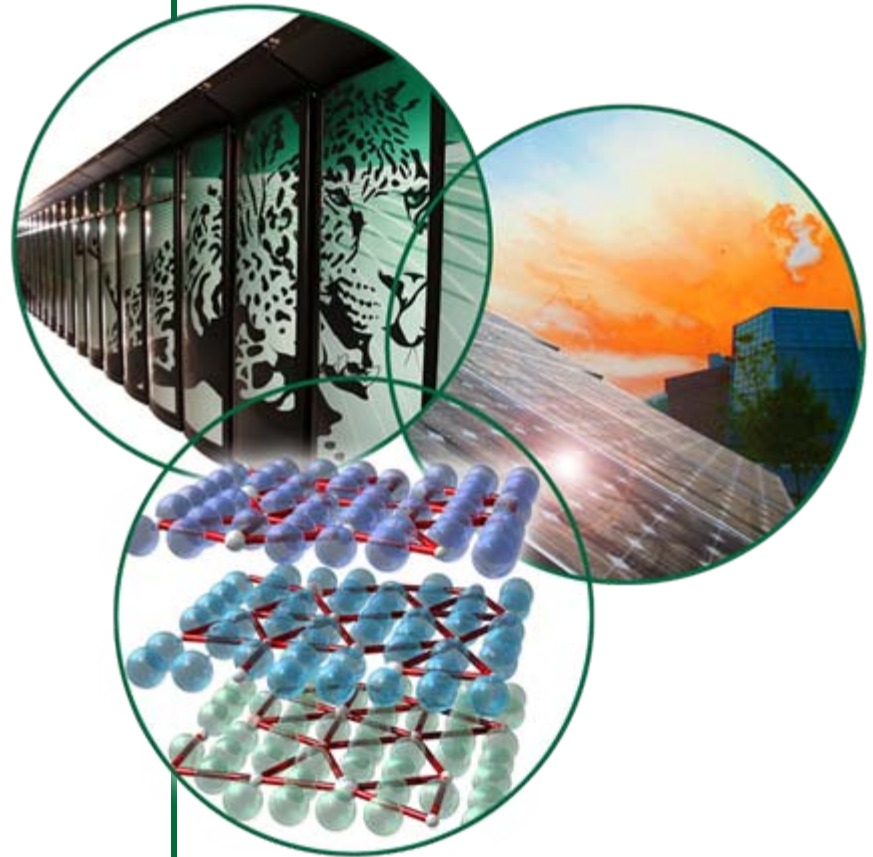


eWFO Work for Others Proposal and Funding System

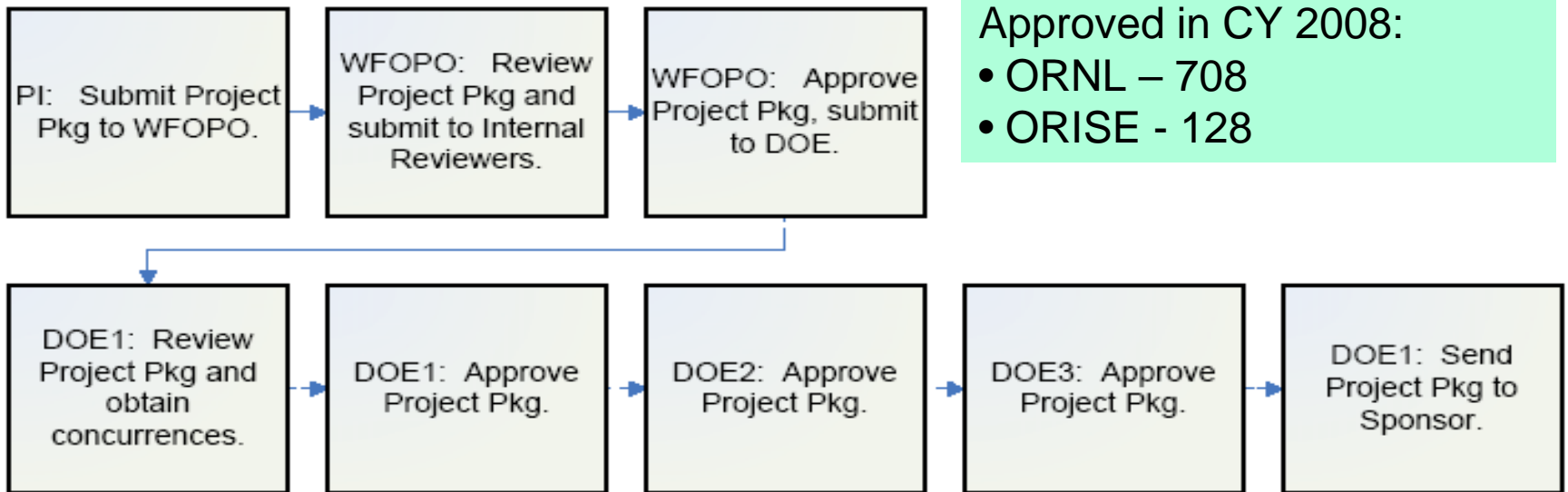
Bob Hamilton, DOE Oak Ridge

Jeff Ault, ORNL

April 15, 2009



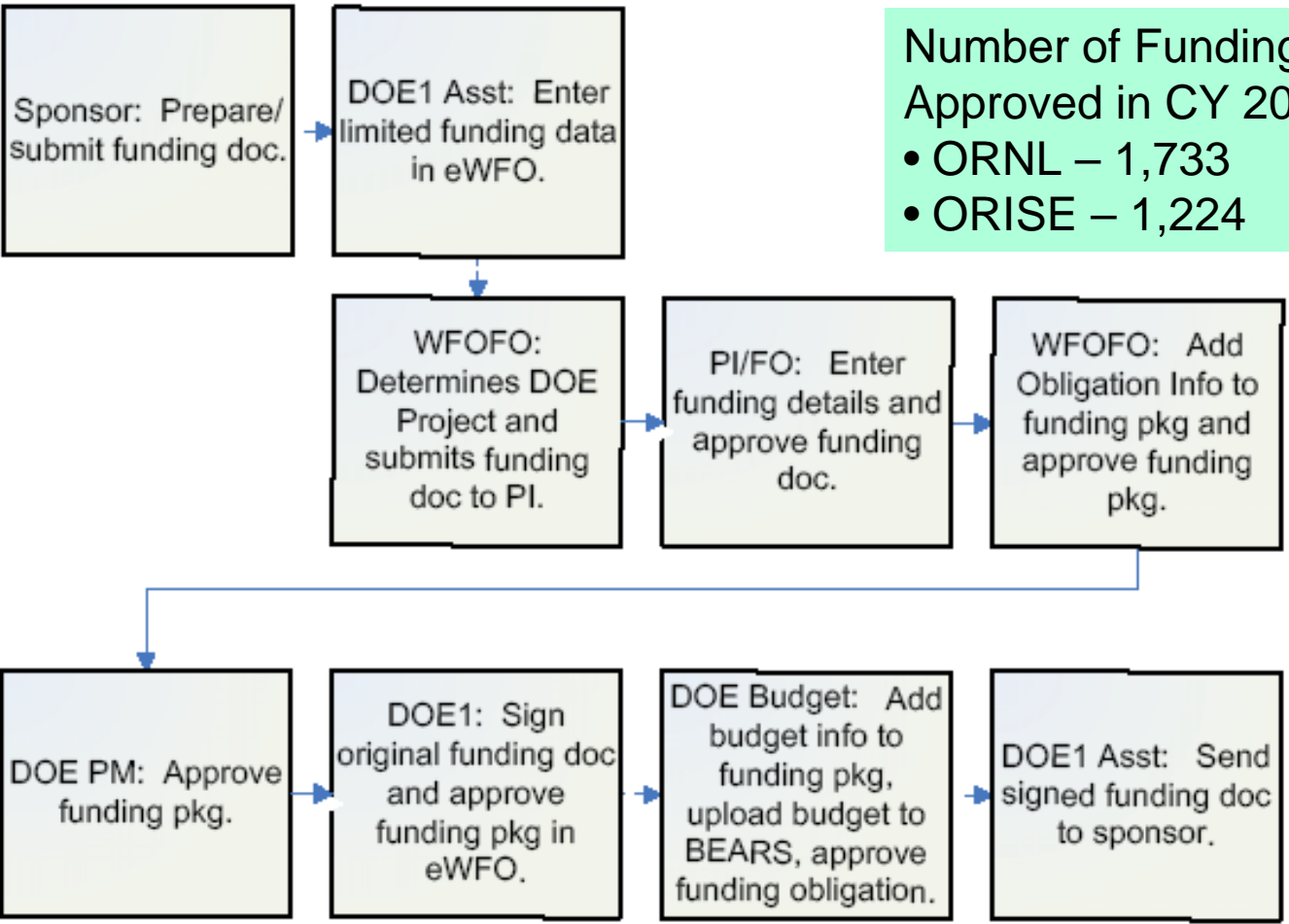
Process Flow: Federal Project Proposal



Number of Project Proposals Approved in CY 2008:

- ORNL – 708
- ORISE - 128

Process Flow: Federal Funding Document



Number of Funding Packages Approved in CY 2008:

- ORNL – 1,733
- ORISE – 1,224



What is eWFO?

eWFO
Work for Others

Project Proposals | Funding | Awaiting Action | Reports | Utilities | Help

Welcome
Jeff Ault

**DOE Work for Others Project Proposal
For Oak Ridge National Laboratory**

Welcome to eWFO

Welcome to eWFO - the on-line Work for Others application.

eWFO is the new Web-based application that will be used to support Project Proposal submission and approval for Reimbursable Work for Others (WFO) and Joint Work Statement (JWS), if applicable, at the Department of Energy (DOE) and DOE/National Nuclear Security Administration (DOE/NNSA) sites in Oak Ridge, Tennessee (ORNL, BWXT, and ORISE). eWFO also supports funding obligation and approval for WFO projects. The system replaces the existing Oak Ridge Reimbursable Activity Processing System (RAPS) and provides better functionality and ease of reporting.

NO CLASSIFIED, SPONSOR PROPRIETARY, OR SPONSOR BUSINESS SENSITIVE INFORMATION SHOULD BE PROCESSED THROUGH THIS SYSTEM.

What's New

- [eWFO Enhancements/Fixes implemented - 12/18/2008](#)
- [eWFO Browser Recommendations for Mac Users - 02/09/2006](#)
- [eWFO Frequently Asked Questions](#)
- [Previous News](#)

Web-based system supporting the submission and approval process for WFO proposals and funding at ORNL and Oak Ridge Institute for Science and Education (ORISE)

Implemented in October 2005

- Developed using SAP® software
- Code owned by SAP®
- Government use license
- Available for sharing or hosting

[eWFO Home](#) | [UT-B](#) | [ORNL Internal](#) | [ORNL SAP](#) | [Questions](#) | [Disclaimers](#)

Powered by [ORNL SAP](#)

How is eWFO used?

Application used by research staff, finance staff and DOE to collect the information necessary to create, modify, and approve project proposals, funding packages and deobligations

The screenshot displays the eWFO web application interface. At the top left is the logo "eWFO Work for Others" and a navigation menu with items: Project Proposals, Funding, Awaiting Action, Reports, Utilities, and Help. The main header area contains "Edit Project Proposal" on the left and "DOE Work for Others Project Proposal For Oak Ridge National Laboratory" on the right. Below the header is a "User Actions" section with instructions: "Enter Information for Project Version. Data must be saved prior to exiting screen in order to retain information." It includes buttons for "Save and Check Project Proposal" and "Save and Submit for Approval", and a section "Or choose the following:" with buttons for "Go To My Projects" and "View / Attach Documents". The main content area is titled "Project Proposal" and contains several form fields: "Project Type" (radio buttons for Federal, Non Federal, JWS), "Project Number" (2107-T527-09), "Project Title" (Research Climate Impact on Structure Integrity Test Project in QAS), "Project Structure" (Basic), "Project Status" (Initial Input), "Version Number" (0000), "Amendment Number" (0000), "Version Title" (Research Climate Impact on Structure Integrity Test Project in QAS), and "Version Status" (Input). Below this is a section for "Lead Sponsor Information" showing "Lead Sponsor: 601095 Army Corp of Engineers". At the bottom is a "Sponsor Proposal Contact" table with columns for Name, Address, Phone, Fax, and Actions. The table contains one row for John Doe, Program Manager, with contact information and icons for edit, delete, and user profile.

Sponsor Proposal Contact				
Name				
John Doe Program Manager	123 University Street Knoxville, TN 37831	Phone: (865)123-4567 Fax: (865) 123-7654		

Staff "enter information" rather than "fill out forms"

“Dynamic Questions” Help the User

► Solicitation Information

Is this in response to a Broad Agency Announcement (BAA) or BAA-type announcement, or grant-like arrangement ? Yes No

► Solicitation Information

Is this in response to a Broad Agency Announcement (BAA) or BAA-type announcement, or grant-like arrangement ? Yes No

If yes, Please Indicate if Responding:	Directly
Agency Issuing Solicitation	Test
Announcement Number	12345-AA
Announcement Title Example of Addition input	
Type of Announcement:	Broad Agency Announcement (BAA)
If Other, Please Specify:	
Attach Copy of Announcement before approval submission.	<input checked="" type="checkbox"/> (Document not Attached)

Answering “Yes” to “dynamic questions” drives the requirement to enter additional information

Additional Information Stored as Attachments

Attachments



User Actions

To return to previous function click 'Continue'.

[Continue](#)

Click paper clip to attach, glasses to view, pencil to update and trash can to remove.

Additional actions are available in the header menu lists

Project Proposal

Project Type : Federal Non Federal JWS
 Project Number : 2107-T527-09
 Project Title : Research Climate Impact on Structure Integrity Test Project in QAS
 Project Structure : Basic
 Project Status : Initial Input

Version Number : 0000 Amendment Number : 0000
 Version Title : Research Climate Impact on Structure Integrity Test Project in QAS
 Version Status : Input
 Lead Sponsor: 601095 - Army Corp of Engineers


Project Version Attachments

Document Type	Attachment Description	Attachment Info	Attach Status	When Required	Enter file to Attach	Click to Attach	Click to View	Click to Update	Click to Delete
ADMINISTR	Admin instructions (attached by WFOPO)	OUO: <input type="checkbox"/> Auth Viewer: CONTRACTOR OR DOE		Required During Approval Process	<input type="text"/> Browse...				
BAA	BAA - Broad Agency Announcement	OUO: <input type="checkbox"/> Auth Viewer: CONTRACTOR OR DOE		Required During Approval Process	<input type="text"/> Browse...				
EXTERNAPPR	Ext Approval Emails (attached by ORO)	OUO: <input type="checkbox"/> Auth Viewer: CONTRACTOR OR DOE		Required During Approval Process	<input type="text"/> Browse...				
SOW	Proposal/Statement of Work	OUO: <input type="checkbox"/> Auth Viewer: CONTRACTOR OR DOE		Required Before Approval Submission	<input type="text"/> Browse...				
TRANSSPONS	Transmittal to sponsor (attach by WFOPO)	OUO: <input type="checkbox"/> Auth Viewer: CONTRACTOR OR DOE		Required During Approval Process	<input type="text"/> Browse...				







Add New Document Types for Attaching: Not required



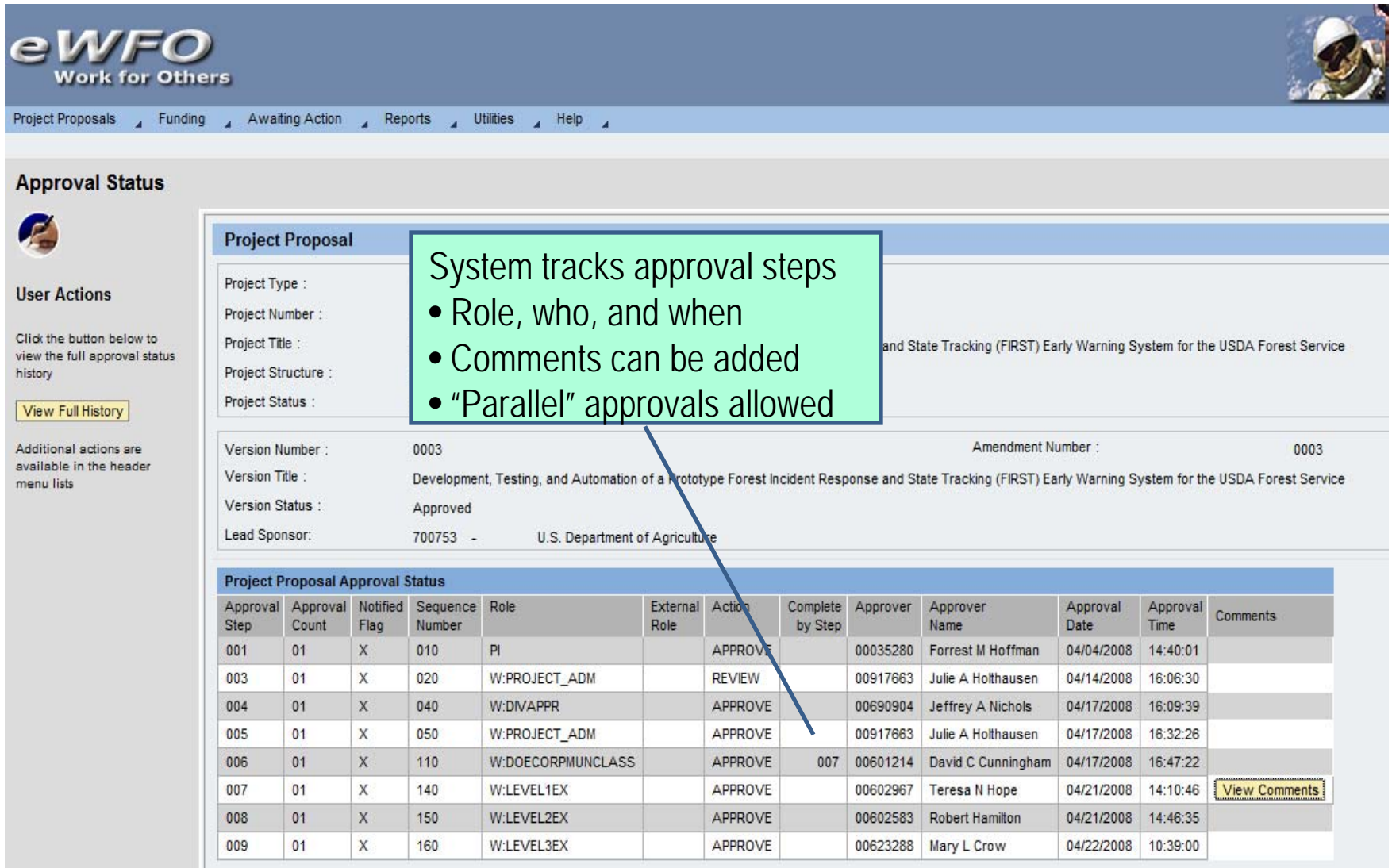
User's Access and Approval Authority Based on eWFO "security roles"

Select another person, user, or position: 

Note: Items in **dark red** are roles that are NOT available for request by general users.

Materials Mgt		Project Mgt		eWFO		HR	PALS/Absences	Travel	Training	Non-Proc. Spending	Acct./Finance	BW	Other
Add	Del	Role		Approver		Description							
<input checked="" type="checkbox"/>		eWFO View Only (AG W:VIEWONLY)		Org Access Approver for Position / ORISE eWFO Approver		View Only access to eWFO project proposals, funding packages, and reports including Display Register Sheets/Data Sheets. Role approver is based on WFO Contractor being requested.							
		For WFO Contractor: 50242683 		ORISE Contractor									
<input checked="" type="checkbox"/>		eWFO View OOU (AG W:VIEWOOU)		Org Access Approver for Position / ORISE eWFO Approver		eWFO users who are authorized to view eWFO documents marked as Official Use Only (OOU). Role approver is based on WFO Contractor being requested.							
		For WFO Contractor: 50242682 		ORNL Contractor									
<input checked="" type="checkbox"/>		eWFO Project Administration (AG W:PROJECT_ADM)		Prime Contract Administrator / ORISE eWFO Approver		Individuals in the Work for Others Program Office (WFOPO) or ORISE Work for Others (WFO) Office. Role access includes the authority to create Master Sponsor, Master Functional, Basic, and Subprojects, attach documents, and submit project proposals to DOE for approval. Access also includes the ability to review/approve, reject, request changes, or change project proposals directly while they are in the approval sequence and view all project data and attachments (unless limited due to security markings, e.g., OOU). Role holders have the authority to create/modify/delete lead sponsors, create/modify/delete agency code, change the status of a project and/or project version, change DOE Project Number before approvals begin, change project structure, and execute Project surveys. This role is contractor specific. Role approver is based on WFO Contractor being requested.							
		For WFO Contractor: 50242682 		ORNL Contractor									
<input type="checkbox"/>		eWFO Funding Administration (AG W:FUNDING_ADM)		Supervisor AR & WFO / ORISE eWFO Approver		Individuals in the ORNL Work for Others Funding Office (WFOFO) or ORISE Work for Others (WFO) Office. Role access includes the authority to create funding packages, attach documents, and submit funding packages to DOE for approval. Access also includes the ability to review/approve, reject, request changes, or change funding packages directly while they are in the approval sequence and view all funding data and attachments (unless limited due to security markings, e.g., OOU). Role holders have the authority to create/modify/delete lead sponsors, create/modify/delete agency code, change the status of a project and/or project version, change DOE Project Number before approvals begin, change project structure, and execute Project surveys. This role is contractor specific. Role approver is based on WFO Contractor being requested.							
		For WFO Contractor: <input type="text"/> 											
<input type="checkbox"/>		eWFO Classification and Security Approver (AG W:CLASSIFICATION)		Manager Cyber & Info Security / ORISE eWFO Approver		Classification Officer, Operations and Security (OPSEC) Coordinator, and/or Security Officer for ORNL and ORISE responsible for reviewing/approving classification and security questions related to eWFO project proposals and funding documents, when applicable. Role access includes the authority to view all project data and attachments (unless limited due to security markings, e.g., OOU), attach documents, view reports, and review/approve/request changes to classification and security checklist items. This role is contractor specific. Role approver is based on WFO Contractor being requested.							
		For WFO Contractor: <input type="text"/> 											
<input type="checkbox"/>		eWFO Finance and Project Management (AG W:FIN)		Org Access Approver for Position / ORISE eWFO Approver		Principal Investigators (PIs) and/or Program Managers (PMs) responsible for entering/editing eWFO project proposals and entering/editing applicable portions of eWFO funding documents. Role access also includes the authority to view all project data and attachments (unless limited due to security markings, e.g., OOU), attach documents to project proposals and/or funding packages, view eWFO reports, and review/change or request changes/approve funding information in eWFO. This role is contractor specific. Role approver is based on WFO Contractor being requested.							
		For WFO Contractor: <input type="text"/> 											
<input type="checkbox"/>		eWFO Accounting (AG W:ACCT)		Supervisor AR & WFO / ORISE eWFO Approver		Individuals in Accounts Receivable, General Ledger Accounting, Treasury Services, Disbursements Accounting, and/or Accounting Managers. Role access includes authority to view/request changes to funding packages, enter funding deobligation information, approve/request changes to funding deobligation information, and create new Lead Sponsor. Role is allowed access to standard templates used for eWFO memos and has the authority to view project/funding data and attachments (unless limited due to security markings, e.g., OOU), attach documents to project/funding packages, and view eWFO reports. This role is contractor specific. Role approver is based on WFO Contractor being requested.							

Workflow Rules Push Notifications



eWFO
Work for Others

Project Proposals | Funding | Awaiting Action | Reports | Utilities | Help

Approval Status

User Actions
Click the button below to view the full approval status history
[View Full History](#)
Additional actions are available in the header menu lists

Project Proposal

Project Type :
Project Number :
Project Title :
Project Structure :
Project Status :

Version Number : 0003 Amendment Number : 0003
Version Title : Development, Testing, and Automation of a Prototype Forest Incident Response and State Tracking (FIRST) Early Warning System for the USDA Forest Service
Version Status : Approved
Lead Sponsor: 700753 - U.S. Department of Agriculture

Project Proposal Approval Status

Approval Step	Approval Count	Notified Flag	Sequence Number	Role	External Role	Action	Complete by Step	Approver	Approver Name	Approval Date	Approval Time	Comments
001	01	X	010	PI		APPROVE		00035280	Forrest M Hoffman	04/04/2008	14:40:01	
003	01	X	020	W:PROJECT_ADM		REVIEW		00917663	Julie A Holthausen	04/14/2008	16:06:30	
004	01	X	040	W:DIVAPPR		APPROVE		00690904	Jeffrey A Nichols	04/17/2008	16:09:39	
005	01	X	050	W:PROJECT_ADM		APPROVE		00917663	Julie A Holthausen	04/17/2008	16:32:26	
006	01	X	110	W:DOECORPMUNCLASS		APPROVE	007	00601214	David C Cunningham	04/17/2008	16:47:22	
007	01	X	140	W:LEVEL1EX		APPROVE		00602967	Teresa N Hope	04/21/2008	14:10:46	View Comments
008	01	X	150	W:LEVEL2EX		APPROVE		00602583	Robert Hamilton	04/21/2008	14:46:35	
009	01	X	160	W:LEVEL3EX		APPROVE		00623288	Mary L Crow	04/22/2008	10:39:00	


System tracks approval steps

- Role, who, and when
- Comments can be added
- "Parallel" approvals allowed

How has eWFO improved the process?

Modify Sponsor

DOE Work for Others - Sponsor



User Actions

Select Sponsor then click the 'Continue' button to display details.

[Continue](#)

Or choose the following:

[Go To My Projects](#)


Additional actions are available in the header menu lists

Sponsors(s)								
	Sponsor No	SOrg	Name	Name 2	Street	City	St	Cty
<input type="checkbox"/>	0000601008						MD	US
<input type="checkbox"/>	0000601086						MD	US
<input type="checkbox"/>	0000601087						MD	US
<input type="checkbox"/>	0000601088						NJ	US
<input type="checkbox"/>	0000601089						DC	US
<input type="checkbox"/>	0000601090						TX	US
<input type="checkbox"/>	0000601091						AL	US
<input type="checkbox"/>	0000601092						AL	US
<input type="checkbox"/>	0000601093						MD	US
<input type="checkbox"/>	0000601094						VA	US
<input type="checkbox"/>	0000601095						VA	US
<input type="checkbox"/>	0000601096						DC	US
<input type="checkbox"/>	0000601097						LA	US
<input type="checkbox"/>	0000601099						NH	US
<input type="checkbox"/>	0000601100						WV	US
<input type="checkbox"/>	0000601101						MD	US
<input type="checkbox"/>	0000601102						AL	US
<input type="checkbox"/>	0000601103						VA	US

- Improved quality of information
 - Key sponsor/agency information maintained in system
 - “Pick list” to select/input key information
 - System warnings if required information is missing
- Integrated with DOE’s budget system (BEARS)
- Supports DOE’s accounting system (STARS)
- Email and fax distribution capability from eWFO
 - Saves time
 - Provides funding acceptance to sponsor more quickly
- Enhanced search capabilities including “Go to My Projects”
- Controls prevent accepting funds in excess of approved dollar amount or outside performance period

How has eWFO improved the process (continued)?

Review/Approval Actions



User Actions

Choose an action for this package by clicking the action buttons here or at the bottom of the screen.

Your comments can be added at the bottom of the screen.

Or choose the following:

- View Project Amendments
- View Funding Packages
- View Awaiting Items
- Go To My Projects
- View / Attach Documents
- Print Proposal Package

Project Proposal

Project Type :	<input checked="" type="radio"/> Federal	<input type="radio"/> Non Federal	<input type="radio"/> JWS
Project Number :	0700-S664-A1		
Project Title :	EXTENSIBLE TERAGRID FACILITY - OAK RIDGE NA		
Project Structure :	Basic		
Project Status :	Active		

Version Number :	0001	Amendment Number :	
Version Title :	BRINGING NEUTRON SCIENCE TO THE TERAGRID		
Version Status :	Approved		

▶ Lead Sponsor Information

Lead Sponsor: 60164


▶ Sponsor/Work Type

Sponsor / Work Types did not apply.

Project and funding information stored together and easily accessible

How has eWFO improved the process (continued)?

**Ad Hoc Reports --
A List of Funding Packages**



User Actions

To find A List of Funding Packages, enter search criteria in the fields to the right, then click the 'Execute Report' button.

Wildcards may be used. For example: Enter Project Number = ABC* to return projects that begin with ABC

[Execute Report](#)
[Clear Selection Criteria](#)

Use the following to store/retrieve selection criteria to easily run reports again in the future.

[Get/Modify Existing Report Variants](#)
[Save Criteria to a New Report Variant](#)

Additional actions are available in the header menu lists

Ad Hoc Report
A List of Funding Packages

Enter Selection Criteria

Contractor	3001 Oak Ridge National Laboratory	Project Type	<input type="checkbox"/> Federal <input type="checkbox"/> Joint Work Statement <input type="checkbox"/> Non-Federal
Project No	<input type="text"/> to <input type="text"/>	Sponsor Funding Document Number	<input type="text"/> to <input type="text"/>
Project Structure	<input type="text"/> to <input type="text"/>	Master Project	<input type="text"/> to <input type="text"/>
Funding Master Title	<input type="text"/>		
Lead Sponsor	<input type="text"/> to <input type="text"/>	Sponsor Name	<input type="text"/>
Agency Code	<input type="text"/> to <input type="text"/>	Agency Name	<input type="text"/>
Type of Action	<input type="text"/>	Funding Status	<input type="text"/>
Classification	<input type="checkbox"/> Classified <input type="checkbox"/> UCNi <input type="checkbox"/> Official Use Only <input type="checkbox"/> Unclassified		
Funding Increment	<input type="text"/> to <input type="text"/>	Internal Contact Badge Number	<input type="text"/>
Fixed POP Begin Date	Month <input type="text"/> Day <input type="text"/> Year <input type="text"/> to Month <input type="text"/> Day <input type="text"/> Year <input type="text"/>	Funding Total Amount	<input type="text"/> to <input type="text"/>
Fixed POP End Date	Month <input type="text"/> Day <input type="text"/> Year <input type="text"/> to Month <input type="text"/> Day <input type="text"/> Year <input type="text"/>	Estimated POP Begin Date	Month <input type="text"/> Day <input type="text"/> Year <input type="text"/> to Month <input type="text"/> Day <input type="text"/> Year <input type="text"/>
Appropriation Date	Month <input type="text"/> Day <input type="text"/> Year <input type="text"/> to Month <input type="text"/> Day <input type="text"/> Year <input type="text"/>	Estimated POP End Date	Month <input type="text"/> Day <input type="text"/> Year <input type="text"/> to Month <input type="text"/> Day <input type="text"/> Year <input type="text"/>
FAC Applies Flag (Y/N)	<input type="checkbox"/> Y = Yes <input type="checkbox"/> N = No		
Advanced Payment Required Flag (Y/N)	<input type="checkbox"/> Y = Yes <input type="checkbox"/> N = No		
Other DOE Work Flag <input type="checkbox"/> Selected			

Select Columns to Display Select All? NOTE: If none are checked, all columns will be displayed.

<input type="checkbox"/> Project No	<input type="checkbox"/> Funding Status	<input type="checkbox"/> Can Completion Date be Met Flag (Y/N)	<input type="checkbox"/> Generate Register Sheet Flag
<input type="checkbox"/> Type of Action	<input type="checkbox"/> Lead Sponsor	<input type="checkbox"/> Sponsor Name	<input type="checkbox"/> Project Manager Number
<input type="checkbox"/> Project Structure	<input type="checkbox"/> Agency name	<input type="checkbox"/> Project Manager Name	<input type="checkbox"/> Project Manager Phone Number
<input type="checkbox"/> Master Project	<input type="checkbox"/> Fixed POP begin Date	<input type="checkbox"/> Other Party Identifier on DOE Fin Plan	<input type="checkbox"/> Other DOE Work Flag
<input type="checkbox"/> Funding Increment	<input type="checkbox"/> Fixed POP End Date	<input type="checkbox"/> Classification	<input type="checkbox"/> DOE Acceptance Date
<input type="checkbox"/> Funding Total Amount	<input type="checkbox"/> Estimated POP Begin Date	<input type="checkbox"/> Send to Budget Flag	<input type="checkbox"/> DOE Closure Date

New reporting capabilities including “ad hoc” reports which can be saved as “variants” for re-use

Who to Contact for more Information?

- Robert L. (Bob) Hamilton, Director, Office of Partnerships and Program Development, DOE-ORO, (hamiltonrl@oro.doe.gov)
- Jenifer Hackett, Director, Planning and Budget Division, DOE-ORO, (hackettj@oro.doe.gov)
- Deborah Walker, Budget Analyst, Planning and Budget Division, DOE-ORO, (walkerda@oro.doe.gov)
- Jeff Ault, ORNL Business Systems, (aultcj@ornl.gov)
- Gail Calloway, ORNL eWFO Functional Analyst, (callowaybg@ornl.gov)
- Linda Burnett, ORNL eWFO Technical Lead, (burnettls@ornl.gov)