United States Department of Agriculture

Agricultural Research Service

Financial Management Division

The Automated

Annual Resource Management Plan System

User Manual

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Introduction

The ARS Resource Management System (ARMS) is a comprehensive annual resource planning process to plan the budget year's expenditures by cost category, at all levels of ARS management. The Automated Annual Resource Management Plan System (ARMPS) automates the information collection and reporting for the ARMS process. This ARMPS User Manual provides instruction for operation of this automated system. Please refer to the ARMS Manual (dated May 1991) for concepts, policies, responsibilities, and interactions regarding the ARMS process.

A. Background

The Annual Resource Management Plan System (ARMPS) began when ARS entered into a contract with Program Resources, Inc. (PRI) in February 1985. The system was first used in 1986 to prepare the FY 1987 ARMP. Revisions to ARMPS have been made periodically to enhance system features, to provide additional information to ARS Management, and to improve system functionality.

The original ARMPS program was developed in a DOS-based language (Clipper). With the advances in technology, it became more and more difficult to maintain and manage the ARMPS program without updating its platform to conform to advancing personal computer (p.c.) platforms. In addition, ARMPS was designed to be operated and managed at the local p.c. level. In order to update a management unit's (MU's) information, a user had to physically go to that p.c. where the information was stored. If a vacancy occurred and another location was asked to provide assistance in developing or updating the information, a download of all the information had to be aggregated and moved to the servicing location's p.c. If a problem occurred with the software or a new version was released, all users in the Agency had to update their software on site. In order to transmit the ARMP, each location had to prepare a disk and mail it to their Area Office. The Area Office had to aggregate and check the data, make a new transmit disk, and mail that disk to Headquarters, and so on.

In 2003, preparations began [through a partnership with the Office of the Chief Information Officer (OCIO) and the Financial Management Division (FMD)] to migrate ARMPS to the Agency's web-based platform (Oracle). This platform was already being used to house the Agency's Agricultural Research Information System (ARIS) and was projected to house the Salary Management System (SAMS), which was also scheduled for migration. Housing all of the financial management systems on the same platform offered numerous opportunities for sharing information and reducing duplication of effort further down the road.

In May 2004, the new ARMPS was implemented across the nation for use in the development of the FY 2005 ARMPs.

ARMPS is designed to be flexible enough to accommodate the largest Management Unit and produce the reports required at all agency levels—locations, area, and headquarters. It is a user friendly system with controls and consistency built in wherever possible. The controls are performed by the use of predefined selections and dynamic screens. The user can enter data by selecting choices found in predefined lists of values (LOVs) available via drop-down menus or direct entry. This reduces the possibility of typographical errors. The data entry procedure is further controlled with the use of dynamic screens. Dynamic screens allow the user to enter data only in the required fields. This reduces the possibility of entering incorrect information. If errors are made, corrections are easily made using the horizontal menus displayed on each of the data input screens. Screens are broken into several types, each type offering the same options.

The planning screens were designed to assist the fund holders in their resource planning process. Planning screens displaying the **Total Allocation Amount**, the **Total Amount Budgeted**, and the **Balance Remaining to be Budgeted** for the Management Unit (MU) and all the Current Research Information System (CRIS) units within the MU are visible at all times from the CRIS Allocation sub-menus. The **Amount Budgeted** and the **Balance Remaining to be Budgeted** are dynamic and change with the moving of dollars. Migrating ARMPS onto the Oracle database provided the ARMPS with sophisticated planning screens that combine the best qualities of databases and spreadsheets. These screens eliminate the need for a calculator or separate spreadsheet.

Although ARMPS is still being enhanced, in the short time since implementation quite a few benefits and efficiencies have already been realized from the new system:

- Updates to the software are handled centrally by the OCIO. No updates or adjustments are required to the local p.c. using the data. A computer technician is not required to load the software at each location.
- Each Area Office has the authority and ability to access each of their location's ARMP information. Therefore, if problems are identified, an Area Office person can look at the location's data from their own computer and help research the issue. If corrections to the data are required, the Area Office can make that correction or instruct the location on-line in what to do and see immediately if the correction was accomplished.
- If an administrative vacancy occurs at the location, the Area Office can assist in the development of the ARMP or can assign rights to those MU's to another location to enter the information.
- The OCIO automatically backs-up the data in their nightly routine, eliminating the risk of data being lost or unrecoverable and the requirement for the locations to prepare daily back-up disks.
- Transmit disks are no longer required. Once the ARMP is finalized at the location level, the Area is notified for review and necessary corrections. Each location and/or Area runs reports at their level for file retention. Areas then notify Headquarters when the ARMP exercise is complete for their respective Area. Headquarters then reviews the data and runs Agency Executive reports.

- As ARIS, SAMS and ARMPS are on the same platform, the exchange of information has greatly improved. This is especially true in ensuring accurate organizational codes and CRIS information is used.
- With the migration of the ARMPS onto the Oracle platform with access via the Internet, the need for any type of aggregation has been eliminated. Based on the authorized level of access, all ARMPS users can now query, view, and edit ARMPS data from any computer. All reports can also be generated and printed from any computer or saved as Adobe PDF files for reference.

OCIO and FMD will continue to explore opportunities for more efficient exchange of information between the ARS systems. User suggestions can be submitted to <u>ARIS@ARS.USDA.GOV</u> with the words "ARMPS Suggestion" in the subject line.

B. Structure of This Manual

The ARMPS User Manual follows this structure:

- Chapter One describes the process for accessing ARMPS from a personal computer.
- Chapter Two describes how the system is organized and the processes of navigating within the system.
- Chapter Three describes how to enter information in ARMPS.
- Chapter Four describes the use of the Dynamic and Working Scenario ARMPS systems.
- Chapter Five describes the reports and how to generate them.
- Chapter Six describes the information available under Reference.
- Chapter Seven describes the functions available under Help.

The appendices (1 through 6) provide additional information about ARMPS:

- Appendix 1 is a listing of available footnotes and their meanings.
- Appendix 2 lists Indirect Research and Shared Research Costs.
- Appendix 3 itemizes the Facility Deficiency (and Safety) Codes (FDC's)
- Appendix 4 provides a sample IT Resources Narrative for the State of the MU/Location.
- Appendix 5 provides additional information on calculations used by the ARMPS program.
- Appendix 6 provides definitions of the different position category codes.
- Appendix 7 provides some helpful hints before beginning the data entry process.
- Appendix 8 suggests recommended steps to follow to build the ARMP
- Appendix 9 provides guidance on developing the Multi Year Analysis

C. ARS Account Management Terms and Definitions

A variety of terms such as ORG Code, Accounting Code, and CRIS Number will be used in this Manual. The following is an explanation of different account management terms.

ARMP: Annual Resource Management Plan

ARMPS: Automated Annual Resource Management Plan System

ARMS: ARS Resource Management System

Accounting Code: The Accounting Code is similar to a bank account number. As goods and services are procured, they are charged to an account at the National Finance Center (NFC—the bank). An Accounting Code is required for all transactions. The Accounting Code is 10 digits long, organized as follows:

XXX-XXXX-XXX where: The first three digits indicate the fiscal year and appropriation type. The next four digits indicate the location (4th level ORG Code). The last three digits are the Account Number.

The Appropriation Code

The first three digits of the Accounting Code indicate which account at the bank is to be charged. Generally, the first digit of the Appropriation Code is the last digit of the Fiscal Year. The second two digits signify which pot of money is to be used. The digits may either be 01 (Direct Appropriation), 02 (Hazardous Waste), 08 (Reimbursable), etc. For example, an FY 2005 direct appropriation account for ARS would start with 501, while a reimbursable would start with 508.

Location Code

The Location Code is identical to the 4th level ORG (Mode) Code.

Account Number

Within the Location's allocation, there can be up to 999 different accounts. There is no specific Agency guidance regarding specific values for these last three digits. However, there are several "rules of thumb". If the last 3 digits start with a 9, the unit is an Indirect Research Cost (IRC) account. If the last 3 digits start with an 8, the unit is a Shared Research Cost (SRC) account. If the last 3 digits start with a 1, the unit is a research management unit (RMU). Finally, if the last 3 digits begin with an "R", the account relates to a capitalized improvement of a facility. Consult the Area Budget and Fiscal Office (ABFO) to see if they have any additional requirements for the Account Number.

Accounting Codes are established by the ABFO. Accounting Codes in SAMS can be loaded from ARMPS and then maintained in the MU/CRIS Information screen or established directly in this screen. Confirm that all Accounting Codes established in SAMS have also been established at NFC.

Account Type: Direct – Appropriated and soft (outside) funds IRC – Indirect Research Cost Account SRC – Shared Research Cost Account

Acquisition: The obtaining by procurement (including small purchase contracts) of supplies, equipment, services, or construction by and for the use of the Federal Government through purchase or lease. (Exclusions include lease or purchase of real property and the sale of surplus property.)

Assistance: The purchase of research support from another organization when such action furthers the ARS mission. This includes grants or specific cooperative agreements.

Base Funds: Congressionally appropriated funds available to the Management Unit (excludes temporary funds). Defined in ARMPS as *Net to MU less Temporary Funds*.

CRAS: CRIS Resource Allocation Schedule. This term refers to a report or to the data entry screens.

CRIS: Current Research Information System

CRIS Number: For each direct research account, there is at least one associated research program. In ARS, these are called CRIS projects, which have individual CRIS numbers. CRIS Numbers are assigned by the National Program Staff (NPS) and relate to a single research project being performed. CRIS Numbers are 15 digits long as follows:

XXXX-XXXXX-XXX-XXA	where:	The first four digits indicate the location performing the research.
		The next five digits indicate research project(s).
		The next three digits indicate the Activity Number relating to the research project at the location.
		The last three places (two numeric and one alpha) are the sequential number.
The location performing the res	search is ge	nerally the 4 th level ORG Code, unless the project is

The location performing the research is generally the 4th level ORG Code, unless the project is sponsored by NPS, in which case, the first four numbers are 0500.

Research projects are usually two digit codes that indicate a project relating to the 22 National Programs identified in the strategic plan of the Agency. Up to two research projects may be specified in the five digit field.

The Activity Number is a sequential number within the research project at the location. If there are research projects occurring at the same location performing research using the same project codes, the first project would have an Activity Number of 001, while the second would have 002.

The last three digits are the sequential number. If the appropriation is direct (X01), the last digit will always be D. If the appropriation is Reimbursable (X08), the last digit will be R. If the authority for the funds is through a Trust Fund (X93 or X91), the last digit will be T.

CRIS Numbers are maintained in the MU/CRIS Information screen.

Direct Costs: All research costs which are not in an IRC account and can be directly associated with CRIS projects and Research MUs. These costs are controlled by the fund holder of the research MU.

Discretionary Costs: Overtime/premium pay, travel of persons, transportation, printing and reproduction, other services, RSA other costs, supplies and materials, miscellaneous services, equipment, and land & structures.

EOD: Entrance on Duty date; the projected starting date of an employee.

EXP: Expiration dates; required for temporary or term appointments.

Extramural Agreement: An R&D contract, grant, or specific cooperative agreement between ARS and another party(ies) for research performed by the outside party that supplements or correlates with ARS programs.

Facilities: Planned expenditures for construction or improvement of existing federal facilities.

Fixed Costs: Federal salaries, lump sum leave, promotions, RSA salaries, RSA utilities, support service contracts with FTE identified, rent and utilities, repair and maintenance, extramurals, IRC, and SRC.

Footnotes: Located on the Position Staffing Plan (PSP) and assigned to individual positions. Footnotes provide additional information about the position. There is a limit of 5 footnotes per position. See **Appendix 1** for a listing of available footnotes and their definitions.

FTE: Full Time Equivalency. Based upon a yearly level of 2088 hours, a full-time employee would have an FTE of "1.0". A part-time employee would have a value less than "1.0". Do not assign more than 1.0 FTE per position.

If the employee/position represents a "Split FTE" (position is paid by more than one account), include only the FTE applicable to the time actually devoted to the MU. For example, a

Permanent Full Time (PFT) employee who is split 50/50 between two MUs should show 0.50 FTE in each MU.

In another example, a Permanent Part Time (PPT) employee who works a total of 32 hours per week should be shown as 0.80 FTE if he/she devoted all time to one MU. If this PPT employee were split 50/50 between two MUs should show 0.40 FTE in each MU.

Fund holder: The person designated as having financial accountability for program funds, as evidenced on the Annual Operating Plan (AOP). This person is typically the MU's Research Leader, or other type of fund holder for an IRC account, but in some cases it may be a higher level manager, e.g., Center Director (CD) or Laboratory Director (LD).

HPRL: High Priority Requirements List; a consolidated list of current-year unfunded items represented in the 550 (Procurement, Extramural, Facilities, Miscellaneous Plans) files.

Indirect Research Costs: (IRC) Common costs that are used to maintain the facility. Examples of these costs are utilities, salaries of maintenance and LAO staff, motor pool, etc. See **Appendix 2** for a comprehensive list of IRC and SRC.

Management Unit (MU): There are two definitions for Management Unit in ARMPS. When referring to data entry and MU reports, Management Unit refers to the 10 digit Accounting Code (501-3625-112). When used in all other reports, Management Unit means a specific 18 digit ORG (Mode) Code (03-30-36-3625-12-00-00-00).

Mode Code: See ORG Code.

Net to Location: Permanent funds available to the Management Unit *prior* to the IRC and SRC assessment.

Net to MU (CRIS): Funds available to the Management Unit or CRIS *after* the IRC and SRC assessment.

ORG Codes (Commonly referred to as MODE Codes): The ORG Code is an 18 digit number that uniquely identifies an organization within the Department of Agriculture. Its structure is as follows:

XX-XX-XX-XXX-XX-XX-XX

Each of the X groupings are known as **levels**. Level 1 is represented by the first two numbers of the ORG Code, while Level 8 (also known as the 8th level ORG or Mode Code), is represented by the last two digits. Each level means something unique.

- Level 1 = The Agency. For ARS, it is the number 03.
- Level 2 = The region. At one time, ARS was subdivided into regions for management purposes. The region numbers are:
 - 01 Headquarters
 - 10 Northeast Region
 - 30 Midwest Region
 - 50 Western Region
 - 60 Southern Region

Level 3 = The Area. There are fourteen areas/entities in ARS (including Headquarters) that have been created to perform the various research and management functions in the Agency. The Area Numbers are:

01	Administrator and Immedi	iate Staffs
02	International and National	Research Programs
03	Administrative and Finance	cial Management
04	HQ Operational Programs	(i.e., OCIO, OTT, etc.)
12	Beltsville Area	(Beltsville, MD)
19	North Atlantic Area	(Philadelphia, PA)
40	International Research	(Overseas Labs)
36	Mid West Area	(Peoria, IL)
53	Pacific West Area	(Albany, CA)
54	Northern Plains Area	(Ft. Collins, CO)
62	Southern Plains Area	(College Station, TX)
64	Mid South Area	(Stoneville, MS)
66	South Atlantic Area	(Athens, GA)
82	National Agricultural Libr	ary

- Level 4 = The Location. This level denotes the next subunit below the Area, also known as the Division. The fourth level ORG Code is used to uniquely identify a large cost center within the Area. The first two digits of the ORG Code always equal the Area Number. Some examples of 4th level ORG Codes are:
 - 0310 Financial Management Division
 - 3625 Ames, IA
 - 6217 Stillwater, OK

Level 5 = The Lab or Branch. This level denotes a Management Unit within the Location or Division.

Level 6 = Denotes a subunit of the Lab.

Level 7 = Denotes a subunit of the Level 6 ORG Code.

Level 8 = Denotes a subunit of the Level 7 ORG Code.

Levels 7 and 8 are rarely used within ARS.

So, an ORG Code like 03-01-03-0310-30-00-00 would mean:

Agency:	ARS	(03)
Region:	Headquarters	(01)
Area:	Administrative and Financial Management	(03)
Division:	Financial Management Division	(0310)
Branch:	Fiscal Operations Branch	(30)

ORG Code information is maintained by the Human Resources Division (HRD). Updates are loaded into ARMPS when importing from SAMS.

For simplicity's sake, ARMPS uses and displays ORG codes starting with Level 3 and ending with Level 6. Therefore, the above example would be displayed as:

03-0310-30-00

Position Staffing Plan (PSP): All positions/employees officially assigned via a position description and the latest personnel action and supervised within a particular MU must be included in the PSP for the MU's "X01" ARMP package. This includes all positions/employees that are assigned to one MU, but spend 100% of their time in a different unit. In such a case, the unit to which the position/employee is officially assigned includes the information on the PSP with a standard footnote C explaining the situation, lists the FTE as "0", and the full-year salary as "\$0".

Shared Research Costs (SRC): Costs that are associated with direct research, but may be shared by more than one MU/CRIS and, therefore, may be jointly controlled or funded. They can be characterized as direct research support costs such as livestock operations and shared research equipment, distinguishing them from IRC costs. These costs must be excluded from IRC development. See **Appendix 2** for a comprehensive list of SRCs.

Space Type:

- Federal space owned by the Federal Government
- Mixed a combination of space utilized by the Federal Government at a location that includes both owned and non-owned facilities.
- Other space that could include leased GSA property or MUs located on State owned property.

SY: Scientific Year; an ARS scientific professional position that has a Position Category (CAT) of either 1 or 4. See **Appendix 6** for a listing of all Position Category Codes and their definitions.

NSY: Non-scientific Year; an ARS position that is not defined as a SY.

For further definitions and a discussion of ARS policy related to Resource Management, please see **The ARS Resource Management System (ARMS)** manual last revised in May 1991. Copies are available from FMD - Fiscal Operations Branch (FOB). They may be reached on 301-504-1270.

D. The SAMS – ARMPS Interface

In order to minimize duplication of effort, interfaces between ARMPS and SAMS have been (or will be) developed. These interfaces were established to transfer salary projection information between the two systems.

From ARMPS to SAMS

The ability to import data from ARMPS to SAMS has not yet been implemented.

From SAMS to ARMPS

The Rollover (under Action) function in SAMS allows current year data in SAMS to be rolled over and projected for the next fiscal year. This information can then be imported to ARMPS through the ARMPS software under *Action, Update ARMPS with SAMS*. NOTE: Users should ensure the data reflected in SAMS is completely accurate. This information will be imported into ARMPS exactly as it is reflected in SAMS.

Chapter One – Accessing ARMPS

This chapter provides the instructions necessary to access the Annual Resource Management Planning System. After verifying that authority to access ARMPS has been requested by the Area Budget and Fiscal Office and received (a user name and password will be issued), confirm that <u>Microsoft Internet Explorer (MSIE) 5.5</u> or higher is installed on the computer. To confirm this, follow these instructions:

1. Open the current version of MSIE residing on the computer Click on "Help" Click on About Internet Explorer



This screen will appear:

🚰 About Inte	ernet Explorer 🔀
	Microsoft* Internet Explorer
	Version: 6.0.2800.1106 Cipher Strength: 128-bit Product ID:55736-411-0368281-04467 Update Versions:; SP1; Q822925; q313829; Q832894; Q831167; Q867801; Q833989; Q834707;
	Based on NCSA Mosaic. NCSA Mosaic(TM); was developed at the National Center for Supercomputing Applications at the University of Illinois at Urbana- Champaign.
	Copyright ©1995-2001 Microsoft Corp. Acknowledgements

In the middle of the screen, the version of MSIE will appear.

If it is MSIE 5.5 or higher, click "ok" and go to Step 4.

If it is not at least MSIE 5.5, please continue with Step 2.

 To update Microsoft Internet Explorer (MSIE): From Main Screen, Click on "Tools" Click on "Windows Update"



3. Once this screen appears, click on "Scan for updates". MS Windows Update will test the computer to see what updates are available.



The following screen will appear:



Click on "Install Now" and follow the prompts as instructed for installation.

After the initial download of MSIE 5.5 (or higher), it is strongly recommended that the Critical Updates Package also be downloaded for the version downloaded.

4. Setting the ARMPS Address (NOTE: this does not need to be done if the p.c. already has access to ARIS.)

Place the mouse cursor on any blank place on the desktop and press the right mouse button. A box will be displayed with these options: **arrange icons by, refresh, undo delete, graphic option, display modes, new, and properties.** Select **new** and then **shortcut.** This will create a new shortcut on the desktop. The screen below will be displayed. In the box, type: **https://arisapp.ars.usda.gov** (the web address for the ARMPS application).

Create Shortcut	
	This wizard helps you to create shortcuts to local or network programs, files, folders, computers, or Internet addresses. Type the location of the item:
	< Back Next > Cancel

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Once the address has been entered, press the **Next** button at the bottom. The screen below will appear. In the box, type the name to be displayed on the desktop for this shortcut. It could be ARMPS. After typing the name for the shortcut, press the **Finish** button at the bottom.

Select a Title for the P	rogram	
	Type a name for this shortcut: New Internet Shortcut Click Finish to create the shortcut.	
	< Back Finish	Cancel

5. In order to run ARMPS, the p.c. must have a piece of software called JInitiator installed. If SAMS is accessed without JInitiator installed, a blank screen will be displayed with this message along the top. **This site requires the following ActiveX control: "Oracle Jinitiator" from "Oracle Corporation". Click here to install.** Close this screen by pressing the 'X' in the upper right hand corner. This will bring back the Application Main menu. On the Application Main Menu, in the upper right hand corner, press the button labeled **'Download Jinitiator'.** BE AWARE, THE USER MUST HAVE ADMINISTRATOR RIGHTS IN ORDER TO INSTALL SOFTWARE. If administrator rights are not available, please contact the local technical staff first.

🗿 ARIS Main Menu - Microsoft Internet Explorer	
Elle Edit View Favorites Iools Help	
🔇 Back 🔻 🕗 👻 😰 🏠 🔎 Search 🧙 Favorites 🍘 🔗 🌺 📧 👻 🛄 🛣	
Address 🕘 http://arisappdev.ars.usda.gov/db_selection_sso.html	🖌 🄁 Go 🛛 Links 🌺
United States Department of Agriculture	
Home Registration Jinitiator Solutions Contact Us	
Applications	
ARMPS SAMS	
ATS HEAN WATS	
FDMIS	
Aglearn + Your Finit Cited to the U.S. Government OF The President's Management Agenda E-GOV	
ARS Home USDA Home FOIA Statements and Disclaimers Information Quality FirstGov White House	
	Internet 🥂

Once the Download JInitiator button is pressed, the following screen will display. Press 'download Oracle JInitiator 1.3.1.18' (or whatever version is deplayed). This screen will always display the correct version of JInitiator required for ARMPS.

Oracle Jinitiator 1.3.1.18 Download Page - Microsoft Internet Explorer	
Elle Edit View Favorites Iools Help	7
Image: Search Forward Image: Search Forward <td< td=""><td></td></td<>	
Agdress 🕘 https://arisapp.ars.usda.gov/forms90/jinitlator/us/jinit_dwwnload.htm 🕑 🎅 Go Link	5 »
Google - 💽 😚 Search Web - 🔊 🔁 Site popups allowed 🖫 AutoFill 🚾 Options 🥒	
Oracle JInitiator 1.3.1.18 Download Page	~
This page will allow you to download and install Oracle Jinitiator	
Click on the download link below and save the file named jinit.exe to your filesystem.	
When the download finishes you can install Oracle Jlnitiator by locating the file using the Windows Explorer and double-clicking on it to start the installation process.	
When the installation process has finished, exit your browser and restart it. Return to the initial application starting page and the browser will then load Oracle Jlnitiator and start your ARIS system applications.	
Download Oracle Jinitiator 1.3.1.18	
	~
🗃 Done	

The system will next display a file download dialog box. Here, choose Save.

File Dov	vnload 🛛 🔀
?	Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file. File name: jinit.exe File type: Application From: arisand ars used gov
	This type of file could harm your computer if it contains malicious code.
	Would you like to open the file for save it to your computer?
	Always ask before opening this type of file

/

A save dialog box will be displayed. This will show the directory where this file will be saved. Please make sure and note the name of the directory where the file will be saved and press the **save** button. It will save as Jinit; do not change this name.

Save As						? 🔀
Save in:	🗀 My Download	d Files	~	G 🦻	• 📰 🏷	
D Recent						
Desktop						
My Documents						
My Computer						
	File name:	jinit.exe			~	Save
My Network	Save as type:	Application			~	Cancel

Once the file has been downloaded, go to the directory where the file was saved and double click on the Jinit file. The file will start to install and the following screen will be displayed.

Oracle JInitiator Setup	
Choose Destination Location Select folder where Setup will install files.	
Setup will install J1nitiator 1.3.1.18 in the following folder.	
To install to this folder, click Next. To install to a different folder, click Brows another folder.	e and select
Destination Folder	
C:\Program Files\Oracle\JInitiator 1.3.1.18	Browse
InstallShield	
< Back Next >	Cancel

Press **next** and the software will install to the correct location. Do not change the destination folder. A couple of other screens will quickly display and then the message JInitiator successfully installed will be displayed. ARMPS should now be able to be accessed.

6. This screen will appear every time the system is accessed. Click "I Agree".



The following screen will appear. Those programs available on the ARIS platform will be identified. Click on ARMPS System Application.

ARIS Main Menu - Microsoft Internet Explorer		
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorites <u>T</u> ools <u>H</u> elp		AT
😋 Back 🔹 🐑 🔹 🛃 🌈 Search 🤺 Favorites 🤣 🔗 🍇 🗷	i • 🧫 🔝 🏭 🦀	
Address 🕘 http://arisappdev.ars.usda.gov/db_selection_sso.html		🔽 🔁 Go 🛛 Links 🎽
United States Department of Agriculture	NASS	
Home Registration Jinitiator Solut	ions Contact Us	
Applications		
ARIS ARIS		
ARMPS	SAMS	
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The log-on screen will appear. Enter the user name and password and click on "Login". User passwords will need to be changed every 60 days. The password is case sensitive, so do not enter as capitals.

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Welcome To Unified Login Page	
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Login Cancel	

7. Adobe Software

In order to display reports in ARMPS, either Acrobat Reader or Adobe Acrobat (full version) must be loaded on the computer. The Area Computer Specialist can assist with obtaining this software.

January 2006

Chapter Two – Organization and Navigation

The ARMPS automates the resource planning process and generates the ARMP documents. The user must enter data into the ARMPS, perform the planning process, and generate the ARMP documents.

The ARMPS is designed for easy modification of data once entered. Use the tab key or mouse to move the cursor from one field to another within the different screens.

The ARMPS consists of drop-down menus with list of values (LOV), data input screens, planning screens, and the report generation functions. **Menu screens** are used to display the system options available to the user. **Data Input** screens are used to enter data into the ARMPS.



When entering ARMPS, the user will be presented with three choices.

Official ARMPS: This choice is the one to use to develop and maintain the official ARMP. It has all of the abilities and functions described in this Manual. Once the ARMP has been developed and finalized, the information can be imported into the Dynamic ARMPS or the Working Scenario ARMPS systems.

Dynamic ARMPS: Official ARMP information can be imported into the Dynamic ARMP system and then can be modified and updated as needed without changing the Official ARMP. Locations can choose to maintain their Position Staffing Plan information in an up-to-date manner. The Area can request HPRL updates through the Dynamic ARMP process.

Working Scenario ARMPS: Occasionally, the need arises for the Areas to change data within an ARMP to determine the impact of those changes. Importing the Official ARMP (or Dynamic ARMP) information into the Working Scenario ARMP system allows the Areas to make changes and analyze outcomes without impacting the official ARMP information.

This Manual is written to describe the workings of **"Official ARMP".** Although "Dynamic ARMP" and "Working Scenario ARMP" may not contain all of the abilities as "Official ARMP", they look and work the same way.

Click on the icon or the words under the icon to enter the system required. The following sections will describe general features of each type of screen and the functions available during their use.

A. Main Menu

The primary menu in ARMPS is the ARMPS Main Menu. The ARMPS Main Menu is the starting point for ARMP navigation. This screen also reflects the name of the user and the Fiscal Year active. Through the drop-down menus, the user can enter data, print reports, reference mode code information, obtain help, and exit the program.



Annual Resource Management Plan System (ARMPS) User Manual

B. Status Line

Most ARMP screens contain the following basic features

- Screen heading
- Menu bar
- Tool bar
- Status line

The **Screen heading** (blue bar) consists of the title of the automated system, ARMPS-Annual Resource Management Plan, and the title of the screen being used (black bar).

The Menu bar contains drop-down features.

The **Tool bar** (grey bar) will appear once a selection is made from the menu bar.

C. Menus/Data Entry

The menu bar displays a list of options currently available to the user. These options allow the user to work with the various data entry screens. Each menu screen has the automated system name displayed on the first line, followed by a unique menu name in white type on the black bar directly beneath it. For detailed information about a specific data entry screen, refer to **Chapter 3, Entering Information in ARMPS**.

D. Data Entry Screens

Data entry screens allow structured entry and modification of ARMP data. Data entry screens are composed of labeled fields. The ARMP system monitors the information entered into each field to ensure that it matches the information that is required by the field. For example, the system would not permit a phone number to be entered in a field that requires a dollar amount. Each value entered must meet the requirements specified for the particular field. Use the List of Values (LOV) and search feature (identified by a question mark) where available. Refer to the individual screen descriptions in the **Data Entry** section for specific field requirements.

Select the Add option to add new data using the Data Entry screen.

Select the **Delete** option to delete the currently displayed record.

Select the **Query** icon located on the tool bar to search the database.

The tool bar icons are similar to other Windows-based programs, such as cut, copy, and paste options. The **Print** icon functions *only* as a print screen, not an entire document print.

Data entry screens also function as customized spreadsheets, showing updated total and balance figures as data elements are changed. Data input screens monitor funding levels to prevent over-allocation of management unit budgets.

As data is entered or changed in a data entry screen, totals and balances are automatically adjusted and displayed to reflect the new data. This process allows the user to experiment with data on the screen in order to see the effects of resource allocation on current balances and totals. The **MU Balance** and **Unassigned Balance** figures on each data entry screen show the user the amount that has not been assigned to a CRIS unit. If the entry of a new amount results in MU over-allocation, a negative balance will appear. **To allow for flexibility, negative balances are allowed while assigning the funds within data input screens. However, the user must be certain not to leave the plan reflecting any negative amount on the ''Balance to Budget'' line in the Assistance and Acquisition section or the "MU Balance" line in the CRIS Resource Allocation.**

NOTE: Select the *Save* icon ⁽²⁾, when available, to save data . If fields require data, the program will prompt the user to enter data before saving or exiting.

WARNING: It is possible to delete information in ARMPS. Please ensure approval of this deletion is obtained, and that the appropriate line is highlighted prior to deleting any records. Once deleted, the information can not be restored; it must be re-entered.

ARMPS is the tool used to plan and manage the unit's resources each fiscal year (October 1st through September 30th).

- Each ARMPS user enters data for the Mode Code(s) and Accounting Codes for which they are responsible.
- The following items are consistent throughout the program:
 - The next to a field means there is a List of Values (LOV) available to select from
 The * next to a field name means the information is required
 - The mext to a new means the information is required
 The pull-down menu provides a choice of the correct entry options

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Remarks		

Annual Resource Management Plan System (ARMPS) User Manual

- Tabs allow users to navigate within the different data screens. The gray tab is information currently displayed. The blue tabs are the available screens which are currently not in use.
- % allow for searching the database (i.e. %dough%)

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- Tool Bar:
 - *First, Back, Next & Last* arrows also located under *Record*; allow user to move between records with ease.

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• *Cut*, *Copy* and *Paste* – also located under *Edit*; function like any Windows program.

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• *Print* – also located under *File*; functions as a print screen, not a document print.

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• Query Screen – also located under Action; takes user to Query Screen.

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• Exit – also located under *File*; returns user to previous screen. Do NOT use the X.

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 - The system allows sorting within the 'list' screen by ascending or descending order when user clicks on any of the gray header boxes.
 - Clicking once will sort in ascending, click again to get descending.

Note – This affects only the order of the data on the screen - not the way the data is stored. When system is re-accessed, data will be displayed in the original format.

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• White fields require data entry. Shaded fields are system generated.

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	MU/CRIS Information	
List MU Info	CRISInfo	
*Acct Code	501 3602 110 Mode Code 36 3602 10 00 1	
MU Name	CROP PRODUCTION AND PEST CONTROL RESEA	
Location	WEST LAFAYETTE, INDIANA	
Area	Midwest	
Acct Name	CROP PRODUCTION & PEST CONTROL RESEARCH	
Contact	LARRY D. DUNKLE	
'Acct Type	DIRECT	
Space Type	Other	
Revolving FTE	Revolving Fund Amount	
Donated FTE	Other State Funds	
Other FTE	Other Funds	
Remarks	USB=\$124.350: Iowa State University=\$51.555	
	•	

Chapter Three – Entering Information in ARMPS

Before beginning data entry, review Appendix 7, Before You Begin, for some helpful hints that may make the development of the ARMPS easier. Also, Appendix 8, Suggested Steps for Developing Your ARMPS, may also provide some assistance.

A. MU/CRIS Information

This screen captures the general MU information required for the ARMPS process.

Select Action, then MU/CRIS Information



NOTE: If the following screen does not appear, please proceed to the next diagram.

If a mode code(s) or accounting code(s) needs to be established, the following screen may appear. This screen allows a user to query codes within their authority. Use the *question mark icon* to view existing accounting codes and mode codes. Browse the list to see if the account needed has already been entered. Select appropriate account. To add an account, press *Enter*. To have FMD establish a mode code, go through the proper chain of command (i.e. LAO)

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	MU/CRIS Information		
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Acct Code 501 3625 325	2 Mode Code	2	
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Space Туре	Acct Type		
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Select *Add* button to establish a new account.



Selecting *Delete* will completely delete all the information for this MU. Therefore, the delete button is only accessible by the Servicing Budget and Fiscal Office staff. If a user mistakenly establishes an account, they should notify the SBFO to delete it.

Add brings up the *MU Info* screen. Shaded fields are system generated. If corrections to the shaded fields are necessary, contact FMD through the LAO. Enter the data in the white fields as appropriate by tabbing between fields. **FTEs** received via RSAs, contributed, or donated from a non-Federal source should be entered on this screen and will be reflected on the Position Staffing Plan.

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MU/CRIS Information							
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*Acct Code	501 3625 325 'Mode Code 36 3625 30 25 ?						
MU Name	RESPIRATORY DISEASES OF LIVESTOCK						
Location	cation AMES, IOWA						
Area	Midwest						
Acct Name	DESDIDATORY DISEASES OF LIVESTOCY						
Contact	Contact JOHN DOUGH						
'Acct Type							
Space Type	Space Type Federal						
Revolving FTE	Revolving Fund Amount						
Donated FTE	Other State Funds						
Other FTE	Other Funds Use of this section may						
Remarks	OUTSIDE FUNDS = \$25,500						
	Vary by Area. Consult						
	Area policy.						

After the MU info has been selected or entered, select the *CRIS Info* tab and add the *CRIS Numbers* for the unit. To navigate between fields, use Tab key, Arrow keys, or the mouse. Select the *Save* icon to save the data. MU Setup is now complete. *Exit* - Also located under *File*; returns user to previous screen. Do NOT use the X.

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Acct Code 501	3625 325	Mode	cone 36 3	625 30 25					
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	3625 32000	047 00	D	NOTE: The CRIS number is					
	3625 32000	064 00	D	15 digits long. If the					
	3625 32000	067 00	D	appropriation is X01, the last					
		<u> </u>		digit must always be D. If the					
				appropriation is X08, the last					
				digit must be R. If the					
				appropriation is X9X, the last					
		<u> </u>		digit must be T.					
<u></u> <u>D</u> elete ▼									

To delete a CRIS Number, click on the CRIS Number to be deleted, *then* click the **Delete** icon.

NOTE: The CRIS Numbers added must match those provided by the Budget and Program Management Staff (BPMS) on the Area's initial ARMP guidelines.

B. PERSONNEL

This screen captures all personnel information related to a specific MU.

A Position Staffing Plan must be prepared for each MU under which personnel are assigned. For a large organizational unit having several subordinate MUs (e.g., a Center, Institute, or Division), a Master PSP/ Component PSP approach should be used. A Master PSP (based on the 4th level mode code) should include complete PSP data only for those positions/employees within the immediate office of the Center Director, Deputy Area Director, Division Director, etc.

This information can be entered directly into ARMPS through the *Personnel Information* screen or may be imported from SAMS under the *Update ARMPS with SAMS* function.

Select Action, then Personnel Information


Select the question mark icon for a list of accounting codes or type in the required accounting code. Select the appropriate code, then *Enter* and the code will appear. Once the accounting code is selected, *Enter* to get to the Personnel list.

Action Personnel Information File Edit Action Record Help Personnel Information Ouery Acet Code SOI 3602 IIO Personnel Information Personnel Information <th></th> <th></th> <th></th>			
Ele Edit Action Beord Help Personnel Information Ouery Acet Code S01 3602 110 Modecode S6 3602 10 00 2 Name (Last, First) Position # Eod Date Pay Plan Job Status Vacancy Status Record: 1/1 Keeord: 1/1 Coder Record: 1/1 Coder C	Revenue Information	ement Plan System	
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The list of personnel for the accounting code will be displayed for editing. If a new position must be added, select *Add* to bring up the data entry screen, or to access information on current position, click the name of the person to highlight the record, then **Personnel Information** tab.

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501	3625	32	36	3625	30	25	104074	10/01/2004		SMITH	JANE	
501	3625	325	36	3625	30	25	104094	10/01/2004		JONES	CARYN	
501	3625	325	36	3625	30	25	104134	10/01/2004		VIN DIESEL	STEPHANIE	
501	3625	325	36	3625	30	25	104144	10/01/2004		MARTIN	SANDY	
501	3625	325	36	3625	30	25	1W4164	10/01/2004		DUHAMEL	HEATHER	
501	3625	325	36	3625	30	25	104405	10/01/2004		MAXWELL	JOHN	
501	3625	325	36	3625	30	25	104407	10/01/2004		BROWN	SANDRA	
501	3625	325	36	3625	30	25	106778	10/01/2004		SINATRA	FRANK	
501	3625	325	36	3625	30	25	107667	10/01/2004		DAVIS	SAMMY	
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All positions/employees officially assigned to and supervised within a particular MU must be included in the PSP for the MUs "X01" ARMP package. This includes all positions/employees that are officially assigned to one MU, but spend a portion or 100% of their time in a different unit or paid out of a soft fund account. In such cases, the unit to which the position/employee is officially assigned includes the information on the PSP with a standard footnote C explaining the situation, lists the FTE as "0", and the Full-year salary as "\$0".



- Name (Last, First)—Enter name (leave this field blank if the position is vacant and make sure the Vac Stat is set to vacant).
- **Position number**—Ensure that the current official position numbers are used for each approved and funded position (whether filled or vacant). The first digit of each position number corresponds to the "Position Category" column of the Annual Operating Plan. (See **Appendix 6** for an explanation of these codes.) Once this number is entered and saved, **it can not be changed**. To change the number, delete the record and re-enter it with the correct position number. **NOTE:** Official position numbers are assigned only by the Human Resources Division (HRD).
- Supervisor—The Supervisor position number can be found by using the question mark icon to bring up the drop down menu. Select Supervisor by last name; the information will automatically go to the correct field. Enter the Supervisor's Position Number (the Research Leader, Center Director, or Area Director is the MU's Supervisor and must be seven zeros '0000000'). There can only be one position with an all zero Supervisor Position Number per MU. There *must* be a supervisor assigned for the MU or the report will not print. The system will not allow the user to enter a Supervisor's Position number which has not already been established.

NOTE: If a supervisor position is deleted in the Personnel Information Screen, all of the employees reporting to the deleted supervisor will not be printed on the PSP unless the position number of the deleted supervisor is used for another position or the people are reassigned to an active supervisor.

- **Position title** (as abbreviated on Employee Roster obtained from the LAO)—An incumbent's name, title, grade and other data must appear on only one PSP unless the incumbent's duty time is actually split between two or more MUs and explained with either a standard C or D footnote.
- **Pay plan** (GS, WG, etc.)
- **Grade** (1-15, etc.)
- **FPL**—The Full Performance Level (FPL) is the highest grade determined for the position by the HRD and must be entered on the PSP. Zero "0" must be used for all SES, ST, and Category 1 SY positions or the field may be left blank for these types of positions only. If the established full performance level is unknown or is equal to the position's current grade level, repeat the current grade. Do not put the employee's within-grade step in this space.
- **Bi-weekly salary**—Obtained through import from SAMS. Not necessary for ARMP calculations.
- **Full-Year salary** (rounded to the nearest \$100).
- **FTE** (to enter a fractional FTE, i.e. .5 FTE, enter a period and the number five)—If the employee/position represents a "Split FTE" (i.e. when either standard footnote C or D applies) include only the FTE applicable to the time actually devoted to the MU. For example, a Permanent Full Time (PFT) employee who is split 50/50 between two MUs should show 0.50 FTE in each MU. A Permanent Part-Time (PPT) employee who works a total of 32 hours per week should be shown as 0.80 FTE if he/she devoted all time to one MU. If this PPT employee were split 50/50 between two MUs, each MU would only show 0.40 FTE along with the proper C or D footnote. Make sure that more than 1.0 FTE per person is not assigned among the Management Units.
- Job status (Permanent or Temporary)
- Tour duty (Full Time, Part Time, or Intermittent)
- **EXP date** (Temporary or Term Appointments; Footnotes E1, E2 or F require Expiration Dates)
- **Vacancy Status**—Select the current Status of the position, with either 'Filled', 'Vacant', 'New' or 'New Vacancy' (indicating a proposed vacancy). If 'Vacant' or 'New Vacancy' has been selected, then an Entrance on Duty Date (EOD) must be entered.
- **EOD**—Vacant Positions require an EOD date. Indicate the earliest possible starting date for this position by entering a date between 10/1 of the current calendar year and 9/30 of the following calendar year (the end of the fiscal year). Name fields for vacant positions should be left blank. The word "vacant" will be printed on the reports for vacant positions. If a name has been entered on the Personnel Information screen, ensure the Vacancy Status field shows "FILLED" or the report will show the position as VACANT.

NOTE: Be realistic in estimating the date—consider the typical lead time needed for the type of position in addition to the anticipated date the MU will submit the request to HRD.

• **Footnotes:** See **Appendix 1** for a complete listing of footnotes.

If footnotes are necessary, select the question mark icon to bring up the **Footnote LOV** screen. For special C, D, M, S, X, or Z footnotes, enter explanatory information in the space provided. Up to five footnotes per employee are allowed.

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Acci code 50	J1 3625 325 ·	Т3	Person responsible for maintaining unit	website
Last, First) S1	MITH JANE		Person responsible for secure telecomr	Aunication:
Pos Title M	ICRBIOL	X2	Recruitement incentives include: (1) cas	sh incentive
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After previous screen has been completed and saved, the data will be added to the list of personnel.

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501	3625	325	36	3625	30	25	104164	10/01/2004		DUHAMEL	HEATHER		
501	3625	325	36	3625	30	25	104405	10/01/2004		MAXWELL	JOHN		
501	3625	325	36	3625	30	25	104407	10/01/2004		BROWN	SANDRA		
501	3625	325	36	3625	30	25	1₩6778	10/01/2004		SINATRA	FRANK		
501	3625	325	36	3625	30	25	107667	10/01/2004		DAVIS	SAMMY		
501	3625	325	36	3625	30	25	108725	10/01/2004		DOUGH	JOHN		
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C. CRIS Resource Allocation and Planning

These screens allocate funds and level of effort for various categories and allow user to assign resources to specific CRIS within the MU.

1. <u>MU Allocation by CRIS</u>

This screen captures the allocation, Indirect Research Costs, Shared Research Costs, and Temporary Funds for the MU and for each CRIS project.

Select Action, then CRIS Resource Allocation, then MU Allocation by CRIS.



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	/IPS - MU Allocation by CRIS	
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	MU Allocation by CRIS	
	MU Info	
Select the	Acct Code Modecode A/C Type Acct Name Contact	
Accounting	3635 110 36 3635 10 00 D SUGARBEET & BEAN RESEARCH DR. RENFU LU, ACTING	RI 🚔
Accounting	3635 120 36 3635 20 00 D Avian Disease And Oncology Re Dr. Aly M. Fadly	
Code from	3635 910 36 3635 01 00 I Location Admin Support C. D. Glasscock	_
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If the necessary Accounting Codes are not listed, select Action then Query Screen.

From the Query Screen, enter *Acct Code* and press *Enter* key.

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MU Allocation by CRIS	
Query	
Acct Code 501 3625 325 ? Mode Code 00 00 ?	
Contact Acct Name	
Acct Type Space Type	
User Last Mod Date Last Mod	
Date created	
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On the next screen, select *MU Info* tab.

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Enter the dollar amounts in the *MU Allocation* column. The Net to Location amount can be obtained from ARIS. Shared Research Costs and IRC Assessments will be provided by your Location Administrative Officer (LAO). See explanation on Temporary Funds below.

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Use the question mark icon to bring up the CRIS Number LOV. Select appropriate CRIS project to begin entering data.

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ne	t to MU/CRIS - Total:	2,362,074	0	3625	32000	047 00			
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Enter the dollar amounts in the Net to Location, Shared Research Costs, IRC Assessments, and Temporary Funds for each CRIS project. After the allocation is entered in the first data entry screen, the Total Allocation, Amount Budgeted, and the Balance to Budget amounts are displayed on the screen continuously and will reflect the status of all changes. The Amount Budgeted line will equal the Alloc-Net to MU/CRIS line when all funds are allocated. The Unassigned Balance Column and the Balance to Budget line will reflect zero amounts when all funds are assigned. Monitor balances to be sure they are not negative when the data entry process is completed. *MU Allocation Net to Location – Permanent* dollar amounts must agree with the final guidelines issued by BPMS in mid-August which are also reflected in ARIS as Net to Location – Permanent Dollar amounts. All fields in *MU Balance* column must be zero when finished. [Numbers in this column show percentage of CRIS expenditures in relation to the entire Unit.]

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Net to Lo	cation - Permanent:	3,680,832				817,343	22		
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Less	IRC Assessments:	949,179		0		303,781	32		
Net to M	U/CRIS - Permanent:	2,393,660		0		438,259	18		
Ado	l Temporary Funds:	-31,586		0		-6,048	19		
Ne	t to MU/CRIS - Total:	2,362,074		0		432,211	18		
	Net to bench:	2,700,067		0		507,514	19		
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Temporary Funds - Determine if any of the following items apply to the project. If so, add all that apply and enter the total sum in the *Add Temporary Funds* field. This field's title is misleading as funds can be added or subtracted. If funds are to be subtracted, a minus sign must be placed in front of the dollar amount. The National Program Staff or LAOs will advise if temporary funds will be added.

- The Farm Bill assessment of biotechnology research is a temporary reduction made to operating levels of current projects coded as biotechnology to be issued by BPMS and incorporated into the final guidelines. The percentage will be determined by BPMS. To figure CRIS project assessment, add the dollars associated with all BT codes on the AD-417 for the CRIS project and multiply by the percentage assessed.
- BPMS will advise if Global Climate Change budget costs are not going to be covered by the Agency. To figure CRIS project assessment, add the dollars associated with all global climate change codes on the AD-417 for the CRIS project and multiply by the percentage assessed.
- Radiological Safety License Assessment.
- Salaries associated with Headquarters-funded Post Doc positions.

2. <u>Assign Positions to CRIS</u>

This screen captures the level of personnel/salary effort for each CRIS.

Select Action, then CRIS Resource Allocation, then Assign Positions to CRIS.



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Select the *Details* tab to bring up the positions for the highlighted accounting code.

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Use the question mark icon to bring up the CRIS Number LOV. Select the appropriate CRIS project to begin assigning position percentages to CRIS.

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	VACANT	209663	80,900	1.00	0	0.0	o] o	0	0.00	0	
ANNETTE	KELLERMAN	307382	65,500	1.00	0	0.0		0	0.00	0	
	VACANT	704075	36,800	1.00	0	0.0			0.00	0	
LAURA	AMAYA	704113	60,300	1.00	0	0.0		0	0.00		
PETER	COTTONTAIL	706406	64,400	1.00	0	0.0	o] o	16,100	0.25	25	
BROOKE	LOGAN	706433	60,300	1.00	0	0.0		0	0.00	0	
LUKE	SPENCER	707357	64,700	1.00	0	0.0		0	0.00	0	
LAUREN	FENIMORE	708526	51,700	1.00	0	0.0		25,850	0.50	50	
LEONARD	SKYNARD	709404	61,800	1.00		0.0		61,800	1.00	100	
STAR	RAINBOW	904388	52,100	1.00		0.0		17,714	0.34	34	
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Assign positions within <u>each</u> project in the appropriate CRIS. Even though a position may have zero FTE, it must be 100% assigned to the CRIS project(s). Assign percentages in whole numbers – no fractions. The *Unassigned Salary* and *Balance FTE* columns must be zero when completed. If not, review for errors. This example shows .50 FTE Balance. Therefore, the CRIS projects would need to be reviewed to verify that employees have 100% of their salary assigned. Consult with Unit fund holder to determine distribution of salary percentages across CRIS projects.

NOTE: An outside funds ARMP package (i.e. X08 or X93) would be input the same way. For example, supervisors will have zero FTE; however, 100% of their time must be assigned to the CRIS project(s).

Assigning positions to CRIS is not required for IRC/SRC accounts.

3. Assign Salary Related to CRIS

This screen captures the salary-related costs (i.e., promotions, overtime, etc.) and allows the user to assign these costs to the appropriate CRIS projects within the MU.

Select Action, then CRIS Resource Allocation, then Assign Salary Related by CRIS.





Enter the MU Totals for each Salary Related item. Assign the MU Salary Related Amount to the proper CRIS project(s) by using the question mark icon to pull up the CRIS Numbers. The allocations to the individual CRIS project(s) may not exceed the sum of the MU total. Monitor the Unassigned Balance column to determine the amount available for each salary-related cost.

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Merit Pay:	0				
Lump Sum Leave:					
Prmtn/Awrd/QSI:	11000		0	1000	
Merit Pay:	0			0	
Premium Pay:	0		0	0	
Overtime:	0		0	0	
Lump Sum Leave:	0		0	0	
Salary Related Cost:	17000	77	0	3000	
Balance to Budget:	2362074	82	-521874	355664	_

4. <u>Assign All-Other to CRIS</u>

This screen captures the all-other costs and allows the user to assign the funding level for these costs to each CRIS project within the MU.

Select Action, then CRIS Resource Allocation, then Assign All-Other to CRIS.



Use the question mark icon to bring up the *CRIS NUMBER LOV* screen. Select the appropriate *CRIS project* to begin assigning All-Other information.

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Alloc-Net to MU/CRIS: Amount Budgeted:	2362074	78	432211 227975	53
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Transportation 2200:			100	
Rent,Comm,Util 2300 :	Find 3625%		0	
Print & Repro 2400:	Cris No1 Cris No2	Cris No3 Cris No	500	
R&M 2530:	362 32000	047 00	1325	
RSA - Other 2554 :	3625 32000	064 00	0	
RSA - Salary 2554 :	3625 32000	067 00	0	
RSA - Utilities 2554 :			0	
Supplies & Mat 2600 :	Eind	QK Cancel	65522	
Equipment 3100:			0	
Land & Struct. 3200:			0	
Total All Others			0	
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Enter the **MU Totals** for All-Other items. Assign the MU All Other Amount to the proper CRIS project(s) by using the question mark icon to display the **CRIS NUMBER LOV**. The allocations to the individual CRIS project(s) may not exceed the sum of the MU total. Monitor the Unassigned Balance column and the Balance to Budget field to determine the amount available for All Other Items. When all CRIS projects are completed, the *Unassigned BALANCE* column and the *Balance to Budget* field must be zero.

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Transportation 2200:	300			100	
Rent,Comm,Util 2300 :	0				
Print & Repro 2400 :	2200			500	
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RAM 25551:	12664				
RSA - Salary 2554 :	22300				
RSA - Utilities 2554 :	0				
Supplies & Mat 2600 :	432365			65522	
Equipment 3100:	7500				
Eand & Struct. 5200:					
Total All Other:	E21074			72547	17
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D. Assistance and Acquisition

These screens capture the data required for the Extramural Plan, Facilities Plan, Procurement Plan, and the Miscellaneous Requirements Plan for the MU.

Select Action then Assistance and Acquisition



Options:

• Extramural Plan (550A)

Select *Extramural* from the available drop down menu to enter data related to funded and unfunded extramural agreements (i.e., RSA, SCA, etc.) for the MU.

- Facilities Plan (550B) Select *Facilities* from the available drop down menu to enter data related to funded and unfunded facilities projects for the MU.
- Procurement Plan (550C) Select *Procurement* from the available drop down menu to enter data related to funded and unfunded procurement requirements for the MU. Procurements entered into the plan are only for procurement purchases equaling \$25,000 or more.
- Miscellaneous Requirements Plan (550D) Select *Miscellaneous* from the available drop down menu to enter data for any funded or unfunded miscellaneous items not captured on any of the above plans for the MU.

1. <u>Extramural Plan</u>

This screen captures the data for funded and unfunded Extramural requirements for the MU.

The Extramural Plan includes all Research Support Agreements (RSA), Interagency Reimbursable Agreements (IA), Grants (G), Assistance Type Cooperative Agreements (ATCA), Specific Cooperative Agreements (SCA), and Intergovernmental Personnel Act (IPA).

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Select the *Type 550* drop down arrow to choose the appropriate category.



To modify existing data, highlight the appropriate agreement, then select the *Extramural* tab.

When adding a new agreement, select the appropriate accounting code by using the *Acct Code* question mark icon. The *item number* in this plan is program-assigned and shown next to the Accounting Code. This is a non-modifiable field. Verify the *Mode Code* information is correct. Enter the Budget Object Class Code (*BOC*) from the LOV. Choose *Fund Type* (funded or unfunded: consult with fund holder to determine fund type).

The *Amount Available* is the amount entered for this Budget Object Class Code in the Assign All Other planning screen. The *Amount Budgeted* reflects the amount entered on all of the funded 550's for this Budget Object Class Code. The Amount Available and Amount Budgeted are non-modifiable fields.



In the *Item Description* field, enter the status of the research agreement (i.e., new, ongoing) and a brief explanation of the need. For Research Support Agreements, detail the support services to be obtained.

Consult with the fund holder to determine if All CRIS or Select CRIS benefit. If Select CRIS is

chosen, a *CRIS Benefits* box will appear. Click on the ? to bring up the CRIS Number LOV, select the correct CRIS. When it returns to the CRIS Number box, enter the percentage (PCT) of benefits.

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Use the question mark icon to select the *Type* of Extramural Plan. The *Congressionally Mandated Agreement* field (formerly referred to as PASSTHRU funds) identifies funds appropriated by Congress to be used for a specific agreement: Confer with the LAO if in doubt about the correct selection.

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If the Agreement Type has personnel associated with it, determine *FTE* and *Salary*. *Other Costs* may include supplies, travel, and overhead.

Item Cost will be automatically calculated for RSA's. Enter the amount for other types of agreements. Add *Performing Organization* and *Item Description*, which must include an explanation of FTE, graduate student tuition, services, overhead, etc. The *Balance to Budget* line reflects the amount remaining for the Budget Object Class Code not on a 550 plan. The displayed Balance to Budget of each Budget Object Class Code is recalculated as funded 550 items are entered to ensure that the amounts on the 550 form do not exceed any given object class total.

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All Cris All Cris ? Type RSA ? Amount Budgeted 0	
Congressionly Mandated Agreement No -	
FTE 50	
other 13,664	
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Chemical supplies, telephone & computer hookup at ISU, and sequencing services (Tabatabai) = \$7,500; tuition = \$1,000. One	

2. <u>Facilities Plan</u>

This screen captures the data related to funded and unfunded Facilities needs for the MU.

Select the *Type 550* drop down arrow to choose the appropriate category. Select the *Acct Code* question mark icon to display accounting code. Select appropriate accounting code, then *Enter*.

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To enter a new Facilities item, select *Add*. To delete an item, select *Delete*. To modify existing data, highlight the appropriate item, then select the *Facilities* tab.

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501	3635	910	36	3635	01	00	5	F		2530	RM	INSTALL AEROTECH 24" I	
501	3635	910	36	3635	01	00	6	F		2530	RM	UPGRADE ENVIRONMENTAL	
501	3635	910	36	3635	01	00	7	F		2530	RM	REPAIR ROOF VENT SHAFT	
501	3635	910	36	3635	01	00	8	F		2530	RM	PROVIDE POSITIVE AIR I	
501	3635	910	36	3635	01	00	9	F		2530	RM	REMOVE ROOFTOP EXHAUSE	
501	3635	910	36	3635	01	00	10	U		2530	RM	INSTALL COOLERS IN GRE	
501	3635	910	36	3635	01	00	12	F		2530	RM	REPLACE CEILING TILE &	
501	3635	910	36	3635	01	00	13	F		2530	RM	MISC SUPPLIES AND MATE	
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NOTE:

The Amount Available is the amount entered for this Budget Object Class Code in the Assign All Other planning screen. The Amount Budgeted reflects the amount entered on funded 550's for this Budget Object Class Code (2530). The Amount Available and Amount Budgeted are non-modifiable fields.

When a funded plan contains less than the 4% mandated base funds for R&M, enter a statement in the Facilities Paragraph of the State of the MU indicating the authority for the partial or total exemption (Waiver) and the amount of the Waiver.

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Facilities Plan	
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'OC 2530 'Fund Type Funded A	mount Available 41, 658
Type RM ? All Cris Select Cris ? Ar	mount Budgeted 0
Replace Value FDC 5 ?	Cy Design 0
Real Property Owned Building ?	Cy Const 5,500
Procur Office Location	Item Cost 5,500
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ttem Desc RM UPDATE GREENHOUSE 24 (C) Comments Up	odate cooling for greenhouse 24, ncludes 6 vent motors.
	5555 D

- Select *Acct Code* from the drop-down LOV and hit enter or type in the code and hit tab
- Next to the Acct Code is the sequence number for the item automatically assigned by the system
- The correct *Mode Code* will be populated
- Select the correct *Object Class* for the type of plan being entered from the drop-down LOV
- Select the *Fund Type* from the drop-down LOV
- Select the *Type*—Includes Hazardous Waste Cleanup (**HWC**), Headhouse/Greenhouse (**H/G**), Miscellaneous (**MIS**), Repair & Maintenance (**RM**), Ten Percent Alteration (**TPA**), Ten Small Building (**TSB**), Unlimited Small Building (**USB**)
- Select *All CRIS*—Consult with fund holder to determine if *All CRIS* or *Select CRIS* benefit. If *Select CRIS* is chosen, a *CRIS Benefits* box will appear for the user to select the related CRIS Number(s) and assign the Percentage(s) (Pct)
- Enter *Replace Value*—If the type selected is TPA or RM, enter the Replacement Value.
- Select *FDC* (*Facility Deficiency Code*)—If this is a Repair and Maintenance item, enter the Facilities Deficiency Code to be remedied by this action (*Refer to the list of valid FDC's in Appendix 3*)
- Select *Real Property*—Options include Owned Land (O), Leased Building (L), Leased Land (N), Owned Building (B), or No Interest (I)

- Select *Procurement Office*—Options include Location, Area, or Headquarters
- Enter *CY Design*—The current year design cost for this item
- Enter *CY Const*—The current year construction cost for this item
- *Item Cost*—Generated by the system by summing CY Design and CY Cost. Only itemswith a cost of at least \$1,000 should be reflected on the Funded Facilities Plan. Funded items with a cost of less than \$1,000 should be listed on the Miscellaneous Requirements Plan
- Enter Item Description—Complete description of project entered in all CAPS
- Enter *Comments*—Can be typed in upper and lower case. For projects expected to be completed beyond 2 years, identify the remaining costs in the Comments field describing project schedule in more detail. Enter justification and any other essential remarks, e.g. In-house Construction
- Save the record with the save icon 2 or answer 'Yes' when the system asks if the record is to be saved

Continue entering records as needed following the same procedures.

3. <u>Procurement Plan</u>

This screen captures the data related to funded and unfunded procurement needs greater than \$25,000 for the MU.

Select the *Type 550* drop down arrow to choose the appropriate category. Select the *Acct Code* question mark icon to display accounting code. Select appropriate accounting code, then *Enter*.

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To enter a new Procurement item, select *Add*. To modify existing data, highlight the appropriate item, then select the *Procurement* tab to display the following screen. To delete a record, highlight it and then select *Delete*.

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Procurement Plan Acct Code 501 3655 120 Mode Code 36 3655 20 00	
List Procurement	
*Acct Code 501 3655 120 ? 10 *Mode Code 36 3655 20 00 ?	
*BOC 3100 * *Fund Type Unfunded Amount Available 148,500	
All CRIS All Cris Quantity 1 S&H 12 unded lead 115,000	
IT Resource Planning No FTE .00 Balance to Budget 0	
Contributed Amt 0	
Method of Procurement Federal Supply Procuring Office	
Item Desc Comments	
AUTOMATED DNA EXTRACTOR	
Record: 1/1 <08C>	

- Select *Acct Code* from the drop-down LOV and hit enter or type in the code and hit tab
- Next to the Acct Code is the sequence number for the item automatically assigned by the system
- The correct *Mode Code* will automatically populate
- Select the correct *Budget Object Class Code (BOC)* for the type of plan being entered from the drop-down LOV
- Select the *Fund Type* from the drop-down LOV
- The *Amount Available* is the amount entered for this Budget Object Class Code in the Assign All Other planning screen. The *Amount Budgeted* reflects the amount entered on funded 550's for this Budget Object Class Code. The Amount Available and Amount Budgeted are non-modifiable fields
- Select the correct CRIS determination(s) from the *Select CRIS* drop-down LOV. If all CRIS benefit from the item, leave the field reflecting All CRIS
- Enter the *Quantity* required
- Enter the Safety & Health Code *S&H*, if applicable, from the drop-down LOV. (Refer to Appendix 3 for the list of codes)
- Enter the *Funded/Unfunded Need*—Planning efforts and priorities must also recognize and include the full costs associated with equipment acquisition such as salaries for dedicated operators, peripheral equipment maintenance contracts, and facilities modification. When such costs are applicable, the MU Heads should indicate in the Comments field that such costs have been recognized and budgeted in their base allocations

- Select the applicable *IT Resource Planning* answer (yes or no) from the drop-down LOV
- Enter the *FTE*—Enter the number of FTE associated with recurring contract support services costing \$25,000 or more per year
- The *Balance to Budget* line reflects the amount remaining for the Object Class Code not on a 550 plan. The displayed Balance to Budget of each Object Class Code is recalculated as funded 550 items are entered to ensure that the amounts on the 550s do not exceed any given object class total
- Enter the *Contributed Amt*—If the MU is contributing any funds towards the procurement in this record, enter the amount. This is recommended for large-cost unfunded items
- Select the *Method of Procurement*—Open Market is to be used only when an item is not available through any other mandatory source or on a GSA Contract. Federal means it is available on a GSA Contract
- Enter the *Procuring Office*—Location, Area or Headquarters
- Enter the *Item Desc* in all CAPS.
- Enter *Comments* to define/justify the necessity for the procurement. Planning efforts and priorities must also recognize and include the full costs associated with equipment acquisition such as salaries for dedicated operators, peripheral equipment, maintenance contracts, and facilities modification. When such costs are applicable, the MU Heads should indicate in the Comments field that such costs have been recognized and budgeted in their base allocations
- Save the record with the save icon 4 or answer 'Yes' when the system asks if the record is to be saved

4. <u>Miscellaneous Requirements Plan</u>

This screen captures data for Miscellaneous Requirements for the MU. The Miscellaneous Requirements Plan should include one-time requirements (salary costs, travel, training, IT, real property lease/purchase, telephone system upgrade, utility hook-up, etc.) or recurring costs under \$25,000 that could not be appropriately included in the other plans.

Select the *Type* 550 drop down arrow to choose the appropriate category.

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January 2006

Select appropriate accounting code from the drop-down LOV, then *Enter*.

To enter a new Miscellaneous item, select *Add*. To modify existing data, highlight the appropriate item, then select the *Miscellaneous* tab to display the data entry screen. To delete a record, highlight it and then select *Delete*.

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Miscellaneous Plan Acct Code 501 3655 120 Mode Code 36 3655 20 00	
List Miscellaneous	
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*BOC 3100 - *Fund Type Funded - Amount Available 148,500	
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the Cost 10,000	
IT Resources Planning No S&H ?	
Item Description Comments	
ULTRACOLD FREEZER	
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- Select *Acct Code* from the drop-down LOV and hit enter or type in the code and hit tab
- Next to the Acct Code is the sequence number for the item automatically assigned by the system
- The *Mode Code* will be automatically populated
- Select the correct *Budget Object Class Code (BOC)* for the type of plan being entered from the drop-down LOV
- Select the *Fund Type*—Funded or Unfunded
- The *Amount Available* is the amount entered for this Budget Object Class Code in the Assign All Other planning screen. The *Amount Budgeted* reflects the amount entered on funded 550's for this Budget Object Class Code. The Amount Available and Amount Budgeted are non-modifiable fields
- Select the correct CRIS determination(s) from the *Select CRIS* drop-down LOV. If Unfunded, identify the CRIS impacted
- Select the applicable *IT Resource Planning* answer (yes or no) from the drop-down LOV
- Enter the Safety & Health Code *S&H*, if applicable, from the drop-down LOV. (Refer to **Appendix 3** for the list of codes)
- Enter the *Item Cost*
- The *Balance to Budget* line reflects the amount remaining for the Object Class Code not on a 550 plan. The displayed Balance to Budget of each Object Class Code is recalculated as funded 550 items are entered to ensure that the amounts on the 550s do not exceed any given object class total
- Enter the *Item Desc* in all CAPS
- Enter *Comments* to define/justify the necessity for the procurement
- Save the record with the save icon 🖉 or answer 'Yes' when the system asks if the record is to be saved

Continue to add records as needed following the same procedures.

E. High Priority Requirements List

This screen allows the user to prioritize the items listed on the Unfunded ARS 550s by MU, Location, or Area. The HPRL must be created with the Create High Priority List option (Section E) from the Action menu on the ARMPS Main Menu first.





Select Account to obtain the high priority list by descending account number.



The screen will display all unfunded 550 records. The user will prioritize applicable items within its own accounting code. The Center Director or Location Coordinator will assist the LAO with Location prioritization, and the Area will prioritize the entire Area.

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			501	3 6 0 2	110	D	12	ULTRA LOW FREEZER	8,540	
			501	3602	110	D	11	OLYMPUS BX41 MICROSCOPE	15,323	
		11	501	3 6 0 2	115	C	5	ICP-MASS SPECTROPHOTOMETER	113,000	
		4	501	3 6 0 2	115	D	9	PORTABLE SAMPLE FREEZER	7,000	
		2	501	3602	115	C	1	GAS CHROMATOGRAPH WITH MASS	100,000	
		3	501	3 6 0 2	115	С	4	EXTENDED CAB 4 WHEEL DRIVE U	40,000	
			501	3 6 0 2	120	С	2	MANURE TANK	50,000	
			501	3 6 0 2	910	в	2	RM PAVING OF DRIVEWAY AT LBR	15,000	
			501	3 6 0 2	910	В	11	RM NSERL - REPLACE FLEXIBLE	37,000	
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Select the *Save_icon*, then the *door_icon* to exit.

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			501	3602	110	D	10	NANODROP ND100A UV IS SPECTR	7,535
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NOTE: If any of the items are not prioritized, they will not be reflected on the HPRL report.

To view items in priority order, re-enter the same window by selecting *Action*, then *High Priority List Requirements* as shown previously. Then select *Priority*.



To view Area/Location/Management Unit prioritization select from one of the choices below.


F. State of the MU/Location/Comments

These screens allow the user to enter the narrative description of the State of the Management Unit and State of the Location. The State of the MU should be a narrative which will serve as a resource document to the AD (DAAFM, OA) in developing the State of the Area (AFM, PM). The State of the MU should address programmatic issues, financial condition, personnel matters, R&M, HWC, IT issues, procurement, extramural agreements, and other important issues which should be brought to the attention of the AD (DAAFM, OA). Review the Agency's annual ARMP guidance for additional instructions on completing the State of the Management Unit. Suggested items to include are listed below.

1. <u>State of the Management Unit</u>

Select Action then MU/Location/Comments then State of Management Unit.



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State of Management Unit	
Query	
Acct Code	

Select the *Acct Code* from the drop-down LOV, then *Enter*.

To enter data into any one of the sections of the State of the MU, select Add.

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Select the *Details* tab to display the following screen. Select the *Acct Code* from the drop-down LOV, then select the *Type of Comments* from the drop-down LOV.

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Acct Code 501 3602 110 Mode	TYPE Comments		>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>
List Details	Find <mark>%</mark>		
Acct Code ? Mode Code	Type_Comments ACQ AIS	Com_Desc Acquisition Assistance	
	ARE	Director's Comments MU	
Type or Comments	FAC	Facilities	
Comments	FUN	Funding IT Resource Planning	The State of
	м	Major Issue	the MU/
	PER	Personnel/Position Mgt	Location
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			allows for
Comments are limited to 4000 Cha			data to be
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State of Management Unit Acct Code 501 3635 110 Mode Code 36 3635 10 00	
List Details	
Acct Code 501 3635 110 ? Mode Code 36 3635 10 00 Type of Comments Acquisition ?	
Comments A VIS/NIR Camera is needed for CRIS 3635-43000-004-00D for measuring optical properties of fruit in the visible and near- infrared regions. The estimated cost is approximately \$35,000; the CRIS can contribute \$15,000. CRIS 3635-21000-011-00D requires nucleotide sequence information for gene discovery activities.	
Comments are limited to 4000 Characters	

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	501	3635	110	36	3635	10	00		Facilities		
	501	3635	110	36	3635	10	00		Funding		
	501	3635	110	36	3635	10	00		IT Resource Planning		
	501	3635	110	36	3635	10	00		Major Issue		
	501	3635	110	36	3635	10	00		Personnel/Position Mgt		
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- **Research Program**—Identify any significant research issues. Refer to Area guidance for specific information requirements for this section
- **Funding**—Identify any significant funding issues. Capture any changes in program or operations that will impact the MU's funding level
- **Personnel/Position Management**—Anticipated or impending vacancies and plans to restructure the position prior to recruitment, or plans to abolish the position
 - Explanation of the need to establish new positions, change the nature or status of existing positions, add more staff reporting to certain positions, etc.
 - Plans to acquire or terminate additional "work support" through Research Support Agreements with the state cooperative institutions (and any related problems anticipated).
 - Needs for/plans to divide the work effort of a position in the MU with a different MU (any related problems anticipated).
 - Identification of Position Numbers for any SY position abolished in the previous fiscal year or proposed for abolishment in this fiscal year.
 - Rationale for planned adjustments of work schedules (e.g., FT to PT or PT to FT).
- Acquisition—Identify any major purchases planned within the fiscal year or any high priority needs
- **Facilities**—If applicable, identify and explain any exceptions granted to the MU regarding the mandatory 4% base-funded R&M set-aside
- Assistance—Identify relationships with cooperators and anticipated funding to be received or to be spent
- **IT Resources**—Funded and unfunded IT and telecommunications needs (documented on the funded or unfunded Procurement or Miscellaneous Plans);

- Any single IT procurement exceeding \$25,000 and any single IT project with multiple procurements exceeding \$25,000 that require submission of a waiver request to the USDA Office of the Chief Information Officer (OCIO)(see REE Bulletin 00-001).
- Life cycle management of IT infrastructure by addressing plans to meet minimal replacement schedules recommended by the OCIO;
- Plans for keeping IT skills current for all employees (documented on the funded or unfunded Miscellaneous Plan).

Accurately reflecting these requirements will ensure that the Agency Advanced IT Acquisition Plan is complete.

See Appendix 4 for a sample narrative for the IT section.

• **Major Issues**—All significant issues should be summarized for the MU/Location. Only the first 5 lines of this section will be reflected on the Agency Executive Summary Reports. Therefore, this section should be as precise and concise as possible to ensure the issues are reviewed by the Agency

2. <u>State of the Location</u>

Together with the Center Director, Lab Director, or Location Coordinator, the LAO will compile the major issues from each unit into one document for the State of the Location, following the same procedures for data entry as for the State of the MU.



Enter the four digit mode code and hit *Enter*. The following screen will appear. Follow the same procedures used for entering the sections of the State of the Management Unit.

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3635	Personnel/Position Mgt	
3635	IT Resource Planning	
3635	Major Issue	
3635	Research Program	
3635	Funding	
Add	Delete	-

G. Update ARMPS with SAMS

This function allows the user to update ARMPS with data from SAMS. This will update the data in the MU/CRISINFO and PERSONNEL files. Please ensure that the data in SAMS in accurate before importing into ARMPS.

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 Eile
 Action
 Reports
 Reference
 Help

 MU/CRIS
 Information
 Personnel Information Fiscal Year User Id • LBALDUS Assistance and Acquisitions High Priority Requirements List **OFFICIAL ARMPS** MU/Location/Comments Update ARMPS with SAMS Load CRIS Project Titles Record: 1/1 <OSC>

Select Action/Update ARMPS with SAMS from the Main Menu.

Select the range of accounting codes from the drop-down LOV to be updated into ARMPS. Click *Update ARMPS with SAMS*. A message will be displayed verifying ARMPS has been updated.

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H. Update CRIS Allocation File

One of the executive reports available in ARMPS is a summary of the MU's information (the MU Summary Report). This Report lists all the CRIS' identified in the MU/CRIS Information Screen and pulls in their titles from the ARIS database (*see Chapter I. Load CRIS Titles*). In certain cases, the title may not be available in ARIS and the information has to be entered into ARMPS in order to be reflected correctly on the MU Summary Report.

Select Action/Update CRIS Allocation from the Main Menu.



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	then the location 4-digit
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	code for that MU in the
	3 rd and 4 th fields.

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268030	3625	2 6803	000	01	R	36	3625	30	01	A	10/01/2004	09/30/2005	
268620	3625	26862	000	00	R	36	3625	30	20	A	07/01/2004	12/31/2004	j
402062	3625	32000	057	01	Т	36	3625	30	20	A	04/01/1999	03/31/2004	
402686	3625	12130	003	01	Т	36	3625	15	10	A	03/23/1999	03/22/2004	
402883	3625	11000	001	00	D	36	3625	15	15	A	04/03/2000	04/02/2005	
402892	3625	12660	001	00	D	36	3625	15	05	X	10/01/1999	04/08/2004	
403053	3625	12660	002	01	R	36	3625	15	05	A	09/01/1999	08/31/2004	
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Select the project to be modified from the displayed list for that location/MU.

Click the *Details* tab to modify the data that is displayed, as necessary.

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CRIS Number 3625 31320 001 00 D	
Accession 404747	
Fiscal Year 2005	1
Allocation 452503	
Project Title MICROBIAL FACTORS/PATHOGENESIS OF SUBACUTE RUMEN ACIDOSIS (SARA)	
IN CATTLE TO ASSURE FOOD SAFETY	

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Select the *Save* icon, or click 'Yes' when prompted to save the changes.

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Fiscal Year 2005	
Allocation 452503	
Project Title MICROBIAL FACTORS/PATHOGENESIS OF SUBACUTE RUMEN ACIDOSIS (SARA)	
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186640	3625	18664	000	01	Т	36	3625	15	10	A	12/13/2000	12/12/2005	
204010	3625	20401	000	01	Т	36	3625	10	00	A	07/11/2001	03/31/2005	
226790	3625	22679	000	01	Т	36	3625	10	00	A	09/25/2002	08/31/2005	
231960	3625	23196	000	01	Т	36	3625	30	15	A	07/14/2003	04/30/2005	
232230	3625	23223	000	01	R	36	3625	30	15	A	07/01/2003	06/30/2004	
232690	3625	23269	000	00	Т	36	3625	10	00	A	09/01/2003	08/31/2005	
250320	3625	25032	000	00	Т	36	3625	30	20	A	01/01/2004	12/31/2004	
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Moder CRIS Nun Acces Fiscal ¹ Alloca Project	nber Casion Casi	3625										<i>Details</i> tab to display the data entry screen. Enter new data; <i>Save</i> the record	

To add a new record, select *Add* from the list screen

I. Load CRIS Project Titles

This function allows the user to import the active CRIS project titles from ARIS into ARMPS. This can be accomplished any time during the ARMP process but must be completed after the final allocation guidelines are published (mid-August). This information is needed to generate the MU Summary Report correctly.

Select Action/Load CRIS Project Titles from the Main Menu.



Enter the Area Mode Code and (if necessary) the location Mode Code and select Load Titles.

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Eile Record Action Help	
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	Load CRIS Project Titles
	Area ? Location ??
	Load Titles Cancel
Record: 1/1	<0SC>



Once completed, the user will receive the following message:

Click on OK and exit to the Main Menu.

Chapter Four – Dynamic and Working Scenario ARMP Systems

Once the Official ARMP has been completed, the user has the option of importing the information into 2 other systems. The Dynamic ARMPS allows the user to maintain the data in an up-to-date manner (i.e. keep the PSP current, change funding levels to reflect recissions or pay cost increases, etc.) without impacting the Official ARMP data (which is required when building the future year's ARMP).

At the Area Office level, either the Dynamic ARMP or the Official ARMP data may be imported into the Working Scenario ARMP system to allow the user to change information and run "what if" scenarios. For instance, if the Area wanted to determine how much the Discretionary \$ per SY would change if a certain amount of funding was added along with the salary for another position. This can be accomplished without impacting the Official or the updated Dynamic ARMP data.

These 2 systems work exactly the same as the Official ARMP system. The information contained in the other Chapters of this Manual work for these systems as well. There are, however, a few differences.

A. Dynamic ARMPS

From the Main ARMP Menu, click on the Dynamic ARMP icon or title box to enter Dynamic ARMPS.



The following screen will appear.



This system does not allow the user to enter State of the MU or State of the Location information. Nor can the user Update ARMPS with SAMS information, Update the CRIS Allocation figures, or Load CRIS Titles. All of this information will come in during the import from the Official ARMPS and does not need to be maintained on a dynamic basis.

To import information from the Official ARMP into the Dynamic ARMP, access *Action*, then *Rollover Official to Dynamic Scenario*/



The following screen will appear:



Enter the accounting code(s) to be imported. Either 1 specific accounting code may be identified or multiple codes may be selected to import more than 1 at a time. Then click on the *Load Dynamic ARMPS from Official ARMPS* button.

A message box will identify when the process is completed. Click OK. \setminus

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aRMPS - Create Dynamic Armps Scenario (FROM OFFICIAL)	
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Load Dynamic ARMPS from OFFICIAL ARMPS	
	Update Complete

The information will now be available to modify or update. Click on the Exit icon or *File*, *Exit*, to return to the main menu.

Dynamic ARMPS has all of the detailed MU Reports as well as the same Agency Executive Summary Reports as those found in Official ARMPS. The Area Reports in Official ARMPS are not available in Dynamic ARMPS.

B. Working Scenario ARMPS

From the Main ARMP Menu, click on the Working Scenario ARMP icon or title box to enter Working Scenario ARMPS.



The following screen will appear.



This system does not allow the user to enter State of the MU or State of the Location information. Nor can the user Update ARMPS with SAMS information, Update the CRIS Allocation figures, or Load CRIS Titles. All of this information will come in during the import from the Official ARMPS and is not required to develop working scenarios.

To import information from the Official ARMP or from Dynamic ARMP into Working Scenario ARMPS, access *Action*, then *Rollover Official to Working Scenario* or *Rollover Dynamic to Working Scenario*.



The process works exactly the same as importing information into Dynamic ARMPS. See Section A of this Chapter.

The information will now be available to modify or update.

Working Scenario ARMPS has all of the detailed MU Reports as well as the same Agency Executive Summary Reports as those found in Official ARMPS. The Area Reports in Official ARMPS are not available in Working Scenario ARMPS.

Chapter Five – ARMP Reports

A. MU Reports

To print individual components of the MU ARMP, select *Reports*, then *MU Reports*, then select any report from the displayed list.



After selecting the desired report, click on the question mark to display the accounting code LOV or type in the accounting code.

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Accounting Code	501 <u>3602</u> 115		Select the
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Select *print*.

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An Adobe (pdf) file is generated. A sample report is shown below. Select *Print* and/or *Save a Copy*, then select *File/Close* or the \boxed{a} to exit/close this document.

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	Service Scientist	4	1000	76,200	1.00	79,500	1.00	3,300		3655-22000-015-00D 10.80%	
	Support Effort									3655-43440-003-00D 23.53%	
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	Technician/Aid/Asst	5	6000								
	Technician/Aid (Eng. & Sci.)	7	6000	525.000	10.25	584.855	13.05	59.855	2.80		
	Trades & Crafts	8	6000	020,000	10120	001/000	10100	00,000	2100		
	Admin. Support	9	6000	43,100	1.00	80,500	2.00	37,400	1.00		
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Repeat the previous procedures for compiling and printing any desired ARMPS Report(s).

The following is a list of the ARMP component reports and their functions available under MU reports:

Annual Operating Plan (AOP)—Summarizes all ARMP financial data and provides statistical data and management criteria calculations for the MU.

CRIS Resource Allocation Schedule (CRAS)—Displays available funds and planned levels of effort for various categories and displays assigned resources for each CRIS project.

Extramural Plan—Identifies funded and unfunded agreements between ARS and outside organizations for research performed by the outside organization that supplements or correlates with ARS programs.

Facilities Plan—Identifies funded and unfunded construction and architectural-engineering items planned.

High Priority Requirements List (HPRL)—Identifies current year unfunded items identified on the Extramural, Facilities, Procurement, and Miscellaneous Plans in priority order.

Miscellaneous Plan—Identifies funded or unfunded items to be purchased that could not be identified elsewhere in the ARMP.

Procurement Plan—Identifies funded and unfunded equipment, supplies and services over \$25,000 to be purchased within the next fiscal year.

Position Staffing Plan (PSP)—Displays summarized personnel data including supervisory relationships, existing filled and vacant positions, and all new positions being approved or established.

State of the Management Unit—Provides narrative descriptions and comments on pertinent issues for the MU.

ARMPS Package—Compilation of the Annual Operating Plan, State of the Management Unit, CRIS Resource Allocation Schedule, Position Staffing Plan, Extramural, Facilities, Procurement and Miscellaneous Plans, and High Priority Requirements List. To print an entire ARMPS package for each MU, select *Reports*, then *MU Reports*, then *ARMPS package*.



Select appropriate accounting code from the list, then select OK.

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Select *print*.



An Adobe (pdf) file is generated. A sample report is shown below. Select *Print* and/or *Save a Copy*, then select the to exit this document.

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Pages Lay	Personal Services Scientific Effort Research Scientist Service Scientist Support Effort	1 4	1000 1000		1,030,400 78,800	9.00 1.00	1,030,400 78,800	9.00 1.00	3602-21000-004-00D 9.95% 3602-21220-008-00D 25.77% 3602-21220-009-00D 9.42% 3602-22000-013-00D 19.09% 3602-22000-014-00D 35.78%	
	Non Perm Res/Serv Sci. Support Scientist	2	6000 6000		131,400	2.00	131,400	2.00		
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l ste	Specialist Technician/Aid (Eng. & Sci.)	67	6000 6000		739,000	16.00	739,000	16.00		
E I	Trades & Crafts Admin, Support	8	6000 6000		48.300	1.00	48.300	1.00		
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Printing ranges of accounting codes:

Several reports allow the user to select a range of accounts to be printed rather than just one.

EXAMPLE: To print all of the Position Staffing Plans for a Location at one time, select *Position Staffing Plan* from the Main Menu Reports for the MU. Enter the range of accounting codes for which the report is needed. Select *Print*. The Adobe report will be generated for review and/or printing.

Follow the same procedure for printing any report for which an option for selecting a range of accounting codes is available. The range option may not be available for all reports.

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🤹 Annual Resource Management Plan System	
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Position Staffing Plan (Range)	
Starting Acct Code ? Mode Code	
Ending Acct Code Mode Code	
Print Cancel	

State of the Location—Summarizes key location issues, problems, concerns, and opportunities that may not be identifiable in individual MU packages. This report includes all of the sections the State of the Management Unit contains and reflects the data relative to the entire Location as opposed to just the Management Unit.



Select State of the Location from the MU Reports Menu

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🧑 Annual Resource Management Plan System	
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State of the Location	Enter the location mode code and the fiscal year for which the report is
Location Code 3 602 ? Fiscal Year 2005	desired Select
WEST LAFAYETTE, INDIANA	Print. The Adobe report will be displayed.
Print Cancel	

B. Area Reports

Special reports have been developed to support the Area Office when reviewing ARMPS. These reports (not all have been developed at the time of this printing) can be accessed under the Area Reports selection under Reports.

To print one of these reports, select *Reports/Area Reports* from the Main Menu, then select the type of report desired.



Follow the same procedures for selecting and printing Area Reports as for MU reports:

- Select the report desired
- Enter the criteria required for the report screen displayed
- Select *Print*
- The report will be displayed in Adobe and can be printed and/or saved as a PDF file.

C. Executive Summary Reports

Several reports have been developed to support Area management and Headquarters personnel in gathering data related to ARMPS. These reports may be found under the Agency Executive Summaries option under Reports.

To print one of these reports, select *Reports/Agency Executive Summaries* from the Main Menu, then select the type of report desired.



Follow the same procedures for printing Agency Executive Summaries as for MU and Area reports:

- Select the report desired
- Enter the criteria required for the report screen displayed
- Select **Print**
- The report will be displayed in Adobe and can be printed and/or saved as a PDF file.

D. User Account Report by User Name

This report allows the user to print a listing of ARMP users for the range selected in alphabetical order.

To print this report, select *Reports/User Account Report by User Name* from the Main Menu.



Enter the range required and select Run Report.

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ARMPS - Welcome Eile Action Reports Reference Help User Id LBALDUS User Account Report User Account Report User Account Report Enter Area NodeCode : Enter Loc ModeCode : Run Report Cancel	
	D
(Record: 1/1 < 08C>)

The report will be displayed in Adobe and can be printed and/or saved as a PDF file.

E. User Account Report by Mode Code

This report allows the user to print a listing of ARMP users for the Mode Code.

To print this report, select *Reports/User Account Report by Modecode* from the Main Menu.



Enter the range required and select Run Report

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🙀 ARMPS - Welcome			
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	User Account Repo	rt by Modecode	
	Enter Loc ModeCode : Run Report	Cancel	
Record: 1/1		<08C>	

The report will be displayed in Adobe and can be printed and/or saved as a PDF file.

Chapter Six – Reference

The Reference function of ARMPS provides the user with information and the ability to move from one serviced location's information to another without exiting ARMPS. Also, several information tables are available but access may be limited to the Area and/or Headquarters levels.

A. Listing of Modecodes

This table allows the user to view all the exiting Modecodes available in ARMPS.

To view this information, select *Reference/Listing of Modecodes* from the Main Menu.

🏙 ARMPS - Area Reso	ource Management Plan	System 📃 🗖 🔀
🙀 ARMPS -Welcome		
Eile Action Reports	Reference Help	
₽?	Listing of Modecodes	
	Change Modecode Erozen ARMPS	User Id Fiscal Year ALDUS 2006
	Facility <u>D</u> eficiency Codes Eootnote Codes <u>R</u> eal Property Codes	FFICIAL ARMPS
Record: 1/1		<0SC>

A query screen will appear. Enter the information required (i.e., enter 12 to see all Mode Codes for the Beltsville Area).

🏽 ARMPS - Area Resource Management Plan System	
🙀 Salary Management System	<u> </u>
Eile Edit Action Record Query Help	
🕹 i 🔀 🔞 🎁 i 📸 🖷 🐜 i 🔍 🕨 i 🕸	
Modecode Records	
Query	
Modecode Status Status Date	
Facility Research Unit	
Performing Organization 1) ? 2) ?	
Responsible Organization 1) ? 2) ?	
Responsible Person	
(Last,First,MI,Suffix)	
Title	
City State ? Postal Code	
Country	
Mission Statement	

A list of the applicable Mode Codes will be displayed.

S ARMPS - Area Resource Management Plan System	×
🙀 Salary Management System	
Eile Edit Action Record Query Help	
(ﷺ) 🖓 👘 👘 👘 🔍 ♦ ♦ ♦ ♦ 👘	
SAMS Sel	
List Moderande Info Mission Statement	
Modecode Area / Location / Research Unit/ Management Unit Description	
12 00 00 00 BELTSVILLE AREA	
12010000 BELTSVILLE AREA	
OFFICE OF THE/DIRECTOR	
12 01 01 00 BELTSVILLE AREA	
CONSULTANT COLLABORATOR STAFF	

More information about that Mode Code may be found by selecting the Modecode Info and/or Mission Statement tabs.

B. Change Modecode

Some ARMP users support customers under more than one Mode Code. This function allows the user to jump from one Mode Code to another without exiting ARMPS.

To change Mode Codes, access *Reference/Change Modecode* from the Main Menu.



Click on Choose Mode Code.

😹 ARMPS - Area Resource Management Pla	an System	
🙀 Annual Resource Management Plan		
Eile Edit Help		
🖉 🌫 🗊 🕸		
	Change Modecode	
	Choose Modecode	
<u>а</u>		-

A list of the Mode Codes that the user has authority to access will be displayed. Highlight the Mode Code required and click OK.

😹 ARMPS - Area Resource Ma	anagement Plan System	
Image: Second	nt Plan	
	Change Modecode	
	Choose Modecode COORCECCORONOLOGY X Find 0% Area Locati Mode3 Mode4 0 0 0 0 Eind QK Cancel	

C. Frozen ARMPS

Once the ARMPS are finalized, they are "frozen" so that the users may not be able to make any changes. This ensures the integrity of the information for the start of the next year's ARMP process.

This function may only be accessed by the Servicing Budget and Fiscal Officer and/or the Financial Management Division.

D. Facility Deficiency Codes

The Facility Deficiency Codes (and Safety) are used in the ARS-550 Procurement and Facilities Plans. This function allows the Financial Management Division to modify or add codes as required.

E. Footnote Codes

Footnotes are assigned to personnel in the Personnel Information data entry screen. This Reference function allows the Financial Management Division to modify or add codes as required.

F. Real Property Codes

Real Property Codes are used in the ARS-550 Facilities Plan. This Reference function allows the Financial Management Division to modify or add codes as required.

Chapter Seven – Help

ARMPS has a Help function which may be accessed from any of the screens. This function may be helpful in trying to articulate to the Helpdesk which screen an error is referencing.

To access this information, click on *Help* from any menu. The user may then select to *Display Error*, obtain *Field Help*, obtain other *Help*, or access the version information by selecting *About*.

🏽 ARMPS - Annual Resource Mana	gement Plan System			
🙀 Personal Information				
Eile Edit Action Record Help				
🛯 🍛 🔀 👘 🎁 🖪 🖣 Display B	Error 🖉 👘 🥼			
Eield Hel Help About	p Personnel	Information		
Query				
Acct Code	?	Modecode	\$	
Name (Last, First)		Position #		
Eod Date		Grade		
Pay Plan	~	Position Title		
Job Status	~	Active Status		
Vacancy Status	-			
<u>هــــــــــــــــــــــــــــــــــــ</u>				

When reporting issues to the ARMPS Helpdesk, screen prints of these reports may be helpful.

User problems and issues can be submitted to <u>ARIS@ARS.USDA.GOV</u> with the word "ARMPS" in the subject line.
Appendix 1 – Footnotes for the PSP

- A1 Incumbent will be reassigned out of the MU and position to be abolished (arrangements have been made).
- A2 Position can no longer be supported (e.g., position's function is superfluous to the MU mission; inadequate funding for the position; etc.) and assistance is needed in placement of current incumbent.
- B When vacated, resources will be redirected.
- C (Numbered C1, C2,...C9) Position/employee is officially assigned to and supervised within this organization, devoting _____ percent of work time, yet remainder of the time is spent in ______. (Can list up to three Accounting Codes.)
- D (Numbered D1, D2,...D9) Position/employee devotes ____ percent of work time to this MU, but is officially assigned to and supervised within _____. (One Accounting Code.)

NOTE: A position cannot have both a C and a D footnote.

- E1 Research Associate headquarters approved, headquarters funded.
- E2 Research Associate headquarters approved, some/all locally funded.
- F Research Associate locally approved, locally funded.
- G Student Career Enhancement Program (formerly Cooperative Education Program).
- I L/A Appointment.
- J Student Temporary Employment Program (formerly Stay-in-School position).
- K Summer Aid position.
- LC Location Coordinator.
- L1 Level I SY (i.e., Lead Scientist/Project Leader).
- L2 Level II SY (i.e., Research Leader).
- L3 Level III Scientist (i.e., Director).

- L4 Level IV Scientist (i.e., Area Director).
- M1 Exigency employee that must report to or remain on work site for weather or other emergency condition.
- M2 Exigency employee that must report to or remain on work site for budget shutdowns.
- N1 Safety Officer.
- N2 BioSafety Officer.
- N3 Radiological Safety Officer (RSO).
- N4 Collateral Duty Safety Officer (CDSO).
- P Position will be examined for performance by extramural effort (i.e., grant, contract, or Research Support Agreement).
- Q Position is reserved for the eventual return of an ARS employee who is currently assigned to an ARS overseas position administered by the Assistant to the Administrator, Office of International Research Programs (OIRP).
- R Includes funding from other sources.
- S (Numbered S1, S2,...S26) Employee is technically supervised by position number _____.
- T1 Person responsible for assuming the security of IT systems including telecommunications.
- T2 Technical IT and telecommunications contact(s) responsible for local area network administration, e-mail management, and voice, video, satellite and radio transmissions.
- T3 Person responsible for maintaining unit web site.
- T4 Person responsible for security telecommunications (for COOP sites only).
- X (Numbered X1, X2,...X9) Recruitment Incentives Apply.
- Z (Numbered Z1, Z2,...Z26) Other (MU must explain).
- Z99 Employee on long-term OWCP.

Appendix 2 – Indirect Research Cost/ Shared Research Costs

Indirect Research Costs (IRCs) are those costs that are associated with the basic operations of the location and are distributed to CRIS'. They can be characterized as things needed to "open the doors" of the location – utilities, facility operations, janitorial, communications, administrative support, EAP, OHMP, copier maintenance, facility R&M, etc. These are assigned to an IRC account with costs spread to CRIS' using a formula, weighted factor, or actual cost basis.

Cost Category	Description
Facility Operations	Salaries of personnel responsible for the operation of the
	location's facilities, 4% R&M, supplies and materials
	needed for facility operation, janitorial, maintenance
	contracts, etc.
Telephone	Base telephone line and equipment charges, long distance
	and internet costs.
Utilities	Water, gas, electricity, fuel, sewer, etc.
Administrative Support	Salaries, supplies, travel, training, equipment, etc. Typical
	positions include LAO, Accounting Technician,
	Purchasing Agent, etc.
Postage	US mail, express mail charges, etc.
Computer Network	Costs associated with the administration of a computer
	network (salaries, supplies, contracts, equipment, etc.)
OHMP/EAP	Contracts, fees, etc.
Center Director, Institute	Salaries, supplies, travel, training, equipment, etc.,
Director, Lab Director,	associated with this office. Includes % of CD, ID, LD, LC
Location Coordinator	and support staff time assigned to administrative duties.
Office Equipment	Copiers, fax machines, maintenance costs, paper, etc.
Rent/Lease	Rent or lease costs paid for lab/office facilities. Does not
	include rent or lease costs for research field plots.
Safety/Health and	Salaries, equipment, supplies, contracts, travel, training,
Hazardous Waste	etc., associated with providing the basics of the location's
Disposal	safety and health program and waste disposal costs.
EEO/CR	Salaries, supplies, contracts, travel, training, etc.
Vehicle Costs	Administration of non-research motor pool costs.

Shared Research Costs (SRCs) are those costs that are associated with direct research activities, but may be shared by more than one MU/CRIS and therefore may be jointly controlled or funded. They can be characterized as direct research support, distinguishing them from IRC costs. These costs must be excluded from the IRC development.

Cost Category	Description
Special laboratory services,	Salaries, equipment, supplies, contracts, travel,
analytical labs, quarantine	training, etc.
facility, common laboratory	
services spread to CRIS's and	
laboratory support costs	
Scientific Equipment	Contracts for maintenance of scientific equipment.
Maintenance	
Library services	Salaries, publications, subscriptions, equipment,
	supplies, contracts, travel, training, etc.
Livestock operations	Salaries, equipment, supplies, contracts, travel,
	training, animal feed, animals (can be charged
	directly to benefiting CRIS), etc.
Land/Greenhouse operations	Salaries, equipment, supplies, contracts, travel,
	training, fertilizer, irrigation, etc.
Computer/Data Processing	Salaries, contracts, supplies, equipment, etc.,
	associated with providing direct computer service
	for research activities.
Vehicle Expense (related to	Gas, repairs, and maintenance for farm and
research only)	scientific vehicles.
Human Studies	Stipends, honoraria, dietetic nursing services, etc.
Aircraft Services	Salaries, equipment, supplies, contracts, travel,
	training, etc.
Photographic services, graphics,	Salaries, equipment, supplies, contracts, travel,
information services	training, etc.
Leases	Lease costs for land associated with research
	projects. (Leases for lab and administrative
	facilities should be in Location Indirect Research
	Costs.)

Appendix 3 – Facility Deficiency and Safety Codes

DEFICIENCY AND SAFETY CODE INDICATORS									
	SAFE	FUNCTIONAL DEFICIENCIES / NEEDS							
	Correct	Correct	Repair or	Repair or	Correct	Repair or alteration			
	IMMINENT	Existing	alteration work	alteration	OTHER	work to correct			
	DANGER	SERIOUS	to enhance	work to	THAN	BUILDING			
	conditions	HAZARD	LABORATORY	enhance	SERIOUS	DETERIORATION,			
	(Safety)	(Safety &	SECURITY	SITE &	HAZARD	FUNCTIONAL and			
		Health)		BUILDING SECURITY	(Safety & Health)	CODE deficiencies.			
CODE >	1	2	3	4	5	6			
	URGENT PRIORITY	HIGH PRIORITY		MEDIUM PRIORITY		LOW PRIORITY			

Code 1 <u>Imminent Danger</u>: A condition or practice which could reasonably be expected to cause death or serious physical harm immediately or before the imminence of such danger can be eliminated through normal administrative/engineering procedures. Situations identified must be immediately referred to location management for intervention to mitigate the situation.

Examples:

- Bare electrical wires near grounded surfaces.
- Pressure relief valves tied off or corroded shut.
- Code 2 <u>Serious Hazard</u>: Shall be deemed to exist if there is a substantial probability that death or serious physical harm could result from a condition which exists or from one or more practices, means, methods, operations, or processes which have been adopted or are in use.

The test:

- 1. Is there a violation of the recognized standard?
- 2. What is the severity of the type of injury that could reasonably result?
- 3. Will the resulting injury make a body part functionally useless or substantially reduce the effectiveness of the body part?

Examples:

- Unguarded machinery that would cause amputation.
- Ungrounded electrical systems.
- Reduced air flow in hoods in areas of toxic chemical use.
- Unguarded floors.
- Any activity that could cause explosion or fire.

Code 3 <u>Repair or alteration work to enhance Laboratory Security</u>:

Examples:

- Laboratories and plant and animal care areas are to be separate from the public areas of the buildings in which they are located.
- Laboratories and plant and animal care areas must be locked at all times.
- Use of key cards or similar devices to permit and record entry of all authorized personnel into laboratory and animal care areas.
- All refrigerators and freezers containing pathogens are to be locked and/or contained in a secure laboratory as described above.

Code 4 <u>Repair or alteration work to enhance Site and Building Security</u>:

Examples:

• Use of physical barriers, parking controls, lighting, and Closed Circuit Television Monitoring (CCTV).

- Use of access control (i.e., providing a combination of walk-through metal detectors and X-ray devices, some combination of ID check, electronic access card, and turnstiles at entrances).
- Use of CCTV to monitor exterior of the facility. Use of security locks on all doors and windows and an intrusion detection system. All life safety systems, intrusion alarms, and CCTV monitoring devices must have emergency power backup. All access to utility areas must be secured and access limited to authorized personnel.
- Code 5 <u>Other Than Serious Hazard</u>: Defined as an accident or illness resulting from a hazardous condition (code violation) that would probably not cause death or serious physical harm, but would have a direct and immediate relationship on the safety and health of the employee.

Examples:

- Those mandated regulations and standards where "shall" and "will" are active in the regulations.
- Those standards or code violations where the word "should" or "may" are the active words of the code paragraph.
- If there is a specific problem with a building / equipment / procedure not covered by a specific code, but would enhance the overall safety and health opportunity for the employees.
- Code 6 <u>Repair or alteration work to correct building deterioration, functional</u> and code deficiencies:

Examples:

• Improve operational utilization, increase energy efficiency, extend useful life of an existing facility, and compliance with current code requirements.

Appendix 4 – Sample Narrative for IT Resources Section of State of MU/Location

The following is an example of how an IT Resource Planning narrative may look. Adequate length of a typical narrative is envisioned to be approximately one-half to one page.

Location IT Resource Planning:

The Location upgraded internal network wiring in FY 2005 as phase 1 in a three-year plan to modernize the Location IT infrastructure. Network switches will be replaced in FY 2006 at an estimated cost of \$12,000, refer to Miscellaneous Plan. The network server is planned to be replaced in FY 2007, but due to a need for increased capacity, we are requesting \$18,000 in HPRL funds to replace the server in FY 2006, refer to unfunded Miscellaneous Plan, and the HPRL list priority #2. The Location is planning to replace 14 PCs used by scientific and administrative personnel to comply with the Agency's recommended life cycle replacement policy, refer to Procurement Plan. In order to facilitate better coordination and communication with the Quincy work site, a new video conferencing system is planned for FY 2006, refer to Miscellaneous Plan.

The Location network obtains Internet services by way of the USDA IAN. The local network is protected by a firewall. Several workstations at the Quincy work site are not connected to the USDA IAN. These workstations connect to the local University network. We have submitted a request for a Technical Waiver from the Department. The workstations are protected with personal firewalls and anti-virus software.

Key individuals responsible for IT functions are designated by T footnotes on the Position Staffing Plan. On-line training will be provided to staff adopting new word processing software. Network Administrator will be attending Advanced Network and Security Training (\$2,500 has been allocated for this training). All PCs have recommended virus protection and are backed up to ensure data and information protection.

The Location telephone system has reached its expected life cycle and will need to be replaced in FY 2006. Plans will be developed with the Area Office and the OCIO in FY 2006 to ensure compliance with Departmental policy DR 3300-1.

Management Unit IT Resource Planning:

In FY 2006, the MU will replace outdated analog data collectors with a digital data logger and a wireless network dedicated scientific LAN. The application of this technology will facilitate the collection and use of data essential to field studies and will provide new capability for the research program. Cost will be \$60,000 for data loggers, wireless transmitters, remove network server, UPS and new data communications circuit, refer to Procurement Plan.

Appendix 5 – Calculations for Management Criteria

Several Management Criteria/Indicators are used to forecast the health of a MU. These indicators, their "rule of thumb" value levels, and formulas are as follows:

1. **Total Dollars per SY** = <u>Net to Location Dollars</u> Number of SY's in the MU (Cat. 1 & 4)

- Rule of Thumb: \$250-300,000 per SY for a viable research program
- Varies by research program (animal/insect/modeling, etc.)

Net to Location Dollars = Permanent and temporary funds available to the MU CRIS prior to the IRC assessment.

- 2. Bench Dollars per SY = <u>Total Dollars Net to Location less IRC costs</u> Number of SY's in MU
 - Addresses disparity of IRC levels
 - Levels the playing field in comparing across research programs
 - Reflects what level of funding is actually at the bench
- 3. **Discretionary \$'s per SY** = <u>Discretionary Costs</u> Number of SY's in MU
 - Rule of Thumb: \$25,000 Discretionary Dollars per SY
 - Ensures sufficient operating funds for travel, supplies, etc., to run the research program

<u>Discretionary Costs</u> = Overtime/premium pay, travel of persons, transportation, printing, other services, RSA non-salary/non-utilities costs, supplies, miscellaneous services, equipment, and land & structures.

<u>Fixed Costs</u> = Federal salaries, lump sum leave, promotions, RSA salaries, RSA utilities, support service contracts with FTE identified, rent and utilities, repair and maintenance, extramural agreements, IRC, and SRC.

4. **Percent in Soft Funds** = <u>Total Soft Funds</u> Net to Location \$'s

- Agency Average is 7%; \$60 Million
- Rule of Thumb: 7% to 15%
- Too much incoming funds may impact accomplishment of base research program
- Will not be considered in funding decisions on base allocations
- 5. **Percent in Outgoing Funds** = <u>Total Extramural Funds (BOCC 4000)</u> 1/ Net to Location \$'s

1/ This figure excludes Congressionally mandated pass through funds

- Agency average: 9%, \$76 Million
- Measures extent to which appropriated funds are going outside the agency
- Level of funding may impact accomplishment of base research program

Appendix 6 – Explanation of Category Codes for Position Numbers

<u>Research Scientist (CAT 1)</u>: These are SY positions and are established on a permanent basis. The highest level of work, for a major portion of the time, involves personal conduct and/or leadership of theoretical and experimental investigations primarily of a basic or applied nature. [CAT 1 positions that meet the supervisory/manager definitions remain in this code]. Examples are: Laboratory Directors, Laboratory Chiefs, Research Leaders, Supervisory Research Scientists, Research Biologist, Research Physiologist, Research Plant Pathologist, Research Entomologist, etc.

<u>Service Scientist (CAT 4)</u>: These are SY positions and are established on a permanent basis. Incumbents serve as project or program leaders over, or personally perform, work assigned to ARS which involves professional scientific services to the public or to other Government agencies.

<u>Non Permanent Research/Service Scientist (CAT 2)</u>: These are professional scientific positions which are established on a non-permanent basis; these are filled through temporary or term appointments; positions entail research and/or service science work. Examples are: Research Associates, Visiting Scientists, individuals reemployed in ARS after having retired from CAT 1 or CAT 4 positions.

<u>Support Scientist (CAT 3)</u>: Professional scientific positions which function to provide direct support of service to one or more positions in Categories 1 or 4; are responsibly involved in one or more, but not all phases of research, particularly not the problem selection and definition phases; and participate responsibly in the analysis and preliminary interpretation of data, but are not responsible for the final interpretation and conclusion which relate the results to the field of research involved.

<u>Technician/Aid/Assistant (Non-Engineering & Non-Scientific) (CAT 5)</u>: Includes all technicians, aids, and assistants in non-engineering and non-scientific single-interval occupational series (except those within the GS-300 group). Examples: Safety Technician, Personnel Clerk/Assistant, Accounting Technician, Purchasing Agent, Procurement Assistant, Library Technician, Supply Clerk, Photographer, Guard, Firefighter.

<u>Specialist (CAT 6)</u>: Positions in which incumbents perform managerial, advisory, or administrative work based upon established principles which require training equivalent to that represented by college graduation. They are typically in two-grade interval series and encompass non-SY staff scientists and staff specialists. Examples: Area Director, Deputy Area Director, Center Director, Deputy Administrator, Agricultural Administrator, Safety Specialist, Personnel Officer, Personnel Staffing Specialist, Computer Specialist, Administrative Officer, Program Analyst, Accountant, Public Affairs Specialist, Technical Publications Writer, Facility Management Specialist, Budget Officer, Librarian.

<u>Technician/Aid (Engineering & Scientific Support) (CAT 7)</u>: Identifies technician and aid positions in one-grade interval series in the GS-400, -600, -700, -800, -1300, or -1500 Groups. Examples: Biological Technician/Aid, Electronics Technician, Hydrological Technician, Statistical Clerk/Assistant.

<u>Trade and Crafts Occupations (CAT 8)</u>: Positions having trade or craft knowledge as the paramount qualifications requirement. Examples: Boiler Plant Operator Foreman, Animal Caretaker Leader, Laborer, Farmer, Motor Vehicle Operator.

Administrative Support Occupations (Clerical/ Secretarial) (CAT 9): General occupations involved in structured work in support of office operations within one-grade interval series in the GS-300 occupational group. Examples: Clerk Typist, Secretary, Clerk-Stenographer and Reporter, Computer Operator, Administrative Technician/Clerk.

<u>Other (CAT 0)</u>: Includes all positions that do not fit any of the above codes. Example: Student Temporary Employment Program (STEP).

Appendix 7 – Before You Begin (Helpful Hints)

There are several things the user should keep in mind or can accomplish before beginning data entry into ARMPS to make the process run smoothly. The following are recommended before beginning:

- Ensure salary information in SAMS for the current fiscal year is complete and up-to-date. Ensure that the information for the last pay period is accurately recorded. This final pay period's information will be used to project the future year's salary when rolling over the data. Ensure that the appropriate pay cost percentage is reflected. (NOTE: users have to identify this percentage for each Location they service. Updating the percentage for 1 Location will not update it for others.) Ask each RL to mark up the Position Staffing Plan to identify any promotions, QSI's, retirements, etc. Incorporate this data in SAMS. Roll over the information to the next fiscal year; add within grade and promotion information, and ensure that all the data is completely accurate. Please refer to the SAMS Manual for instructions for the above. In short, ensure the information in SAMS is perfect before importing to ARMPS.
- Identify the CRIS number information for the location IRC and SRC accounts. There is a CRIS number for these accounts and it usually looks like: XXXX-88888-999-OOD. Do not use program CRIS numbers in IRC and SRC accounts.
- Make sure the Mode Code information is correct. If the same mode code is used for more than 1 account, then the information is combined on the executive summary reports. IRC accounts usually have the 5th level Mode Code of 01 or 00. If personnel are assigned to the wrong Mode Code in SAMS, do not import into ARMPS. Contact FMD to see if there may be a way to change the Mode Code prior to import. Otherwise, the information can not be imported and will have to be individually entered into ARMPS under the correct Mode Code.
- Do not categorize soft funds as IRC. Although they may relate to an IRC function or account, they have to be categorized as "Direct" on the MU/CRIS Information screen and they should have a CRIS number. This CRIS number is the number assigned in ARIS for those with a budget greater than \$25,000 or "made up" using the ARIS log number (if possible) for those agreements less than \$25,000. If assistance is needed identifying a CRIS number, contact your SBFO. Soft fund accounts may be "lumped" together under one ARMP as long as the fund type (i.e., X08, X91, X93) is the same. Each account lumped into one ARMP must have a separate CRIS number as stated above.

- When developing soft fund ARMPS, list the funding as "temporary" on the MU Allocation by CRIS screen. Do not label these funds as permanent.
- For the leader of the MU, enter the Supervisor's Position Number on the Personnel Information screen as "0000000". This tells the system that this position is first on the Position Staffing Plan.

Appendix 8 – Suggested Steps for Developing Your ARMPS

There is more than one way to accomplish the development of the ARMPS for the MU's and for the Location. The following provides only a guideline to assist Location personnel.

Locations:

- 1. Ensure salary information in SAMS for the current fiscal year is complete and up-to-date. Ensure that the information for the final pay period is accurately recorded. This pay period's information will be used to project the future year's salary when rolling over the data. Ensure that the appropriate pay cost percentage is reflected. (NOTE: users have to identify this percentage for each Location they service. Updating the percentage for 1 Location will not update it for others.) (Note: Some SBFO's perform this function for their locations.) Ask each RL to mark up the Position Staffing Plan to identify any promotions, QSI's, retirements, etc. Incorporate this data in SAMS. Roll over the information to the next fiscal year; add within grade dates and promotion pay period information, recalculate, and ensure that all the data is completely accurate. Please refer to the SAMS Manual for instructions for the above.
- 2. Calculate the Location's Indirect Research and Shared Research Costs and assign these costs to the MU's and CRIS'. This is done outside of ARMPS by using prescribed methodologies. Please consult your Servicing Budget and Fiscal Office for assistance.
- 3. Import salary information for all accounts from SAMS into ARMPS (See Chapter 3, Section G). Add footnotes, EOD and Expiration Dates as necessary. If you Area requires it, round off the salaries to the nearest \$100th. Or, this can be done in SAMS prior to import so that the SAMS salary figures match the ARMP salary figures.
- 4. Enter the CRIS Allocation Screens and access the MU Allocation by CRIS Screen. Enter the Permanent, IRC, SRC, and Temporary funding for the MU and for each CRIS. (The Permanent and Temporary Funding levels are provided by BPMS through the issuance of the ARMP Guidelines. These will be provided by the Area or may be obtained from ARIS. These figures MUST match the final ARMP Guidelines.)
- 5. Access the Assign Position to CRIS screen and distribute each positions FTE to the appropriate CRIS'.
- 6. Access the Assign Salary Related to CRIS screen and identify the funding for overtime, promotions/awards, and any lump sum payments for the MU and by CRIS. As a starting point, use the funding levels used in the prior year and confirm with the Research Leader that these amounts are acceptable. Provide guidance to the RL on any changes you may

be aware of (i.e., the need for a lump sum payment or the potential promotion of several employees, etc.).

- 7. Access the Assign All Other to CRIS screen and distribute the remaining funds to each Object Class Code for the MU and by CRIS. Again, as a starting point, it might be useful to distribute the funds in a similar manner as the previous year while using OCC 2600 as the "difference". The Balance to Budget should be "\$0" for the MU and all CRIS' when completed. This gives the RL a starting point for making adjustments based on knowledge of upcoming events. For instance, perhaps an RSA will be discontinued or reduced.
- 8. Enter recurring 550's (i.e., recurring agreements in the Extramural screen; known facilities projects using the 4% set-aside in the Facilities screen; known procurements (i.e., maintenance and/or service contracts) in the Procurement screen; and recurrent miscellaneous costs (i.e., utilities, postage, safety and health supplies, FedEx, etc.) in the Miscellaneous screen.
- 9. Prioritize the unfunded requests in the HPRL. This can be arbitrary at this point so that they will print on the HPRL reports. The RL and the LC/LD will need to provide the official priorities.
- 10. Provide a draft ARMP to the RL for review and revision. At this point, the RL will need to:
 - review position assignment percentages to ensure they are correct
 - review the Position Staffing Plan to make sure it accurately reflects all the known data (promotions, etc.)
 - ensure funding levels for the salary-related costs and each object class code are accurately reflected
 - o identify an other items which should be reflected on the 550's
 - prioritize unfunded requirements (HPRL)
- 11. Work with the RL's to develop the State of the MU. Recommend this is drafted and finalized in Word and cut and pasted into ARMPS. Some Areas require the State of the MU be submitted in Word so that edits can be identified on the document and returned to the Location for finalizing before pasting into ARMPS.
- 12. Develop ARMPS for anticipated incoming soft funds.
- 13. Finalize the draft ARMPs for review by the Area.
- 14. Print the MU Summary Report and the Location Summary Report and ensure that the data is accurately reflected on these reports. If the reports are not reflecting the data correctly, ensure that the data is accurately reflected on the screens. The MU Summary Report pulls information from the ARIS files for CRIS Titles. The titles for soft funds

are not in ARIS; they will need to be entered by the Location in ARMPS. (See Chapter 3, Sections H and I.)

- 15. Work with the LC/LD to develop the State of the Location. This should be a compilation (but not a complete combination) of the information prepared for the State of the Management Units.
- 16. Develop the Multi Year Analysis (See Appendix 9). (Note: This report may be prepared by the SBFO.)
- 17. Notify the Area that the Location's ARMPS are ready for review.

Area Budget and Fiscal Officers:

In addition to the functions required to ensure that the detailed ARMPS are developed in accordance with the Area specifications and the Agency's published ARMP guidance, ABFO's should also do the following:

- Run the Executive Briefing Book reports (i.e., the Area Agency Summary, the Area Summary by MU, the Location Summaries, and the Management Unit Summaries). These can be run individually or as a group by selecting *ARMP Briefing Book* under Agency Executive Summaries in ARMPS.
- 2. Ensure the information reflected on these reports is accurate. The funding levels must match those provided by BPMS in the final ARMP Guidelines. Review the MU Summary Reports carefully and ensure there are no "Title Unavailable" listings under the CRIS Titles and ensure that any * next to the allocation amounts are correct.
- 3. Consolidate the Location Multi Year Analysis into the Area Multi Year Analysis. See Appendix 9 for additional guidance.
- 4. Once everything has been reviewed and corrected, freeze the ARMP data (under References) to ensure the data is not changed. Notify the FMD that the information is ready for review. E-mail the Area Multi Year Analysis and the State of the Area to FMD.

Appendix 9 – Multi Year Analysis

One of the tools used by Agency Management is the Multi Year Analysis. This report identifies the number of scientists, the total dollars available by scientist, and the discretionary dollars available by scientist for the current and 2 future years. This report is not generated by the automated ARMPS system but is considered part of the ARMP submission required by the Areas.

Parameters:

- The yearly guidance published by the Administrator will provide the percentages to use for general pay cost to project salaries for the upcoming and future fiscal years.
- The increase in IRC or other fixed costs can be determined at the MU/location level. However, if you prefer to use a standard percentage for inflationary increases, use **2.1** percent for the 2 future fiscal years.
- Hold the number of SYs constant in the out-years.

Use the data reflected on the MU ARMP Annual Operating Plan and MU Summary Report to compute the future year's Discretionary Dollars/SY as follows:

1. Calculate the next year salary increase (SI) and IRC increase plus any other significant increase in a fixed cost that would reduce discretionary resources.

Total Salaries = Federal permanent and temporary salaries plus RSA Salaries. FY current plus 1 - SI = ARMP Total Salaries x Annualized Pay Cost Rate FY current plus 1 - IRC Increase = Change in IRC or other fixed costs over ARMP amount (determined locally).

2. Total the increases derived in Step 1 and divide by the # of SYs shown on the MU Summary Report. The result is the Out-year Reduction Factor" or ORF to the Discretionary Dollars per SY.

Current year plus 1 SI + current year plus 1 IRC Increase)/# of MU SYs = ORF

3. Subtract the ORF from the current year Discretionary Dollars per SY figure reflected on the MU Annual Operating Plan (AOP) to determine the current year plus 1 Discretionary Dollars per SY.

Current year Discretionary Dollars per SY - ORF = current year plus 1 Discretionary Dollars per SY

Repeat Steps 1-3 to determine the second out year's (current year plus 2) Discretionary Dollars per SY, subtracting the current year plus 2 ORF from the derived current year plus 1 Discretionary Dollars per SY figure.

4. Summarize the information for the 3 FYs by MU on the "Summary of Multi Year Analysis" shown on the following pages.

Example Multi-year Analysis:

Location A MU 1

Factors: FY 2006 Discretionary Dollars per SY = \$35,250 FY 2006 Total Salaries = \$395,250 FY 2006 SY Total = 13 FY 2007 Annualized Pay Cost Rate: 2.55% FY 2008 Annualized Pay Cost Rate: 2.55%

To compute FY 2007 Discretionary Dollars per SY:

<u>Step 1</u>:

FY 2007 SI: FY 2006 Total Salaries of \$395,250 x 2.55% = \$10,079 FY 2007 IRC Increase = \$17,500 (derived locally)

<u>Step 2</u>:

(\$10,079 + \$17,500)/13 = \$2,121 ORF

<u>Step 3</u>:

FY 2007 Discretionary Dollars per SY = \$35,250 - \$2,121 ORF = \$33,129

To compute FY 2008 Discretionary Dollars per SY:

<u>Step 1</u>:

FY 2008 SI: (\$395,250 + \$10,079) x 2.55% = \$10,336 FY 2008 IRC Increase = \$20,500 (derived locally)

<u>Step 2</u>:

(\$10,336 + \$20,500)/13 = \$2,372 ORF

<u>Step 3</u>:

FY 2008 Discretionary Dollars per SY = \$33,129 - \$2,372 = \$30,757

Example Summary Multi Year Analysis

Location	MU Name	Org. Code	# of SYs	Total \$ per SY	FY 2006 Discret. \$'s Per SY	FY 2007 Discret. \$'s Per SY	FY 2008 Discret. \$'s Per SY
Location A	MU 1	XXXX-XX- XX	13	\$401,250	\$35,250	\$33,129	\$30,757
	MU 2	XXXX-XX- XX	8	\$350,800	\$19,800	\$11,014	(\$2,300)
Location B	MU 1	XXXX-XX- XX	12	\$382,000	\$35,000	\$28,450	\$25,733
	etc.	etc.	etc.	etc.	etc.	etc.	etc.

Summary of FY 2006 Multi-year Analysis _____ Area

Note: List all MUs in each location.