

Attachments: SPA

Dear XXX,

Attached is a Standard Form (SF) 1 for you to QA prior to me submitting to GPO for bid.

Thanks,

Your signature block

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I.4 SF 1 Template 2a: Send SF 1 to BMO for Number and Signature

Template Title: Request BMO Sign & # SF 1

TO: GPO Group

CC: n/a

Subject: Requisition # and Signature Needed – Title of Project

Attachments: SF 1

BMO Team,

We have been requested to support Title of Project.

Please see the attached SF 1 request. Please validate, assign a Requisition Number, and sign as Authorizing Signature.

Thanks,

Your signature block

I.5 SF 1 Template 2b: Send SF 1 to BMO for Number and Signature (with Strap #)

Template Title: Request BMO Sign & # SF 1s with Strap #

TO: GPO Group

CC: n/a

Subject: Requisition # and Signature Needed – Title of Project

Attachments: SF 1s

BMO Team,

We have been requested to support Title of Project.

Please see the attached SF 1 requests. Please validate, assign a Requisition Number, and sign as Authorizing Signature. Note that the **Requisition No** and the **Strap with Requisition No** fields need to be filled out on both forms before signing.

Thanks,

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Your signature block

I.6 SF 1 Template 3: Send Signed SF 1 to GPO and Team

Template Title: Signed SF 1 to GPO and Team

TO: GPO Atlanta

CC: GPO Group

Subject: SF 1 – Requisition #, **Title of Project**

Attachments: SF 1

GPO,

We have been requested to support **Title of Project**.

Please see the attached SF 1 request, signed by our Authorizing Official.

For questions regarding the requested product or technical specifications, please refer to the contact information located on the SF 1.

Thanks,

Your signature block

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Appendix J – Test Data for Screen Shots

When a project includes using screen shots, it is important to ensure that no character names or live data (e.g., names/info that are or could be real) are used and that all Personally Identifiable Information (PII) is removed or redacted before placing in the document.

Important: If test accounts are available, that is the preferred method of populating screens to capture. If test accounts are not able to be used, the data must be replaced or blurred in SnagIt, then the image flattened (so the sensitive information cannot be uncovered), copied, and pasted into your Word file. Do not put screens with live data or PII in a Word file and then cover up with boxes or text.

The following sample e-mail can be customized to send to customers:

Dear **Name**,

I am not sure what types of fields you need to fill, but here is what we have been using on test accounts.

When preparing any documentation or graphics, it is important to ensure that no Personally Identifiable Information (PII) is used in graphics, examples, screen shots, etc. We have not been able to locate any official NASA policies on creating test/dummy accounts for publishing in desk guides or other documents/graphics. However, there are some widely accepted practices (e.g., test phone numbers) as well as information on the Social Security Administration Web site to help create appropriate test data. The key is that we have to create a fake identity that does not look like a real person and cannot be attached to a real person. The other key is that we cannot use character names (e.g., television, film, cartoons, etc.) or anything that might be trademarked or copyrighted.

The following is an example of information that could be used to develop test accounts to capture screen shots or to use as examples in documentation:

- Name: John Q. Public (For one that sounds less like a person: John Q. Testname.)
- Address: 123 Main Street; Anytown, MO 12345
- Phone Number: 555-555-0100 (This should be used for all phone numbers. However, if you are developing several test accounts and the

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system requires different phone numbers, the only ones currently reserved for fictitious use are 555-0100 through 555-0199.) (NOTE THAT THIS IS UPDATED INFORMATION.)

- SSN: 000-00-0000 (This is the preferred fictitious SSN. However, if the system will not allow you to put all 0s, please use 123-45-6789.)
- E-mail Address: johnqpublic@example.com (If you use John Q. Testname for the name, then use johnqtestname@example.com.)
- Date of Birth: 05-05-1955 (I could not find an accepted test DOB, but keeping with the 5s in the phone number, thought this might work.)
- Place of Birth: Anytown, MO

If examples are needed that do not require last names, do not use last names. This simplifies the PII issue.

Please let me know if you have any questions.

Thanks,

[Your signature block]

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Appendix K – Document Control Number

All documents/products produced by the team are required to have a document control number. New document control numbers must be obtained through the official SDNS, using the procedures in this appendix.

Important: If you are updating a document that already has a valid document control number from SDNS, do NOT obtain a new one for an update to that document. The document number remains the same if it is just an update. Refer to [paragraph K.4, Determine if a New Document Control Number is Needed](#).

K.1 Explanation of Old and New Document Numbering

- **Old Numbering System:**

- Upon go live of the NSSC, there was no system for the team to use, so an internal numbering system was developed. When SDNS was made available, it was determined that the old numbers would be updated to the new SDNS numbers only if/when the document was updated.
- If you are assigned an old document that needs to be updated, there are several things you will need to do regarding the document number. Request guidance/assistance from your Service Owner/Lead if needed. The following are the items that need to be completed:
 - Obtain a document number from SDNS using the instructions in this appendix.
 - Change the document number on the document/product from the old number to the new number.
 - If there is a Document History Log in the document/product, capture the document number change in that log.
 - After the document is finalized and all approvals received, when you upload to TechDoc, you will need to use the **Modify** feature in TechDoc to change the Name/Number of the document.

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- **Current Numbering System:**

- SDNS is the official document numbering system for our work.
- As the NSSC has used SDNS, additional features/options have become available. If you are assigned a document to update that you believe may have an incorrect style of number (even if it was assigned through SDNS), request assistance from your Service Owner/Lead to determine if a new number is needed. Do not change numbers without their guidance since it may impact other things.

K.2 NSSC Standards and Requirements

There are requirements related to how the numbering system is used and how to apply for certain document numbers (e.g., SDGs, Work Instructions, etc). The following guidelines apply:

- [NSPLN-1410-0001, NSSC Electronic Library \(NEL\) Standards and Procedures.](#)
- [NSNPI-1410-0001, NSSC Document Management Program Procedural Instruction.](#)

K.3 Guidelines for Document Control Numbers

For restrictions related to which Document Types we can select, refer to [NSPLN-1410-0001, NSSC Electronic Library \(NEL\) Standards and Procedures](#). In general, our team uses the following **Document Type** categories:

- **REF:** Reference
- **DIM:** Development of Information Materials
Used for our team's job aids, templates our team develops to assist our team and HR teams, our team references, etc.

In general, our team uses the following **Agency Filing Scheme (AFS) number**:

- **3000:** Human Resources/Personnel (General)

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K.4 Determine if a New Document Control Number is Needed

A new document control number is needed in any of the following circumstances:

- The team has never previously worked on or delivered the document.
- The document has an old document control number per the description in paragraph K.1, Explanation of Old and New Document Numbering.
- For some documents (e.g., NSSC Annual Reports), even though the team has previously worked on NSSC Annual Reports for specific topics, each year, a new document control number is needed because we are not “updating” the prior year’s content.

A new document control number is not needed in the following circumstance:

- The team has previously delivered a version of the document and you are delivering an update of the document.
- The team has previously delivered a version of a particular NSSC Annual Report for a particular year and the team has been asked to update that year’s document.

K.5 Obtain Document Control Number

Note: Since there have been several instances of document titles changing throughout the development process, some right before publishing, we do not obtain document control numbers until all draft reviews completed and we are ready to finalize for delivery. If a document title changes after you obtain a document control number, you will need to submit a correction to the Document Management Team through their request process.

To obtain a document control number:

1. Visit SDNS at <https://ssccampus.ssc.nasa.gov/sdns/welcome.asp>.
2. Click the **Request Document Number** link.
3. On the next screen, click the **Request Document Number** link.
4. Click the **Center** field drop-down menu, then select the **NSSC** option.

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5. On the Request Document Number screen:

- a. Click the **Document Type** drop-down menu, then select the applicable option. The following are our most commonly used Document Types:

- (REF) Reference
- (DIM) Development of Information Materials

Note: If you think another Document Type should be used, verify with your Lead before selecting it. It is important to know that some of the Document type options are restricted as to which groups can use them.

- b. In the **AFS Number** field, type **3000**. (There are rare instances when our team would use a different AFS Number, such as when a customer specifies it.)
- c. Do **NOT** select anything in the **Unique** field.
- d. In the **Enter Document Title** field, type the document title exactly as it appears in the document.
- e. In the **Enter Document Requestor(s)** field, type your name.
- f. Click the **Request Document Number** button.

The success window is displayed, showing the Document Number assigned by SDNS as well as the information you entered into the request form.

- g. For quick reference, it is recommended that you save a screen shot JPG file of the Success window information to your document's working folder. In addition to using the document control number on the document, you will also need that and the title for uploading to TechDoc.

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K.6 Submit Correction to SDNS Regarding Document Type, Number, or Title

In rare circumstances, the SDNS record will need correcting. Examples include:

- The incorrect Document Type was selected when requesting the document control number.
- The incorrect AFS Number was typed when requesting the document control number.
- The document Title was modified after obtaining the document control number.
- In a subsequent revision of the document, the customer requested the document title be changed. You would use the same document control number and change the SDNS record if the document was largely the same content. However, if the document content changed substantially, a new document number would be warranted.

If a document record related to SDNS needs to be corrected, verify the correction with your Service Owner/Lead, then submit a request for the correction to the Document Management Team. At this time, that is done by using the following steps:

1. Visit the NSSC Support Operations Directorate portal at <https://sod.nssc.nasa.gov/sodportal>. (You may need to copy and paste the link into your browser.)
2. Click the **Information Resources Division Service Catalog** link.
3. Click the **Documents/Records Services** link.
4. Under the **Category** heading, click the **SDNS – Create/Cancel/Modify** option.
5. Complete the rest of the required fields.
6. Click the **Order Now** button.

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Appendix L – TechDoc Guidance

TechDoc is the Electronic Document Management System (EDMS) software platform used for the NSSC Electronic Library (NEL). TechDoc is where we store official electronic documents. All documents that we deliver must be uploaded to TechDoc properly.

Note: Refer to [Appendix K, Document Control Number](#), for important information on document numbering.

L.1 Upload Files to TechDoc

L.1.1 Determine if Document will Need to be Released and Which Option to Select

When uploading a file to TechDoc or uploading an update to a file, you need to determine if the document needs to be released for access. In most cases, we do not release our copies of documents that we upload into our TechDoc folders. Some best practices for our team (these do not apply to other teams):

- Discuss with the document Requester to determine if the document needs to be uploaded and released for access. (Refer to next bullets to identify who uploads for release.)
- All of our team's internal working documents (e.g., templates, job aids) that need to be released should be uploaded and released by our team, not NSSC(CS) (refer to next bullet). This allows us to update and release quickly whenever needed. These internal working documents should only be released to Campus users. In rare instances, one of these documents may need to be accessed by OCHCO personnel, that document can be released to Community users.
- Most customers' documents that need to be made available on the Web or via the Search Pub links should be uploaded and released by Deirdre Wolverton, NSSC(CS) Oversight. This was determined to be an appropriate safeguard after OCHCO and NSSC were working to eliminate unneeded Web links and OCHCO directed NSSC to delete a number of files out of TechDoc. Their direction nearly caused official deliverables to be deleted out of our team folder instead of OCHCO just eliminating the link from the Web page. After discussion, Deirdre Wolverton created a TechDoc folder structure where she could upload copies of our deliverables, release them, and provide links to requesters so they could

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include the links on Web pages. IMPORTANT: Even if a document is uploaded and released by Deirdre Wolverton, that document **MUST** be uploaded to our team TechDoc folder structure.

When uploading a file to TechDoc, you have to select if it is available to just NSSC (Campus), to all of NASA (Community), or to anyone on the Web (Public). Requesters determine the access for their documents. When it is uploaded for release, the criteria is set in the main screen, then the document is released. To get the **correct** link, you **cannot** just go to the **Links** link in TechDoc. You have to go to the NSSC Internal Web site, click the **References and Resources** link. Then in the Electronic Library section, click the link to the applicable search engine. Search for the document (I usually search the document number), then you will see the links. If you set the document in TechDoc for Campus, but then search for the link using the Community Search, you will not get results.

There are different instructions for uploading a new file that has never been uploaded to TechDoc and a file that has previously been uploaded that you have just updated and delivered. To upload a new file, refer to paragraph L.1.2, Upload New File to TechDoc. To upload and update to a previous file, refer to paragraph L.1.3, Upload Updated File to TechDoc. For instructions on obtaining the link to the released document, refer to paragraph L.1.4, Obtain the Correct Web Link.

L.1.2 Upload New File to TechDoc

To upload a new file (not an update/revision of a previously delivered file) to TechDoc, use the following steps:

1. From the [NSSC Employees webpage](#), click the **TechDoc** link.
2. Navigate to our team's main folder:
/Root/HR/Development_of_Informational_Materials/
3. Navigate to the correct subfolder. (If you are unsure, contact your Lead for assistance.)
4. In the **Folder** portlet, click the **Create Document** link.
5. Complete the document information:
 - In the **Number** field, type the document control number that you obtained from SDNS. Refer to [Appendix K, Document Control Number](#).
 - In the **Title** field, type the document title as you typed it into SDNS when obtaining the document control number.

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- In the **Doc Type** field, select the same Document Type you selected in SDNS when obtaining the document control number. Note that the first four characters of the document control number indicate the Document Type.
- In the **Doc Category** field, select the applicable category:
 - NS – Non-Sensitive Information is now most commonly used by our team per the Document Management Team.
 - For a description of the Document Categories, under the **Document heading**, click the **Help** link. Then click the **Doc Category Definitions** link in the help text.
- Ensure the check boxes for adding you to the Distribution List and Notification List are selected.
- In the **Point of Contact** field, type your name.
- The **Organization** field should be populated with the **HR_SO – Human Resources Service Providers** option.
- In the **Web Search** field, select the applicable option:
 - **No**: Document attributes are not sent to the Search Manager(s). The document is not searchable from the Search Manager(s). The document is searchable on the Document Manager.
 - **Campus**: The document is viewable only from NSSC.
 - **Community**: The document is viewable within the NASA firewall.
 - **Global**: The document is viewable to anyone anywhere on the World Wide Web.

Note that if you select Campus, Community, or Global options here, you will need to select the related access options later in the upload process. Both selections must match for the Search Pub searches to work properly.

- The **Resident Document** field should remain with the **Yes** option selected.
Explanation from Help menu: Starting with TechDoc 6a, TechDoc supports nonresident Documents. Selecting No specifies that a Document is nonresident. A nonresident Document is a Document that does not have the electronic file(s) actually stored in TechDoc. This allows a Document to be created to track an external object such as a physical item (video tape, microfiche, hardcopy book, etc), an item that is located somewhere else and is not allowed to be duplicated on your system (an article in a publication, proprietary or classified data on another system), etc.

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- In the **Reason** field, type the reason you are uploading the file.

6. Click the **Next** button.

If the file needs to be released to be available to the Search Pub searches:

- In the **Folder** portlet, click the Release link.
- In the **Revision** field, type the date the file's date (YYYY-MM-DD).
- In the **Reason** field, type the reason for releasing.
- Click the **Next** button.
- In the **Release Document** screen, deselect the **Render the Generation to a watermarked PDF file** option, then click the **OK** button. The render to PDF option is selected as the default, but we do not normally use this feature. We convert to PDF within our software, then check for 508 compliance, then upload that file.

L.1.3 Upload Updated File to TechDoc

To upload an update of a previously delivered file to TechDoc, use the following steps:

1. From the [NSSC Employees webpage](#), click the **TechDoc** link.
2. Navigate to our team's main folder:
/Root/HR/Development_of_Informational_Materials/
3. Navigate to the correct subfolder. (If you are unsure, contact your Lead for assistance.)
4. Click the Explore Document icon.
5. In the **Folder** portlet, click the **Reserve** link.
6. In the **Reason** field, type the reason you are reserving the document.
7. Click the **OK** button.
8. In the **Folder** Portlet, click the **Replace** link.
9. In the **Reason** field, type the reason you are reserving the document.
10. Click the **Next** button.

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11. In the Replace Document screen, click the **Choose File** button.
12. In the **Open** window, navigate to the folder where the document is located.

Important: If you are uploading more than one file, the last file you upload should be the one you want opened. For documents that were developed in Word, but converted to PDF, upload the Word file first, then Reserve and Replace, uploading the PDF after that.

13. Click to select the document, then click the **Open** button.

In the Replace Document screen:

- The Fetch Access option should remain as **Normal**.
- Do not select the check boxes for overwriting and reserving.
- Click the **OK** button.

The document is uploaded to TechDoc and you are returned to the document's main screen.

14. If you have other files to upload associated with this document, repeat Steps 5 through 14 to reserve and replace with the other files.
15. If the file needs to be released to be available to the Search Pub searches:
 - Verify that the document is set up for the correct access to just NSSC (Campus), to all of NASA (Community), or to anyone on the Web (Public). The Web Search field and the Access Users groups must match for the Search Pub search to work properly.
 - In the **Folder** portlet, click the Release link.
 - In the **Revision** field, type the date the file's date (YYYY-MM-DD).
 - In the **Reason** field, type the reason for releasing.
 - Click the **Next** button.
 - In the **Release Document** screen, deselect the **Render the Generation to a watermarked PDF file** option, then click the **OK** button. The render to PDF option is selected as the default, but we do not normally use this

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feature. We convert to PDF within our software, then check for 508 compliance, then upload that file.

- Unrelease prior released versions.

L.1.4 Obtain the Correct Web Link

To get the **correct** link, you **cannot** just go to the **Links** link in TechDoc. Search for the document (I usually search the document number), then you will see the links.

If you set the document in TechDoc for Campus, but then search for the link using the Community Search, you will not get results.

1. Visit the NSSC References and Resources page at:
<https://nasa.sharepoint.com/sites/nssc/SitePages/NSSC-References-and-Resources.aspx>.
2. In the Electronic Library section, click the link to the applicable search engine.
3. Search for the document (the document number is a fast method), then the links are displayed.

L.2 Access Groups in TechDoc

It is critical that the correct groups are given the correct access to files and folders at the time that you create the folders and upload the files in TechDoc. It is very time consuming to correct the access permissions at a later time.

L.2.1 View Shared Access Groups

To view the shared groups in TechDoc:

1. From the [NSSC Employees webpage](#), click the **TechDoc** link.
1. From the top menu, click the **Groups** link.
2. In the **Groups** portlet, click the **Shared Groups** link.
3. Locate the desired list name. (Refer to paragraph [L.2.3, Current Shared Access Groups](#), for a list of the groups our team currently uses.)
4. To review the individuals associated with a group, click the **Show Info** link.

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L.2.2 Old Shared Access Groups

When TechDoc groups were initially set up, NSSC(CS) and NSSC(SP) personnel were included in the same groups (by team). This resulted in confusion as to the ownership of documents. In December 2010, NSSC(CS) and NSSC(SP) leadership decided to create different groups for the teams to separate out CS and SP personnel. This ensures NSSC(SP) can maintain accurate records of deliverables and be responsible for the contents of the folders/products.

You can easily determine if a group is one of the old HR groups using any of the following methods:

- If the HR group does not have “SP” or “CS” as part of the name, it is likely an old group. Do not use it.
- Review the list of groups by clicking the **Groups** link at the top of the TechDoc screen, then the **Shared Groups** option. Locate the desired group, then review the **Description** column to determine if it is showing that it should not be used.

Important: The reason that the old groups are still found in TechDoc is that there are still files and folders associated with those groups for access rights. There was no global correction for this. If the old group was deleted from TechDoc, then the team would no longer have access to the content with that association. Additionally, we also have to update the old groups with team names so that anyone new to the team can access old documents.

L.2.3 Current Shared Access Groups

The table in this paragraph provides the NSSC(SP) and NSSC(CS) TechDoc Shared Group names for each team. As we receive clarification from the teams on which groups are correct, this list will be updated.

Team Name	NSSC(SP) TechDoc Shared Group Name	NSSC(CS) TechDoc Shared Group Name
Awards and Recognition	HR_SP_Awards	HR_CS_Awards

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Team Name	NSSC(SP) TechDoc Shared Group Name	NSSC(CS) TechDoc Shared Group Name
Benefits	HR_SP_Services	HR_CS_Benefits_Counseling
Classification Appeals	HR_SP_Class_Appeals	HR_CS_Class_Appeals
Classification Services	HR_SP_Class_Services	HR_CS_Class_Services
Development of Information Materials	HR_SP_Dev_Info_Matls (Note that the old group name is HR_Dev_Info_Matls. It should not be used for any new documents or folders. Any old documents or folders with the old group name should be updated to include the new group name.)	HR_CS_Dev_Info_Matls
Development of Information Materials for Suitability Adjudication support	HR_SP_Dev_Info_Matls_SA	HR_CS_Dev_Info_Matls_SA
Drug Testing	HR_SP_Drug_Testing	HR_CS_Drug_Testing
Employee Notices	HR_SP_GEI_EN	HR_CS_Emp_Notices
eOPF	HR_SP_Services	HR_CS_eOPF
Financial Disclosures	HR_SP_FD	HR_CS_FD
General Employment Inquiries	HR_SP_GEI_EN	HR_CS_Emp_Inq
HR Administration		
HRIS		
In-Processing	HR_SP_Services	HR_CS_Inprocessing

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Team Name	NSSC(SP) TechDoc Shared Group Name	NSSC(CS) TechDoc Shared Group Name
Leave Programs		
Payroll	HR_SP_Services	HR-CS-PAYROLL
Personnel Action Processing	HR_SP_Services	HR_CS_PAP
Personnel Action Request	HR_SP_Services	
Presidential Rank Awards	HR_SP_SES	HR_CS_SES
Senior Executive Service	HR_SP_SES	HR_CS_SES
Retirements	HR_SP_Services	HR_CS_Benefits_Counseling
Staffing	HR_SP_SS	HR_CS_SS
Suitability	HR_SP_SA (Need clarification from team as to difference between the two groups.)	HR_CS_SA
Suitability Folder	HR_SP_SUITABILITY (Need clarification from team as to difference between the two groups.)	
Telework		
Training Administration	HR_SP- Training_Administration	
Workers' Compensation	HR_SP_FWCP	HR_CS_FWCP