Universal Budget Estimating Tool (UBET)

Introduction

The Universal Budget Estimating Tool (UBET) is Business Operations (BUS) Division's budgeting tool. The UBET was designed to operate as though a budget proposal based on one or more worksheets will be submitted. The UBET allows users to enter a number or worksheet for their proposals, then it allows users to see a roll-up, or summary, of these worksheets.

The UBET is available on the IBM mainframe and is accessed with any of the terminal emulator software. However, PC/TCP 3.x is preferred.

In this guide

This is an overview of the information available in this guide and where it can be located.

Topic	Page
1. Accessing UBET	2
Conventions Used in this Guide	2
Keyboard Differences	3
2. Using PRP	5
3. Using WKS	10
4. Using WKC	13
5. Using WKO	16
6. Using WKT	19
7. Worksheet Detail Reports	22
8. Final Proposal Forms	23
9. How to Print Final Proposals	32

1. Accessing UBET

Introduction

UBET is successfully accessed using PC or MAC workstations and PC/TCP 3.x. For the minimum hardware and software requirements, see page 4. Follow the instructions below.

Conventions

This guide uses the following conventions.

Convention	Explanation
type **xx**	The word *type* indicates that you are to type the letters or word in bold that follow. For example, "type **IB**" means press the <Shift> key and type IB.
<Enter>	Key names will be enclosed in the less than (<) and greater than (>) signs..
Menu Names	Menu names and menu options will be bold. For example, you may see something like this "Under the **File** menu name, select the **Save** option and double click."
Double Click	Double click is used as a verb and means to press the mouse button twice after selecting something on the screen.
Single Click	Single click is used as a verb and means to press the mouse button once after selecting an item or option on the screen.
Minimize	Minimize is used as a verb and means to use the mouse button to click on the box in the top right corner of the screen (showing two small triangles with one sitting on top of the other) to shrink the screen on the video terminal so that other windows can be seen concurrently.
Maximize	Maximize is used as a verb and means to use the mouse button to click on the box in the top right corner of the screen (showing two small triangles with one sitting on top of the other) to enlarge the screen on the video terminal so that no other windows can be seen concurrently.
<Tab>	Use the <Tab> key to move from field to field within the worksheets.

Keyboard differences

It is common for some users to have a keyboard on which only three F keys (the keys labeled F1, F2, and F3) are mapped to work. If your F4 through F9 keys do not appear to work, do the following.

Do this . . .	to. . .
Ensure that <Num Lock> is on	ensure that the keypad keys will work.
Press keypad #7	use the F4 key.
Press keypad #8	use the F5 key.
Press keypad #9	use the F6 key.
Press keypad #4	use the F7 key.
Press keypad #5	use the F8 key.
Press keypad #6	use the F9 key.

Note: System users can also <Tab> to the F key field at the bottom of the screen, type the number of the necessary key in that field, and press <Enter>. If these suggestions do not work, call the INFORM office at 667-9444 for further assistance.

Other tips

Follow these tips to easily fill in fields for which you do not readily have the information.

Action	Results
1. Press <F4> at fields for which you do not have the necessary information.	The system will display a list of applicable information.
2. <Tab> to the description or information you want, type <S> , press <Enter>.	The system will fill in the field.
3. <Tab> to the next field.	The system will move the cursor forward.

In this section

This describes the information available in this section.

Topic	Page
Hardware Requirements	4
Software Requirements	4

Hardware

Below are the minimum hardware requirements needed to successfully use all the functions of this system.

Required	With
IBM PC (a 386 or better)	
	at least 4 MB RAM
	11 MB disk space free
Macintosh (a 68030 or better)	
	at least 4 MB RAM
	8 MB disk space free

Software

Below are the minimum software requirements needed to successfully use all functions of this system.

Required for PCs
Windows version 3.1 or greater
PCTCP 3.x or greater (with Winsock)
Netscape or Mosaic 2.0 or greater
Jetform Filler (Available on LAN)
PC/TCP
A connection to the LAN
Required for Macintoshes
TN3270 (with Winsock)
Netscape
Jetform Filler (Available on LAN)
System 7.1 minimum, 7.5 recommended
A connection to the LAN

2. Using Proposal Header Maintenance/Inquiry (PRP)

Introduction

All UBET system users must create a proposal header by using the PRP option available in the UBET system. Analysts should get most of this information directly from their managers.

In this section

In this section, the PRP option is explained and an example of how to use it is provided.

Fields	Location, Description, and Notes	Required? Y/N
Screen Action	upper left corner of screen; <Q>uery, <A>dd, <U>pdate, <D>elete, <C> Comment	Y
Proposal Number		Y
Title		Y
Program Code		Y
MTA/AA		Y
B&R (Budget & Reporting)		Y
OH Rate	system will provide based on B&R. May be 0.000	N
CF Rate	required for R/W proposals, except for NRC	N
Start and End Date	these are optional, but if entered, use month/day/year i.e., 01/05/63	N
Incl IP	means Institutional Plan and the answer should *always* be **Y** for yes.	Y
SNM Sec	the analysts will know if SNM security applies to their program. The SNM Security rate is applied to Total Costs.	N

Setting up a Header

Adding information

Follow the steps below to set up a proposal header for indirect programs under the PRP option.

Step	Action
1	In the **Screen Action** field, type **A** for *Add* and press <Tab>. The system will move the cursor to the **Proposal Number** field.
2	Type in the **Proposal Number** field with a unique number. This number can be any alphanumeric combination of 10 to 12 characters with no leading spaces. <Tab> to the next field.
3	Type a title in the **Title** field and press <Tab>. **Note:** This is not a case-sensitive field.
4	Type a program code in the **Program Code** field and the cursor will move to the **MTA/AA** field. **Note:** This code can be a dummy code because there is a validation step later.
5	Select the proper **MTA/AA** field and press <Enter>.
6	<Tab> to the **B&R** field (Budget & Reporting) and type a B&R code, then <Tab >. **Note:** These are 9-digit codes that DOE assigns. This code must be valid or the system will not accept it **Note:** The lookup table lists only those B&R codes that have a support rate. The List Program Overhead Table can be prompted to list all valid B&R codes.
7	<Tab> to the **OH Rate** field and press <Enter> and the system displays the correct information based on the B&R code you enter when the proposal is completed.
8	<Tab> to the **CF Rate** field. The continuity funding (CF) rate is entered by the system for R/W proposals. <Tab> to the next field.
9	At the **Start Date and End Date** field, type in the dates by month/day/year. For example, 01/05/64. This is an optional field. <Tab> to the next field. **Note:** If the start date is earlier than 10/02/94, Lab OH is zero for Capital Equipment or Construction Funds.
10	At the **Incl IP** field always enter <Y> for yes. <Tab> to the next field.
11	At the **SNM Sec** field, type <Y> if Special Nuclear Material security applies to your project, and <N> if it is not appropriate for your project. <Tab> to the next field.

Continued on next page

Setting up a Header, Continued

Additional Fields

This section is a continuation of **Setting up a Header** under the PRP option. This information is usually received from the Department of Energy (DOE), so it is listed separately. This information is also available by typing <F4> so that the system will display the codes. **Note:** To select an item from this list, <Tab> to the item you select, type <S>, and <Enter>. The system will select that option and return the cursor to the PRP screen.

Fields	Location, Description, and Notes	Required? Y/N
DOE Funct Cat	Applies to indirect proposals	N
Maj Funct Cat	Applies to indirect proposals	Y
Higher Task Level	Description of work	N
Lower Task Level	Description of work	N
Funding Agency	Description of work	N
Originator	Principal Investigator	Y
LANL Prog. Mgr.	Lab Employee	Y
Div Contact	Lab Employee	N
PFISCON	Lab Employee	N
DOE Prog Mgr	DOE Employee	N
Ops Contact		N
Attachments	these fields must contain either a ‘Y’ for yes of ‘N’ for no.	Y
Work Proposal Description	Text description of the proposal	N

Continued on next page

Setting up a Header, Continued

Step	Action
1	The **DOE Funct Cat** field is optional. The information is used for the preparation of the allocable cost report. This is the annual report to DOE on indirect costs. Type in the information and <Tab> to the next field. Or, <Tab> to the next field.
2	The **Maj Funct Cat** field applies to all Indirect Programs (G&A, Organizational Support, and Recharge). Type the two-digit functional area number (you can also type <F4> to get a listing) and <Tab> to the next field.
3	The **Higher Task Level** field is optional and provides more detail. Type in the information and <Tab> to the next field. Or, <Tab> to the next field.
4	The **Lower Task Level** field is optional and provides more detail. Type in the information and <Tab> to the next field. Or, <Tab> to the next field.
5	The **Funding Agency** field is optional and is used for reimbursable programs. **Note:** If this is someone other than DOE, analysts may want to write in DOD, etc. <Tab> to the next field.
6	The **Originator** field is required. Type the name of the Principal Investigator (PI) in charge of the proposal. Information should be entered into this field as Z No. <Space> Last Name <Space> First Name. <Tab> to the next field. **Note:** A partial Z No. or name can be entered.
7	The **LANL Prog Mgr** field is required. Type the name of the non-BUS technical contact and type in their respective division. Information should be entered into this field as Z No. <Space> Last Name <Space> First Name. <Tab> to the next field.
8	The **Div Contact** field is optional. Type in the information and <Tab> to the next field. Or, <Tab> to the next field.
9	The **PFISCON** field is optional. Type in the information and <Tab> to the next field. Or <Tab> to the next field.
10	The **DOE Prog Mgr** field is optional. Type the name of the non-LANL DOE contact in Washington. Include their telephone number and organization and <Tab> to the next field. Or, <Tab> to the next field.
11	The **Ops Contact** field is optional. Type this information in the same way as the DOE Prog Mgr information. <Tab> to the next field.
12	The **Attachments** field should include all attachments to the report. Type <Y> for yes or accept the default which is <N>.

Continued on next page

Setting up a Header, Continued

13	The **Work Proposal Description** field is a brief description of the work planned in the proposal . Access it by entering <C> in the screen action field. Depending on your system, it may be possible to cut and paste into this field from a word processing file by using the Paste utility from the Edit menu on FMIS. Be sure to set up the file you are pasting from with a 70 character line width. Use the F3 key to save, and again to confirm.

Completing the function

Once you've filled in all the valid data, follow the steps below.

Step	Action
1	Look at the prompt that the system displays at the lower right corner of the screen. For example, the prompt looks like this: **Are you sure? Y/N**
2	Type <Y> and press <Enter>. The system will display this prompt: **Add function complete** **Note:** Type <N> to go back to any field and make corrections.

Updating information

If it is necessary to change data in the system, type <U> at the upper left corner of the **Screen Action** field and follow the steps from page 7 on.

Deleting a record

If it is necessary to delete a record, delete the worksheets first, then delete the proposal header.

3. Using Worksheet Detail—Salary & Fringe (WKS)

Introduction

In this section, the WKS option is explained and an example of how to use it is provided.

Filling in the proposal

The fields for the Worksheet Detail screen are described below.

Field	Location, Description, and Notes	Required? Y/N
Screen Action	upper left corner of screen <Q>uery, <A>dd, <U>pdate, <D>elete, <N>ext	Y
Proposal Number		Y
Div or Cost Center		Y
Worksheet Type		Y
Sequence Number		the System Supplies
Date Prepared		the System Supplies
Priority		N
Proposal Type		Y
Budget Analyst		*
Budget Year		the System Supplies
Standard Labor Rate (SLR) Code/ Description	Maximum of six per worksheet Sequence 002 can be used for additional SLR's	Lookup by SLR Code
Hours by SLR Code		N
Total UC Labor Costs		Calculated
Contract Labor Hours		N
Contract Labor Costs		N
Worksheet Costs		Calculated
Proposal Total Costs		Calculated
	*** Note:** If this field is left blank, the system will look this field up based on the cost center.	

Adding information

Follow the steps below to fill in a Worksheet Detail screen.

Step	Action
1	In the **Screen Action** field, type **A** for *Add* and press <Tab>. The system will move the cursor to the **Proposal Number** field.
2	Type in the **Proposal Number** field using the same number used in the PRP screen. <Tab> to the next field.
3	Type the appropriate two-digit Division code, if used, in the **Div** field and zeros in the **Cost Center** field. <Tab> to the next field. **Note:** Type <F4> to list valid Division codes.
4	Type the appropriate six-digit cost center code in the **Cost Center** field. <Tab> to the next field. **Note:** Type <F4> to list valid cost center codes.
5	Type a worksheet type in the **Worksheet Type**. There are three options, capital equipment (CAP), construction (CON), and operating (OPS). **Note:** Type <F4> to get a listing of these. <Tab> to the next field.
6	At the **Date Prepared** field, the system will automatically enter the current date. <Tab> to the next field
7	At the **Priority** field, the system automatically enters this information. <Tab> to the next field.
8	At the **Budget Yr** field, the system will automatically enter the budget year. <Tab> to the next field.
9	At the **SLR Code/Description**, (Standard Labor Rate/ Description) field, press <F4> to get a listing of the SLR's. The system will provide you with a list of the SLR's to select <S> from. You may choose up to six SLR's per Worksheet/Sequence Number. **Note:** The analyst can overwrite the number that the system plugs in, but should do so only if it is absolutely necessary.
10	At the **SM Hours** field the analyst should use whatever tools they've used throughout the year to determine these figures. <Tab> to the next field.
11	At the **Contract Labor Hours** field, type in the appropriate number. <Tab> to the next field.
12	At the **Contract Labor Costs** field, type in the appropriate number. <Tab> to the next field **Note:** When you have filled in fields in steps number 2 through 11, the system automatically fills in the fields described in steps 12 through 13.

Continued on next page

Using WKS, Continued

Step	Action
13	The system automatically fills in the **Worksheet Costs** field. <Tab> to the next field.
14	The system automatically fills in the **Proposal Total Costs** field. <Tab> to the next field.
15	Look at the prompt that the system displays at the lower right corner of the screen. For example, the prompt looks like this: **Are you sure? Y/N**
16	Type <Y> and press <Enter>. The system will display this prompt: **Add function complete.** **Note:** When the add function is complete, the system will move the cursor to the top left corner of the screen. You can now type <N> to get the next screen. Typing <N> here will bring the proposal number and cost center from the previous WKS option screen so that you do not have to start over.

NOTE: The F10 and F11 keys will enable you to enter data for years beyond the budget year for DOE proposals, or the next five years for other types of proposals.

4. Using Worksheet Detail—Estimated Costs (WKC)

Introduction

In this section, the Worksheet Detail - Estimated Costs (WKC) option is explained and an example of how to use it is provided.

Filling in the proposal

The fields for the Worksheet Detail - Estimated Costs screen are described below.

Field	Location, Description, and Notes	Required? Y/N
Screen Action	upper left corner of screen <Q>uery, <A>dd, <U>pdate, <D>elete, <N>ext	Y
Proposal Number		The system brings this information over from the first screen.
Div and /or Cost Center		The system brings this information over from the first screen.
Worksheet Type		The system brings this information over from the first screen.
Budget Year		the System Supplies
Total Labor Costs		The system brings this information over from the first screen.
Cost Categories	Maximum of eight per worksheet	N
Subtotal Costs		Calculated
Worksheet Costs		Calculated
Proposal Total Cost		Calculated

Using WKC, Continued

Adding information

Follow the steps below to fill in a Worksheet Detail - Estimated Costs screen.

Step	Action
1	Type <N> and press <Enter> to bring forward the proposal number and cost center from the previous WKS option screen so that you do not have to type in all the information over.
2	In the **Screen Action** field, type **U** for *Update* and press <Tab>. The system will move the cursor to the **Proposal Number** field.
3	The system will have filled in the **Proposal Number**. <Tab> to the next field.
4	The system will have filled in the **Div** and/or **Cost Center** field. <Tab> to the next field.
5	The system will have filled in the **Worksheet Type** field. <Tab> to the next field.
6	The system will have filled in the **Budget Yr** field. <Tab> to the next field.
7	The system will have automatically filled in the **Total Labor Costs** field. <Tab> to the next field.
8	At the **Cost Code/Description** field, press <F4> to get a listing of the types of costs. The system will provide you with a list of the types of costs to select <S> from. You may choose up to eight SLR's per Worksheet/Sequence Number. The amount is whole dollars even though you will see it as decimal numbers. For example $25,000 will be shown as 25000. **Types of costs:** At the **Interdivisional Services** field, type in the recharges. At the capital equipment field that is greater than (> =) 100K, the **CE Purch** field, type in the numbers that are greater than 100K. At the capital equipment field that is less than (<) 100K, the **CE Purch** field, type in the numbers that are less than 100K. **Note:** Applies to CE purchased with operating money *only*. At the **Procure** field that is greater than (> =) 100K, type in the numbers that are greater than 100K.. At the **Procure** field that is less than (<) 100K, type in the numbers that are less than 100K At the **Educ Stipends** field, type in the appropriate number. At the **Other Cost** field, type in the appropriate number. **Other Cost Fields** can be added by the analysts assigned to BET Maintenance if necessary. <Tab> to the next field.

Continued on next page

Using WKC, Continued

Step	Action
9	The system automatically fills in the **Subtotal Costs** field. <Tab> to the next field.
10	The system automatically fills in the **Worksheet Costs** field. <Tab> to the next field.
11	The system automatically fills in the **Proposal Total Costs** field. <Tab> to the next field.
12	Look at the prompt that the system displays at the lower right corner of the screen. For example, the prompt looks like this: **Are you sure? Y/N**
13	Type <Y> and press <Enter>. The system will display this prompt: **Update function complete. Note:** When the update function is complete, the system will move the cursor to the top left corner of the screen. You can now type <N> to get the next screen. Typing <N> here will bring the proposal number and cost center from the previous WKS option screen so that you do not have to start over.

NOTE: The F10 and F11 keys will enable you to enter data for years beyond the budget year for DOE proposals, or the next five years for other types of proposals.

5. Worksheet Detail—Overheads (WKO)

Introduction

In this section, the Worksheet Detail - Overheads (WKO) option is explained and an example of how to use it is provided.

Filling in the proposal

The fields for the Worksheet Detail - Overheads screen are described below.

Field	Location, Description, and Notes	Required? Y/N
Screen Action	upper left corner of screen <Q>uery, <A>dd, <U>pdate, <D>elete, <N>ext	Y
Proposal Number		The system brings this information over from the first screen.
Div and/or Cost Center		The system brings this information over from the first screen.
Worksheet Type		The system brings this information over from the first screen.
Budget Year		System Supplies
Subtotal Costs		Calculated
Grp OH Rate		Lookup
Div OH Rate		Lookup
Org Overhead		Calculated
Total Org Costs		Calculated
Prog Overhead		Calculated
Lab OH Rate		Calculated
Lab Overhead		Calculated
SNM Secure Amount		Calculated
Lab Total Costs		Calculated
DOE OH Rate		Calculated
DOE Overhead		Calculated
Total Costs		Calculated

Adding information

Follow the steps below to fill in a Worksheet Detail - Overheads screen.

Making changes

This screen is usually automatically completed by the system based on the information entered in the WKC screen. However, use the table below to determine how to fill in the screen.

If . . .	Then . . .
there are changes to be made,	type <U> in the upper left corner of the screen. You will then be able to overwrite some of the existing information.
there are no changes to be made,	begin with Step 2 below.

Step	Action
1	Type <N> and press <Enter> to bring forward the proposal number and cost center from the previous WKC option screen so that you do not have to type in all the information over.
2	In the **Screen Action** field, type **U** for *Update* and press <Tab>. The system will move the cursor to the **Proposal Number** field.
3	The system will have filled in the **Proposal Number**. <Tab> to the next field.
4	The system will have filled in the **Div** and/or **Cost Center** field. <Tab> to the next field.
5	The system will have filled in the **Worksheet Type** field. <Tab> to the next field.
6	The system will have filled in the **Budget Yr** field. <Tab> to the next field.
7	The system will have automatically filled in the **Subtotal Costs** field. <Tab> to the next field.
8	The system will have automatically filled in the **Grp OH Rate** field. <Tab> to the next field.
9	The system will have automatically filled in the **Div OH Rate** field. <Tab> to the next field.
10	The system will have automatically filled in the **Org Overhead** field. <Tab> to the next field.
11	The system will have automatically filled in the **Total Org Costs** field. <Tab> to the next field.
12	The system will have automatically filled in the **Program Overhead** field. <Tab> to the next field.

Continued on next page

Using WKO, Continued

Step	Action
13	The system will have automatically filled in the **Lab Overhead** field. <Tab> to the next field.
14	The system will have automatically filled in the **SNM Secure Amount** field. <Tab> to the next field.
15	The system will have automatically filled in the **Lab Total Costs** field. <Tab> to the next field.
16	The system will have automatically filled in the **DOE OH Rate** field. <Tab> to the next field.
17	The system will have automatically filled in the **DOE Overhead**. <Tab> to the next field.
18	The system will have automatically filled in the **Total Costs** field. <Tab> to the next field.
19	Look at the prompt that the system displays at the lower right corner of the screen. For example, the prompt looks like this: **Are you sure? Y/N**
20	Type <Y> and press <Enter>. The system will display this prompt: **Update function complete. Note:** When the update function is complete, the system will move the cursor to the top left corner of the screen. You can now type <N> to get the next screen. Typing <N> here will bring the proposal number and cost center from the previous WKS option screen so that you do not have to start over.

NOTE: The F10 and F11 keys will enable you to enter data for years beyond the budget year for DOE proposals, or the next five years for other types of proposals.

6. Using Worksheet Detail—Total Allocations & Costs (WKT)

Introduction

In this section, the Worksheet Detail - Total Allocations & Costs (WKT) option is explained and an example of how to use it is provided.

Filling in the proposal

The fields for the Worksheet Detail - Total Allocations & Costs screen are described below.

Field	Location, Description, and Notes	Required? Y/N
Screen Action	upper left corner of screen <Q>uery, <A>dd, <U>pdate, <D>elete, <N>ext	Y
Proposal Number		The system brings this information over from the first screen.
Div and/or Cost Center		The system brings this information over from the first screen.
Worksheet Type		The system brings this information over from the first screen.
Budget Year		the System Supplies
Total Costs		Calculated
BO Amount		Calculated
BA Amount		N
BOY Amount		N
Proposal Totals		Calculated
Total Costs		Calculated
BO Amount		Calculated
BA Amount		N
BOY Amount		N

Adding information

Follow the steps below to fill in a Worksheet Detail - Total Allocations & Costs screen.

Step	Action
1	Type <N> and press <Enter> to bring forward the proposal number and cost center from the previous WKO option screen so that you do not have to type in all the information over.
2	In the **Screen Action** field, type **U** for *Update* and press <Tab>. The system will move the cursor to the **Proposal Number** field.
3	The system will have filled in the **Proposal Number**. <Tab> to the next field.
4	The system will have filled in the **Div** and/or **Cost Center** field. <Tab> to the next field.
5	The system will have filled in the **Worksheet Type** field. <Tab> to the next field.
6	The system will have filled in the **Budget Yr** field. <Tab> to the next field.
7	The system will have automatically filled in the **Total Costs** field. <Tab> to the next field.
8	The system will have automatically filled in the **BO Amount** field. <Tab> to the next field.
9	The analysts will enter the budget targets for each year, then press <Enter>.
10	The analysts will enter the BOY for the *current year*, then press <Enter>. **Note:** The system calculates the BOY for the out years.
11	The system will have automatically filled in the **Proposal Totals** field. <Tab> to the next field.
12	The system will have automatically filled in the **BO Amount** field. <Tab> to the next field.
13	The system will have automatically filled in the **BA Amount** field. Press <Enter>.
14	The system will have automatically filled in the **BOY Amount** field. <Tab> to the next field.

Continued on next page

Using WKT, Continued

Step	Action
15	Look at the prompt that the system displays at the lower right corner of the screen. For example, the prompt looks like this: **Are you sure? Y/N**
16	Type <Y> and press <Enter>. The system will display this prompt: **Update function complete. Note:** When the update function is complete, the system will move the cursor to the top left corner of the screen. You can now type <N> to get the next screen. Typing <N> here will bring the proposal number and cost center from the previous WKS option screen so that you do not have to start over.

NOTE: The F10 and F11 keys will enable you to enter data for years beyond the budget year for DOE proposals, or the next five years for other types of proposals.

7. Worksheet Detail Reports

Introduction

The system is designed to print worksheet detail reports for all types of LANL proposals, and this section will explain what they are and how to use them.

In this section

In this section, the worksheet detail report each final proposal form is explained and an example of how to use it is provided.

Printing

Use the following steps to print a worksheet detail report on the IBM.

Step	Action
1	From FMIS, use TCP/IP to access the BET screen.
2	Type PWK and press <Enter>.
3	The system will display the PPR screen. At the **Proposal Number** field, type in the proposal number you want to print and press <Enter>.
4	Press <F9> to return to the menu option field, type INF, and press <Enter>. The system will display the Information Manager Main Menu.
5	Select option #1 and press <Enter>. **Note:** The system may take a few minutes to process, please be patient. The system will display the Reports Pending Disposal screen.
6	<Tab> to the report that you want, type <P>, and press <Enter>. The system will display the **Local Printer Selection Menu.** Select your printer.
7	The report should print at your desk.

8. Final Proposal Forms

Introduction

The system is designed to print final proposal forms for many types of LANL proposals, and this section will explain what they are and how to use them.

In this section

In this section, each final proposal form is explained and an example of how to use it is provided.

Topic	Page
What Are Final Proposal Forms?	23
Sample Proposals	24

What Are Final Proposal Forms?

Introduction

Below and on the following pages are the types of final proposals available through UBET using Jetform and Netscape. Final proposal forms are the first and second page of the proposal that result from input into the WKS, WKC, and WKT.

Proposal Types	Examples
DOE Proposals	DOE Field Work Proposals (Special Use Form 1647)
Reimbursable Proposals	Reimbursable Worksheet FY 96-97 (Special Use Form 1649) Reimbursable Worksheet FY98-out (Special Use Form 1653)
Work for Other Federal Agencies	(Special Use Form 1637)
Institutional Proposals	Institutional Work Package (Special Use Form 1652)

9. How to Print Final Proposal Forms

Introduction

Individual proposal forms can be printed on the IBM PC from FMIS using TCP/IP.
Individual proposal forms can be printed on the Macintosh from FMIS using TN3270.
Proposals can be routed to the CCF for bulk printing.

Printing

Use the following steps to print a proposal on the IBM.

Step	Action
1	From FMIS, use TCP/IP to access the BET screen.
2	Type PPR and press <Enter>.
3	The system will display the PPR screen. At the **Proposal Number** field, type in the proposal number you want to print and press <Enter>.
4	Press <F9> to return to the menu option field, type INF, and press <Enter>. The system will display the Information Manager Main Menu.
5	Select option #1 and press <Enter>. **Note:** The system may take a few minutes to process, please be patient. The system will display the Reports Pending Disposal screen.
6	<Tab> to the report that you want, type <R>, and press <Enter>. The system will display the **Routing Options Menu**.
7	Select option #2 and press <Enter>. The system will display the Download to Personal Computer Options screen.
8	The system will display the PC drive/Directory Information (c:\INFORM\IBMDATA). At the **PC file name:** prompt, type in an 8-character file name and press <Enter>.
9	At the **PC file extension:** prompt, type the extension **DAT** and press <Enter>.
10	Logoff or minimize FMIS.
11	Open Netscape.
12	Click on **Information by Subject**.
13	Click on **Business Information Systems (CIC-13)**.
14	Click on **Online Forms**.

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9. How to Print Final Proposal Forms, Continued

Printing (continued)

Step	Action
15	Click on **Budget Estimating Tool Forms**.
16	Select the appropriate form and the proposal you are using.
17	Click on the **Open Data** icon at the top of the screen. The system will display the appropriate directory.
18	Select the download file and click on <OK>. The system will fill in the form.
19	Click on the **Print** icon.

Printing

Use the following steps to print a proposal on the Macintosh.

Step	Action
1	From FMIS, use TN3270 to access the GABET screen.
2	Type PPR and press <Enter>.
3	The system will display the PPR screen. At **the Proposal Number** field, type in the proposal number you want to print and press <Enter>.
4	Press <F9> to return to the menu option field, type INF, and press <Enter>. The system will display the Information Manager Main Menu.
5	Select option #1 and press <Enter>. **Note:** The system may take a few minutes to process, please be patient. The system will display the Reports Pending Disposal screen.
6	<Tab> to the report that you want, type <R>, and press <Enter>. The system will display the **Routing Options Menu**.
7	Select option #2 and press <Enter>. The system will display the Download to Personal Computer Options screen.
8	The PC drive/Directory fields are ignored on the Mac. At the **PC file name:** prompt, type in an 4-character file name, including the extension (XXXX.dat) and press <Enter>/

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9. How to Print Final Proposal Forms, Continued

Printing (continued)

9	Logoff or minimize FMIS.
10	Open Netscape.
11	Click on **Information by Subject**.
12	Click on **CIC-13**.
13	Click on **Online Forms**.
14	Click on **Budget Estimating Tool Forms.**
15	Select the appropriate form and the proposal you are using.
16	The download file is usually in the IB Reports folder. Be sure to click 'continue to use current form'. Click on the **Open Data** icon at the top of the screen. The system will display the appropriate directory.
17	Select the download file and click on <OK>. The system will fill in the form.
18	Click on the **Print** button on the toolbox.

9. How to Print Final Proposal Forms, Continued

Printing

Use the following steps to print a group of proposals in the CCF.

Step	Action
1	From FMIS, use TN3270 to access the BET screen.
2	Type PVP and press <Enter>.
3	The system will display the PVP screen. At **the Assistant Secretary, ECOR or B&R category** field, type in the identifiers for the proposals you want to print and press <Enter>.
4	Press <F9> to return to the menu option field, type INF, and press <Enter>. The system will display the Information Manager Main Menu.
5	Select option #1 and press <Enter>. **Note:** The system may take a few minutes to process, please be patient. The system will display the Reports Pending Disposal screen.
6	<Tab> to the report that you want, type <R>, and press <Enter>. The system will display the **Routing Options Menu**.
7	Select option #1 and press <Enter>. The system will display the CCF Printer Options screen.
8	Select the type of output you want. For final proposals, Portrait <P>, Regular <R>, Double <D>, Unclassified <U>, Unpunched <U>, Unstapled <U>, and Pickup <P> are suggested.
9	Use the following Jetforms names DOEFWP DOE Fieldwork Proposal RW96_97 Reimbursable Worksheet FY96-97 RW98_OUT Reimbursable Worksheet FY98-OUT WFOSUM Reimbursable Worksheet Summary INSTWP Institutional Work Package