PARS II

Project Assessment and Reporting System

PARS II 103 Updating Projects and Reporting Training Workbook

(PARS II Release 1.1)

Department of Energy

September, 2010

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Title Page

Document Name:	PARS II 103 Project Updating and Reporting Training Workbook
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Change Control Page

Current Version #	Date of Revision	Section & Title	Page Numbers	Summary of Changes	Author
1.1	5/10/2010	Cover Page		PARS II Template for Cover Page	J. Peck
1.1	5/10/2010	Exercise 6 -Monthly Status screen updated to PARS II 4/15/2010 Version	30-31	Replaced screens and changed text.	J. Peck
1.1	5/10/2010	Ex 8 and 9	36-38	Re-arranged some steps	J. Peck
1.2	9/9/2010	Updated for PARS II version 1.1		Updated graphics and verbiage to reflect changes in PARS II V1.1	P. Wiggins

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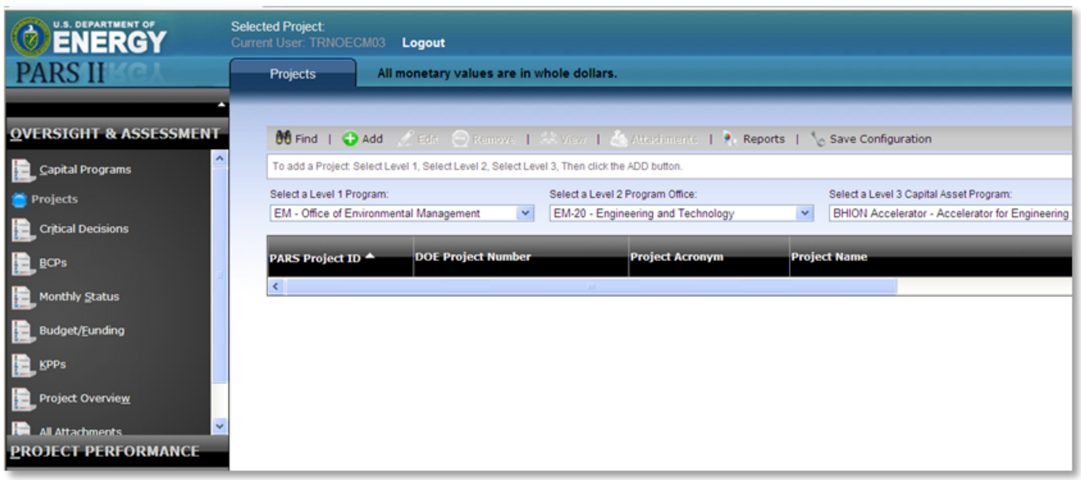
PARS II MONTHLY UPDATE PROCESS

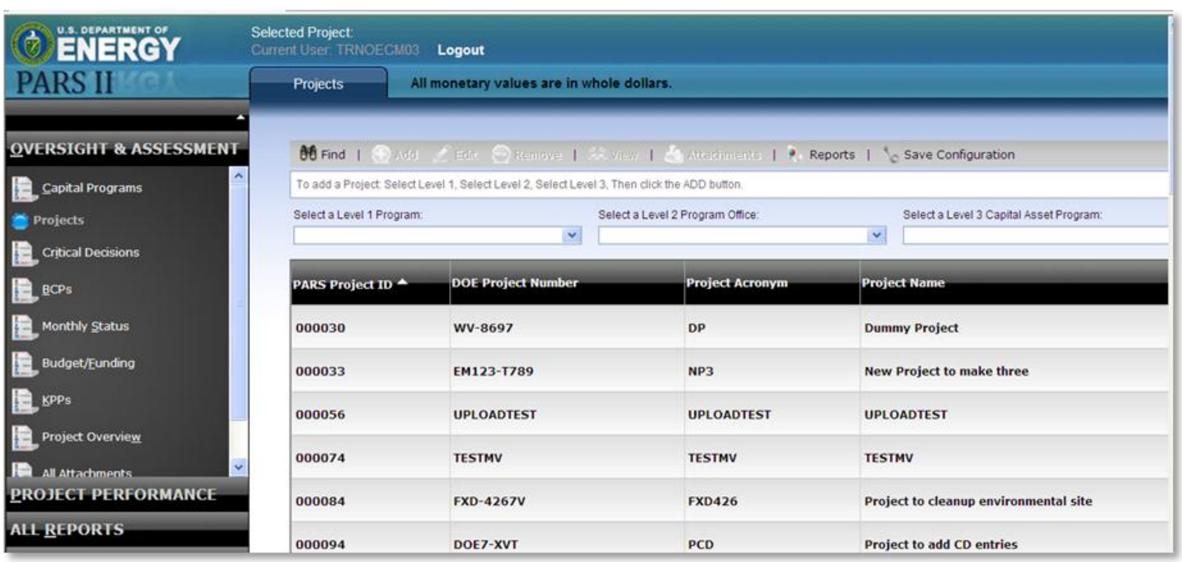
Analyze Oversight and Assessment Data

Exercise 1: Find and View a Project

1. Select **Projects** from the Navigation Bar. The Projects tab displays. The Project list may be empty.



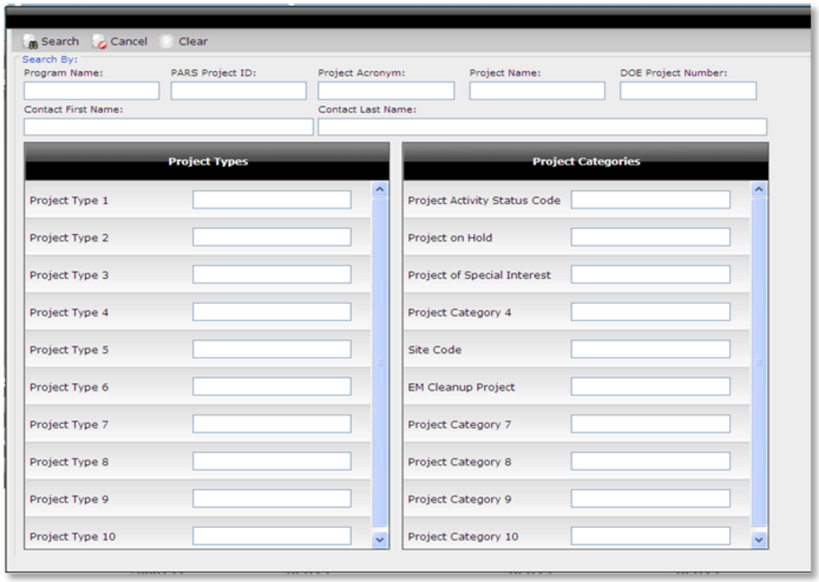
Project Tab – Empty Project List



Project Tab – Multiple Projects in the List

2. Click 

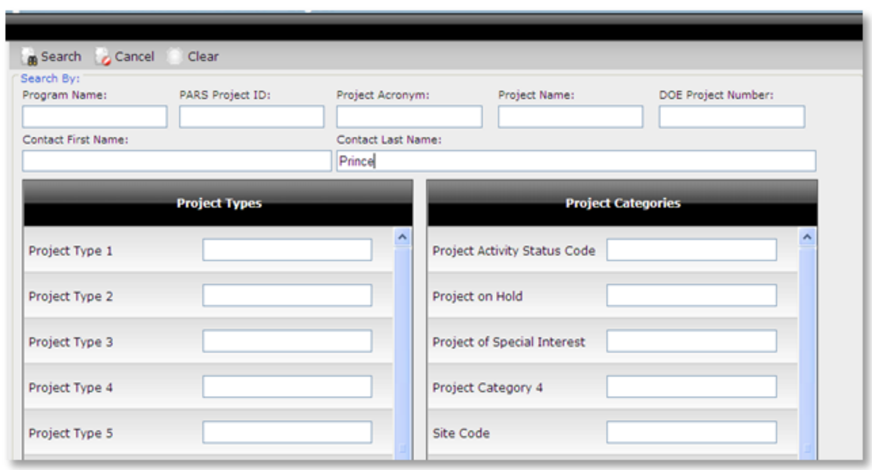
. The Find screen displays.



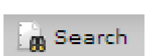
FIND Screen

3. Enter **Prince** (not case sensitive, and just a few letters can be entered) in the Contact Last Name field to search for all projects for which Diana Prince has a role.

TIP: All fields blank (no criteria) will retrieve all projects under your domain.



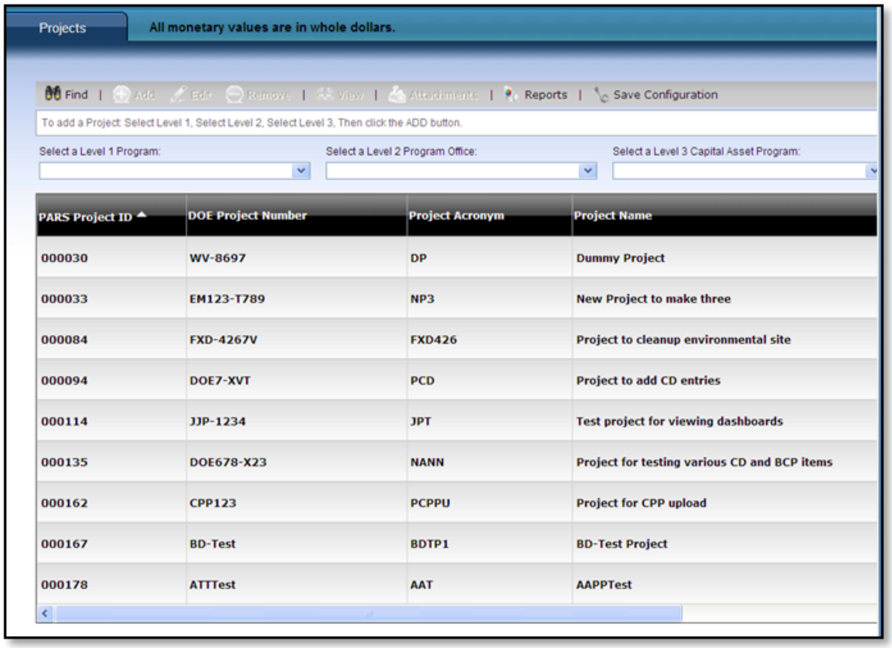
FIND Screen with Search Criteria

4. Click 

. Wait while the search progresses. When the search is complete, the Projects tab displays with the list of projects that met the Find criteria.

   If the Projects tab is empty after the search, then no projects met the specified criteria. Return to the Find screen to enter different criteria.

   TIP: When returning to the Find screen, you may need to clear out any prior search items.



Result of Search

5. **Scroll** to see the complete list.

Sort the Project List

6. Click the column heading for **Project Acronym** to sort the list – first click sorts ascending, second click changes sort to descending.

   TIP: Sort operates in the same manner for other PARS II screen lists, specifically the KPP list and the Attachments list.

7. Click **SAVE Configuration** to save this sort arrangement. Throughout this session and for subsequent logon sessions, PARS II will use the saved sort arrangement.

   TIP: The Save Configuration feature applies only to the project list.

8. Change the sort back to **PARS Project ID** in ascending order, and click **SAVE Configuration** to save this sort arrangement.

Select a Project

9. Highlight **PARS Project ID 000030**. Wait while the project data is loaded and notice the change in the Project Title line at the top of the screen.

View a Project

10. Click 

. The Viewing Project screen displays with two tabs – Project Attributes and Project Contacts.

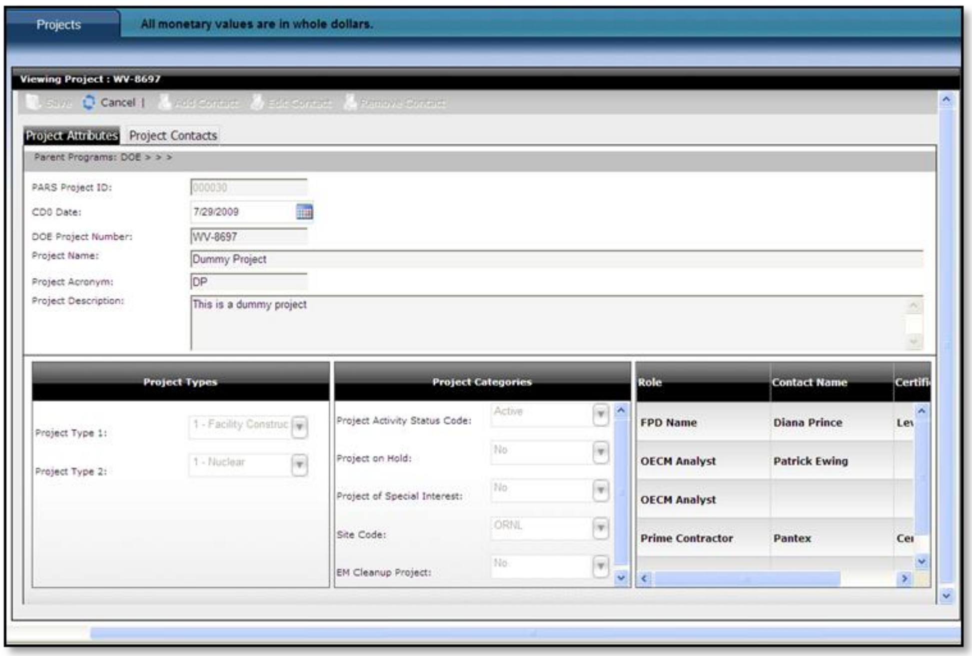
Project Attributes

11. View the information on the **Project Attributes** tab.

    a. The system assigned PARS Project ID - the unique and permanent identifying ID for the project.

    b. The user entered DOE Project Number - the official DOE Project Identification Code for construction and engineering design projects as reported in the OMB A-11 Exhibit 300 or the program budget submission.

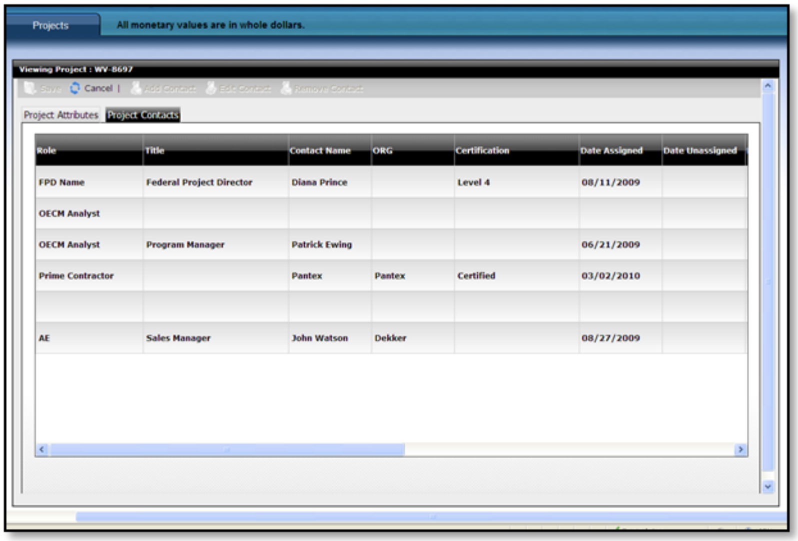
    c. The Project Types, Project Categories, and the three primary project contacts on the bottom half of the screen. Other contacts associated with the project can be viewed from the Project Contacts tab.



Project Attributes Tab

Project Contacts

12. Click the **Project Contacts Tab** and view the Contacts list.



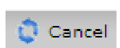
Project Contacts Tab

13. Answer the following questions.

    a. How is Diana Prince associated with the selected project? __________________________

    b. What is Diana's e-mail address? ____

    c. Who is the Acquisition Executive for this project? ___________________________________

14. When finished viewing, click 

On Your Own Workshop

1. Find and select **PARS Project ID 165**. ***Be sure to clear out any prior search items***.
2. View the Project Attributes.
3. View the Project Contacts.
4. Answer the following questions about this project.

    a. Who is the FPD? ____

    b. At what Site is this project located? __________________________________

    c. What is the CD Level of this project? _________________________________

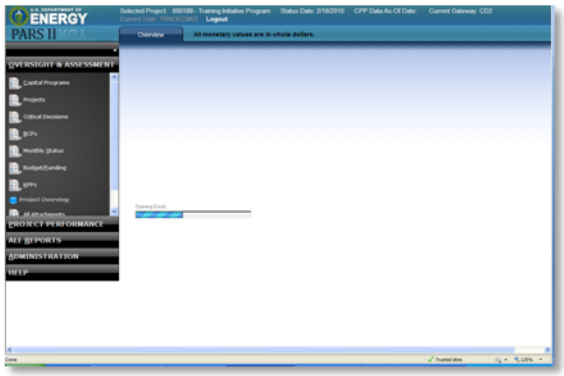
Exercise 2: Project Overview

As part of the monthly assessment update process, users will view and analyze each of the OA data screens. These screens are covered in detail in the OA Data Entry and Update section of this document. This exercise shows the single-view report which contains a summary of the individual OA screens.

1. Verify selected project is **PARS Project ID 189**.

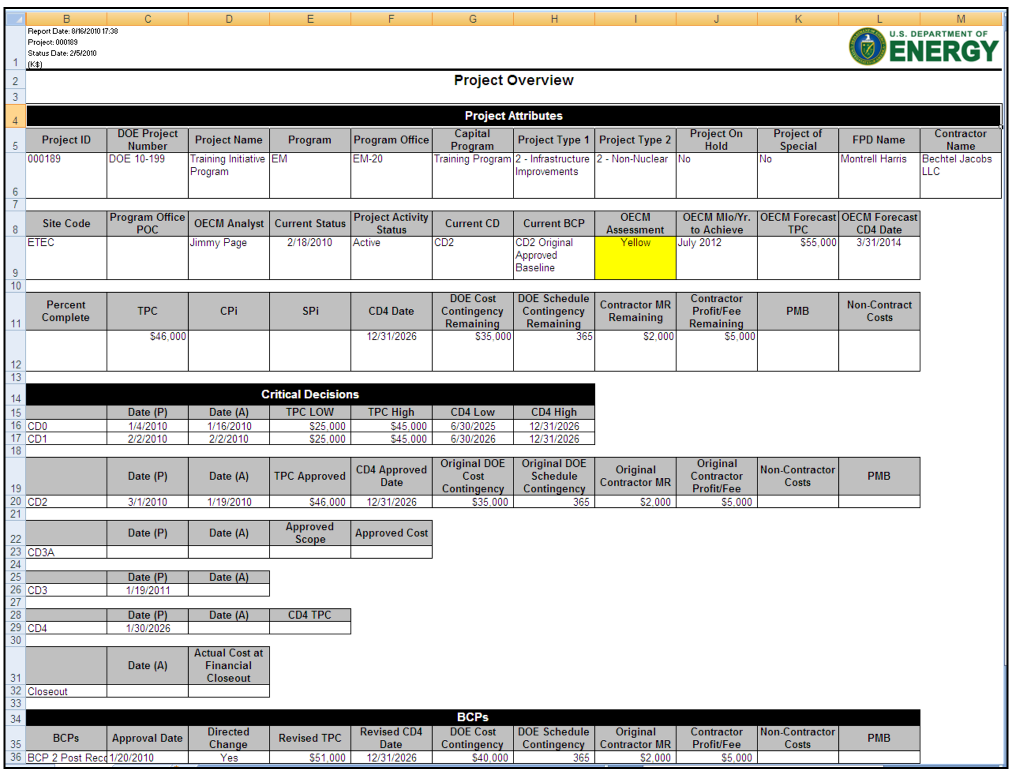
2. Click **Project Overview** from the Navigation Bar. The Overview tab displays. Wait while the Overview report is being processed. The Downloading Report progress bar is displayed.

   TIP: Active-X Control must be installed on your computer to run this and other PARS II reports.



Generating the Project Overview

3. When the report is generated, a new window opens in Excel containing the Project Overview Report.



Report Date: 8/16/2010 17:38
Project: 000189
Status Date: 2/5/2010
(K$)

U.S. DEPARTMENT OF ENERGY

Project Overview

Project Attributes

Project ID	DOE Project Number	Project Name	Program	Program Office	Capital Program	Project Type 1	Project Type 2	Project On Hold	Project of Special	FPD Name	Contractor Name
000189	DOE 10-199	Training Initiative Program	EM	EM-20	Training Program	2 - Infrastructure Improvements	2 - Non-Nuclear	No	No	Montrell Harris	Bechtel Jacobs LLC

Site Code	Program Office POC	OECM Analyst	Current Status	Project Activity Status	Current CD	Current BCP	OECM Assessment	OECM Mlo/Yr. to Achieve	OECM Forecast TPC	OECM Forecast CD4 Date
ETEC		Jimmy Page	2/18/2010	Active	CD2	CD2 Original Approved Baseline	Yellow	July 2012	$55,000	3/31/2014

Percent Complete	TPC	CPi	SPi	CD4 Date	DOE Cost Contingency Remaining	DOE Schedule Contingency Remaining	Contractor MR Remaining	Contractor Profit/Fee Remaining	PMB	Non-Contract Costs
	$46,000			12/31/2026	$35,000	365	$2,000	$5,000		

Critical Decisions

	Date (P)	Date (A)	TPC LOW	TPC High	CD4 Low	CD4 High
CD0	1/4/2010	1/16/2010	$25,000	$45,000	6/30/2025	12/31/2026
CD1	2/2/2010	2/2/2010	$25,000	$45,000	6/30/2026	12/31/2026

	Date (P)	Date (A)	TPC Approved	CD4 Approved Date	Original DOE Cost Contingency	Original DOE Schedule Contingency	Original Contractor MR	Original Contractor Profit/Fee	Non-Contractor Costs	PMB
CD2	3/1/2010	1/19/2010	$46,000	12/31/2026	$35,000	365	$2,000	$5,000		

	Date (P)	Date (A)	Approved Scope	Approved Cost
CD3A				

	Date (P)	Date (A)
CD3	1/19/2011	

	Date (P)	Date (A)	CD4 TPC
CD4	1/30/2026		

	Date (A)	Actual Cost at Financial Closeout
Closeout		

BCPs

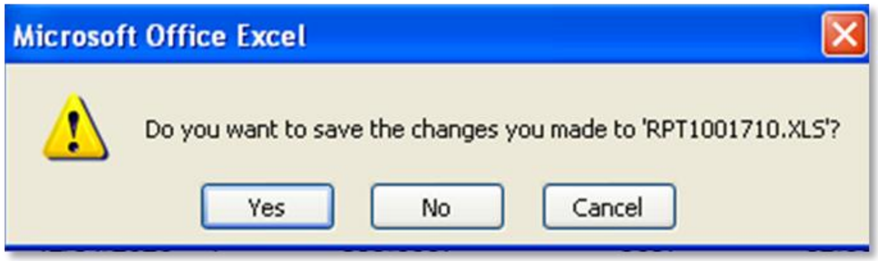
BCPs	Approval Date	Directed Change	Revised TPC	Revised CD4 Date	DOE Cost Contingency	DOE Schedule Contingency	Original Contractor MR	Contractor Profit/Fee	Non-Contractor Costs	PMB
BCP 2 Post Recc	1/20/2010	Yes	$51,000	12/31/2026	$40,000	365	$2,000	$5,000		

Excel Window with Project Overview Report

4. At this point, you can work with the table as you would any other Excel Workbook, including save a copy or print a copy.

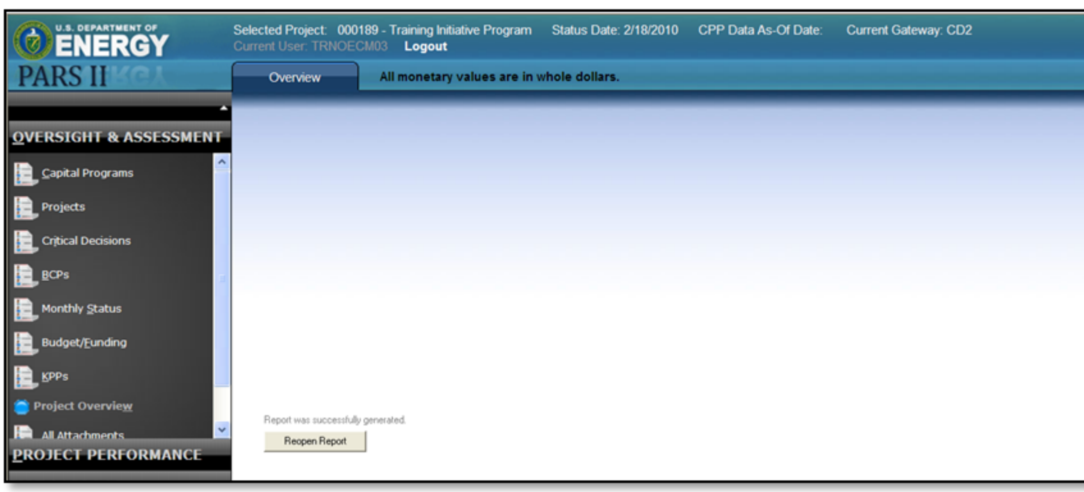
5. What is the latest TPC? ____

6. When finished viewing, **Close** the Excel window. When you close Excel, you will be asked if you want to save changes. Basically, it is a reminder to save the report (optional), even if you didn't make changes.



TIP: If you want to save the report, click "cancel" and save it to a different location and rename it to a recognizable name.

7. Return to the PARS II task window. You can re-open the report without having it re-process as long as you haven't exited the Overview tab. Do this by clicking .



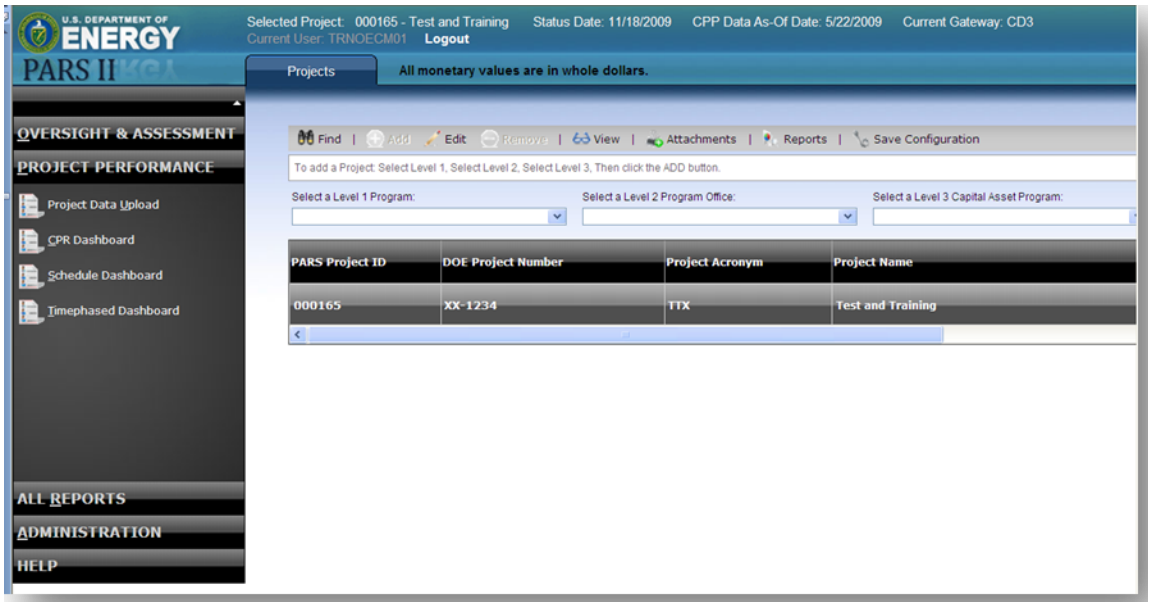
Reopen Report

Analyze Contractor Project Performance Data

Exercise 3: Working with Dashboards

1. FIND and SELECT **PARS Project ID 165**.

2. Select **Project Performance** from the Navigation Bar. The Oversight and Assessment option collapses and the Project Performance option expands.



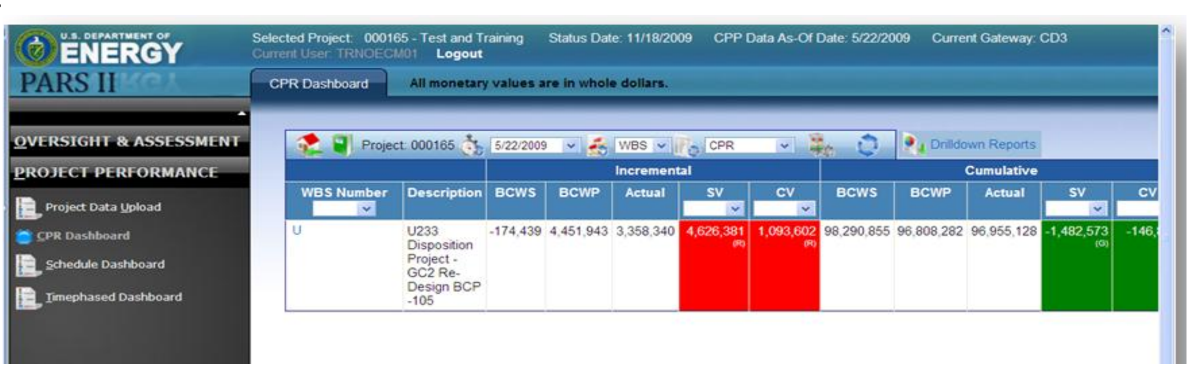
Project Performance Menu Options

View CPR Dashboard

3. Select **CPR Dashboard** from the Project Performance option on the Navigation Bar. The CPR dashboard displays with the following default settings:

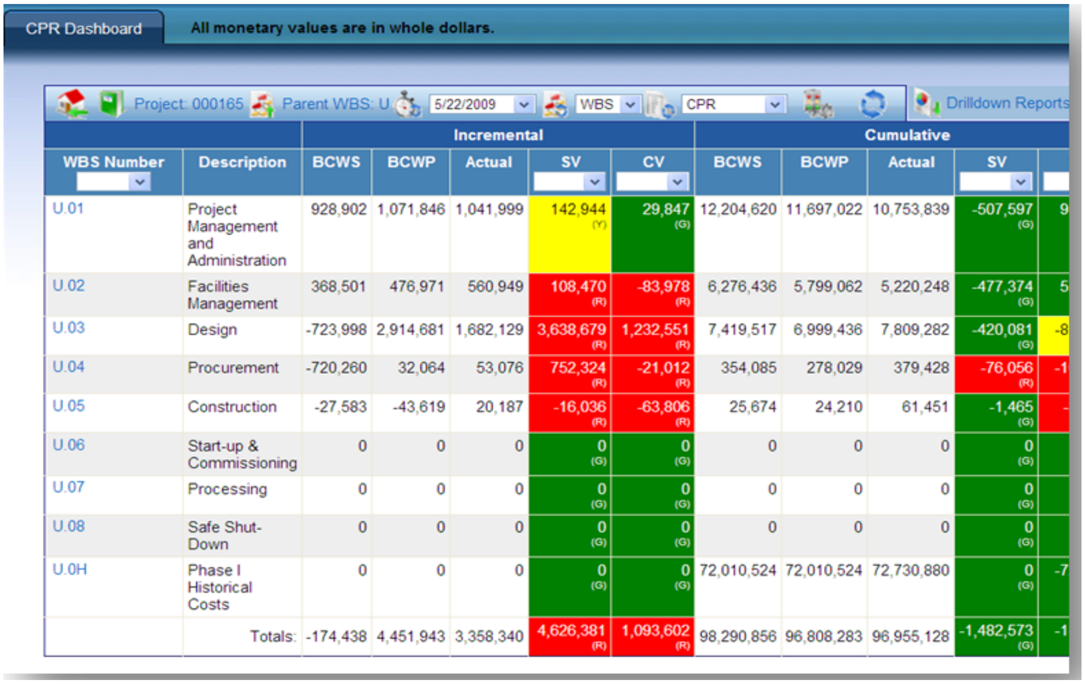
    a. Time period → latest Contractor Upload Date
    b. Table →WBS
    c. Dashboard View →CPR

4.



Drilldown to more Details

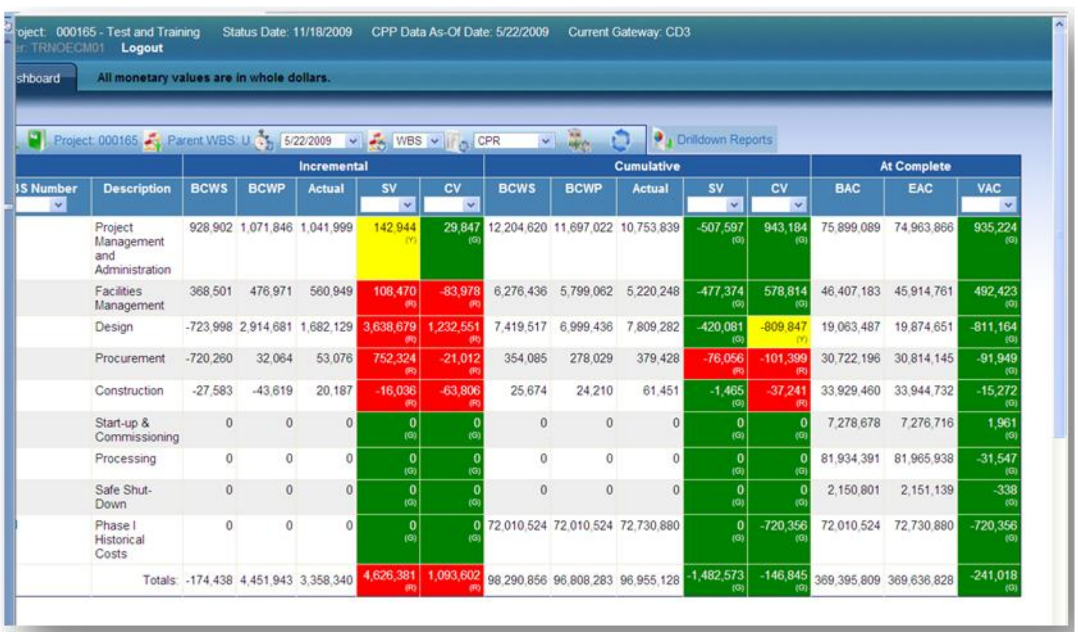
5. You can click on the WBS number to drilldown to more detail. Click the **WBS # U** U. The next level of WBS detail displays.



WBS Number	Description	Incremental BCWS	Incremental BCWP	Incremental Actual	Incremental SV	Incremental CV	Cumulative BCWS	Cumulative BCWP	Cumulative Actual	Cumulative SV
U.01	Project Management and Administration	928,902	1,071,846	1,041,999	142,944 (Y)	29,847 (G)	12,204,620	11,697,022	10,753,839	-507,597 (G)
U.02	Facilities Management	368,501	476,971	560,949	108,470 (R)	-83,978 (R)	6,276,436	5,799,062	5,220,248	-477,374 (G)
U.03	Design	-723,998	2,914,681	1,682,129	3,638,679 (R)	1,232,551 (R)	7,419,517	6,999,436	7,809,282	-420,081 (G)
U.04	Procurement	-720,260	32,064	53,076	752,324 (R)	-21,012 (R)	354,085	278,029	379,428	-76,056 (R)
U.05	Construction	-27,583	-43,619	20,187	-16,036 (R)	-63,806 (R)	25,674	24,210	61,451	-1,465 (G)
U.06	Start-up & Commissioning	0	0	0	0 (G)	0 (G)	0	0	0	0 (G)
U.07	Processing	0	0	0	0 (G)	0 (G)	0	0	0	0 (G)
U.08	Safe Shut-Down	0	0	0	0 (G)	0 (G)	0	0	0	0 (G)
U.0H	Phase I Historical Costs	0	0	0	0 (G)	0 (G)	72,010,524	72,010,524	72,730,880	0 (G)
	Totals:	-174,438	4,451,943	3,358,340	4,626,381 (R)	1,093,602 (R)	98,290,856	96,808,283	96,955,128	-1,482,573 (G)

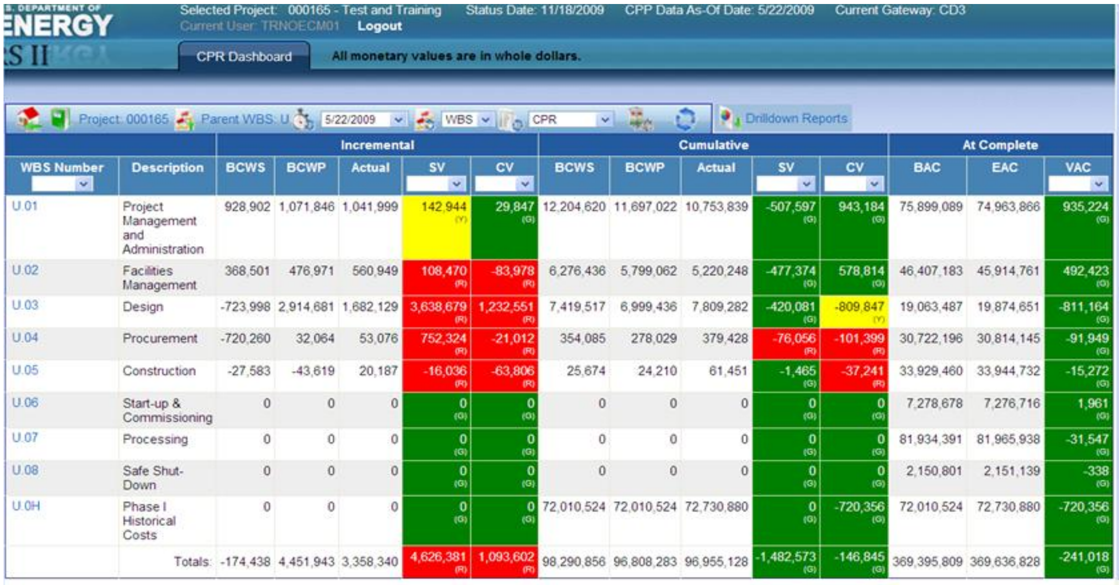
WBS Drilldown

6. **Scroll** to see more data.



3S Number	Description	Incremental BCWS	Incremental BCWP	Incremental Actual	Incremental SV	Incremental CV	Cumulative BCWS	Cumulative BCWP	Cumulative Actual	Cumulative SV	Cumulative CV	At Complete BAC	At Complete EAC	At Complete VAC
	Project Management and Administration	928,902	1,071,846	1,041,999	142,944 (Y)	29,847 (G)	12,204,620	11,697,022	10,753,839	-507,597 (G)	943,184 (G)	75,899,089	74,963,866	935,224 (G)
	Facilities Management	368,501	476,971	560,949	108,470 (R)	-83,978 (R)	6,276,436	5,799,062	5,220,248	-477,374 (G)	578,814 (G)	46,407,183	45,914,761	492,423 (G)
	Design	-723,998	2,914,681	1,682,129	3,638,679 (R)	1,232,551 (R)	7,419,517	6,999,436	7,809,282	-420,081 (G)	-809,847 (Y)	19,063,487	19,874,651	-811,164 (G)
	Procurement	-720,260	32,064	53,076	752,324 (R)	-21,012 (R)	354,085	278,029	379,428	-76,056 (R)	-101,399 (R)	30,722,196	30,814,145	-91,949 (G)
	Construction	-27,583	-43,619	20,187	-16,036 (R)	-63,806 (R)	25,674	24,210	61,451	-1,465 (G)	-37,241 (R)	33,929,460	33,944,732	-15,272 (G)
	Start-up & Commissioning	0	0	0	0 (G)	0 (G)	0	0	0	0 (G)	0 (G)	7,278,678	7,276,716	1,961 (G)
	Processing	0	0	0	0 (G)	0 (G)	0	0	0	0 (G)	0 (G)	81,934,391	81,965,938	-31,547 (G)
	Safe Shut-Down	0	0	0	0 (G)	0 (G)	0	0	0	0 (G)	0 (G)	2,150,801	2,151,139	-338 (G)
	Phase I Historical Costs	0	0	0	0 (G)	0 (G)	72,010,524	72,010,524	72,730,880	0 (G)	-720,356 (G)	72,010,524	72,730,880	-720,356 (G)
	Totals:	-174,438	4,451,943	3,358,340	4,626,381 (R)	1,093,602 (R)	98,290,856	96,808,283	96,955,128	-1,482,573 (G)	-146,845 (G)	369,395,809	369,636,828	-241,018 (G)

Cost Performance Report (CPR) Dashboard – WBS Table



		Incremental					Cumulative					At Complete		
WBS Number	Description	BCWS	BCWP	Actual	SV	CV	BCWS	BCWP	Actual	SV	CV	BAC	EAC	VAC
U.01	Project Management and Administration	928,902	1,071,846	1,041,999	142,944 (Y)	29,847 (G)	12,204,620	11,697,022	10,753,839	-507,597 (G)	943,184 (G)	75,899,089	74,963,866	935,224 (G)
U.02	Facilities Management	368,501	476,971	560,949	108,470 (R)	-83,978 (R)	6,276,436	5,799,062	5,220,248	-477,374 (G)	578,814 (G)	46,407,183	45,914,761	492,423 (G)
U.03	Design	-723,998	2,914,681	1,682,129	3,638,679 (R)	1,232,551 (R)	7,419,517	6,999,436	7,809,282	-420,081 (G)	-809,847 (Y)	19,063,487	19,874,651	-811,164 (G)
U.04	Procurement	-720,260	32,064	53,076	752,324 (R)	-21,012 (R)	354,085	278,029	379,428	-76,056 (R)	-101,399 (R)	30,722,196	30,814,145	-91,949 (G)
U.05	Construction	-27,583	-43,619	20,187	-16,036 (R)	-63,806 (R)	25,674	24,210	61,451	-1,465 (G)	-37,241 (R)	33,929,460	33,944,732	-15,272 (G)
U.06	Start-up & Commissioning	0	0	0	0 (G)	0 (G)	0	0	0	0 (G)	0 (G)	7,278,678	7,276,716	1,961 (G)
U.07	Processing	0	0	0	0 (G)	0 (G)	0	0	0	0 (G)	0 (G)	81,934,391	81,965,938	-31,547 (G)
U.08	Safe Shut-Down	0	0	0	0 (G)	0 (G)	0	0	0	0 (G)	0 (G)	2,150,801	2,151,139	-338 (G)
U.0H	Phase I Historical Costs	0	0	0	0 (G)	0 (G)	72,010,524	72,010,524	72,730,880	0 (G)	-720,356 (G)	72,010,524	72,730,880	-720,356 (G)
	Totals:	-174,438	4,451,943	3,358,340	4,626,381 (R)	1,093,602 (R)	98,290,856	96,808,283	96,955,128	-1,482,573 (G)	-146,845 (G)	369,395,809	369,636,828	-241,018 (G)

Cost Performance Report (CPR) Dashboard – Full View

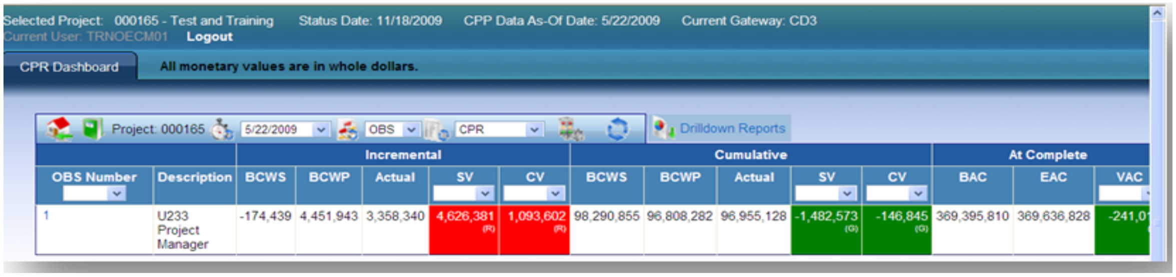
7. There are dropdown list selections to modify one or more of these default settings. The dashboard will automatically re-generate based on the modified settings.

Time Period Dropdown

WBS and OBS Table Dropdown

Dashboard View Dropdown

8. Click on the **Home** button,  and then select **OBS** for the 5/22/2009 CPR dashboard.

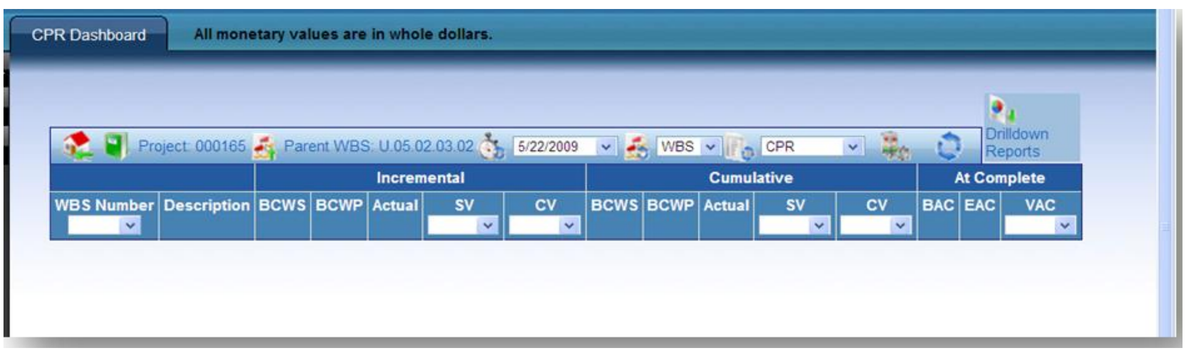


Cost Performance Report (CPR) Dashboard – OBS Table

9. Select **WBS** to return to the CPR WBS table.

10. Click **WBS # U,** and then click **WBS # U.05**.

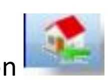
11. Continue drilling down until an empty table displays. The previous level is the lowest level of detail available.



End of WBS Detail

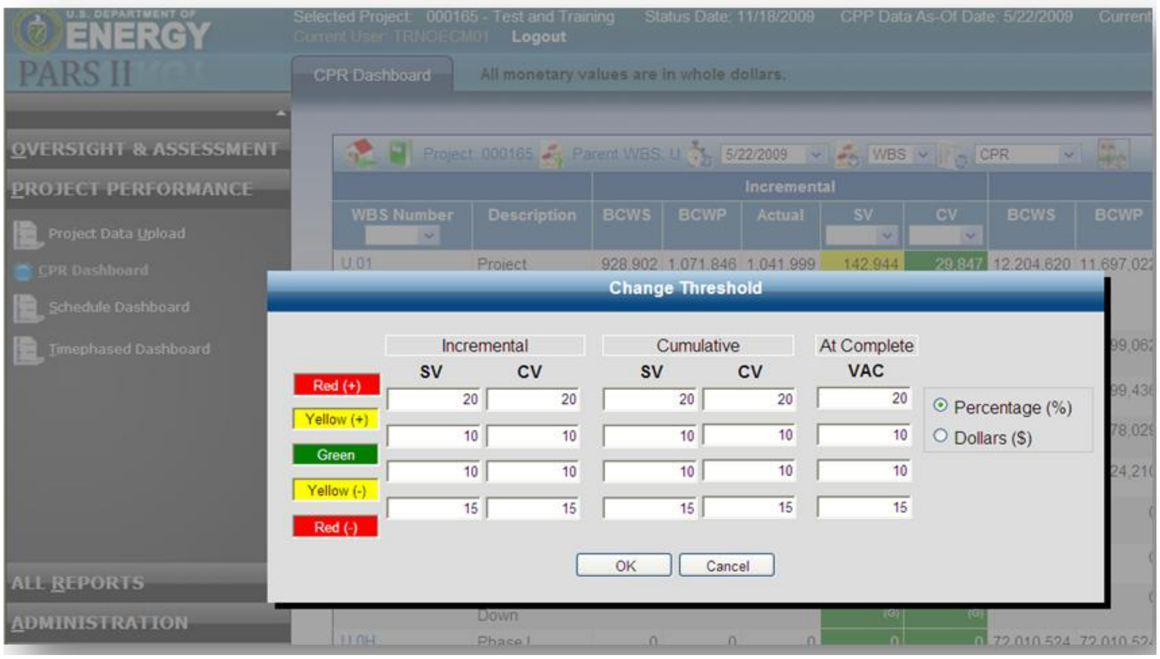
12. Return to the previous level by clicking on the **Parent WBS number** icon  on the icon bar.

13. Each click of  moves the table up one level.

14. For an express return to the first level, click the Home icon 

Check RYG Threshold Settings

15. First click on the **WBS # U** to drill down, and then click the **Threshold Setting** icon **.** View the settings in order to appropriately interpret and analyze the RYG color coding on the dashboard.

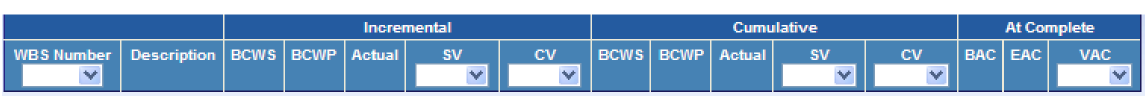


RYG Threshold Settings

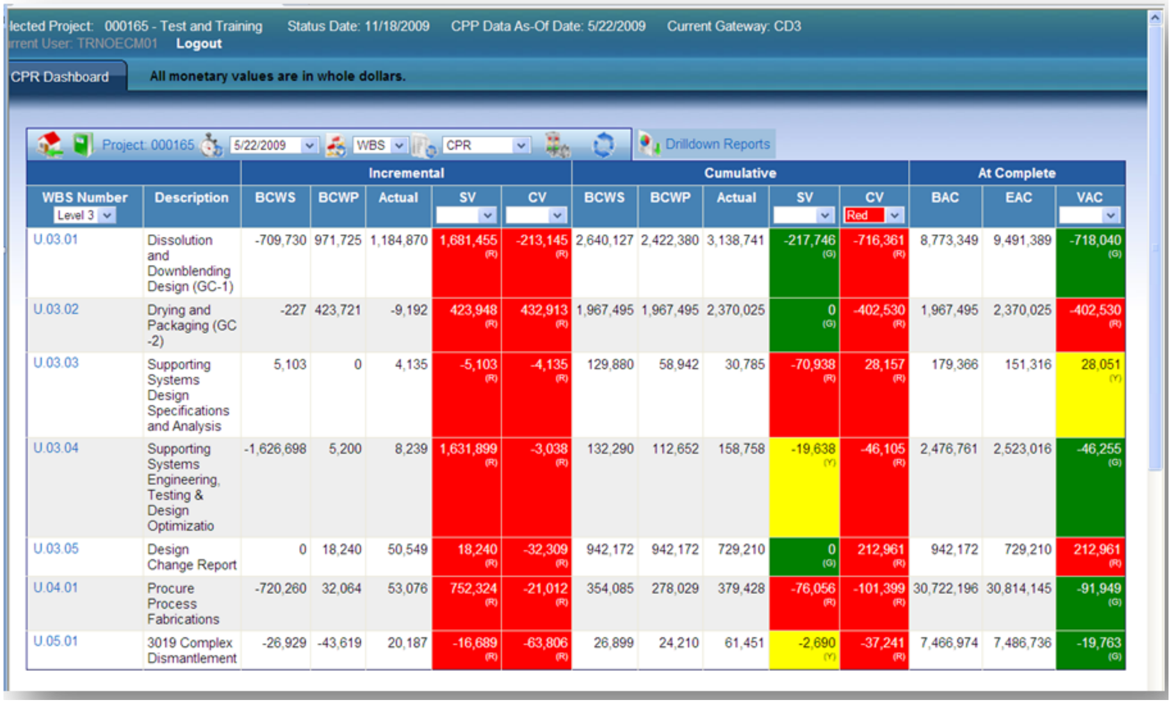
16. Threshold values can be adjusted to do "what if" analysis. The changed values will remain throughout the current login session, including if you select a different project to view. The thresholds will return to the initial settings when you logout.
17. Enter **12** in the SV Red(+) cell (the first cell).Click **OK**. Note some of the yellow cells changed to red.
18. Return to the threshold screen and change the 12 **back to 20**.
19. Click **OK**.

Filter Dashboard Data

1. You can filter the dashboard data for a specific WBS/OBS level and/or a selected RYG setting using the column header dropdown lists.



2. Select **Level 3** from the **WBS Number** dropdown and **Red** from the **Cumulative CV** dropdown.
3. Click **Recycle**  to re-generate the dashboard with the selected filters. Only the Level 3 WBSs that have a Cumulative Cost Variance in the Red are displayed.

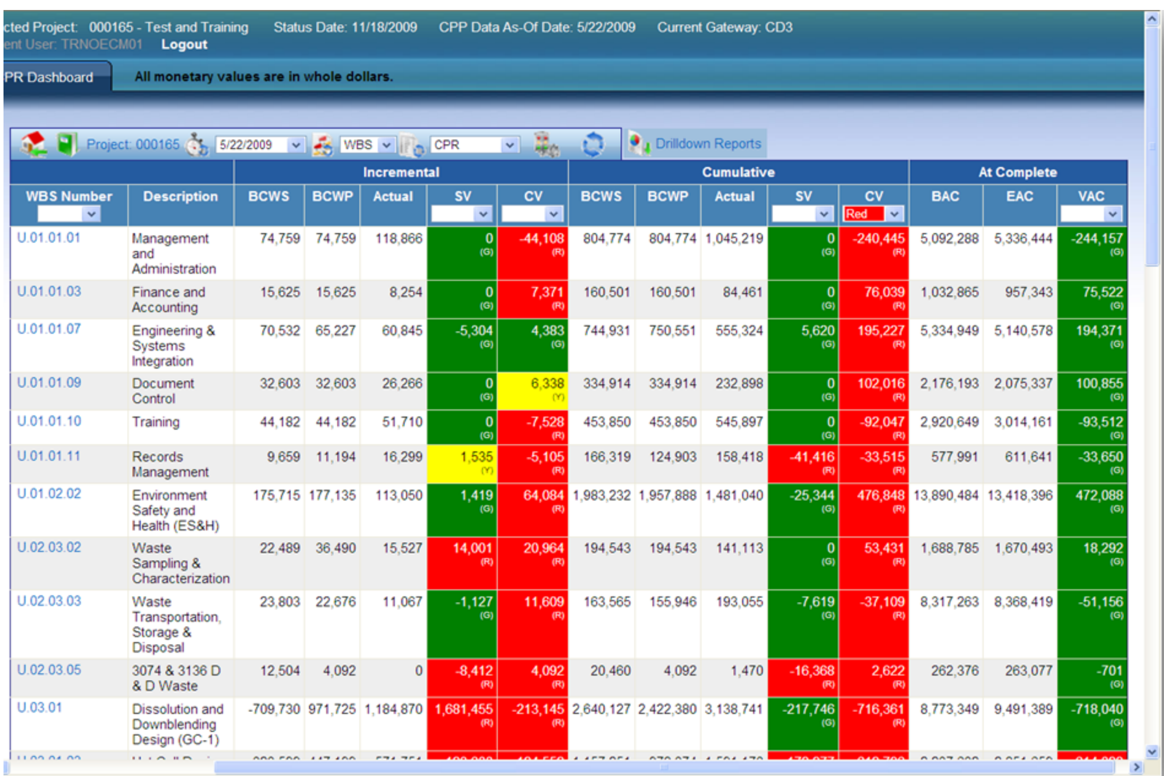


		Incremental					Cumulative					At Complete		
WBS Number (Level 3)	Description	BCWS	BCWP	Actual	SV	CV	BCWS	BCWP	Actual	SV	CV (Red)	BAC	EAC	VAC
U.03.01	Dissolution and Downblending Design (GC-1)	-709,730	971,725	1,184,870	1,681,455 (R)	-213,145 (R)	2,640,127	2,422,380	3,138,741	-217,746 (G)	-716,361 (R)	8,773,349	9,491,389	-718,040 (G)
U.03.02	Drying and Packaging (GC -2)	-227	423,721	-9,192	423,948 (R)	432,913 (R)	1,967,495	1,967,495	2,370,025	0 (G)	-402,530 (R)	1,967,495	2,370,025	-402,530 (R)
U.03.03	Supporting Systems Design Specifications and Analysis	5,103	0	4,135	-5,103 (R)	-4,135 (R)	129,880	58,942	30,785	-70,938 (R)	28,157 (R)	179,366	151,316	28,051 (Y)
U.03.04	Supporting Systems Engineering, Testing & Design Optimizatio	-1,626,698	5,200	8,239	1,631,899 (R)	-3,038 (R)	132,290	112,652	158,758	-19,638 (Y)	-46,105 (R)	2,476,761	2,523,016	-46,255 (G)
U.03.05	Design Change Report	0	18,240	50,549	18,240 (R)	-32,309 (R)	942,172	942,172	729,210	0 (G)	212,961 (R)	942,172	729,210	212,961 (R)
U.04.01	Procure Process Fabrications	-720,260	32,064	53,076	752,324 (R)	-21,012 (R)	354,085	278,029	379,428	-76,056 (R)	-101,399 (R)	30,722,196	30,814,145	-91,949 (G)
U.05.01	3019 Complex Dismantlement	-26,929	-43,619	20,187	-16,689 (R)	-63,806 (R)	26,899	24,210	61,451	-2,690 (Y)	-37,241 (R)	7,466,974	7,486,736	-19,763 (G)

Filtered One-Level WBS

4. Clear the WBS filter by selecting the **Blank** entry from the **WBS Number** dropdown. Leave the Cumulative CV setting as Red.

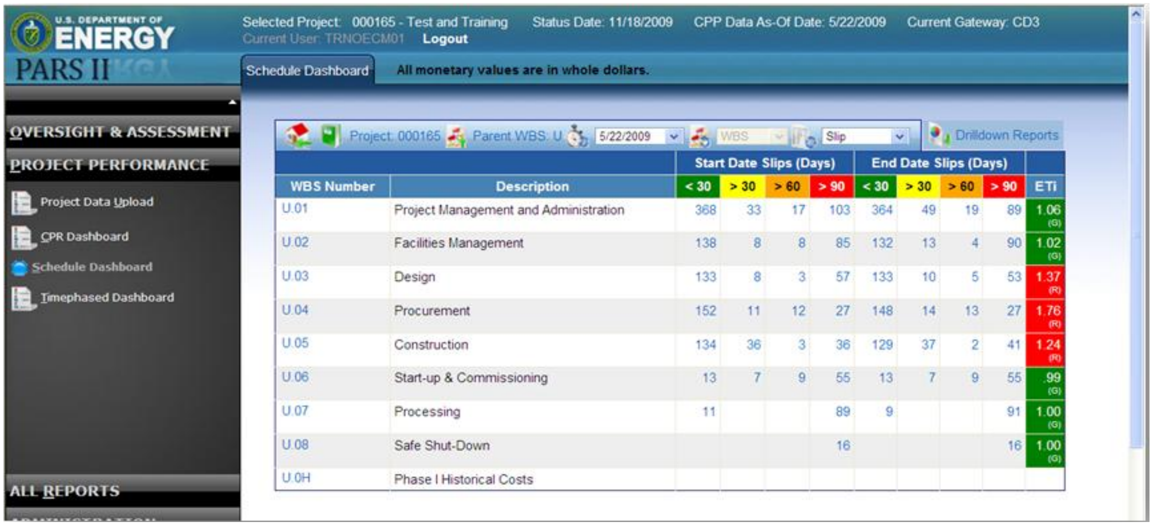
5. Click **Recycle** to re-generate the dashboard with the selected filters. All the WBSs (at any level) that have a Cumulative Cost Variance in the Red are displayed.



		Incremental					Cumulative					At Complete		
WBS Number	Description	BCWS	BCWP	Actual	SV	CV	BCWS	BCWP	Actual	SV	CV (Red)	BAC	EAC	VAC
U.01.01.01	Management and Administration	74,759	74,759	118,866	0 (G)	-44,108 (R)	804,774	804,774	1,045,219	0 (G)	-240,445 (R)	5,092,288	5,336,444	-244,157 (G)
U.01.01.03	Finance and Accounting	15,625	15,625	8,254	0 (G)	7,371 (R)	160,501	160,501	84,461	0 (G)	76,039 (R)	1,032,865	957,343	75,522 (G)
U.01.01.07	Engineering & Systems Integration	70,532	65,227	60,845	-5,304 (G)	4,383 (G)	744,931	750,551	555,324	5,620 (G)	195,227 (R)	5,334,949	5,140,578	194,371 (G)
U.01.01.09	Document Control	32,603	32,603	26,266	0 (G)	6,338 (Y)	334,914	334,914	232,898	0 (G)	102,016 (R)	2,176,193	2,075,337	100,855 (G)
U.01.01.10	Training	44,182	44,182	51,710	0 (G)	-7,528 (R)	453,850	453,850	545,897	0 (G)	-92,047 (R)	2,920,649	3,014,161	-93,512 (G)
U.01.01.11	Records Management	9,659	11,194	16,299	1,535 (Y)	-5,105 (R)	166,319	124,903	158,418	-41,416 (R)	-33,515 (R)	577,991	611,641	-33,650 (G)
U.01.02.02	Environment Safety and Health (ES&H)	175,715	177,135	113,050	1,419 (G)	64,084 (R)	1,983,232	1,957,888	1,481,040	-25,344 (G)	476,848 (R)	13,890,484	13,418,396	472,088 (G)
U.02.03.02	Waste Sampling & Characterization	22,489	36,490	15,527	14,001 (R)	20,964 (R)	194,543	194,543	141,113	0 (G)	53,431 (R)	1,688,785	1,670,493	18,292 (G)
U.02.03.03	Waste Transportation, Storage & Disposal	23,803	22,676	11,067	-1,127 (G)	11,609 (R)	163,565	155,946	193,055	-7,619 (G)	-37,109 (R)	8,317,263	8,368,419	-51,156 (G)
U.02.03.05	3074 & 3136 D & D Waste	12,504	4,092	0	-8,412 (R)	4,092 (R)	20,460	4,092	1,470	-16,368 (R)	2,622 (R)	262,376	263,077	-701 (G)
U.03.01	Dissolution and Downblending Design (GC-1)	-709,730	971,725	1,184,870	1,681,455 (R)	-213,145 (R)	2,640,127	2,422,380	3,138,741	-217,746 (G)	-716,361 (R)	8,773,349	9,491,389	-718,040 (G)

View Schedule Dashboard

1. Select **Schedule Dashboard** under Project Performance on the Navigation Bar, and then click on the **Project # U**.



		Start Date Slips (Days)				End Date Slips (Days)				
WBS Number	Description	< 30	> 30	> 60	> 90	< 30	> 30	> 60	> 90	ETi
U.01	Project Management and Administration	368	33	17	103	364	49	19	89	1.06 (G)
U.02	Facilities Management	138	8	8	85	132	13	4	90	1.02 (G)
U.03	Design	133	8	3	57	133	10	5	53	1.37 (R)
U.04	Procurement	152	11	12	27	148	14	13	27	1.76 (R)
U.05	Construction	134	36	3	36	129	37	2	41	1.24 (R)
U.06	Start-up & Commissioning	13	7	9	55	13	7	9	55	.99 (G)
U.07	Processing	11			89	9			91	1.00 (G)
U.08	Safe Shut-Down				16				16	1.00 (G)
U.0H	Phase I Historical Costs									

Schedule Dashboard - Slip Dates View

2. The Schedule dashboard has fewer options, but operates in a manner similar to the CPR dashboard. Note that only WBS is appropriate for the Schedule dashboard and that it is grayed to indicate it cannot be changed.

You may:

a. Select a different time period
b. Select Slip date view or Float date view
c. Drilldown through WBS detail

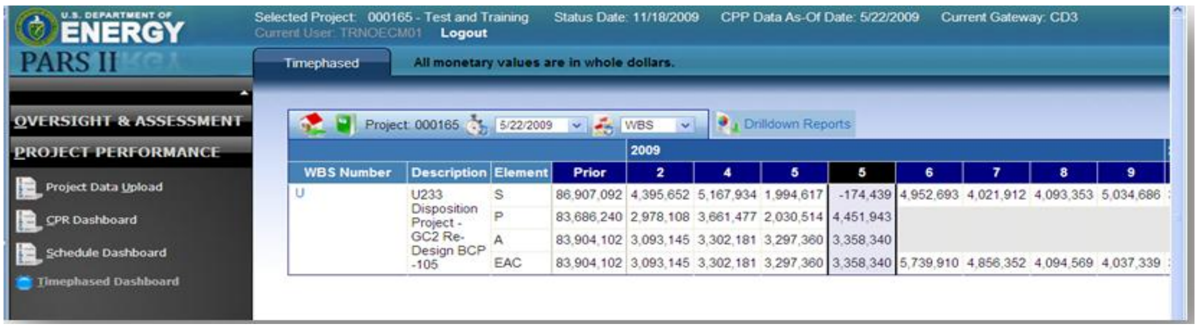
3. Select **Float** from the dropdown list.

		Baseline Critical (Free Float)				Current Critical (Free Float)				Baseline Critical (Total Float)				Current Critical (Total Float)				
WBS Number	Description	> 60	≤ 60	≤ 30	≤ 0	> 60	≤ 60	≤ 30	≤ 0	> 60	≤ 60	≤ 30	≤ 0	> 60	≤ 60	≤ 30	≤ 0	ETi
U.01	Project Management and Administration	52	7	18	469	64	3	8	552	394	57	55	40	317	56	44	210	1.06 (G)
U.02	Facilities Management	52	8	13	181	38	4	8	207	215	15	1	23	136	8	7	106	1.02 (G)
U.03	Design	65	56	73	298	18	4	27	186	192	143	123	34	31	9	14	181	1.37 (R)
U.04	Procurement	15	3	14	209	12	1	17	186	196	15	3	27	115	28	22	51	1.76 (R)
U.05	Construction	29	8	17	258	18	7	15	204	250	30	5	27	114	34	51	45	1.24 (R)
U.06	Start-up & Commissioning	13	3	7	64	11	4	7	123	36	9	26	16	92	3	2	48	.99 (G)

4. Click the WBS Number **U.03.** An additional table appears – Activity Table. This table displays if activity data has been submitted.

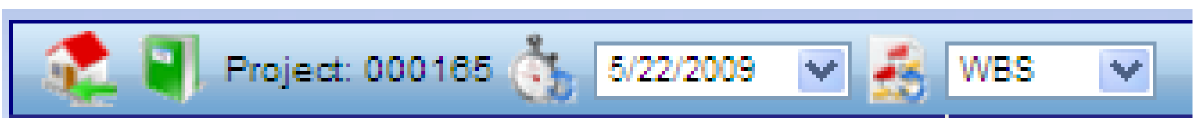
View Timephased Dashboard

1. Select **Timephased Dashboard** under Project Performance on the Navigation Bar.



Timephased Dashboard- WBS Table

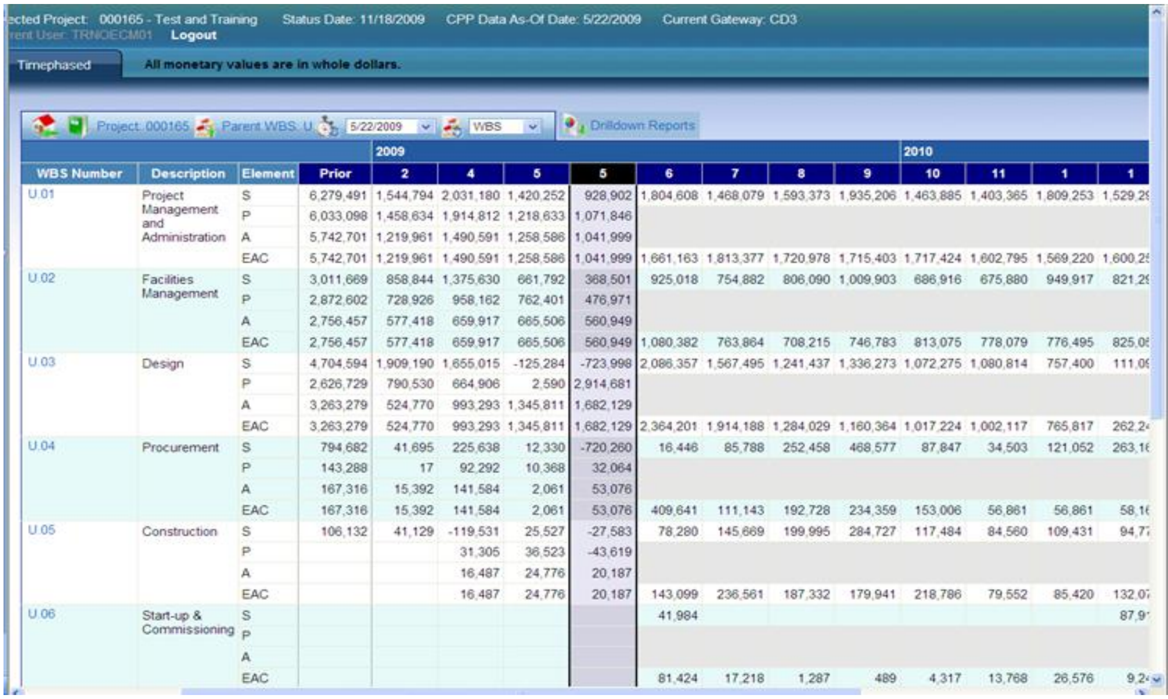
2. The Timephased dashboard operates in a manner similar to the CPR dashboard.



You may:

a. Select a different time period
b. Select WBS view or OBS date view
c. Drilldown through WBS detail

3. **Scroll** right to see complete table.
4. Click the WBS Number **U**.



WBS Number	Description	Element	Prior	2009 2	4	5	5	6	7	8	9	2010 10	11	1	1
U.01	Project Management and Administration	S	6,279,491	1,544,794	2,031,180	1,420,252	928,902	1,804,608	1,468,079	1,593,373	1,935,206	1,463,885	1,403,365	1,809,253	1,529,2
		P	6,033,098	1,458,634	1,914,812	1,218,633	1,071,846								
		A	5,742,701	1,219,961	1,490,591	1,258,586	1,041,999								
		EAC	5,742,701	1,219,961	1,490,591	1,258,586	1,041,999	1,661,163	1,813,377	1,720,978	1,715,403	1,717,424	1,602,795	1,569,220	1,600,2
U.02	Facilities Management	S	3,011,669	858,844	1,375,630	661,792	368,501	925,018	754,882	806,090	1,009,903	686,916	675,880	949,917	821,2
		P	2,872,602	728,926	958,162	762,401	476,971								
		A	2,756,457	577,418	659,917	665,506	560,949								
		EAC	2,756,457	577,418	659,917	665,506	560,949	1,080,382	763,864	708,215	746,783	813,075	778,079	776,495	825,0
U.03	Design	S	4,704,594	1,909,190	1,655,015	-125,284	-723,998	2,086,357	1,567,495	1,241,437	1,336,273	1,072,275	1,080,814	757,400	111,0
		P	2,626,729	790,530	664,906	2,590	2,914,681								
		A	3,263,279	524,770	993,293	1,345,811	1,682,129								
		EAC	3,263,279	524,770	993,293	1,345,811	1,682,129	2,364,201	1,914,188	1,284,029	1,160,364	1,017,224	1,002,117	765,817	262,2
U.04	Procurement	S	794,682	41,695	225,638	12,330	-720,260	16,446	85,788	252,458	468,577	87,847	34,503	121,052	263,1
		P	143,288	17	92,292	10,368	32,064								
		A	167,316	15,392	141,584	2,061	53,076								
		EAC	167,316	15,392	141,584	2,061	53,076	409,641	111,143	192,728	234,359	153,006	56,861	56,861	58,1
U.05	Construction	S	106,132	41,129	-119,531	25,527	-27,583	78,280	145,669	199,995	284,727	117,484	84,560	109,431	94,7
		P			31,305	36,523	-43,619								
		A			16,487	24,776	20,187								
		EAC			16,487	24,776	20,187	143,099	236,561	187,332	179,941	218,786	79,552	85,420	132,0
U.06	Start-up & Commissioning	S						41,984							87,9
		P													
		A													
		EAC						81,424	17,218	1,287	489	4,317	13,768	26,576	9,2

WBS Drilldown – Timephased Dashboard

On Your Own Workshop

1. For Project 165, view the Cost Performance, WBS Table submitted for April 3, 2009.
2. What is the Cumulative BCWS for WBS # U.04.01.03? ______________________

Reports for Contractor Project Performance Data

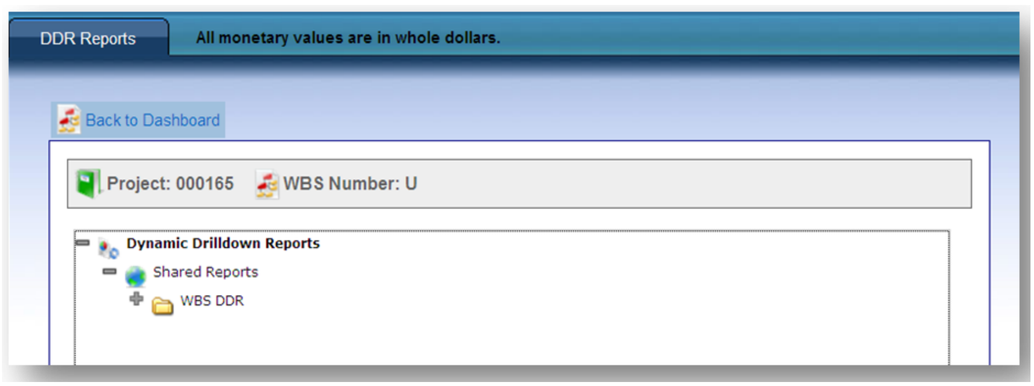
Exercise 4: Reports for Contractor Data

1. Select **CPR Dashboard** under Project Performance on the Navigation Bar
2. For Project #165, select **5/22/2009** for the time period, **WBS** table, and **CPR** view.

WBS Reports

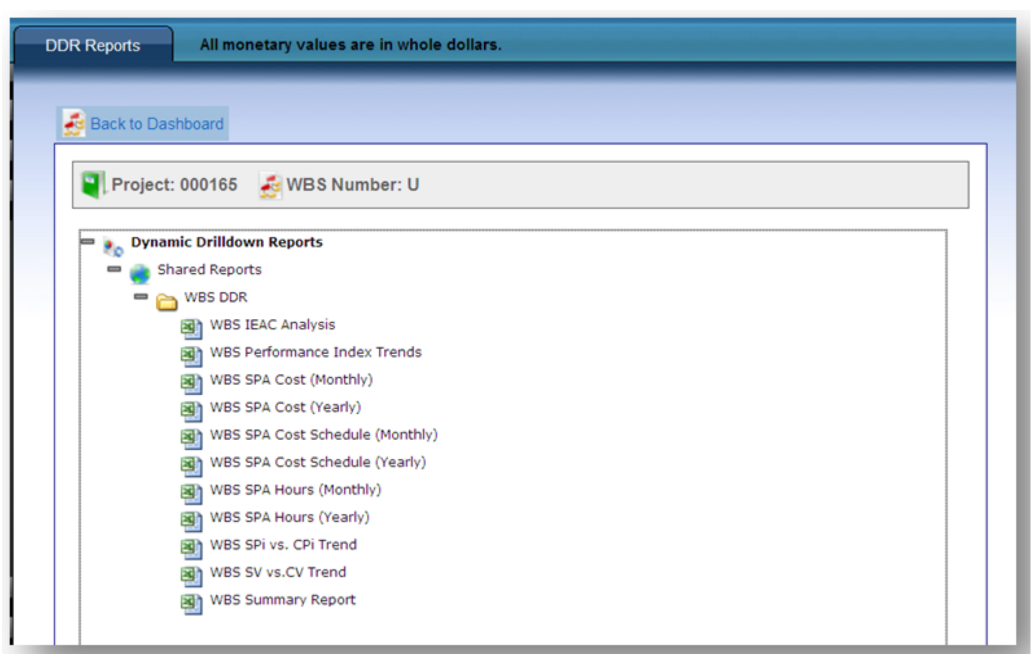
3. Click 

on the toolbar. The DDR Reports tab displays with report folders. Since the WBS table was selected, the DDR Reports tab contains the WBS report folder.



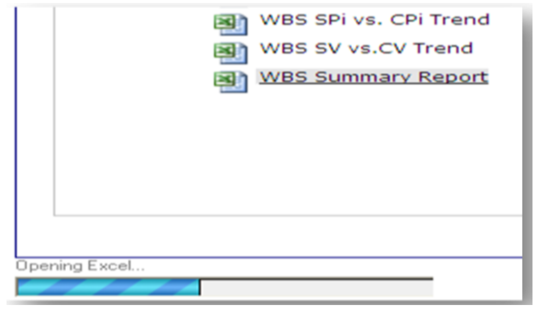
Drilldown Reports Tab

4. Click ✚ to expand the **WBS DDR** folders.

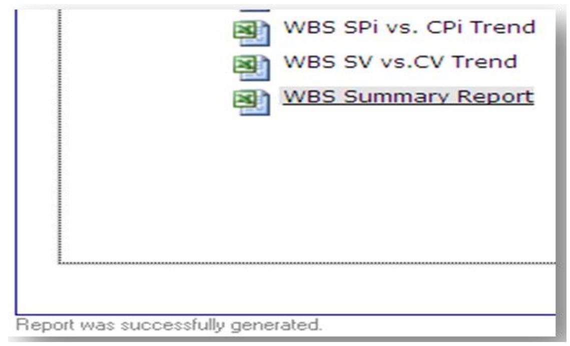


Project Performance WBS Report Listing

5. Select **WBS Summary Report** from the WBS DDR folder. Wait for the report to generate.

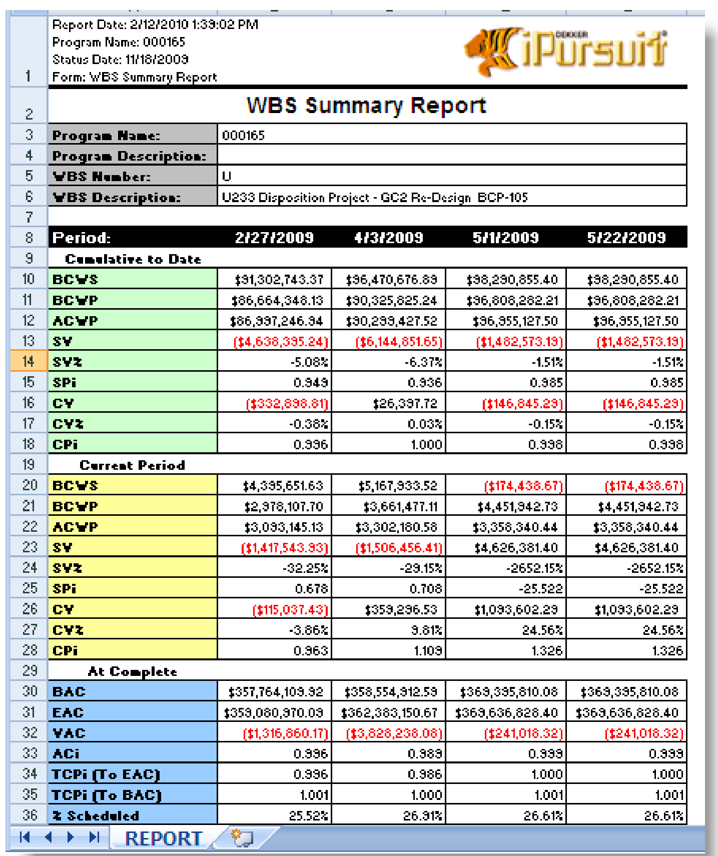


Downloading Report



Report Generated

6. When generated, a new window opens in Excel containing the selected report.



Report Date: 2/12/2010 1:39:02 PM
Program Name: 000165
Status Date: 11/18/2009
Form: WBS Summary Report

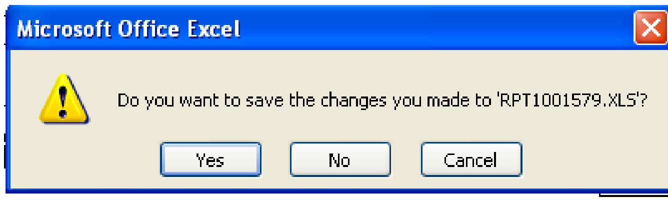
WBS Summary Report

3	**Program Name:**	000165			
4	**Program Description:**				
5	**WBS Number:**	U			
6	**WBS Description:**	U233 Disposition Project - GC2 Re-Design BCP-105			
7					
8	**Period:**	**2/27/2009**	**4/3/2009**	**5/1/2009**	**5/22/2009**
9	**Cumulative to Date**				
10	**BCWS**	$91,302,743.37	$96,470,676.89	$98,290,855.40	$98,290,855.40
11	**BCWP**	$86,664,348.13	$90,325,825.24	$96,808,282.21	$96,808,282.21
12	**ACWP**	$86,997,246.94	$90,299,427.52	$96,955,127.50	$96,955,127.50
13	**SV**	($4,638,395.24)	($6,144,851.65)	($1,482,573.19)	($1,482,573.19)
14	**SV%**	-5.08%	-6.37%	-1.51%	-1.51%
15	**SPi**	0.949	0.936	0.985	0.985
16	**CV**	($332,898.81)	$26,397.72	($146,845.29)	($146,845.29)
17	**CV%**	-0.38%	0.03%	-0.15%	-0.15%
18	**CPi**	0.996	1.000	0.998	0.998
19	**Current Period**				
20	**BCWS**	$4,395,651.63	$5,167,933.52	($174,438.67)	($174,438.67)
21	**BCWP**	$2,978,107.70	$3,661,477.11	$4,451,942.73	$4,451,942.73
22	**ACWP**	$3,093,145.13	$3,302,180.58	$3,358,340.44	$3,358,340.44
23	**SV**	($1,417,543.93)	($1,506,456.41)	$4,626,381.40	$4,626,381.40
24	**SV%**	-32.25%	-29.15%	-2652.15%	-2652.15%
25	**SPi**	0.678	0.708	-25.522	-25.522
26	**CV**	($115,037.43)	$359,296.53	$1,093,602.29	$1,093,602.29
27	**CV%**	-3.86%	9.81%	24.56%	24.56%
28	**CPi**	0.963	1.109	1.326	1.326
29	**At Complete**				
30	**BAC**	$357,764,109.92	$358,554,912.59	$369,395,810.08	$369,395,810.08
31	**EAC**	$359,080,970.09	$362,383,150.67	$369,636,828.40	$369,636,828.40
32	**VAC**	($1,316,860.17)	($3,828,238.08)	($241,018.32)	($241,018.32)
33	**ACi**	0.996	0.989	0.999	0.999
34	**TCPi (To EAC)**	0.996	0.986	1.000	1.000
35	**TCPi (To BAC)**	1.001	1.000	1.001	1.001
36	**% Scheduled**	25.52%	26.91%	26.61%	26.61%

REPORT

7. At this point, you can work with the table as you would any other Excel Workbook, including save a copy or print a copy.

8. When finished viewing, **Close** the Excel window. When you close Excel, you will be asked if you want to save changes. Basically, it is a reminder to save the report (optional), even if you didn't make changes. If you want to save the report, rename it and save it to a location where you can find it.



9. You will return to the PARS II task window.

10. When you are finished running WBS reports, click 

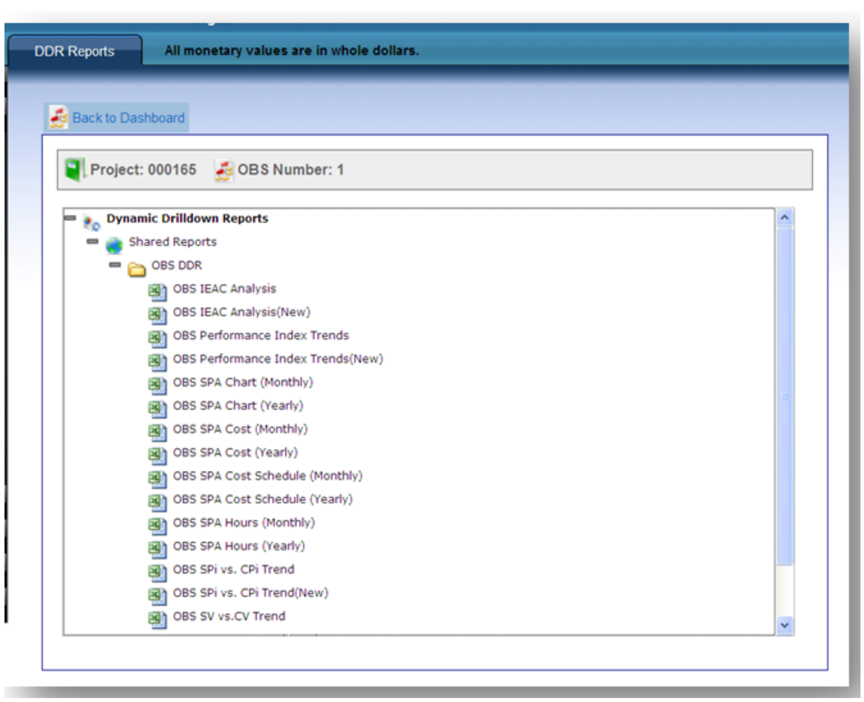
.

OBS Reports

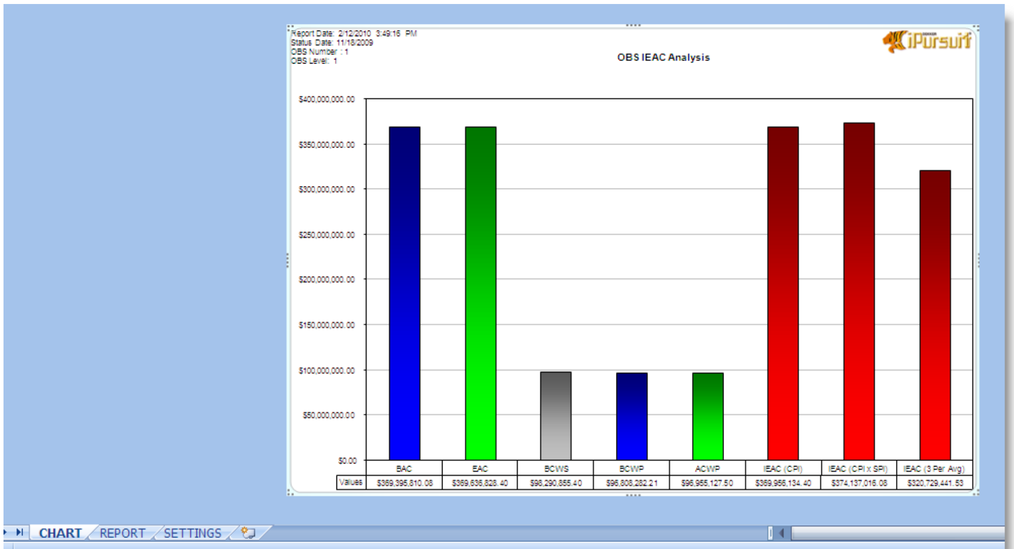
11. To produce OBS reports, click on the **Home** button, then select the **OBS** table from the dashboard.

12. Click 

on the toolbar. The DDR Reports tab displays with report folders. Since the OBS table was selected, the DDR Reports tab contains the OBS report folder. Expand the OBS folder to list the OBS reports.



13. Select **OBS IEAC Analysis** report. Wait until the report opens in an Excel window.



OBS IEAC Analysis Report from Dashboard Drilldown Reports

14. Return to the PARS II task window.

15. When you are finished running OBS reports, click 
.

TIP: There are two sets of reports for Contractor EVM data - the WBS reports when the dashboard view is set to WBS, and the OBS reports when the dashboard view is set to OBS. Currently, the WBS and OBS reports can only be generated from the dashboard tabs under Project Performance.

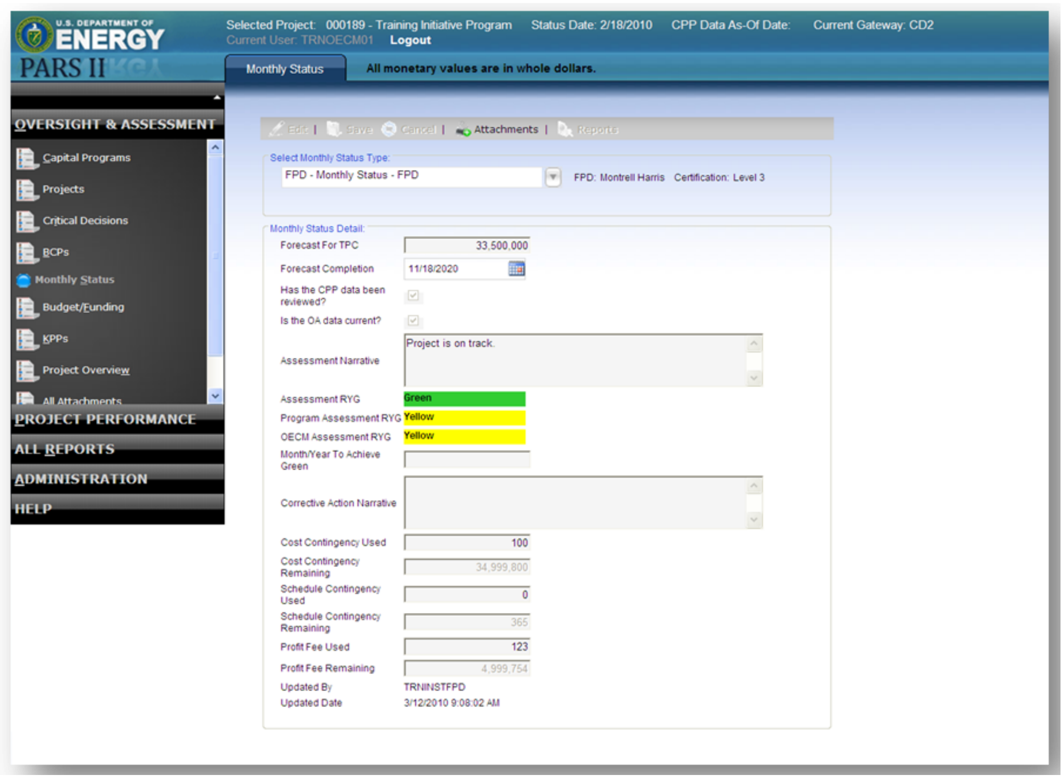
Update Monthly Status Assessment

Exercise 5: Monthly Status Assessment Updates

1. FIND and SELECT **PARS Project ID 189.**

2. Select **Monthly Status** from the Navigation bar. The first set of data that displays is the FPD monthly status update.

   TIP: For a new project or one that has just passed the CD2 Gateway, the tab may be empty.



Monthly Status Update - FPD

View FPD Monthly Status Update

3. The **Monthly Status tab** displays the latest data entered for this screen. The **Updated Date** at the bottom of the screen indicates when the data was updated. If it is blank, then the data has not yet been edited/updated for the new time period – the status date at the top of the screen.

   TIP: The EDIT icon is grayed-out, unless you are a user who has FPD update rights.

4. The **FPD name and certification** level display to the right of the dropdown list for Select Monthly Status Type.

5. Items to note:

   a. Forecast for TPC and Forecast Completion.

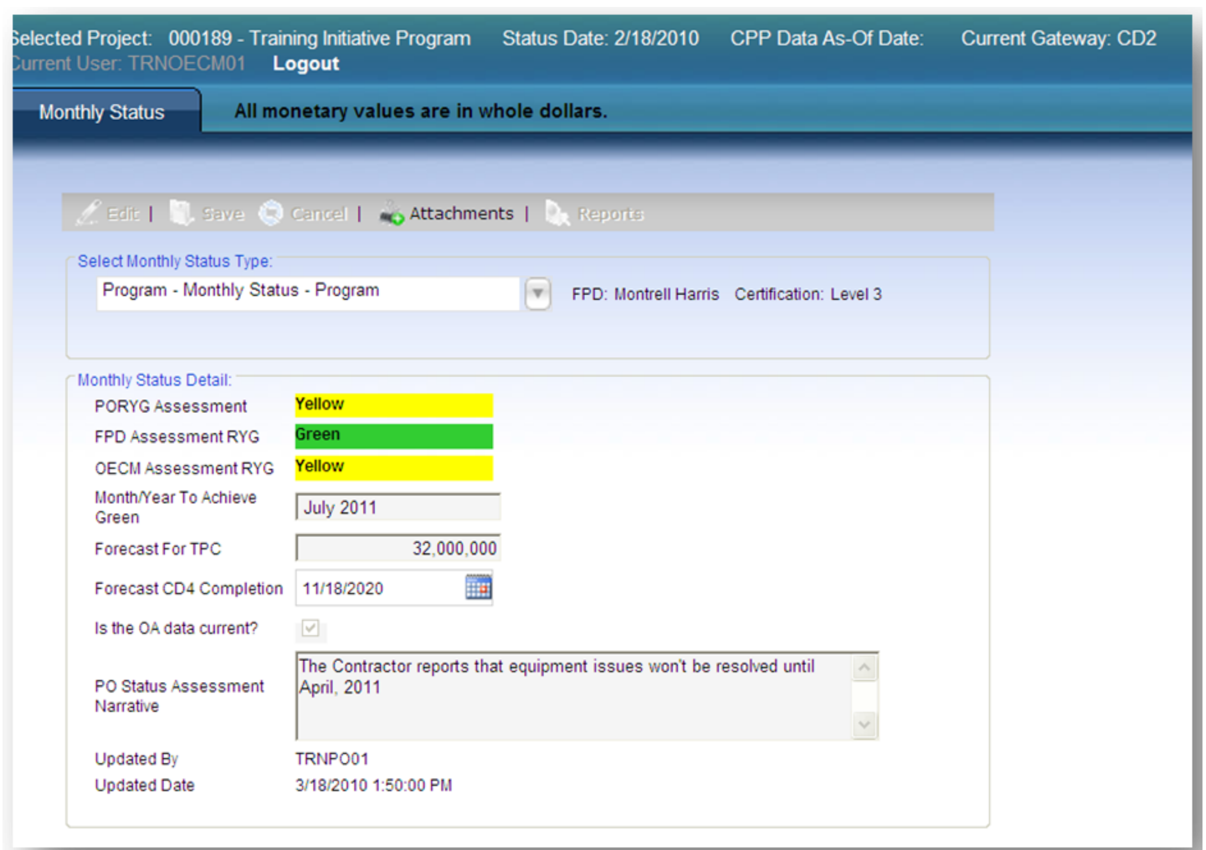
b. The RYG assessment color bands. The FPD, Program Office, and OECM analyst make an independent determination of the RYG standing. The first Assessment box (unlabelled) is the one pertaining to this screen, in this case, the FPD's RYG assessment. A blank color band indicates that an RYG assessment has not yet been entered into PARS II by that organization level.

c. If the FPD Assessment is Yellow or Red, then the Month/Year to Achieve Green should be entered and a Corrective Action Narrative.

d. Cost Contingency Used, Schedule Contingency Used, and Profit Fee Used are entered by the FPD. The grayed-out fields are calculated values.

View Program Monthly Status Update

6. Select **Program – Monthly Status – Program** from the Select Monthly Status Type dropdown list.



Monthly Status Update – Program Office

7. Items to note:

a. There are fewer data elements on the Program Monthly Status screen

b. The RYG order is different. The first RYG assessment box is that of the Program and is labeled PORYG.

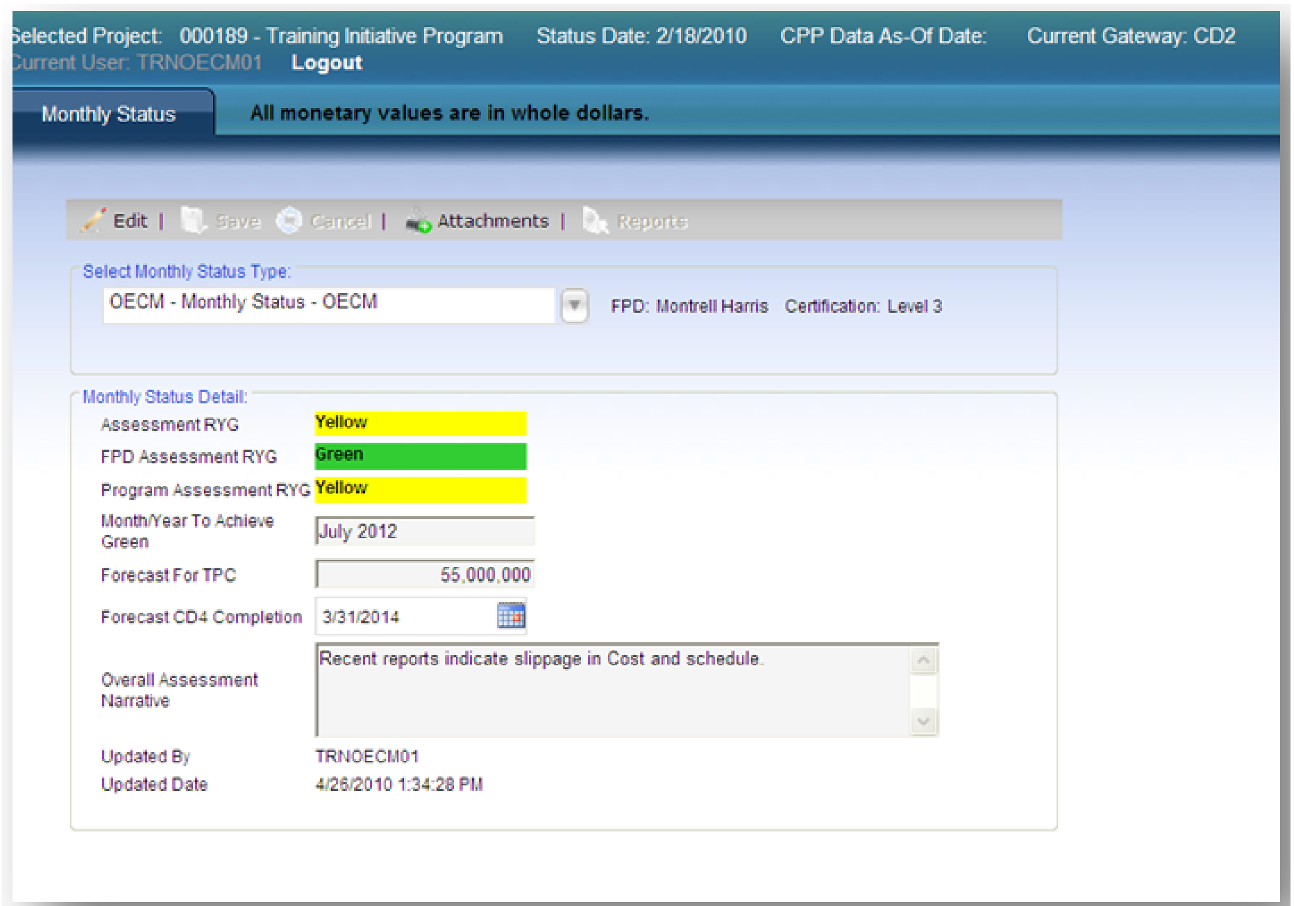
c. Since PORYG Assessment is Yellow, Month/Year to Achieve Green has an entry.

d. It is optional for the Program to review CPP data, so that question is not included on the Program screen.

TIP: The EDIT icon is grayed-out, unless you are a user who has Program update rights.

View the OECM Monthly Status Update

8. Select **OECM – Monthly Status – OECM** from the Select Monthly Status Type dropdown list.



OECM Monthly Status Screen

TIP: The EDIT icon is grayed-out, unless you are a user who has OECM update rights.

9. Depending on your PARS II role, enter one of the following monthly status updates:

   Part 9A – Enter FPD Monthly Status Update

   Part 9B – Enter Program Monthly Status Update

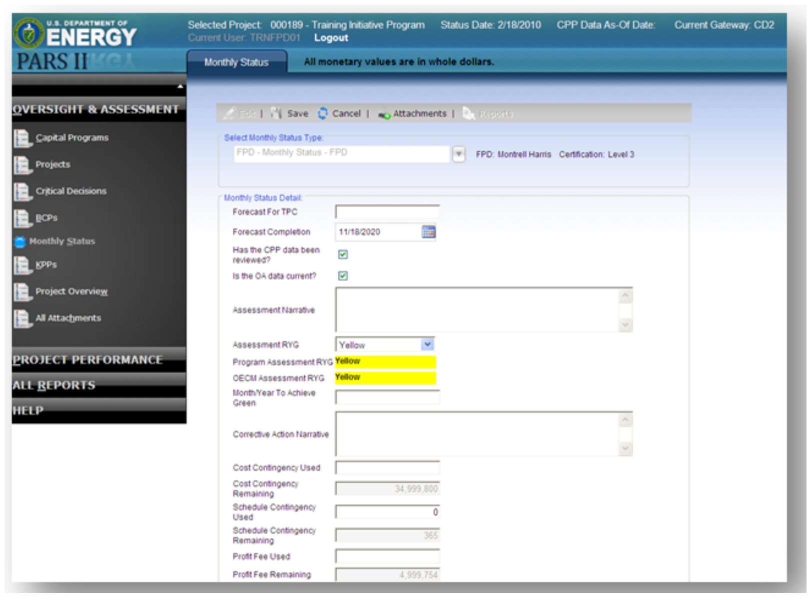
   Part 9C – Enter OECM Monthly Status Update

PART 9A   Enter FPD Monthly Status

1. Find and select **your class-assigned PARS Project ID**.

2. Select **Monthly Status** from the Navigation Bar.

3. Verify **FPD Monthly Status** displays in the Monthly Status type dropdown selection.



Monthly Status Update - FPD

4. Click 

 to begin entering monthly status information.

5. Click checkbox to indicate "**Is the OA Data Current?**"

6. Click checkbox "**Has the CPP Data been Reviewed?**"

7. Enter/Update fields as needed. Fields in gray are calculated values.

    a. Enter or insert **first sentence** in the Assessment Narrative:

    Assessment for training class

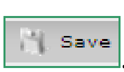
    b. Change **Assessment RYG** to ***Yellow***.

    c. Enter ***July 2011*** as the **Month/Year to Achieve Green**.

    d. Enter **Corrective Action Narrative**:

    Issuing Bids for extra equipment and staff.

    e. Enter dollar values.

8. Click 

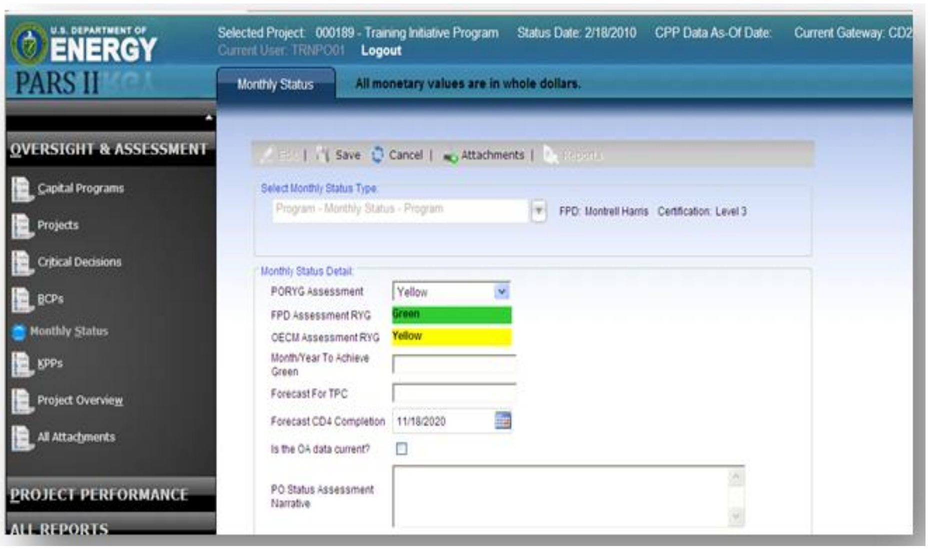
. You are returned to the View mode of the Monthly Status tab.

PART 9B Enter Program Monthly Status

1. Find and select **your class-assigned PARS Project ID**.

2. Select **Monthly Status** from the Navigation Bar.

9. Select **Program Monthly Status** from the Monthly Status type dropdown selection.



Monthly Status Update – Program Office

3. Click Edit to begin entering monthly status information.

4. Enter/Update fields as needed. Fields in gray are calculated values. Updated by and Updated date are populated by PARS.

    a. Change **Assessment RYG** to ***Yellow***.

    b. Enter ***October 2011*** as the **Month/Year to Achieve Green**.

    c. Enter **52,000,000** for Forecast for TPC.

    d. Click checkbox to indicate "**Is the OA Data Current?**"

    e. Enter **March 31, 2026** for Forecast CD-4 Completion.

5. Enter the **Overall Assessment Narrative**:

    Recent reports indicate slippage in Cost and schedule

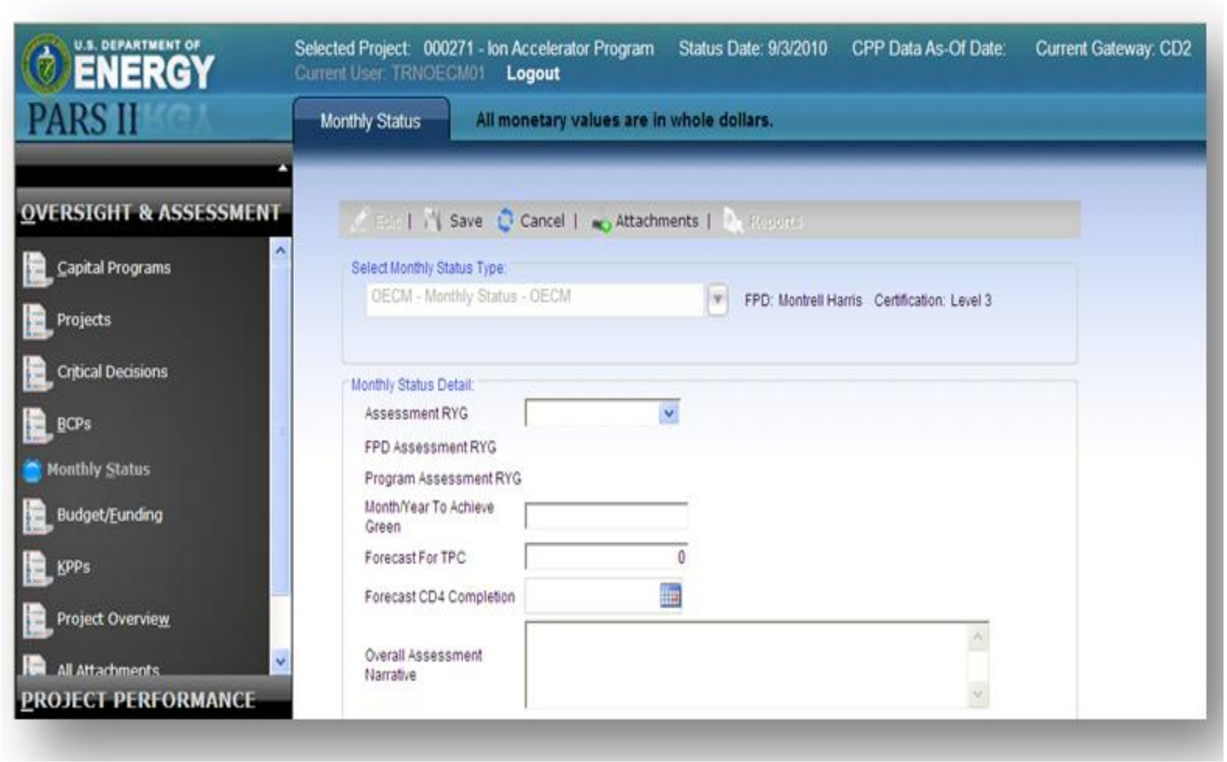
6. Click Save. You are returned to the View mode of the Monthly Status tab.

PART 9C Enter OECM Monthly Status

1. FIND and SELECT your **Assigned PARS Project ID**.

2. Select **Monthly Status** from the Navigation Bar.

3. Select **OECM Monthly Status** from the Select Monthly Status type dropdown list.



OECM Monthly Status Screen

4. Click  to begin entering monthly status information.

5. Select **Yellow** from Assessment RYG dropdown list.

6. Enter **July 2012** as the Month/Year to Achieve Green.

7. Enter **55,000,000** for Forecast for TPC.

8. Enter **March 31, 2014** for Forecast CD-4 Completion.

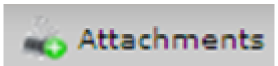
9. Enter the **Overall Assessment Narrative**:

   Recent reports indicate slippage in Cost and schedule

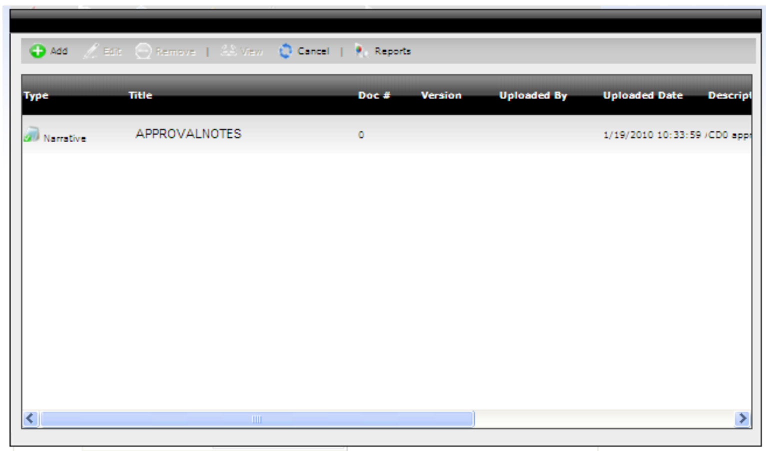
10. Click . You are returned to the View mode of the Monthly Status tab.

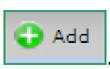
Exercise 6: Add an Attachment

1. Verify that the correct project (**your Assigned PARS Project ID**) is selected and that your Monthly Status (FPD, or Program, or OECM) is selected.

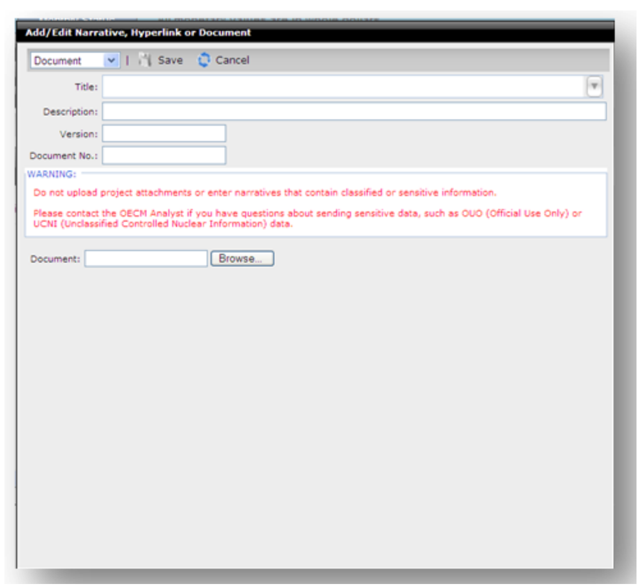
2. Click 

from the toolbar. The Attachment List window displays with the list of attachments pertaining to (submitted for) the Monthly Status tab.



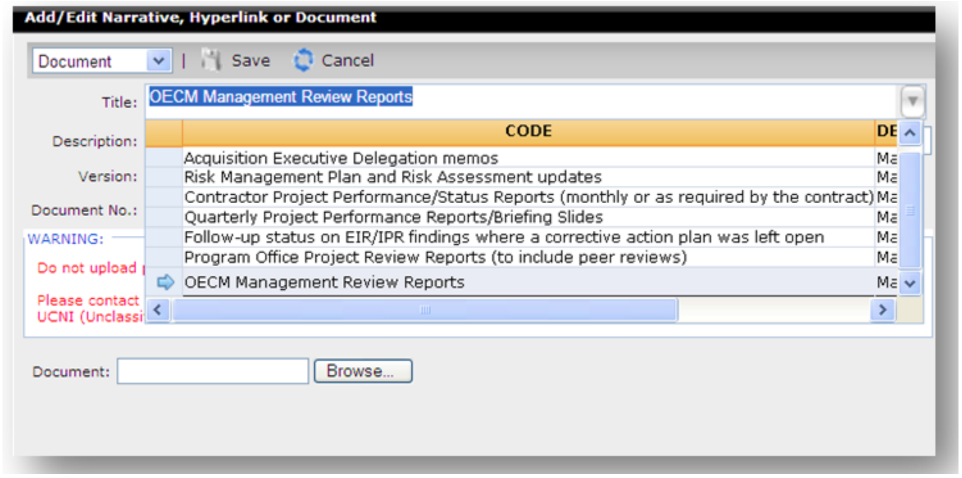
3. Click 

. The Add/Edit attachment window displays.



4. Since Document is selected by default, do not change the defaulted attachment type for this example.

5. Select ***any title*** from the dropdown list of titles.

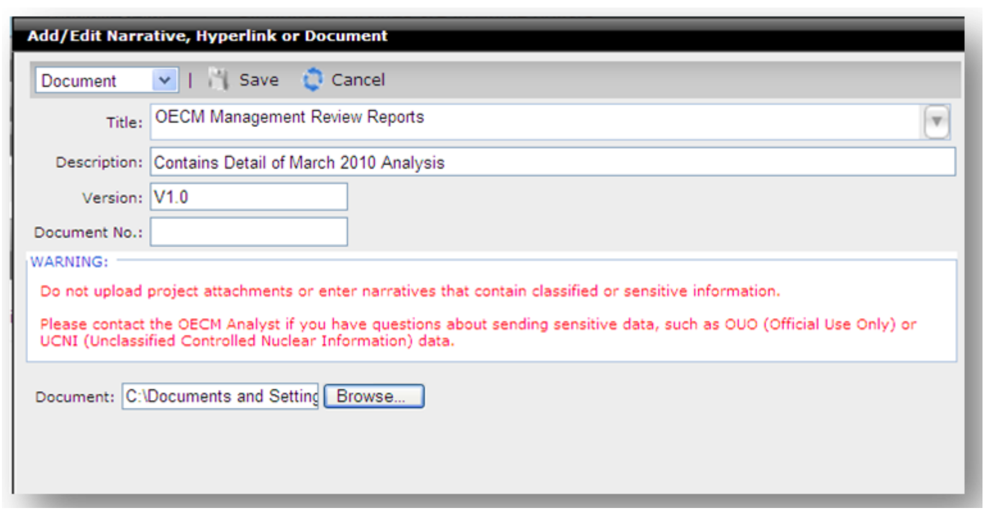


6. Enter attachment description

Contains Detail of March 2010 Analysis

7. Enter **V1.0** for Version.

8. **Browse** for a document. For class, select **Congressional Mandate** from the My Documents folder or any available WORD, PDF, or EXCEL document .



9. Click 

. The attachment is added to the list of attachments for this screen.

10. Click **Cancel** to exit the Attachments window.

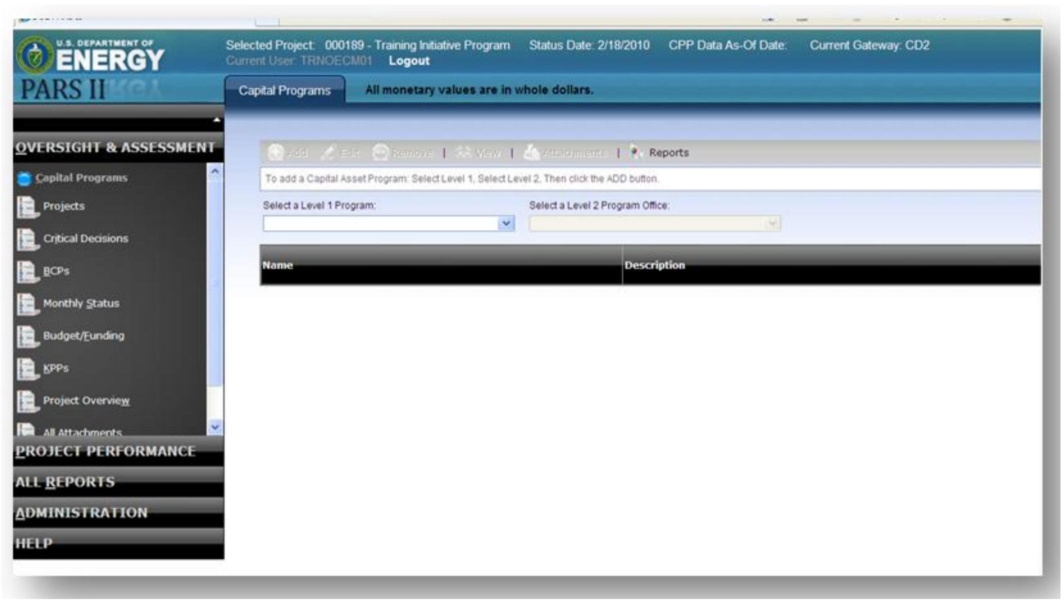
OA DATA ENTRY AND UPDATING

Initiate a Project in PARS II

A project must be placed under the hierarchy of a Capital Program. If the Capital Program does not yet exist, it must be created before the project can be entered.

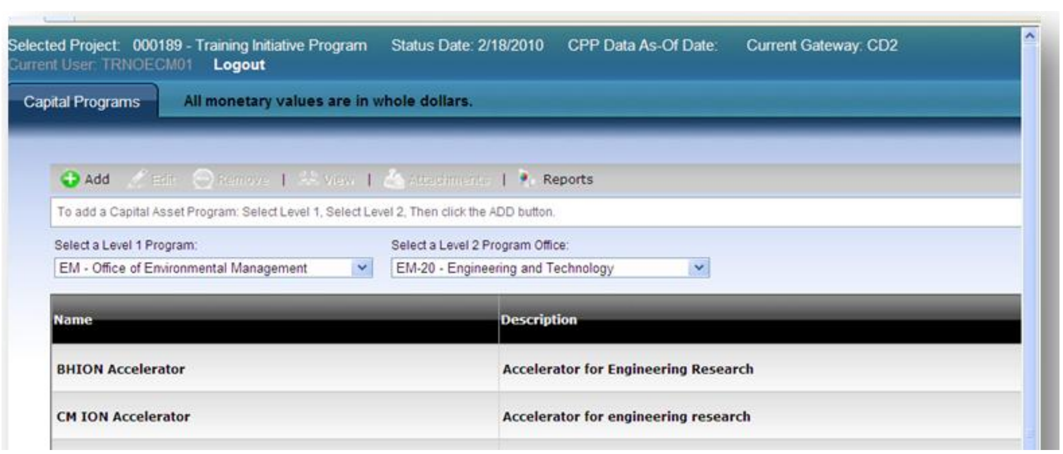
Exercise 7: Create a Capital Program

1) Select **Capital Programs** from the Navigation Bar. The Capital Programs tab displays.



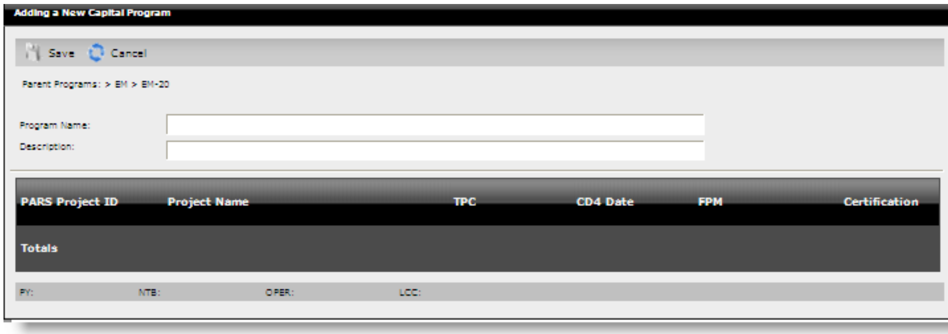
2) Select **EM** from the Level 1 Program dropdown.

3) Select **EM-20** from the Level 2 Program Office dropdown. Existing capital programs under the Level 1 and Level 2 categories, if any, are listed.



4) Click 

. The Adding a New Capital Program screen displays.

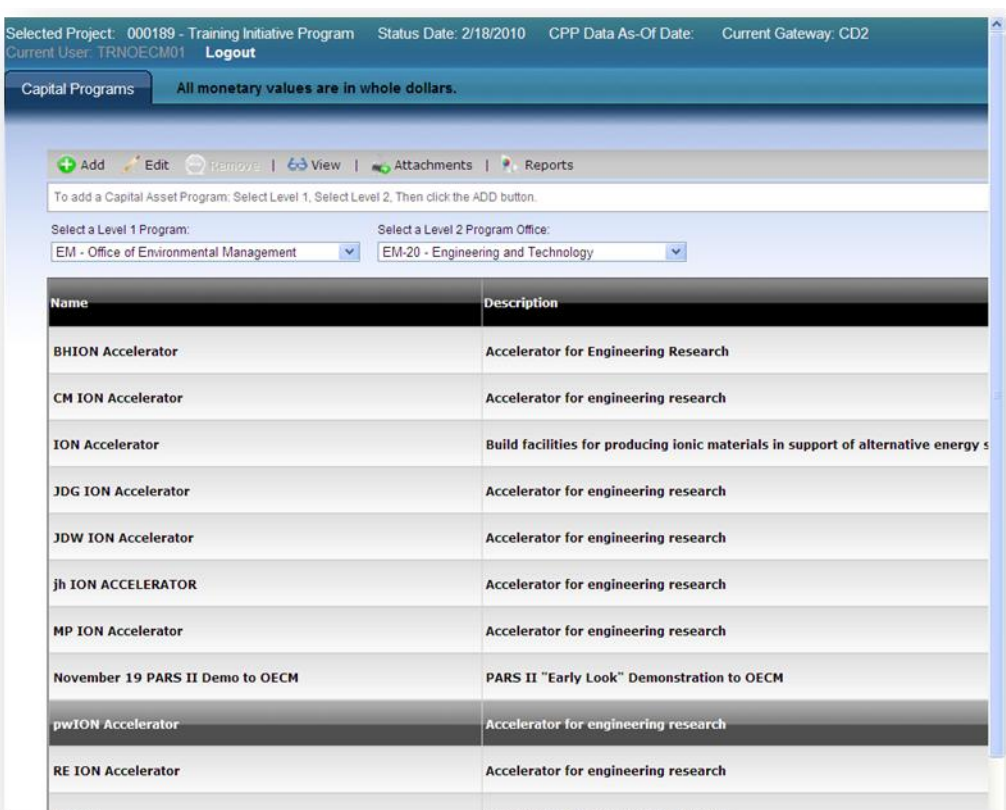


5) Enter ***xx* ION Accelerator** in the Program Name field where ***xx* = your initials**.

6) Enter **Accelerator for engineering research** in the Description field**.**

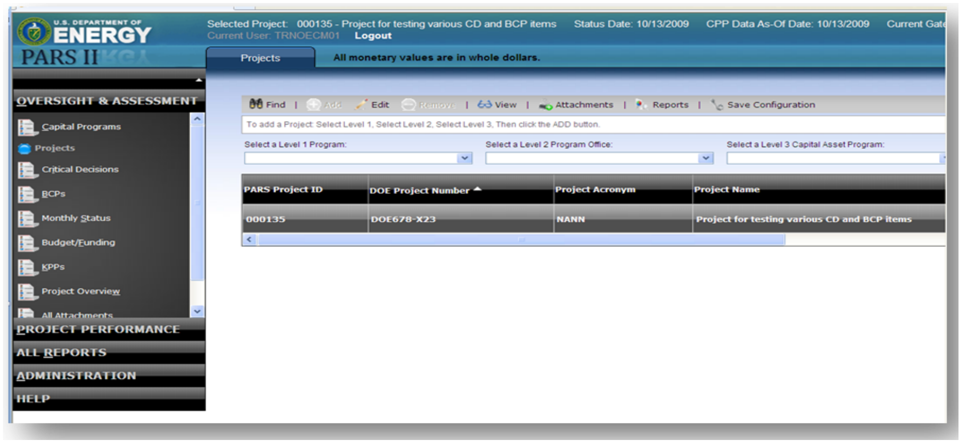
7) Click 

. You are returned to the Capital Programs tab and the new program appears on the list of capital programs for EM-20.



Exercise 8: Add a Project

1. Select **Projects** from the Navigation Bar. The Projects tab displays.



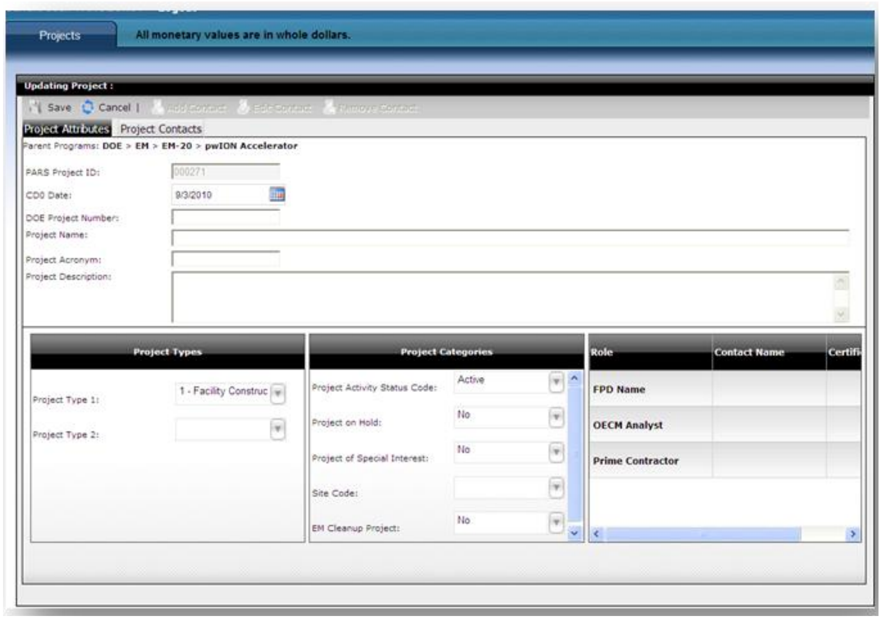
2. From the PROJECTS tab, select the 3 dropdown list categories for the new project.

   TIP: You must use the dropdown list method when adding a new project. This ensures that the project is placed under the appropriate hierarchy.

   a. **EM** for Level 1
   b. **EM-20** for Level 2
   c. ***xx* ION Accelerator** for Level 3. Typically, the Level 3 is the Capital Program recently added

3. Additional icons are activated and any existing projects for the selected categories are listed.

4. Click **ADD** to create a new project. The Updating Project screen displays with two tabs – Project Attributes and Project Contacts. The Project Attributes tab is the default active tab.



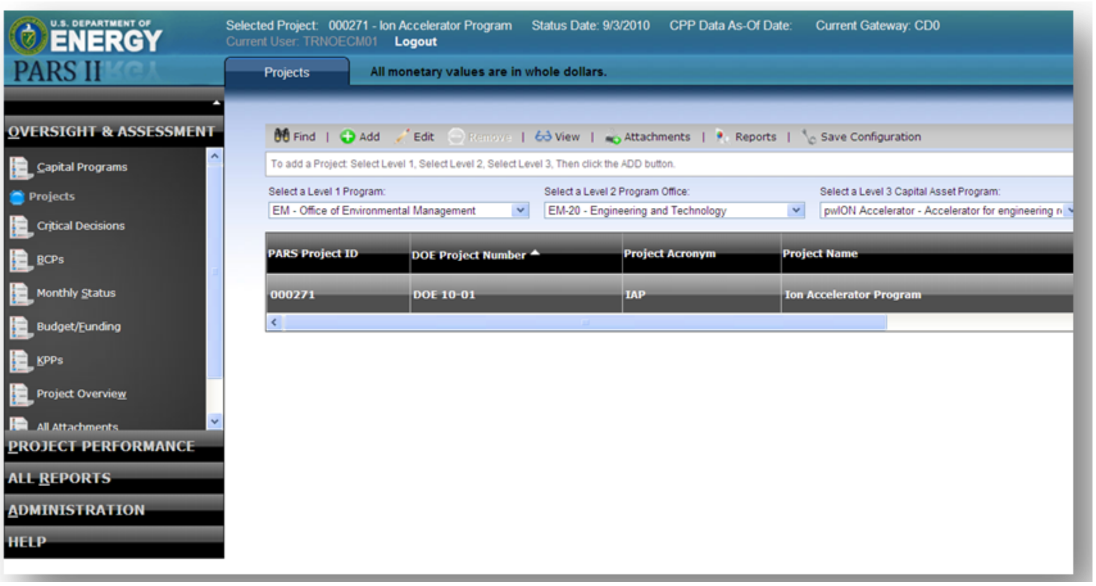
5. Enter Project Attributes information. Note that the PARS Project ID is automatically assigned and serves as the unique database identifier for the project.

   d. The **CD-0 date** defaults to today's date. Change it to **March 22, 2010**.
   e. Enter the DOE Project Number as **DOE 10-nn** where nn is the 2-digit number from your training UserID.
   f. Enter **Ion Accelerator Program** in the Project Name field.
   g. Enter **IAP** for the Project Acronym.
   h. Enter the following Project Description:

      Build facilities for linear accelerator research.

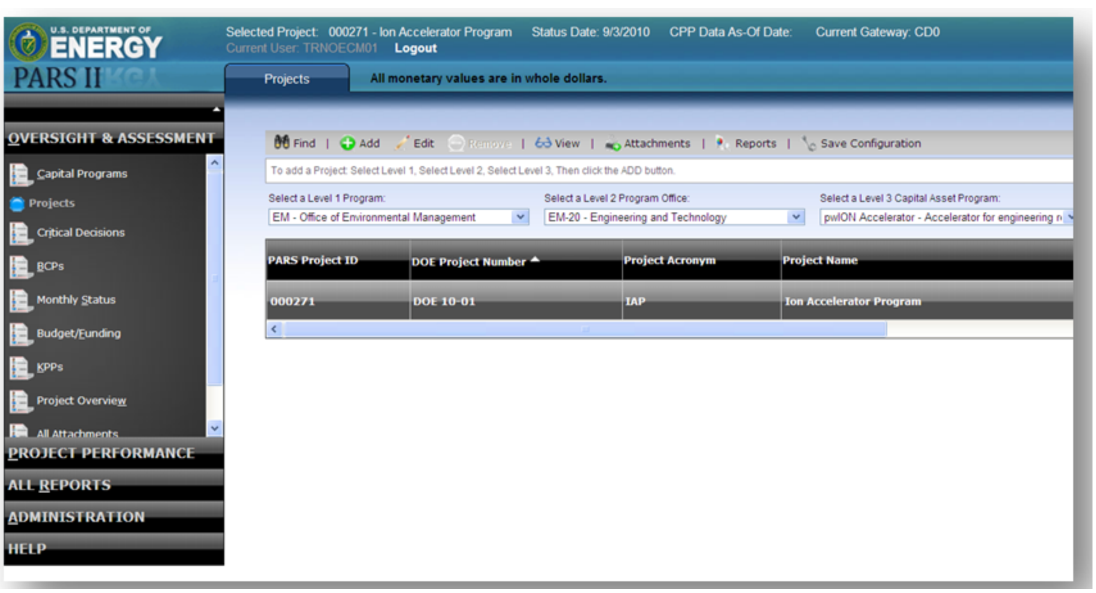
   i. Select **Restoration or Remediation** from the Project Type 1 dropdown.
   j. Select **Non-Nuclear** from the Project Type 2 dropdown.
   k. Keep the default values for the first three Project Categories.
   l. Select **ORNL Oak Ridge National Lab** for the site code.

6. Click **Save**. While it is not necessary to save before adding contacts to the project, it is recommended to do so. You are returned to the Projects list tab.

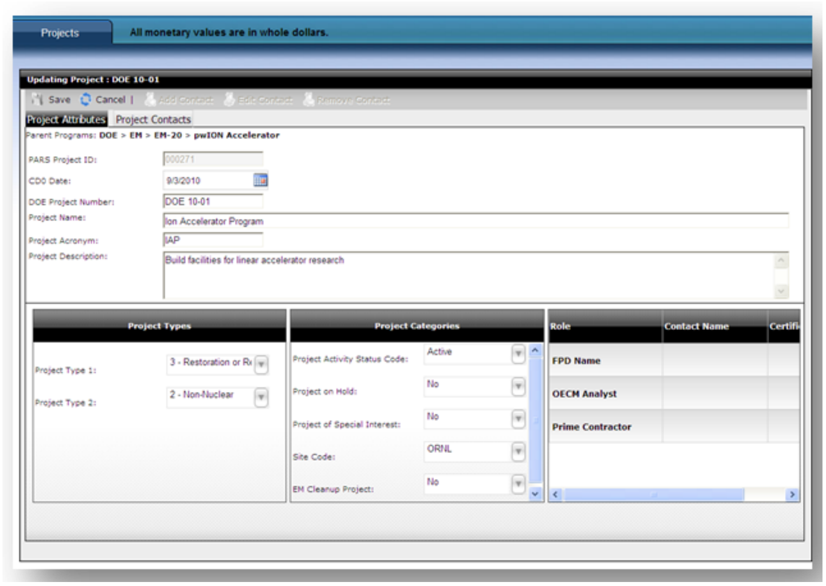


Edit Project Attributes

1. From the Projects tab, verify that the correct project is selected. In this case, it is the new one you created in the previous exercise -- **DOE 10-nn**.



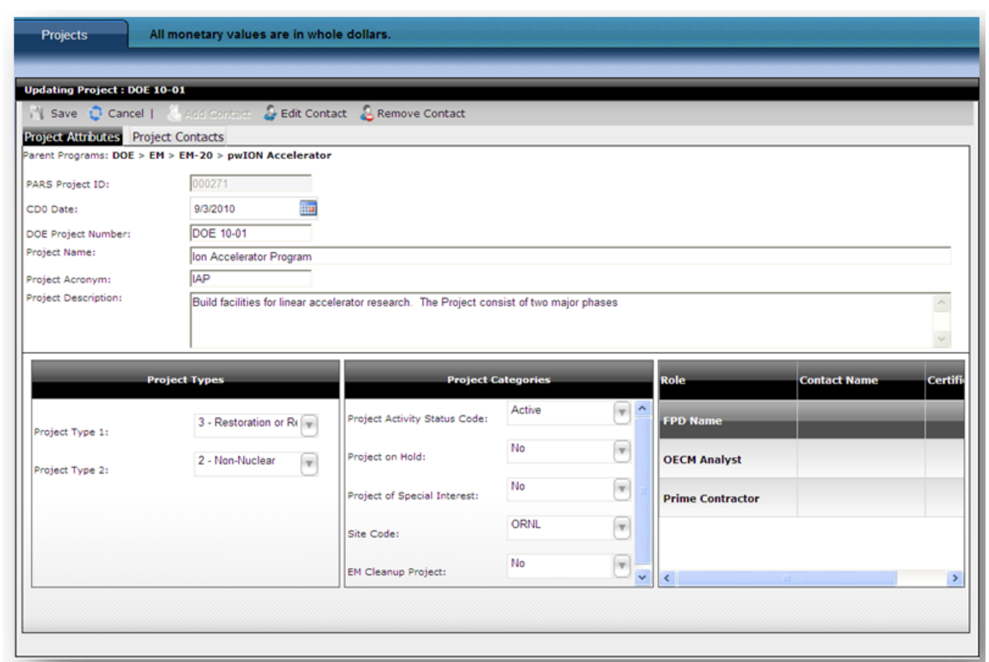
2. Click the **EDIT** icon. The Updating Project screen displays with two tabs – Project Attributes and Project Contacts. The Project Attributes tab is the default active tab.



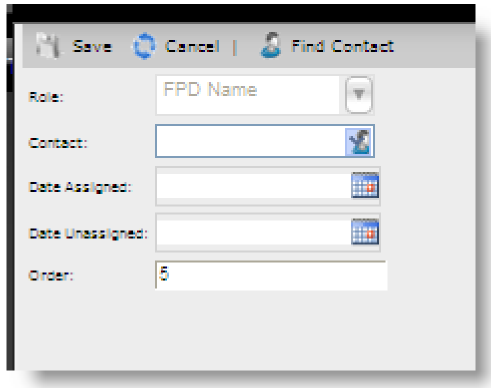
3. Add this sentence to the Project Description – **The project consists of two major phases**.

Select FPD, OECM, and Primary Contractor Contacts

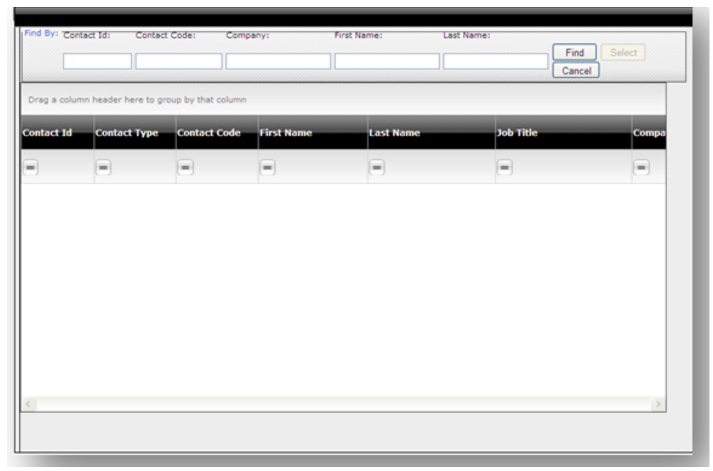
1. From the Project Attributes tab, click **FPD Name** in the lower right contacts list box. The contact icons become active.



2. Click **EDIT Contact** icon. The Contact pop-up box displays with default role of FPD Name.



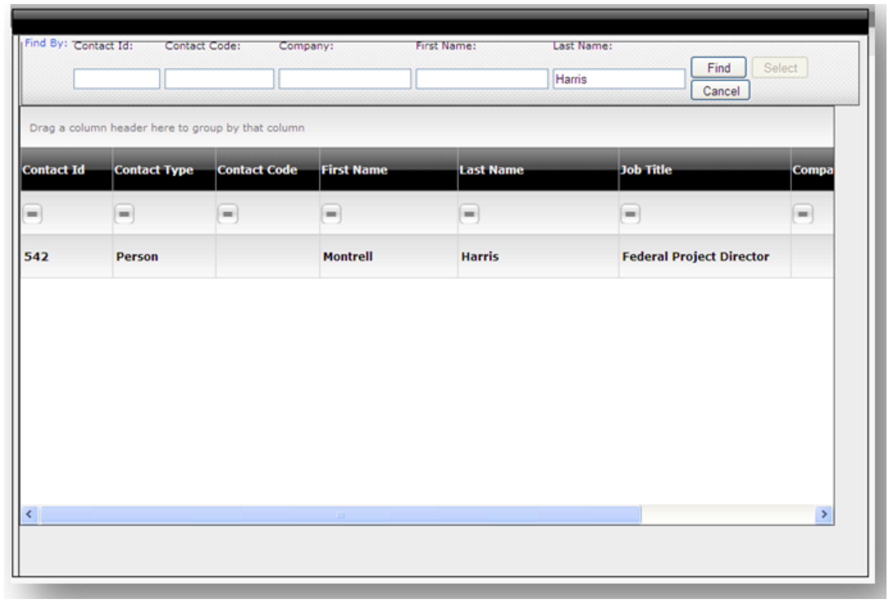
3. Click  on the Contact field. The Find Contact screen displays.



a. Enter **Harris** in the Last Name field.

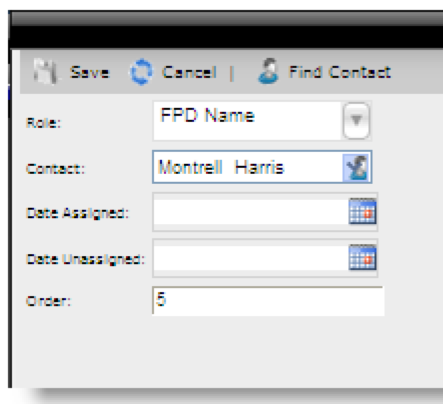
Only contacts that are listed in the PARS II Master Contact list can be selected. The Master Contacts list is maintained by OECM. To have an organization or person added to the PARS II Master Contact list, contact the PARS II Helpdesk or an OECM analyst.

b. Click **Find.** Wait until the search is complete.



c. Highlight the **Montrell Harris** entry

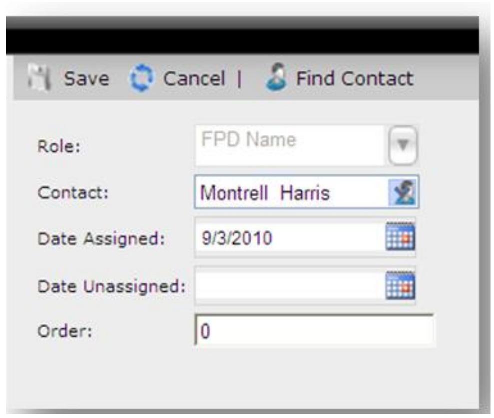
d. Click **SELECT**. You are returned to the add contacts screen with the selected contact name filled-in. If an error was made in your selection, you can return to the contact pop-up by clicking FIND Contact or the contact icon besides the name.



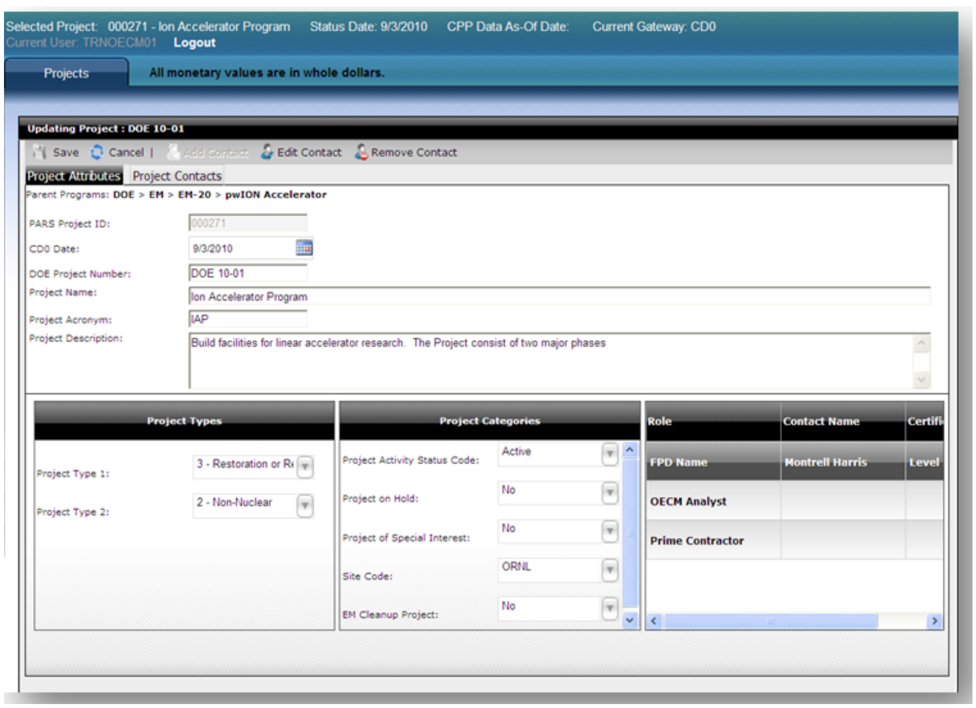
e. Select or type **Today's Date** as the Date Assigned.

TIP: the Date Unassigned is set when this contact is no longer the FPD for the project. It is never removed (unless it is a user entry error). This permits retention of history for the project contacts.

f. Enter **0** for the order number to ensure the FPD appears first in the list of contacts for the project.



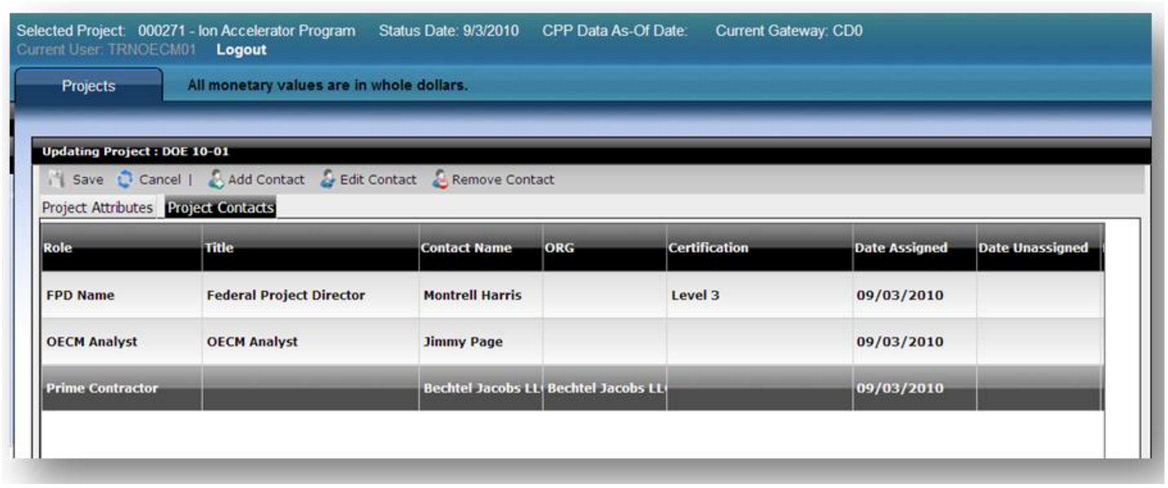
g. Click **Save**. You are returned to the Project Attributes tab. The FPD name is now listed in the Contacts box.



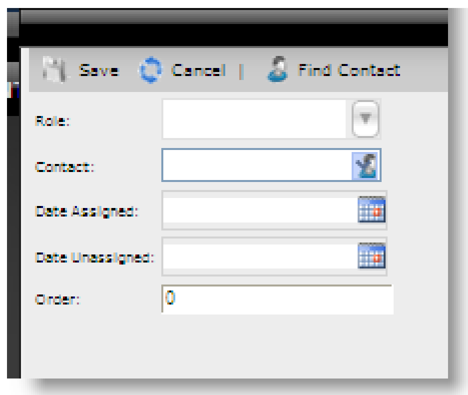
4. Repeat Steps 1 to 3 for the OECM analyst and Prime Contractor using two different contacts – Jimmy Page and Bechtel Jacobs LLC, and Order # 1 and 2, respectively.

Select Other Contacts

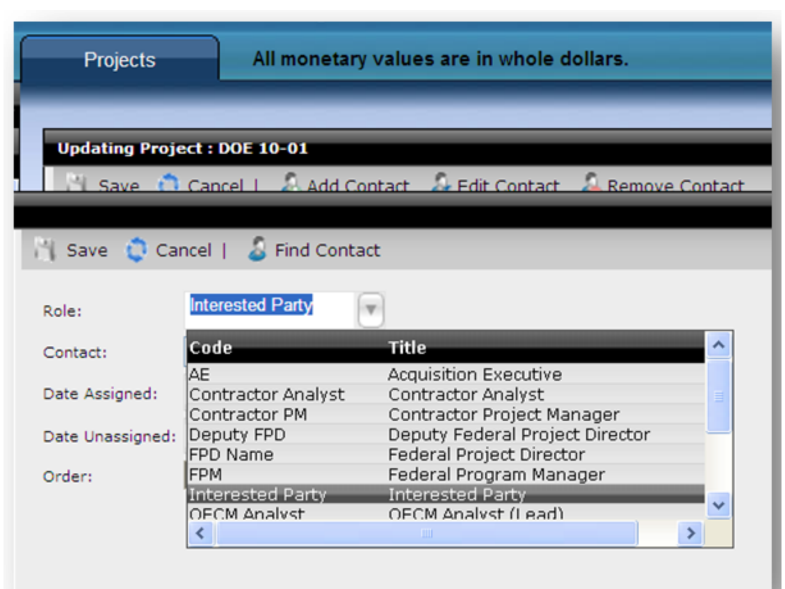
5. From the Project Attributes tab when Adding/Updating a project, **switch to the Project Contacts tab**.



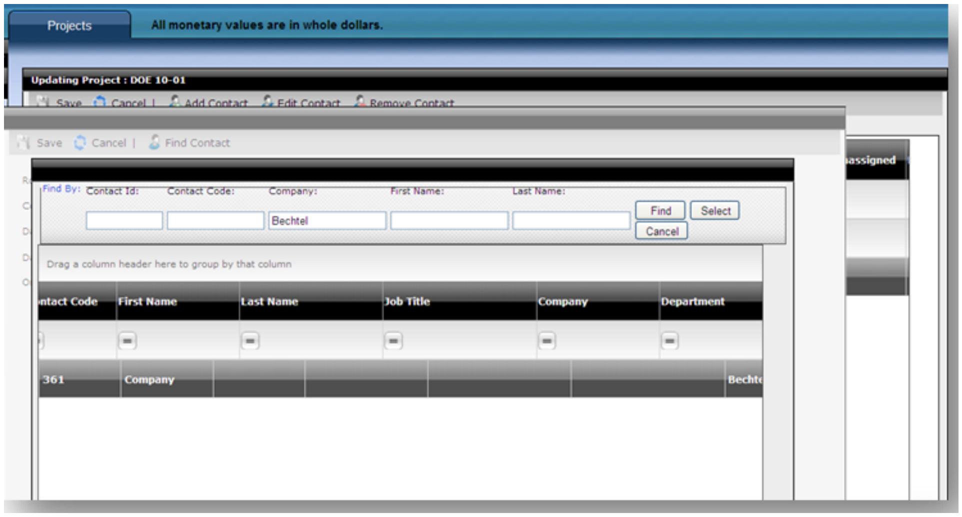
6. Click **ADD contact**. The Contact pop-up box displays with ***blank role or the last highlighted role.***



7. Select **Interested Party** from the Role dropdown list.



8. Click on the Contact field. The Find Contact screen displays.



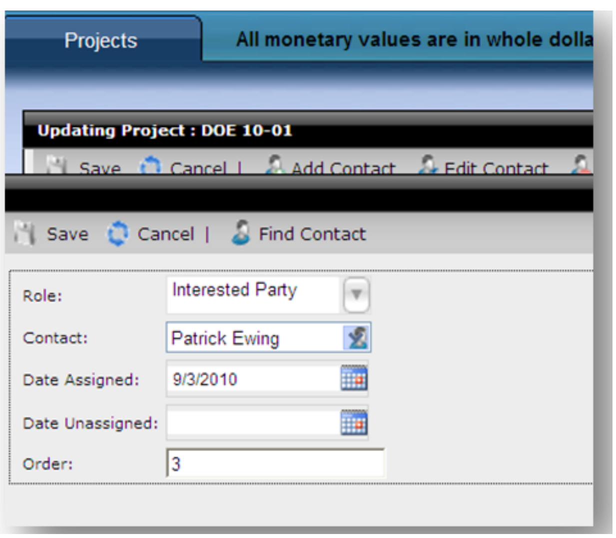
a. Enter **Ewing** (or the first few letters) in the Last Name field. Remember, only contacts that are pre-registered in PARS II can be selected. The contacts register is maintained by OECM.

TIP: When returning to the Find Contact screen, delete any prior search items.

b. Click **Find.** Wait until the search is complete.

c. Highlight **PATRICK EWING** entry

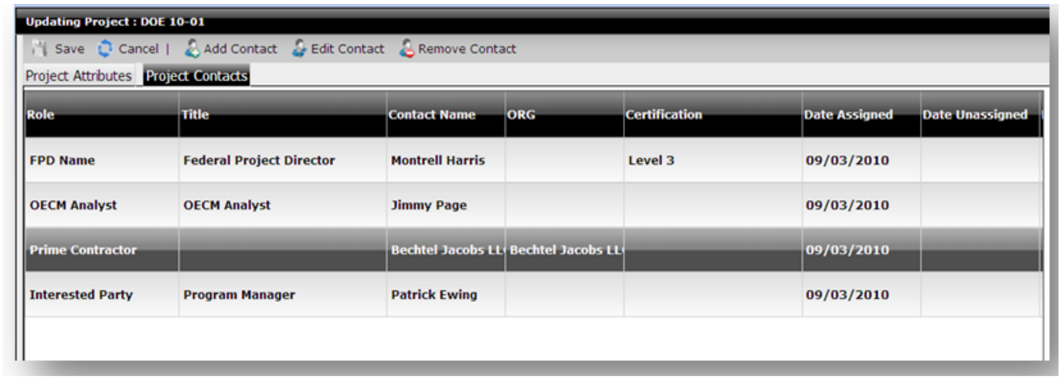
d. Click **SELECT**. You are returned to the add contacts screen with the selected name filled-in



e. Select **Today's Date** as the Date Assigned. Note: the Date Unassigned is set when this contact no longer has this role on the project. It is never removed (unless it is a user entry error). This permits retention of history for the project contacts.

f. Enter **3** for the order number.

g. Click **Save**. You are returned to the Project Contacts tab. Note: the Interested Party name is now listed in the Contacts box. You can add as many contacts as needed.



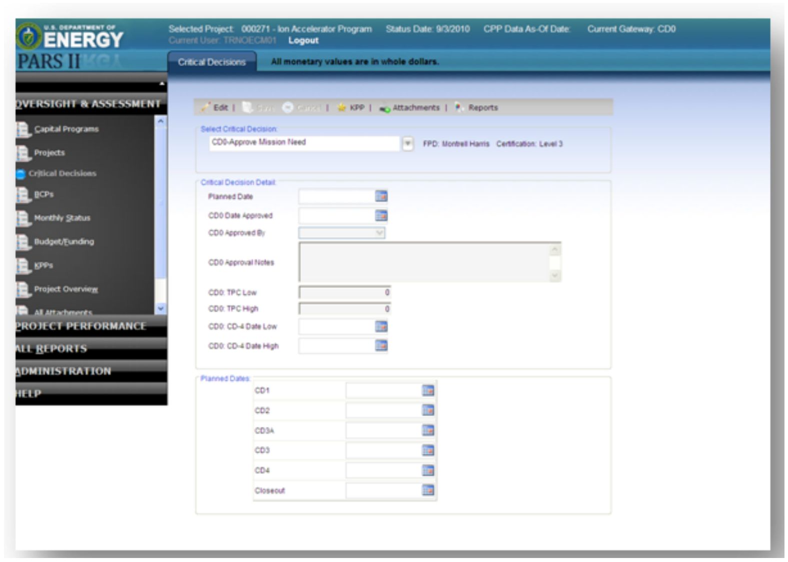
Role	Title	Contact Name	ORG	Certification	Date Assigned	Date Unassigned
FPD Name	Federal Project Director	Montrell Harris		Level 3	09/03/2010	
OECM Analyst	OECM Analyst	Jimmy Page			09/03/2010	
Prime Contractor		Bechtel Jacobs LL	Bechtel Jacobs LL		09/03/2010	
Interested Party	Program Manager	Patrick Ewing			09/03/2010	

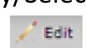
9. Click **SAVE** to save and close the Updating Project screen. You are returned to the projects tab.

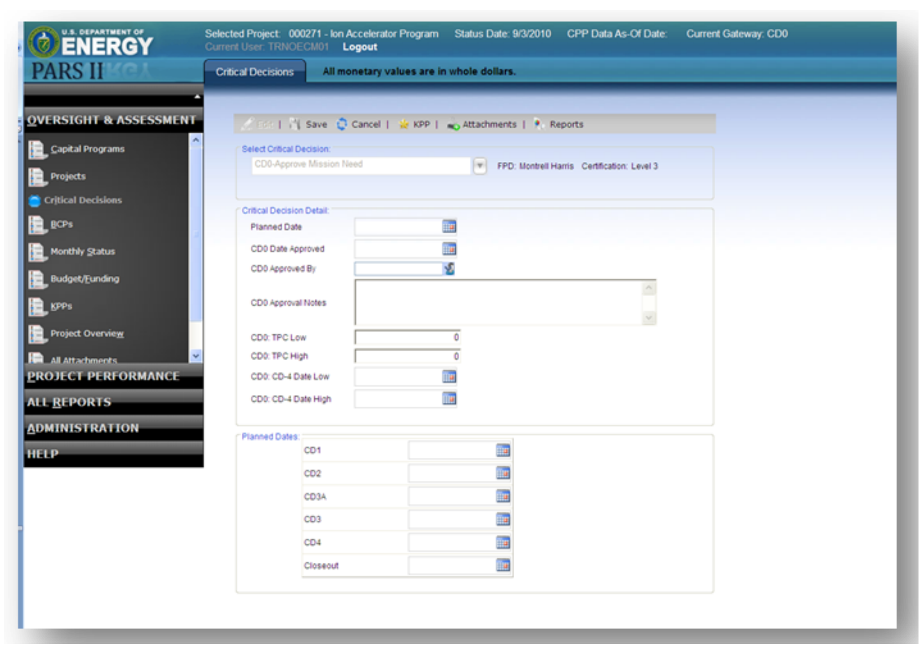
Exercise 9: Enter Critical Decision (CD-0)

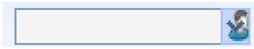
1. Verify that the project you created in class is selected.

2. Select **Critical Decisions** from the Navigation bar. The Critical Decisions tab displays with a default CD level of the next CD to be entered, in this case, CD0.



3. Verify/Select from the first dropdown list the CD level that you want to enter/update, in this case, **CD0.**
4. Click  . The data fields and additional icons are activated for selection.

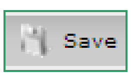


5. Enter CD-0 Detail.
    a. Enter **01/04/2010** as the planned date. The year can be entered as 2 or 4 digits.
    b. Enter **March 22, 2010** as the CD0 Approved Date – the same date entered on the Project Attributes screen.
    c. Search for and select **Alex Johnson** as the CD0 Approved By using the Address Book icon .
    d. Enter CD0 Approval Notes.

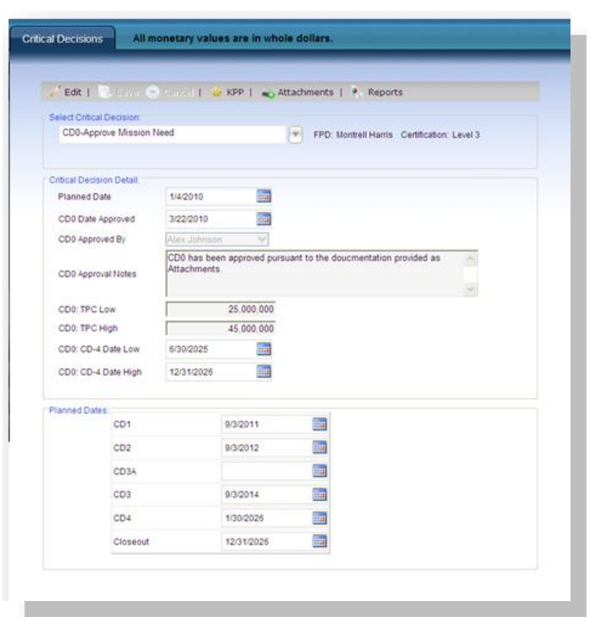
        CD0 has been approved pursuant to the documentation provided as Attachments.
    e. Enter **25,000,000** for TPC Low.

        TIP: Commas can be typed, but the system ignores them and inserts commas where appropriate.
    f. Enter **45,000,000** for TPC High.
    g. Enter **06/30/2025** as the CD4 Date Low.
    h. Enter **12/31/2026** as the CD4 Date High.

6. Enter Planned Dates for reaching other CD milestones. Note: All of the Planned dates are editable no matter which Critical Decision is selected from the drop-down list.
    a. Enter ***1 year from today*** as the CD1 date.
    b. Enter ***2 years from today*** as the CD2 date.
    c. Skip CD-3A. Some projects do not use this CD level.
    d. Enter ***4 years from today*** as the CD3 date.
    e. Enter **01/30/2026** as the CD4 date.
    f. Enter 1**2/31/2026** as the Closeout date.

7. Click 

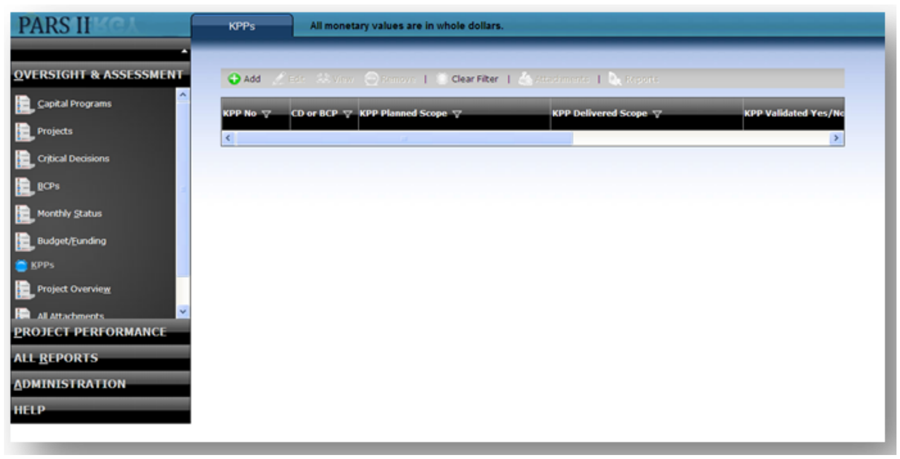
. You are now in View-only mode of the CD tab. Click EDIT if you need to make corrections.



Exercise 10: Enter Key Performance Parameter (KPP)

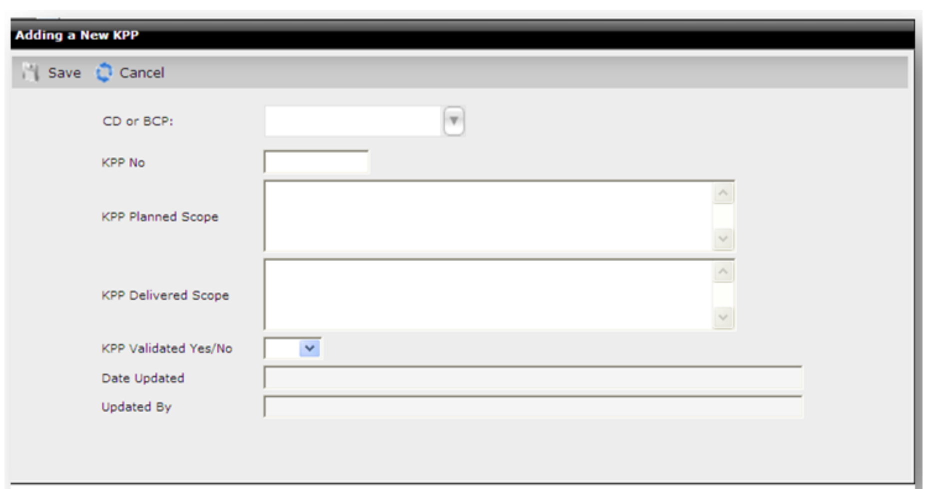
1. Verify that the correct project (the one you created in class) is selected.

2. Select **KPPs** from the Navigation bar. The KPPs tab displays. The list of KPPs is empty since you are entering the first KPP for the selected project.



3. Click 

. The Adding a New KPP screen displays.



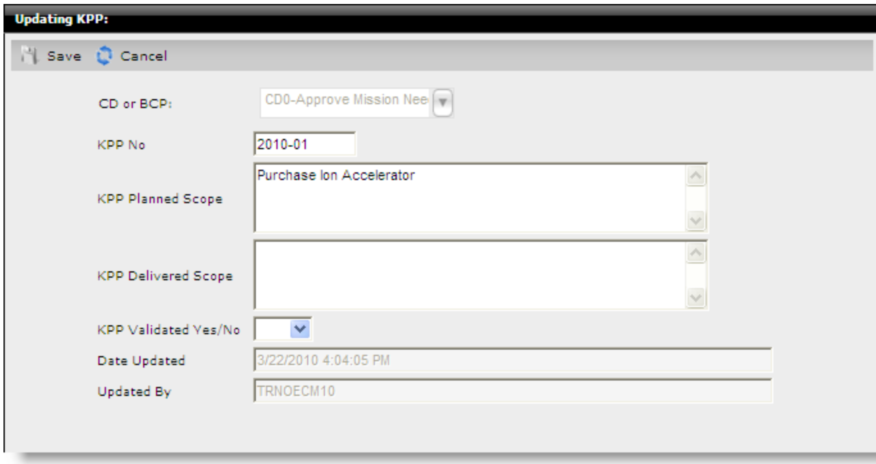
4. Select **CD0 Approve Mission Need** from the CD or BCP dropdown list.

5. Enter **2010-01** as the KPP No.

6. Enter KPP Planned Scope:

   Order ION accelerator

7. Delivered scope and KPP Validated are left blank – not applicable when KPP is initiated for a new project. This KPP will be updated with that information when CD-4 occurs.



8. When done, click . You are returned to the KPPs tab. The new KPP displays in the list of KPPs.

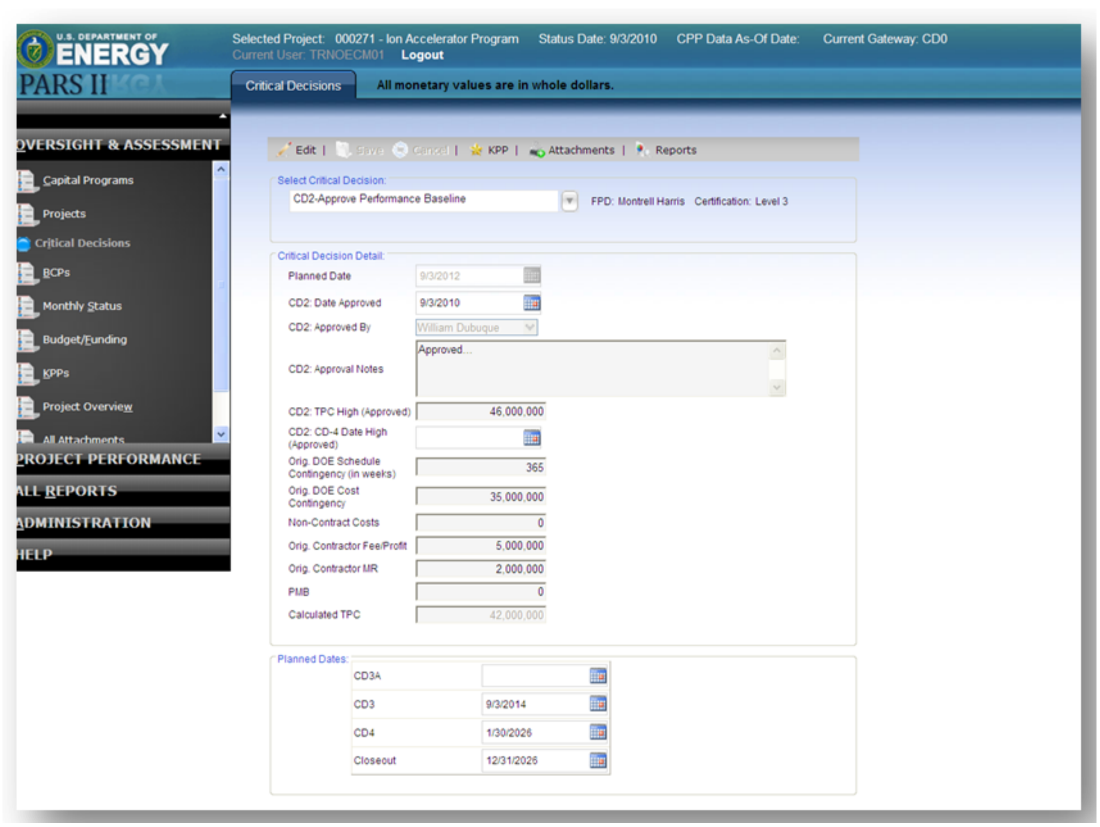
On Your Own Workshop

For the project you created in class,

1. **Enter CD-2 data**. Note: Numbers entered at CD-2 constitute the Performance Baseline.
    a. Enter today's date as the CD-2 approved date.
    b. Select a different person for Approved by.
    c. Enter Approval notes.
    d. Add 1 million dollars to the original TPC low and high.
    e. Enter a few additional data fields that are part of CD-2.
    f. Planned Dates remain the same as those entered at CD-0.

TIP: Don't forget to save before clicking on the KPP link.

2. Click the KPP icon and enter a KPP for CD-2.

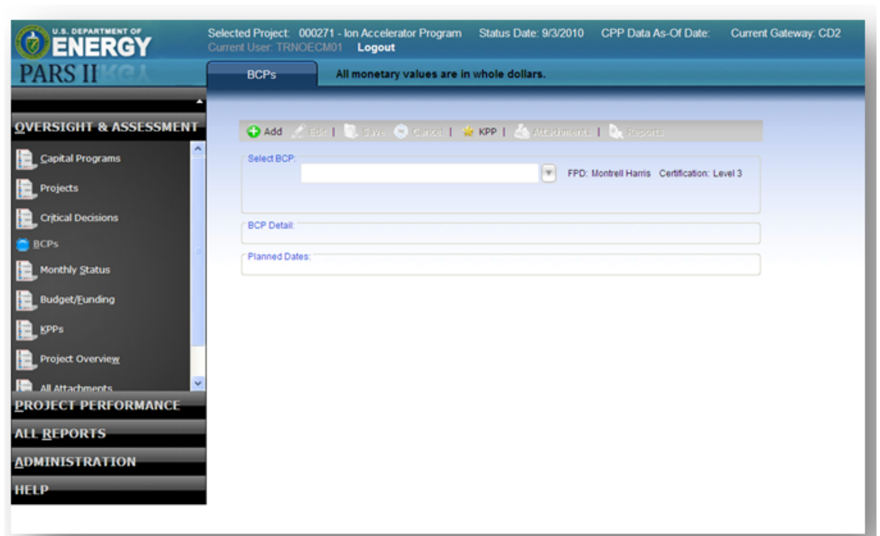


PERIODIC UPDATES OF OTHER OA PROJECT DATA

Exercise 11: Enter Baseline Change Proposal (BCP)

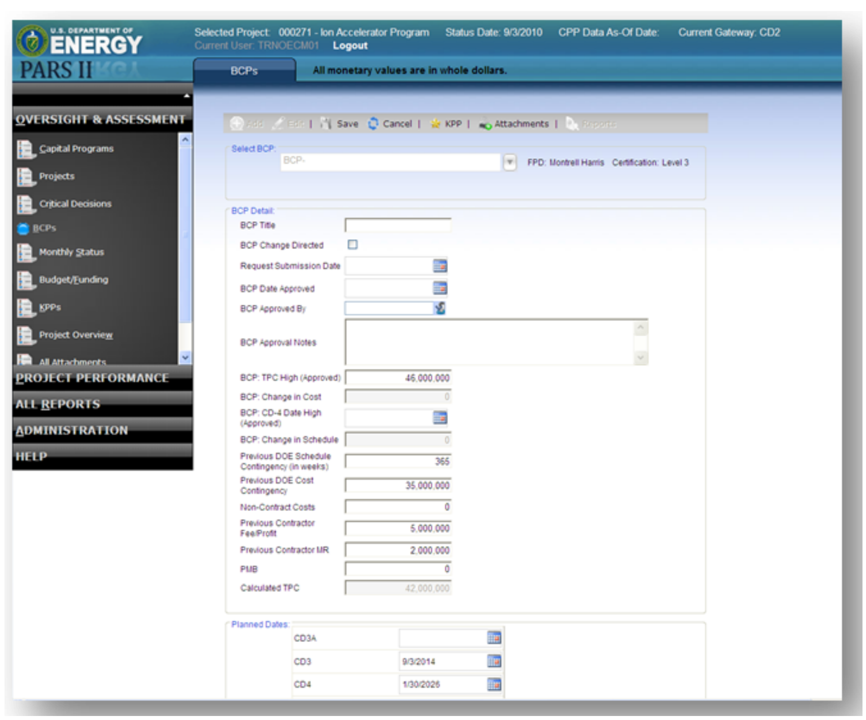
1. Verify that the correct project (the one created in Ex. 10) is selected.

2. Select **BCPs** from the Navigation Bar. The BCPs tab displays.



3. Click 

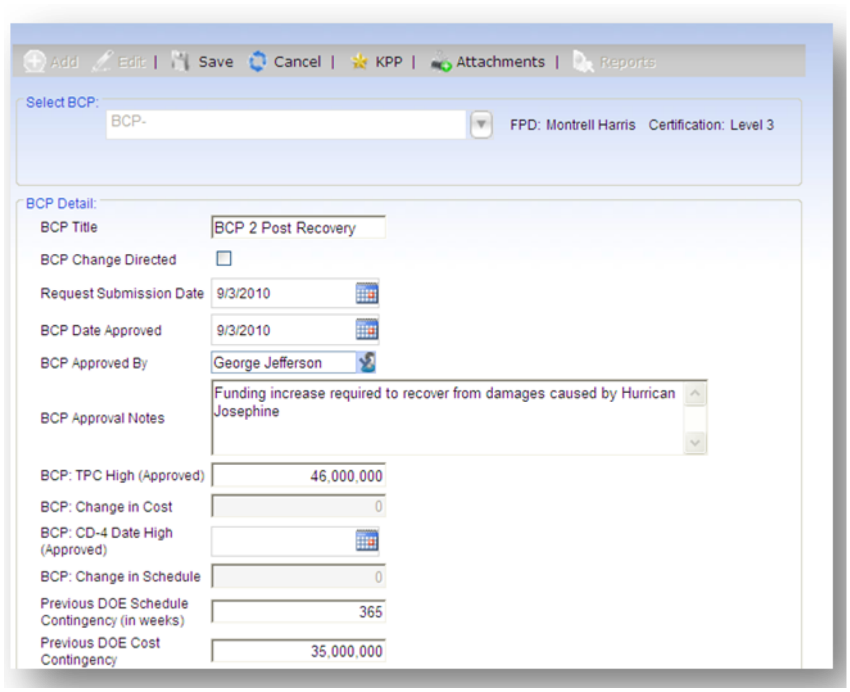
. The Adding a New BCP screen displays. It is pre-populated with the current Baseline, in this case, the data entered for CD-2.



4. Enter **BCP 2 Post Recovery** for BCP Title.

5. Enter Dollar changes – the first click highlights <u>entire value</u> which will be replaced as you type. A second click before typing gives you <u>digit-by-digit</u> control. Grayed boxes are calculated values.

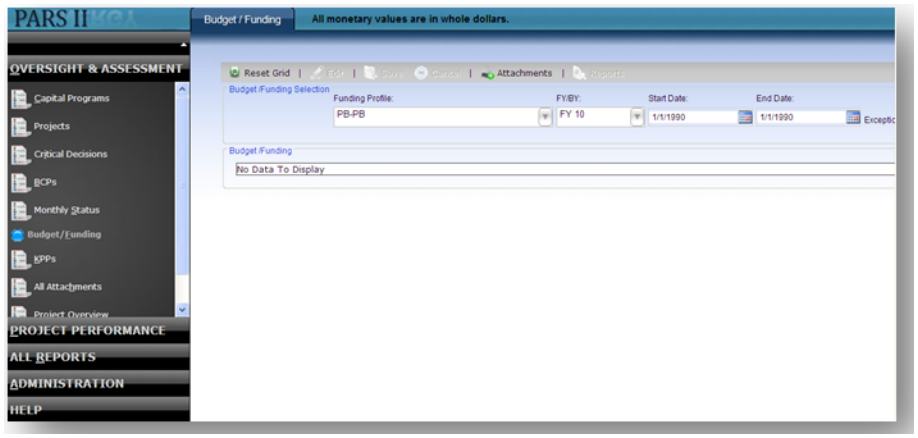
6. Click .



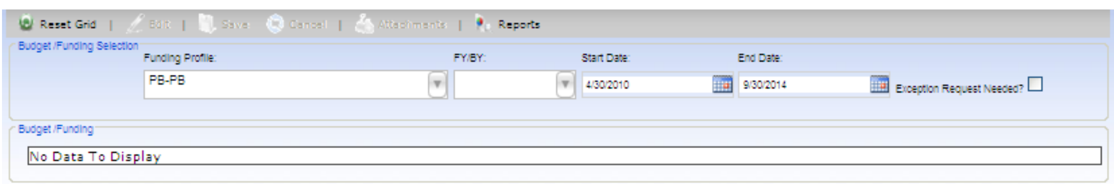
Exercise 12: Enter Budget/Funding Profile

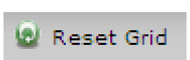
1. Verify that the correct project (the one created in Ex. 10) is selected.

1. Select **Budget/Funding** from the Navigation Bar. The Budget/Funding tab displays.

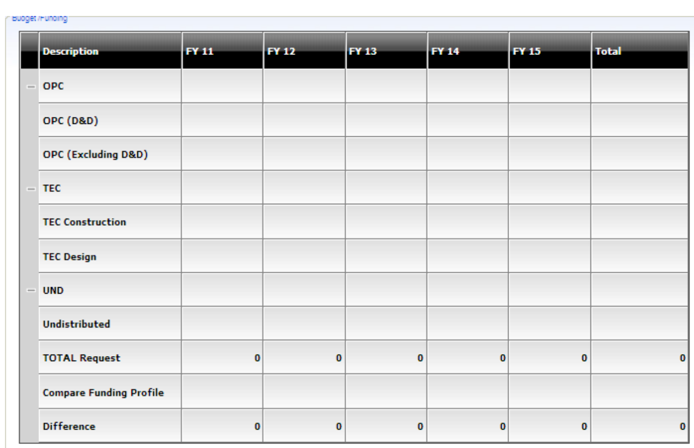


2. Enter **4/30/10** for the ***Start date*** and **9/30/14** for the ***End date***. Note: For class purposes, we will not do the full project duration. The Reset Grid icon activates.



3. Click 

. The funding table displays, in view-only mode, with columns for each fiscal year from the Start Date entered to the End Date entered .



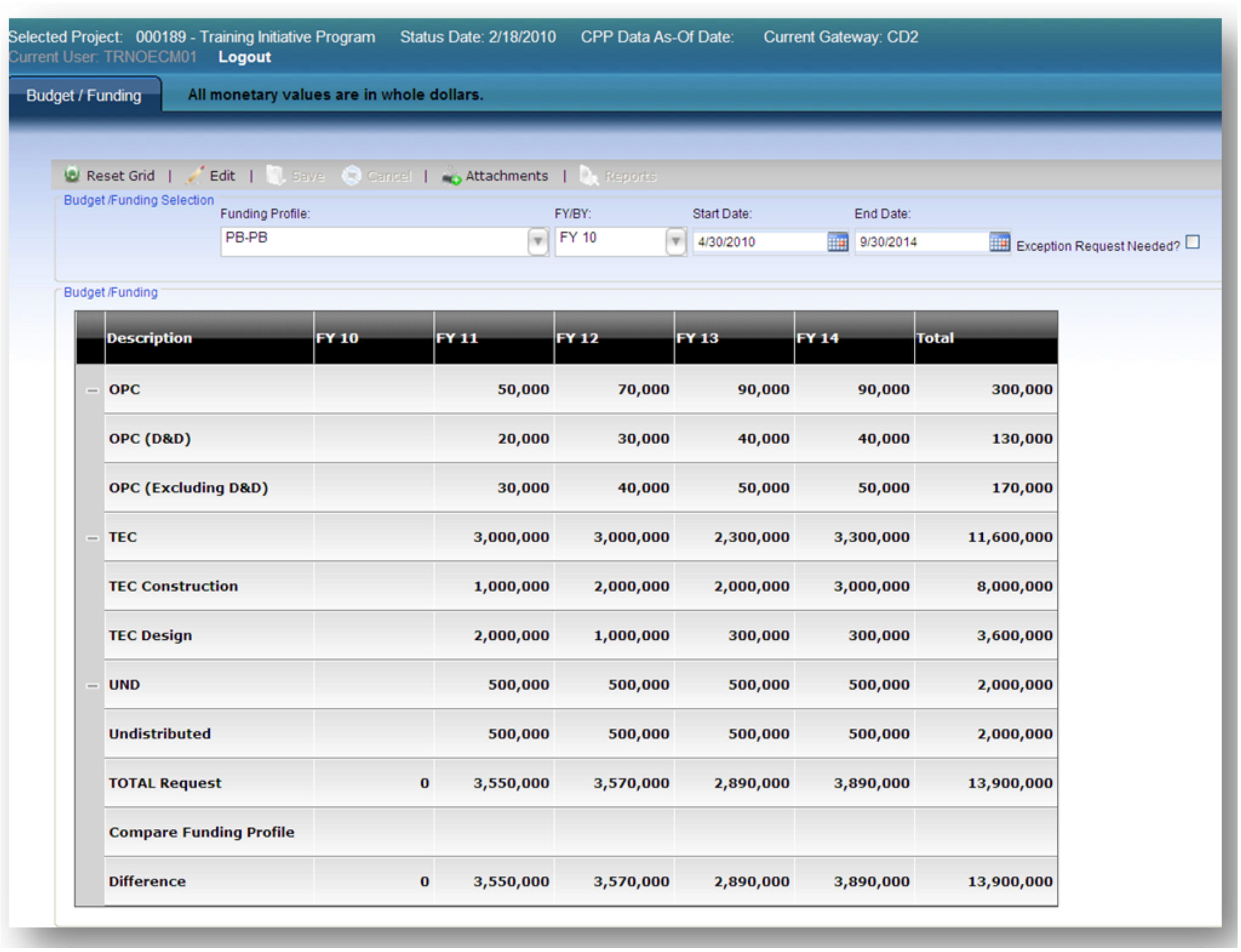
Description	FY 11	FY 12	FY 13	FY 14	FY 15	Total
OPC						
OPC (D&D)						
OPC (Excluding D&D)						
TEC						
TEC Construction						
TEC Design						
UND						
Undistributed						
TOTAL Request	0	0	0	0	0	0
Compare Funding Profile						
Difference	0	0	0	0	0	0

4. Click Edit to begin entering funding values.

5. Click **+** sign to expand detail for OPC, TEC, and UND, if needed. Those lines are calculated totals.

6. **Double-click 1st value cell** - OPC (D & D), FY11 and enter **whole dollar value** for that cell. For class, you can use any values. Repeat this for several cells.

7. Click Save frequently. After a Save, click Edit to continue entering/editing values.



Description	FY 10	FY 11	FY 12	FY 13	FY 14	Total
OPC		50,000	70,000	90,000	90,000	300,000
OPC (D&D)		20,000	30,000	40,000	40,000	130,000
OPC (Excluding D&D)		30,000	40,000	50,000	50,000	170,000
TEC		3,000,000	3,000,000	2,300,000	3,300,000	11,600,000
TEC Construction		1,000,000	2,000,000	2,000,000	3,000,000	8,000,000
TEC Design		2,000,000	1,000,000	300,000	300,000	3,600,000
UND		500,000	500,000	500,000	500,000	2,000,000
Undistributed		500,000	500,000	500,000	500,000	2,000,000
TOTAL Request	0	3,550,000	3,570,000	2,890,000	3,890,000	13,900,000
Compare Funding Profile						
Difference	0	3,550,000	3,570,000	2,890,000	3,890,000	13,900,000

8. When done, do a final Save.

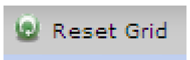
Compare Budget/Funding Profiles

1. Find and select **PARS Project ID** 189.

2. Select **Budget/Funding** from the Navigation Bar. Funding Profile criteria must be entered in order to display data.

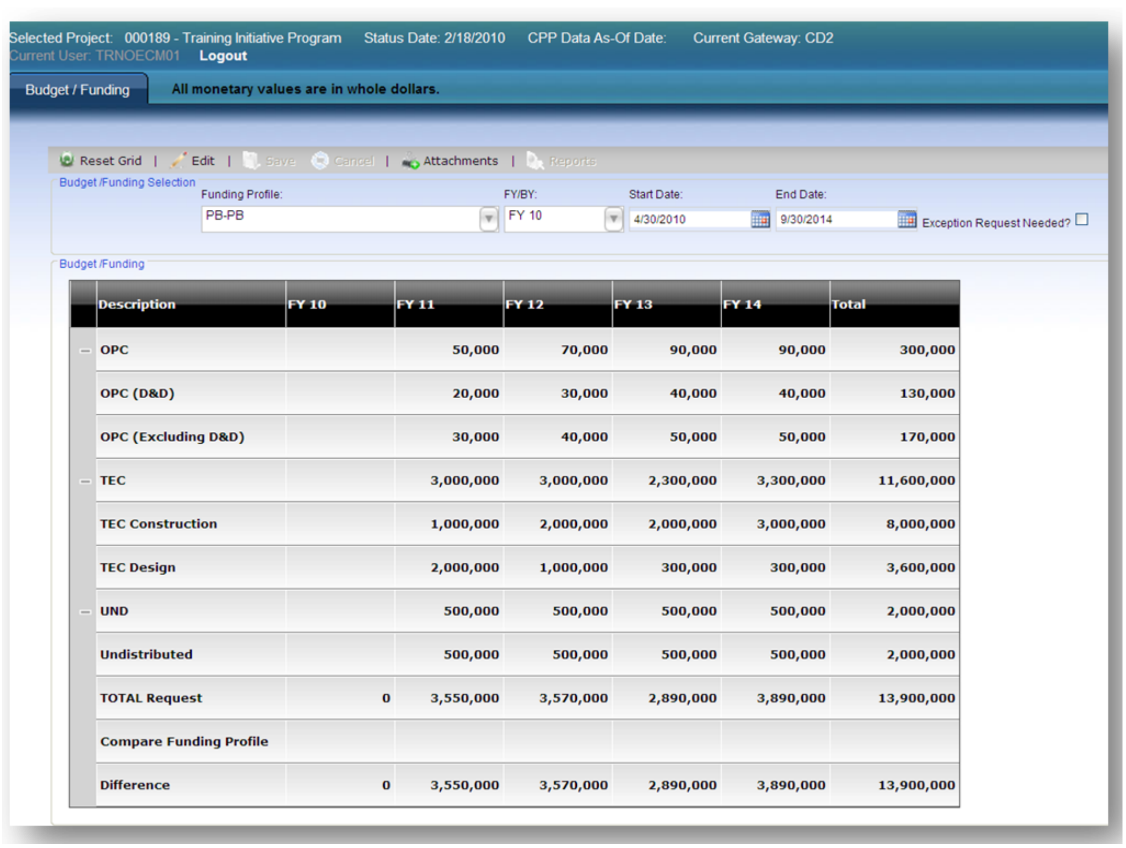
    a. Verify or select PB-PB Funding profile.

    b. Enter **4/30/10** for the ***Start date*** and **9/30/14** for the ***End date***.

3. Click 

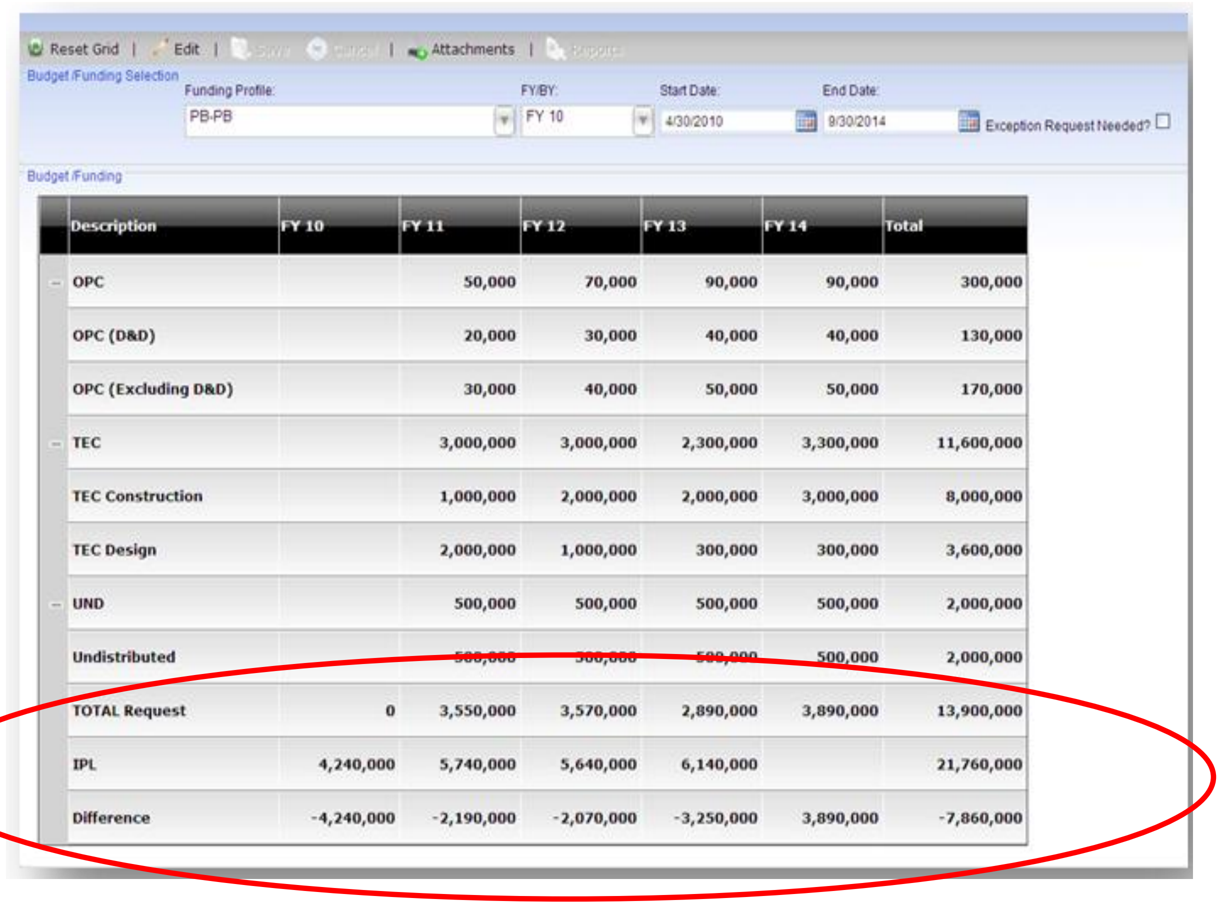
. The funding table displays, in view-only mode, with columns for each fiscal year from the Start Date entered to the End Date entered.

    TIP: You must Reset Grid each time that you change one or more of the criteria selections.



Description	FY 10	FY 11	FY 12	FY 13	FY 14	Total
OPC		50,000	70,000	90,000	90,000	300,000
OPC (D&D)		20,000	30,000	40,000	40,000	130,000
OPC (Excluding D&D)		30,000	40,000	50,000	50,000	170,000
TEC		3,000,000	3,000,000	2,300,000	3,300,000	11,600,000
TEC Construction		1,000,000	2,000,000	2,000,000	3,000,000	8,000,000
TEC Design		2,000,000	1,000,000	300,000	300,000	3,600,000
UND		500,000	500,000	500,000	500,000	2,000,000
Undistributed		500,000	500,000	500,000	500,000	2,000,000
TOTAL Request	0	3,550,000	3,570,000	2,890,000	3,890,000	13,900,000
Compare Funding Profile						
Difference	0	3,550,000	3,570,000	2,890,000	3,890,000	13,900,000

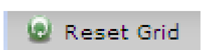
4. **Double-click the "Compare Funding Profiles"** cell and select the **IPL** profile from the drop-down list to use for comparison against the current profile. PARS II automatically calculates the difference between the Total Request of the two profiles.



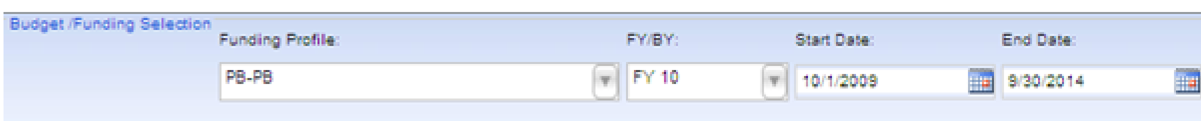
Description	FY 10	FY 11	FY 12	FY 13	FY 14	Total
OPC		50,000	70,000	90,000	90,000	300,000
OPC (D&D)		20,000	30,000	40,000	40,000	130,000
OPC (Excluding D&D)		30,000	40,000	50,000	50,000	170,000
TEC		3,000,000	3,000,000	2,300,000	3,300,000	11,600,000
TEC Construction		1,000,000	2,000,000	2,000,000	3,000,000	8,000,000
TEC Design		2,000,000	1,000,000	300,000	300,000	3,600,000
UND		500,000	500,000	500,000	500,000	2,000,000
Undistributed		500,000	500,000	500,000	500,000	2,000,000
TOTAL Request	0	3,550,000	3,570,000	2,890,000	3,890,000	13,900,000
IPL	4,240,000	5,740,000	5,640,000	6,140,000		21,760,000
Difference	-4,240,000	-2,190,000	-2,070,000	-3,250,000	3,890,000	-7,860,000

Compare Funding Profiles

5. View the Budget/Funding data.

Reminder: Click 

after any change in the criteria for the budget/funding table.



Budget/Funding Criteria Selections

Reports for Oversight and Assessment

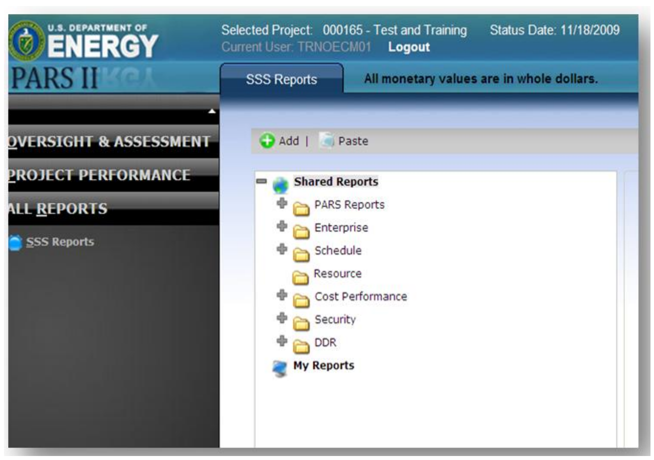
Exercise 13: Generate Standard OA Reports

1. Verify or FIND and SELECT **PARS Project ID 165**.

   TIP: Some of the OA reports pertain to a specific project. Check that you have selected the appropriate project on which to report.

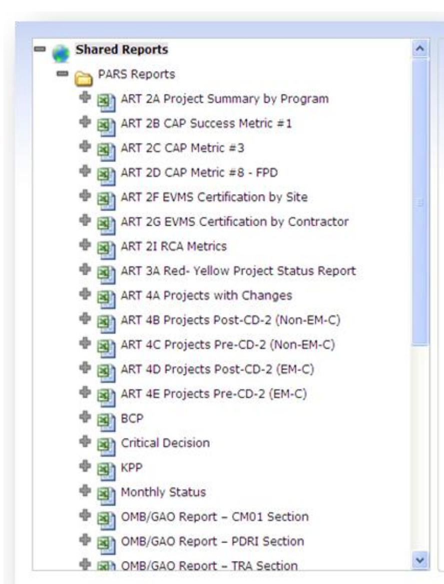
2. Select **ALL REPORTS** from the Navigation Bar.

3. Select **SSS Reports** under All Reports on the Navigation Bar. The SSS Reports tab displays with Report folders.



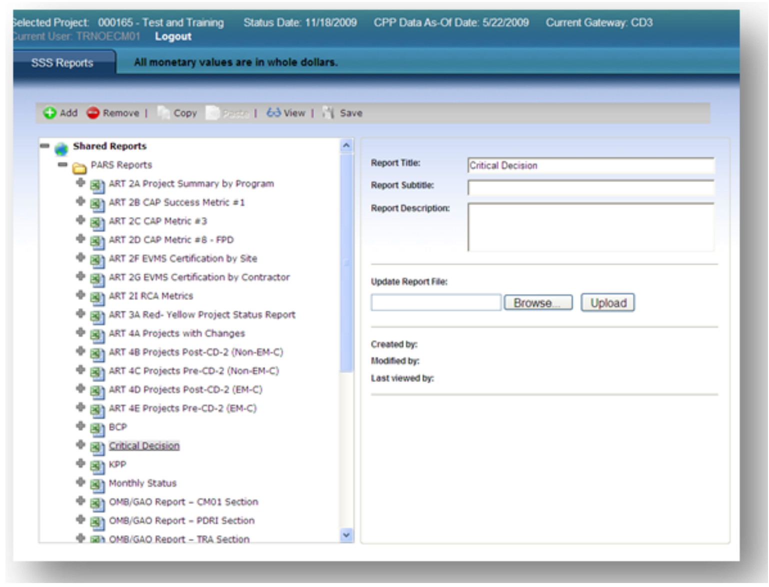
Reports - Sort, Select, Summarize – SSS Tab

4. Click to expand the **PARS Reports** folder.



List of PARS Reports

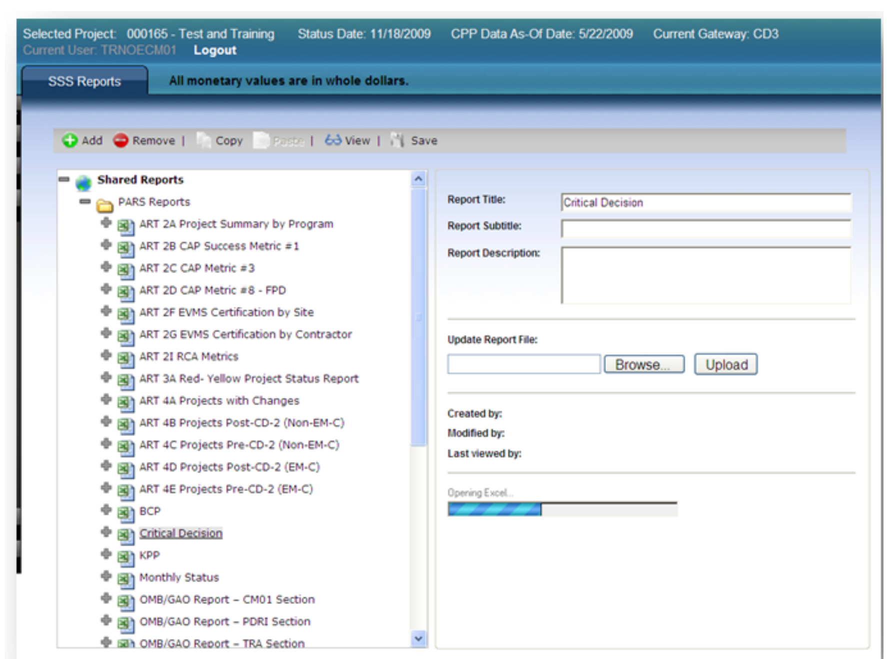
5. Click on the **Critical Decision** report title. The Report Properties window displays on the right-hand side of the screen.



Report Properties

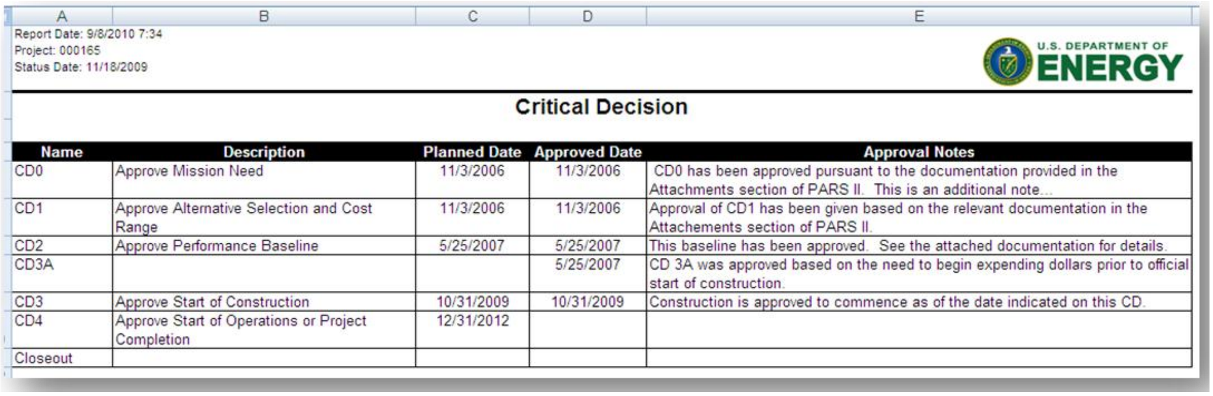
6. Click View to generate the report. Wait as it processes. Status messages appear indicating the following (some may occur too rapidly to see):

   a. Loading –PARS II is loading the report definition and data query.
   b. Downloading (generating report)
   c. Opening Excel
   d. Formatting report



Report Selected for View and Downloading

e. When the report is generated, an Excel window displays with the report.



Report Date: 9/8/2010 7:34
Project: 000165
Status Date: 11/18/2009

U.S. DEPARTMENT OF ENERGY

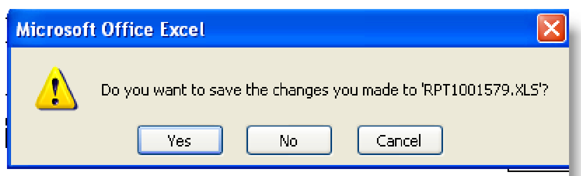
Critical Decision

Name	Description	Planned Date	Approved Date	Approval Notes
CD0	Approve Mission Need	11/3/2006	11/3/2006	CD0 has been approved pursuant to the documentation provided in the Attachments section of PARS II. This is an additional note...
CD1	Approve Alternative Selection and Cost Range	11/3/2006	11/3/2006	Approval of CD1 has been given based on the relevant documentation in the Attachements section of PARS II.
CD2	Approve Performance Baseline	5/25/2007	5/25/2007	This baseline has been approved. See the attached documentation for details.
CD3A			5/25/2007	CD 3A was approved based on the need to begin expending dollars prior to official start of construction.
CD3	Approve Start of Construction	10/31/2009	10/31/2009	Construction is approved to commence as of the date indicated on this CD.
CD4	Approve Start of Operations or Project Completion	12/31/2012		
Closeout				

Critical Decision Report

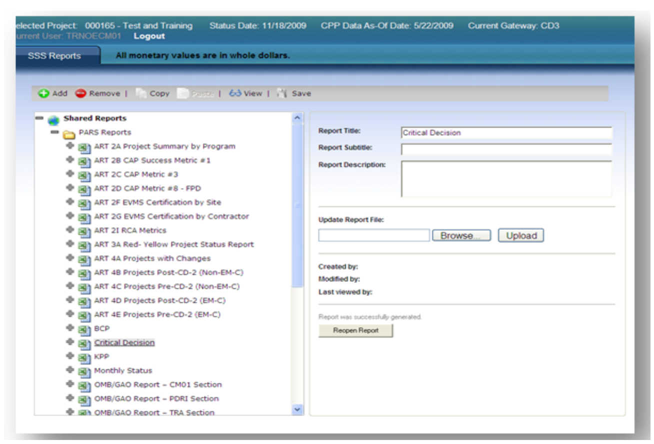
7. At this point, you can work with the document as you would any other Excel Workbook, including save a copy, edit, and print a copy.

23. When finished viewing, **Close** the Excel window. When you close Excel, you will be asked if you want to save changes. Basically, it is a reminder to save the report (optional), even if you didn't make changes.



TIP: If you want to save the report, click "cancel" and save it to a different location, and rename it with a recognizable name.

8. Return to PARS II task window. The report can be re-opened without re-processing, via the "Reopen Report" button.



Option to Re-Open Report

Reminder: After highlighting a Report Title, you must click 

to generate the report.