U.S. Department of Energy

PARS II

Project Assessment and Reporting System

User Guide

Version 1.0 Draft
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1 INTRODUCTION

The Department of Energy Office of Engineering and Construction Management (OECM) introduced its Project Assessment and Reporting System (PARS) as part of the Department of Energy's (DOE) project reform initiative that began in 1999. The new, DOE-wide, PARS II deployment is a web-based Commercial-Off-The-Shelf (COTS) product that is configured to support and enhance the oversight and evaluation capabilities of DOE project analysts for capital program projects.

Earned Value Metrics (EVM) and Schedule data for capital program projects are extracted directly from contractor project management systems and uploaded into PARS II with no manual re-keying of data. PARS II gives DOE project analysts a standardized toolset for evaluating and tracking this data, as well as providing data entry and reporting capabilities for summary-level, Oversight and Assessment (OA) information.

PARS II is a component of the iManage, enterprise-wide systems initiative, and its design reflects how DOE executes and monitors capital projects. Figure 1 *Typical DOE Acquisition Management System for Line-Item Projects* shows the typical process flow of a capital project through Critical Decision (CD) milestones, and the criteria for projects to be included in PARS II reporting.

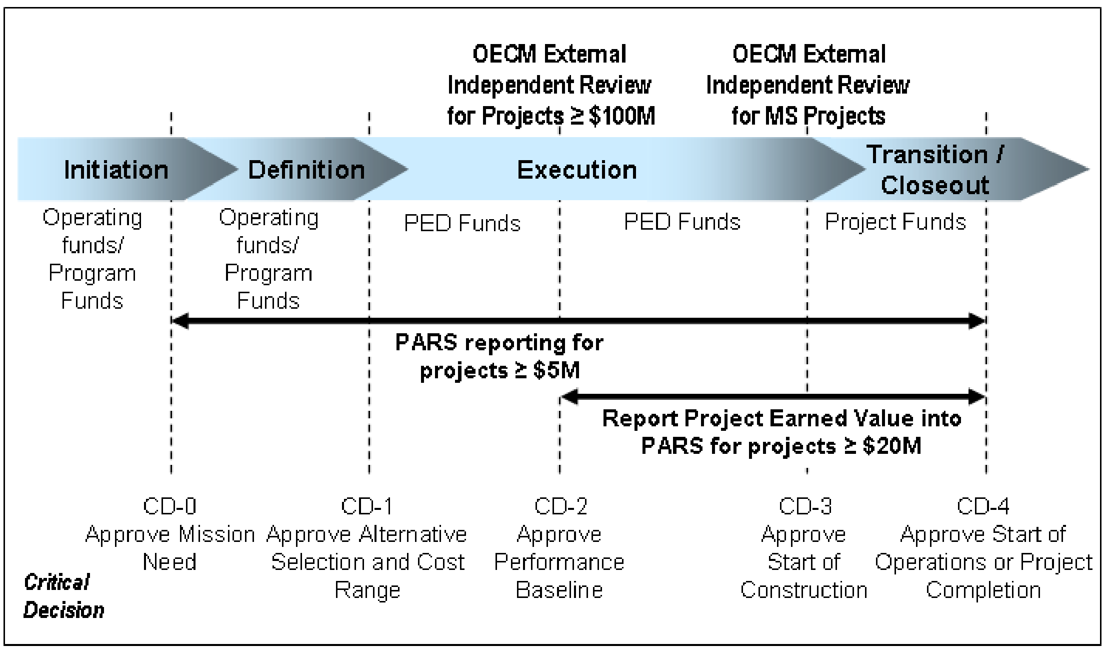


Figure 1 Typical DOE Acquisition Management System for Line-Item Projects
Source: DOE G 413.3-16, 9-24-08

Figure 2 "*Process Cycle of a Project in PARS II*" shows the major functions performed in PARS II. The right-hand side of the diagram represents the life cycle of a project in PARS II with updates occurring as milestones are achieved. The left-hand side of the diagram shows the updates that are performed on a monthly basis. Monthly updates are accepted in PARS II for all projects in the database and at any CD level. As indicated in Figure 1, these monthly updates are required for projects of twenty million dollars or more from CD-2 through CD-4.

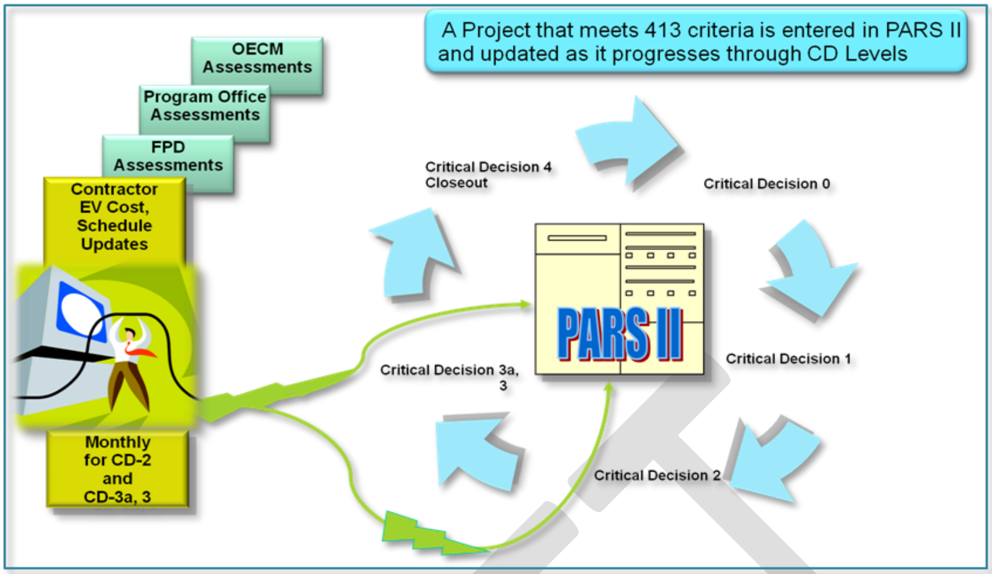


Figure 2 Process Cycle of a Project in PARS II

1.1 Purpose of this Document

This document serves as a reference manual to assist DOE end-users in performing their respective functions within the PARS II web application. The document provides a description and "How To" for the major functions in PARS II.

1.2 How to Use this document

PARS II is designed to accommodate the functional and information requirements of users who have different roles in project assessment and reporting. This document is written as a role-based User Guide with individual Chapters targeted for each particular user group, described as follows.

- All Users – Chapters 1 and 2, Introduction and Getting Started in PARS II
- Additional Chapters are required for each user group:
  - OECM Senior Management, Capital Program Manager, Program Office Manager, Program Point of Contact, Contracting Office Representative, Interested Party, Acquisition Executive, Stakeholders
    - Chapters 3-6, View all data and reporting
  - Federal Project Director, Deputy FPD, and FPD staff
    - Chapters 3-8, View all data and reporting, update FPD Oversight and Assessment (OA) monthly status, add attachments
  - Program Office Analyst
    - Chapters 3-8, View all data and reporting, update Program OA monthly status, add attachments

- OECM Analyst and users who have elected to perform complete OA data entry
    - Chapters 4- 9, Add/edit Capital programs and projects, add/edit Critical Decisions, Key Performance Parameters, Baseline Change Proposals, Budget/Funding Profiles, update OA monthly status, add attachments, view all data and reporting
- Contractors performing Monthly Upload of Project Performance data
    - Chapters 4 and 10, Submit Project Performance data upload, view dashboards.

1.3 Document Conventions

For each major function in PARS II, this document presents:

- A short description
- A table of the toolbar icons pertaining to the current window
- A step-by-step procedural guide to performing the function

This documentation uses the following conventions.

Table 1 Document Conventions

Convention	Description
Procedures to perform a function	Numbered “How to” steps.
Click **Exit**.	Bold text indicates the button to click or option to select.
TIPS, Notes	Appear in blue italic text.
Find	A toolbar icon to click.

A list of acronyms is presented in Appendix C.

1.4 Roles and Access to the System

Within the PARS II system several distinct classes of user roles are defined, each with different rights, privileges, and access, appropriate to the intended use of the system. Appendix A details the rights and privileges for each of the user roles in the table, *User Roles and Access Rights*. Presented in this section is a summary of those user roles and access rights.

With the exception of site contractors, all users can view all the information for projects within their domain. Data entry and update rights, however, are restricted.

NOTE: If users require access to projects outside of their domain, those rights can be granted as necessary on an individual basis by an Administrator.

1.4.1 System Administrator

Administrators have the greatest amount of access to the system. It is the Administrator's responsibility to create user accounts and assign permissions, configure appropriate security settings, and set access rights for other users and groups of users.

1.4.2 Senior Management and Executives for OECM and Programs

This class of user can view all OA project information, view Contractor data, and generate reports.

1.4.3 OECM Analyst, Alternate OECM Analyst

After Administrators, OECM Analysts and Alternate OECM Analysts have the highest level of system access. Within PARS II, OECM Analysts and Alternate OECM Analysts can:

- Initiate a Capital Program
- Initiate/Update a Project
- Assign and Edit Project Contacts
- Update Critical Decision milestones - CD1 through CD4 and Closeout
- Add a Baseline Change Proposal
- Update Monthly Status for OECM
- Edit Key Performance Parameters
- Add attachments

1.4.4 Federal Project Director, Executives, and Management

This class of user can view all OA project information, view Contractor data, and generate reports. In addition, FPDs and FPD Assistants can edit and update appropriate Monthly Status fields, and add Attachments.

1.4.5 Program Analyst, Program Management

This class of user can view all OA project information, view Contractor data, and generate reports. Program Office staff can edit and update appropriate Monthly Status fields, and add Attachments.

1.4.6 Acquisition Executives, Contracting Office Representatives, other Interested Parties, and Stakeholders

This class of user can view all OA project information, view Contractor data, and generate reports.

1.4.7 Project Site Contractors and Managers

Site contractors have the ability to upload Earned Value Metrics, Schedule, Management Reserves, Risk, and Variance reporting data from their respective local EVM systems. Site contractors can view this data, as with all users, in the Project Performance module of PARS II.

1.5 Data Hierarchy

PARS II is designed to reflect the DOE's organization of Programs, and projects within the Program's organizational structure. Figure 3 shows the hierarchal structure of data within PARS II. Level 1 and Level 2 are configurable in the application via system administrator functions. Level 3 is defined by users when initiating a new Capital Program and project in PARS II. Capital Program is a new concept in PARS II. It represents the "parent" or umbrella data element for child projects.

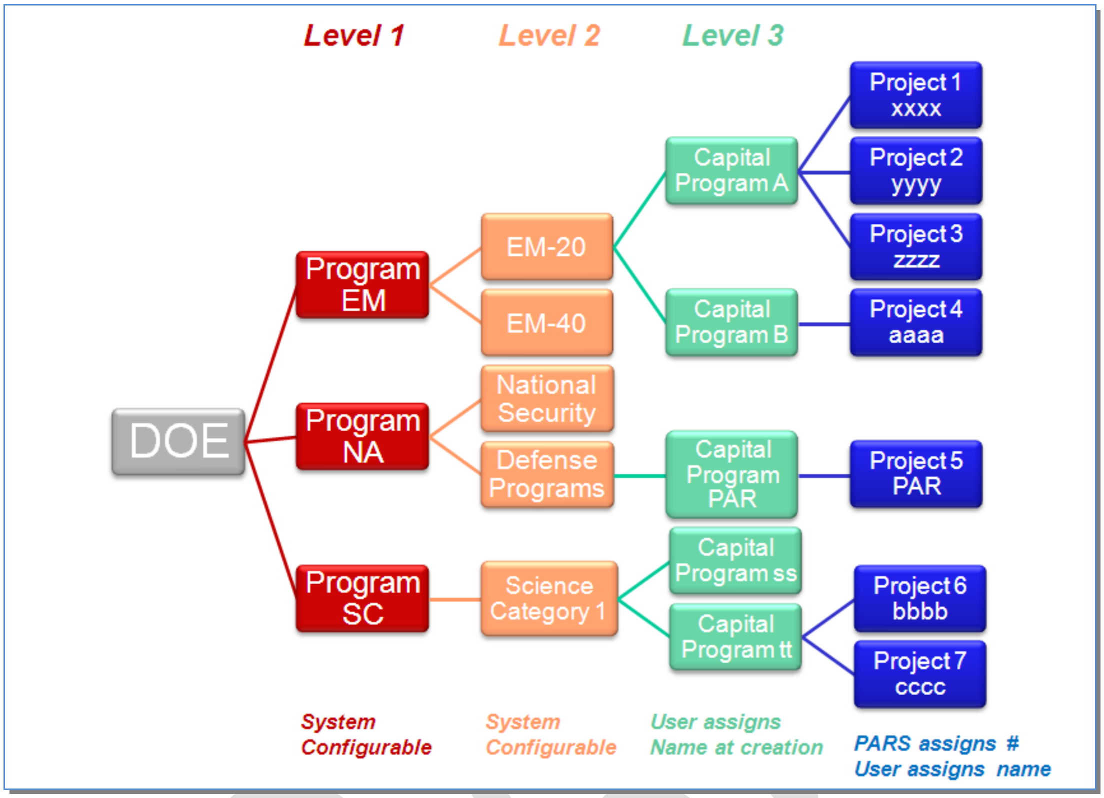


Figure 3 PARS II Data Hierarchy for Capital Programs and Projects

1.6 System Requirements

The system requirements for a PARS II user workstation are as follows.

- Windows (XP or later)
- Broadband access to the Internet
- Internet Explorer 6, 7 or 8 (IE 8 strongly recommended for optimal performance)
- 1280 x 1024 monitor
- 2 GB of RAM (more if doing a lot of reporting)
- At least 2 CPU cores at 2.5 GHz (or 1 CPU core of at least 3+ GHz)
- MS Word, Excel - 97-2003 or 2007
- Active-X Control

2 GETTING STARTED IN PARS II

2.1 Logging in

To log in, a user must go to https://pars2.doe.gov, and when prompted, enter username and password. Passwords are case sensitive.

Once logged in, users will be taken to a “Projects” tab within the Oversight & Assessment (OA) module. On the left-hand side of the window is a collapsible navigation bar with modules for: 1) Oversight & Assessment 2) Project Performance 3) All Reports 4) Administration, and 5) Help. Depending on the roles and responsibilities of the user logging in, some of these modules may not be visible.

2.2 Screen Layout

A typical PARS II screen layout is shown in Figure 4. The options displayed in the Navigation Bar vary based on a user’s access privileges.

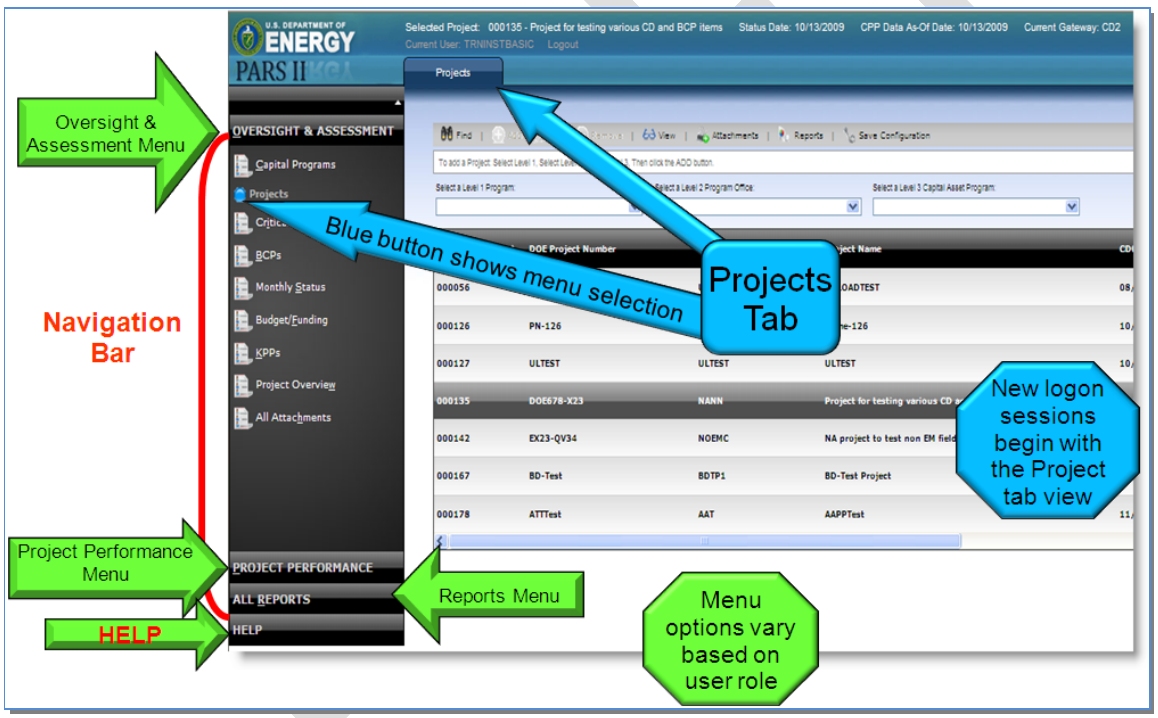


Figure 4 Typical PARS II Screen Layout

2.3 Title Bar

The top line of the PARS II window displays information about the project that is currently active for viewing or editing. If no project is selected, with the exception of the label “Selected Project”, the title bar is empty. When a project is selected, the title bar shows the PARS ID number, the Project Name, the Status Date (ending date) of the current month reporting period, the date of the latest contractor data upload, and the current Gateway (Critical Decision level) for the selected project.

The second line of the title bar displays as a faded font, and shows the User ID of the person logged into PARS II and the link to LOGOUT of the system.

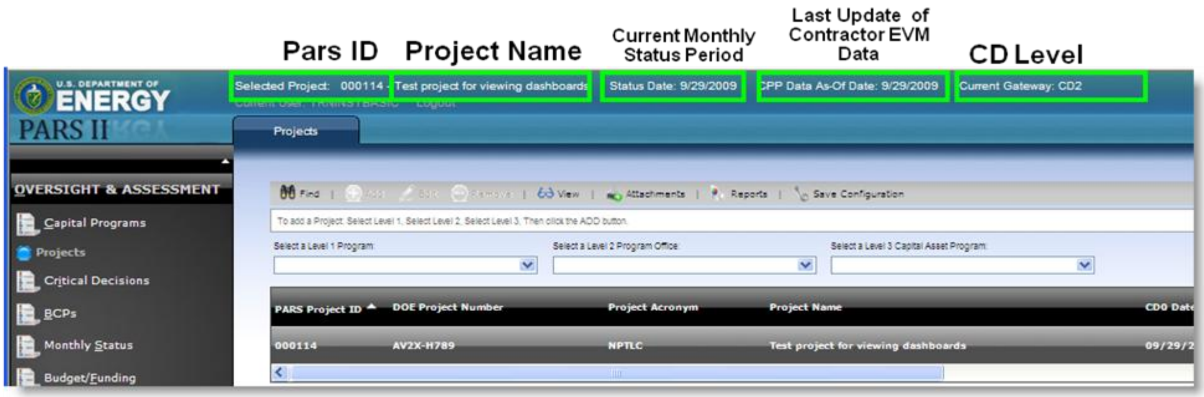


Figure 5 Title Bar - Line 1

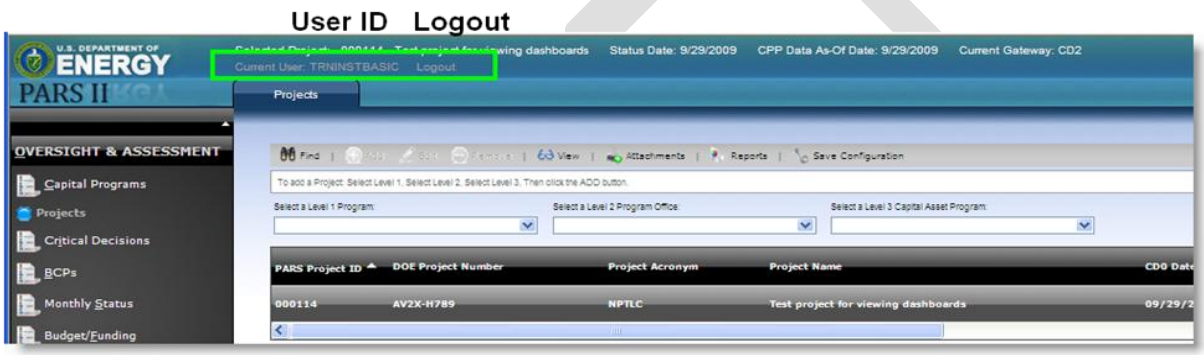


Figure 6 Title Bar - Line 2

2.4 Toolbar

The toolbar located near the top of PARS II windows provides an easy way to select an action, command, or function to perform for a project. Icons are activated or de-activated (grayed-out) based on the user role and sequence of events. For example, the View icon will not be activated until a user has highlighted a project in the project list. The Add and Edit icons will not be activated for View-only users.

Figure 7 Example Toolbar

2.5 Data Values and Dropdown Lists

Data fields in PARS II contain one of the following types of values.

- Text – short text fields, such as name fields, contain up to 256 characters. Long text fields, such as narratives or notes, contain up to 4000 characters.
- Currency – All dollar values displayed or entered in screens are "whole dollars." Reports may have factored dollars, in which case, the unit for dollars is indicated on the report.
- Date – formatted as mm/dd/year

Dropdown lists in PARS II may be static lists or dynamic lists. Static lists contain pre-populated values that can only be changed by the system administrator. Users submit requests to modify, delete, or insert new entries to the PARS II Helpdesk.

Dynamic lists are updated as users create entries. For example, when a CD milestone is reached and entered into PARS, dropdown lists which contain CD levels are automatically updated to include the new CD level.

Reference the *Glossary of Screen Labels for PARS II V1.0.0* document for data definitions, format, and size details for each screen field.

2.6 Selecting a Project

In order to view data or perform any functions in PARS II, users must start by selecting a project.

From the "Projects" screen, users can see a list of projects within their domain, by making selections from the pre-populated "Level 1 Program," "Level 2 Program Office," and "Level 3 Capital Program" drop-downs. Alternately, users can search for a particular project using the "Find" button in the toolbar. Projects are searchable by a number of identifiers, including Program Name, PARS Project ID, Project Name, DOE Project Number, Project Type, Project Category, and more.

Once the results are displayed, clicking on the desired project will cause the toolbar icons to become active. The project and its associated OA data can be accessed for viewing, editing (for users with update rights), or generating reports. Also, the contractor project performance dashboards and reports can be viewed for the selected project.

Table 2 Project Tab Icons- Before Project Selection

ACTIVE ICON	PURPOSE
Find	Search for a project or group of projects. Activates a window where search criteria can be entered to locate a specific project or a group of projects matching the selected criteria.
Reports	Generate reports, if any, pertaining to the Projects tab.
Save Configuration	Saves the current sort sequence of the project list. Users may click on a column heading to sort the project list by the values in that column.

2.6.1 Find a Project

1. Select **Projects** from the Navigation Bar. The Project list may be empty or not.

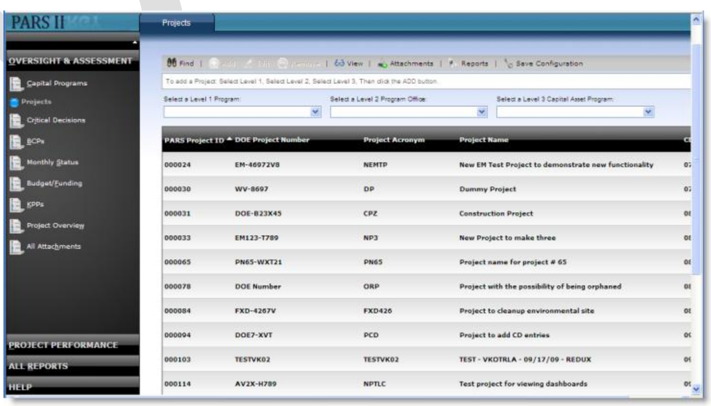


Figure 8 Projects Tab

2. Click 

.

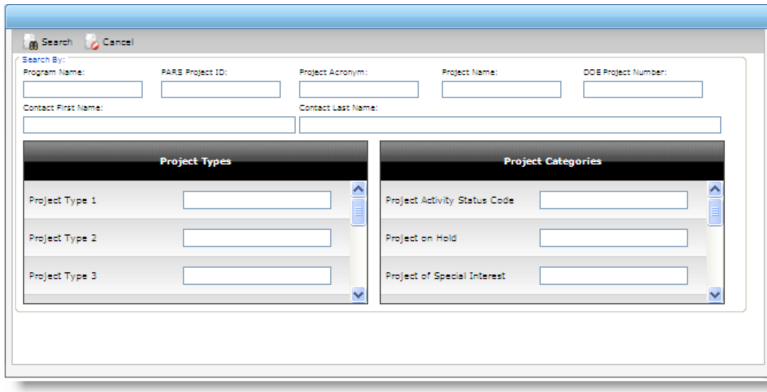
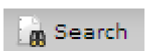


Figure 9 Find Screen

3. Enter **Search Criteria** in one or more data fields. All or just a few characters can be entered for a search value. PARS II searches for any occurrence of the characters within the data field. For multiple fields, the search is an "AND" search, i.e. a project must meet all of the criteria specified to be included in the search results.

4. Click 

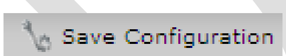
. Wait while the search progresses. When the search is complete, the Projects tab displays with the list of projects that met the Find criteria.

   TIP: 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: Clear out any previous search criteria that do not apply to the new search.

2.6.2 Sort the Project List

5. Click a column heading to sort the list by that column.

6. Click 

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

2.6.3 Select a Project

7. Highlight by clicking the **PARS Project** to be selected. Wait while the project data is loaded. Notice the change in the Project Title line at the top of the window, and the additional icons that activate.

3 OVERSIGHT AND ASSESSMENT – VIEW ONLY

The Oversight and Assessment module of PARS II differs based on user-role. This chapter presents the view-only use of the OA module.

3.1 Capital Programs

To view Capital Programs, users must click on “Capital Programs” within the Oversight & Assessment module, and make a selection in both the “Select a Level 1 Program” and “Select a Level 2 Program Office” drop-down menus. This calls up a list of Capital Programs within the selected Program Office.

Selecting a Capital Program from the list and clicking the “View” icon in the toolbar opens a window that shows the Projects within that Capital Program, the Total Project Cost (TPC), and the estimated completion date - the CD4 Date, for each.

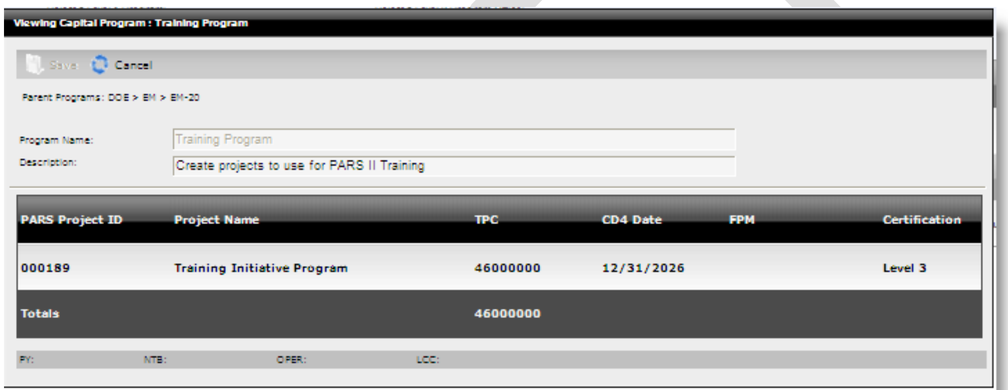


Figure 10 Viewing Capital Program

A Totals line contains the total of TPCs for the projects in the list.

Table 3 Capital Programs Icons–View Mode

ACTIVE ICON	PURPOSE
View	View the full description of the Capital Program. Selecting “View” shows all of the same information as “Edit,” but simply disables the user-input features.
Attachments	Select and view any attachments that were uploaded to this screen.
Reports	Generate reports, if any, pertaining to Capital Programs

3.1.1 View a Capital Program

1. Select **Capital Programs** from the Navigation Bar.

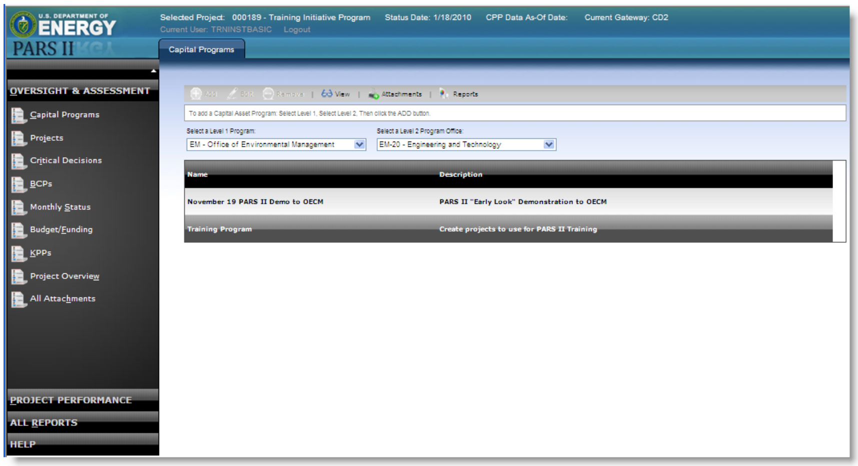


Figure 11 Capital Programs Tab

2. Select a Program from the **Level 1 Program** dropdown.

3. Select the Level 2 category from the **Level 2** dropdown. The Level 2 list is a dependent dropdown, and as such, will contain a list that varies depending on the Program selected in Level 1. Existing Capital Programs under the Level 1 and Level 2 categories, if any, are listed.

4. Click 

. The Capital Program description and a list of any projects for that capital program displays.

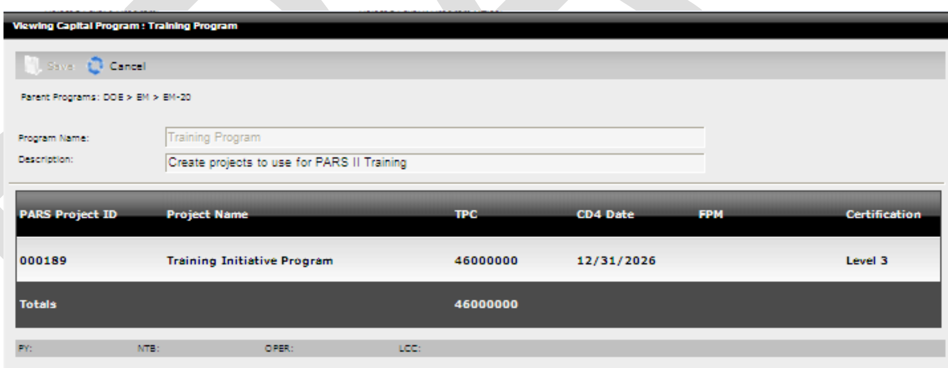


Figure 12 View Capital Program Description

5. When done, click **Cancel**.

3.2 Projects

Selecting a project, as described in Section 2.6, will cause the toolbar icons to become active, and the project can be accessed for viewing, or generating reports.

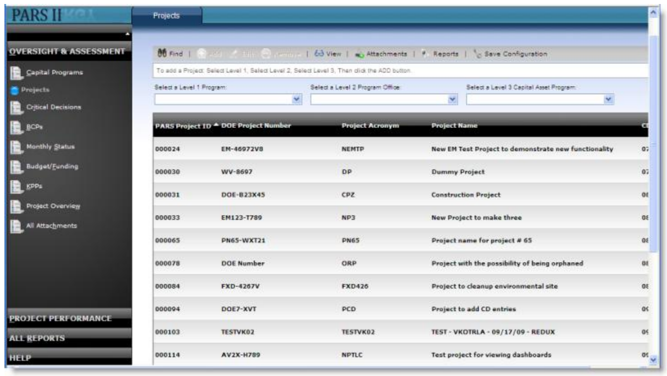


Figure 13 Projects Tab

Table 4 Projects Tab Icons –After Project Selection -View Mode

ACTIVE ICON	PURPOSE
Find	Search for a project or group of projects.
View	View the Attributes of the Project or additional information for Contacts, such as phone, e-mail. Selecting "View" shows all of the same information as "Edit," but simply disables the user-input features.
Attachments	Select and view any attachments that were uploaded to this screen.
Reports	Generate reports, if any, pertaining to the attributes and contacts of the selected Project.
Save Configuration	Save the current Sort Sequence of the project list for use throughout the current session and for subsequent logon sessions.

3.2.1 View a Project

1. Click View. The Viewing Project screen has two tabs: Project Attributes and Project Contacts.

3.2.1.1 View Project Attributes

2. The Project Attributes tab is displayed upon entry to the Viewing Project screen.

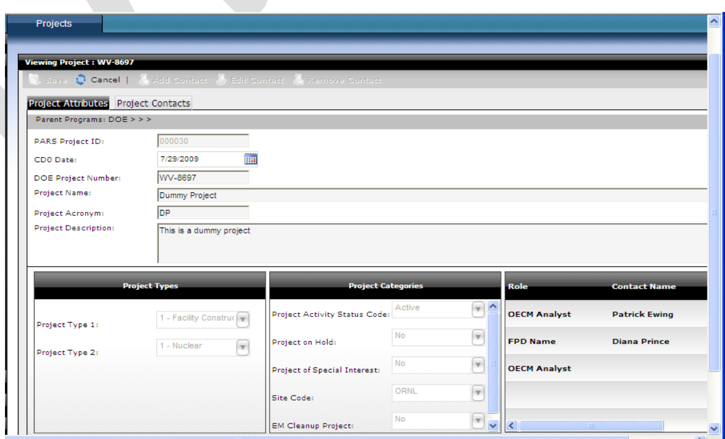


Figure 14 Project Attributes Tab

3. In addition to a narrative description of the project, the Project Attributes tab displays:

    a. The system assigned PARS Project ID - the unique, permanent identifier 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 are viewed from the Project Contacts tab.

3.2.1.2 View Project Contacts

4. Click the **Project Contacts** tab to see the full list of contacts associated with the project.

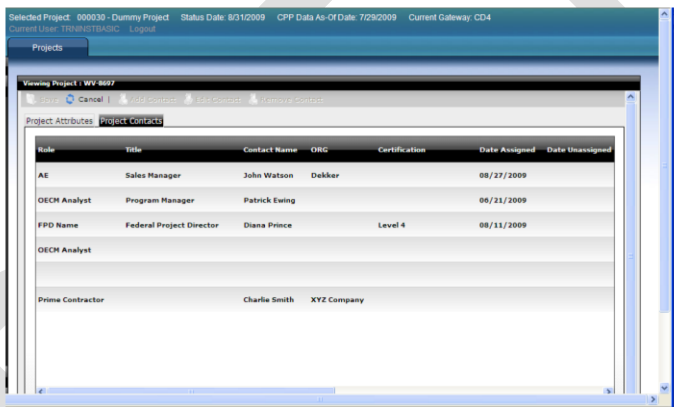


Figure 15 Project Contacts Tab

5. **Scroll right** to view e-mail address and phone number for the contact.

6. When done, click **Cancel**.

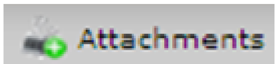
3.2.2 View Attachments

Documents appended to records, entries, and contacts are considered attachments, as are narratives entered within the other tabs in the OA module. For example, entering text into the "Project Description" field on the "Projects" tab or the "Assessment Narrative" field on the "Monthly Status" tab will add a record to the Attachments library under the "Narratives" category.

Using the "Attachments" toolbar icon opens an Attachments window that lists any narratives, appended documents, or hyperlinks to a web page that pertain to the active tab. The attachments are available for viewing. To exit from this window at any time, click the "Cancel" button on the toolbar.

The window displays the Type of attachment, its Title, a one-line excerpt under “Description,” Document Number and Version information, and information on the user who uploaded the document and when it was uploaded.

3.2.2.1 View Attachment Associated with Current Screen/Tab

1. Click 

from the toolbar. The Attachment List window displays with the list of attachments pertaining to the current screen/tab.

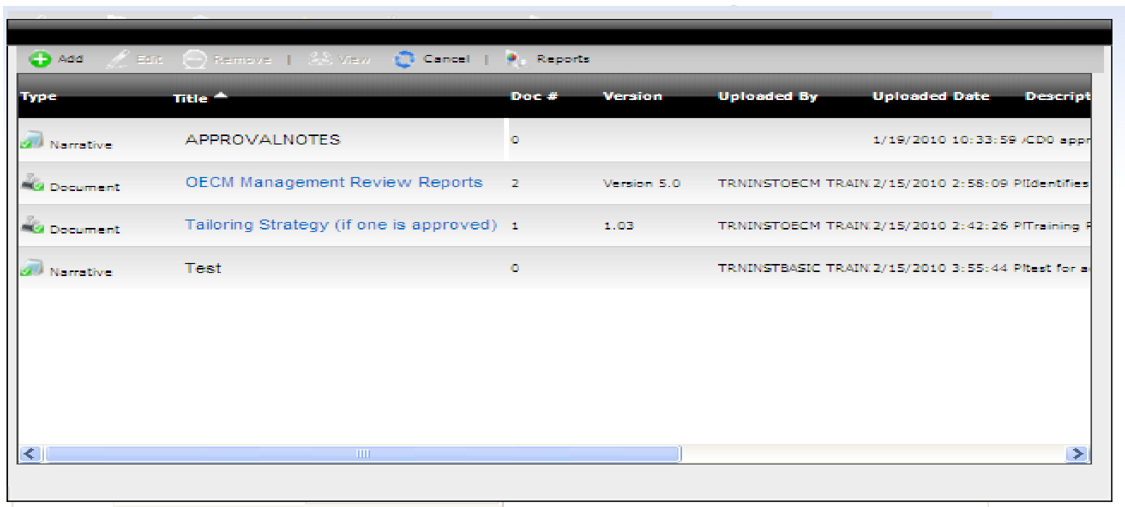


Figure 16 Attachment List Associated with Selected Screen/Tab

2. Click the **Title of the attachment** to view. Documents open in the associated application window (e.g. Word, Excel, Adobe Reader), narratives open in a window within PARS II, and Hyperlinks open to the appropriate web page.

3.3 Critical Decisions (CDs)

With a project selected, clicking on the “Critical Decisions” tab in the left-hand navigation bar will access a screen allowing users to view CD0, CD1, CD2, CD3A, CD3, CD4, and Closeout information.

Just below the toolbar is a drop-down menu containing each Critical Decision for the project. Below that are panes for “Critical Decision Detail” and “Planned Dates.” Upon selecting a Critical Decision from the drop-down, these fields reflect the most recently entered or updated data.

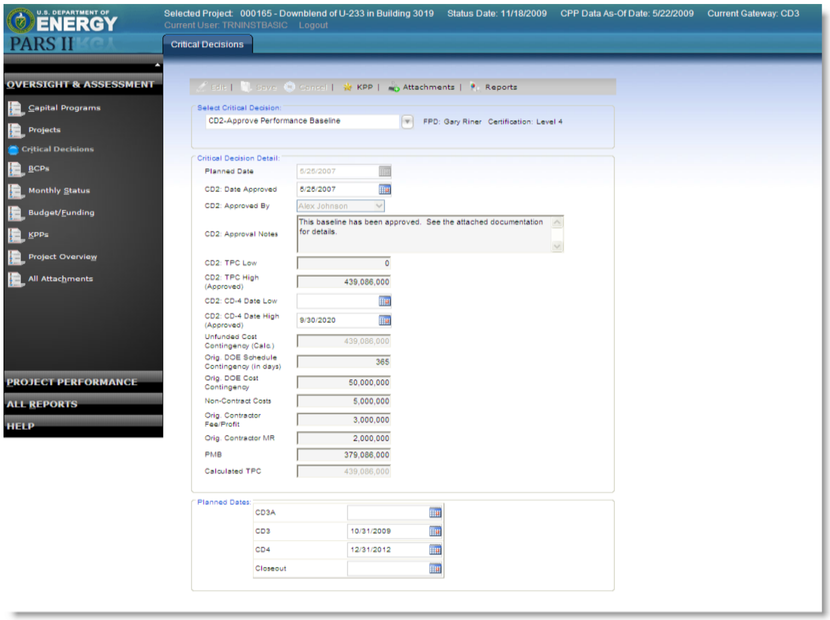


Figure 17 Critical Decision Tab

The "Critical Decision Detail" pane provides fields for the planned date of the CD, the date approved, who approved it, and any approval notes. Also provided are fields for Total Project Cost (TPC) entries, as well as expected CD4 attainment dates.

The "Planned Dates" panel provides fields for the expected dates that each Critical Decision from CD2-Closeout will be attained.

Table 5 Critical Decision Icons –View Mode

ACTIVE ICON	PURPOSE
KPP	Provides a direct link to the KPP Tab listing only those KPPs associated with the current CD screen view.
Attachments	Select and view any attachments that were uploaded to the current CD screen view.
Reports	Generate reports, if any, pertaining to the current CD screen view.

3.3.1 View Critical Decisions

1. Select **Critical Decisions** from the Navigation Bar. Regardless of what CD-level for the selected project displays first, users can change it to view information for any CD level.

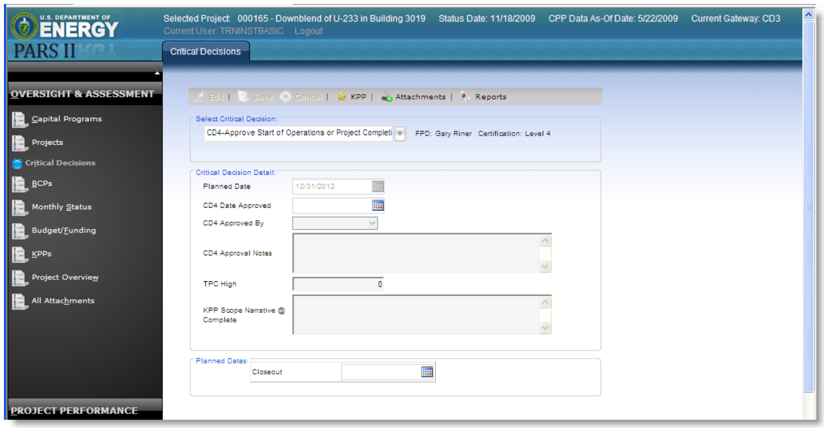


Figure 18 Critical Decision Tab – CD4

2. Select **CD** level from the Select Critical Decision dropdown list.

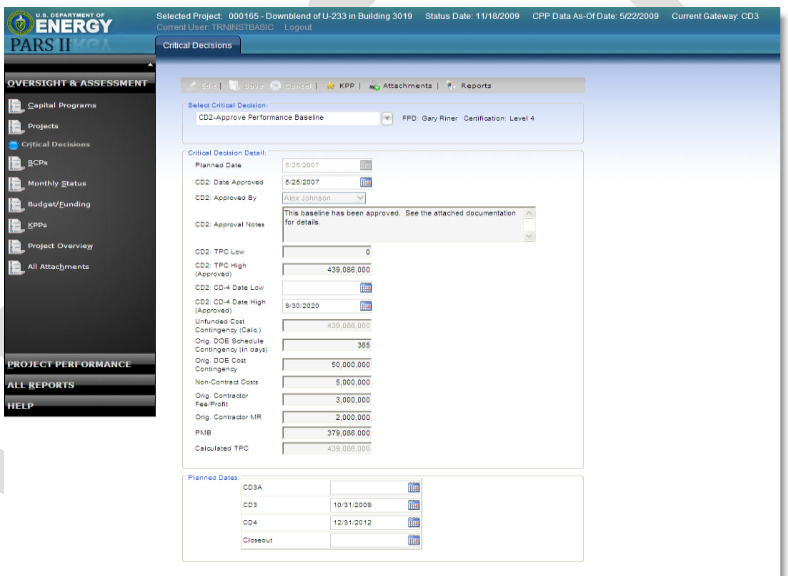


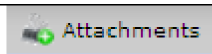
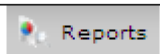
Figure 19 Critical Decision Tab – CD2

3.4 Baseline change proposals (BCPS)

The “BCPs” tab allows users to view information for proposed baseline changes. The BCP is identified by the BCP Title and there is an indicator as to whether or not it represents a directed change. Users can see the BCP Submission Date, Approval Date, who approved the change, and any Approval Notes that were entered. New TPC and CD4 attainment dates that have been approved as part of the BCP can also be viewed in this tab.

Users can access Key Performance Parameters (KPPs) submitted for the BCP. Numbers that do not align with the Performance Baseline will be noted with an error message.

Table 6 BCP Tab icons –View Mode

ACTIVE ICON	PURPOSE
 KPP	Provides a direct link to the KPP Tab listing only those KPPs associated with the BCP.
 Attachments	Select and view any attachments that were uploaded for the BCP displayed on the screen.
 Reports	Generate reports, if any, pertaining to the BCP displayed on the screen.

3.4.1 View BCP

1. Select **BCPs** from the Navigation Bar.

2. Select the **BCP** to view from the Select BCP dynamic dropdown list.

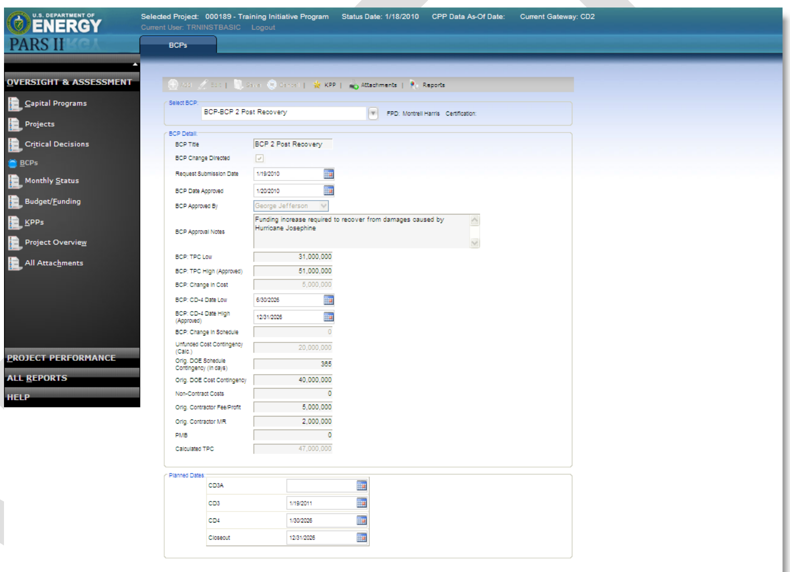


Figure 20 Baseline Change Proposal - BCP

3.5 View Monthly Status

The Monthly Status tab provides three distinct organizational areas for project update:

- FPD
- Program
- OECM

After selecting “Monthly Status” from the Navigation bar, each area can be accessed through a “Monthly Status Type” drop-down menu located just below the toolbar. The reporting fields in the “Monthly Status Detail” pane below will change to reflect only the fields relevant to each type of update. Users will be able to view the information in each of the three areas, but only a user with FPD rights can update the FPD status, as is the case with the Program Office and OECM.

PARS II automatically sets the "Updated by" and "Updated Date" when each organizational representative enters an update for the current reporting period shown as the Status Date on the Title Bar of the screen. If those two fields are blank, an update has not yet been entered for the reporting period. In that case, the data being viewed represents the previous time an entry was made. Viewing status for prior months is performed via reports.

The first set of reporting fields that displays is the FPD monthly status update.

Table 7 Monthly Status Icons - View Mode

ACTIVE ICON	PURPOSE
Attachments	Select and view any attachments that were uploaded for the current monthly status.
Reports	Generate reports, if any, pertaining to Monthly Status updates.

3.5.1 FPD

With "FPD" selected in the "Select Monthly Status Type" drop-down, PARS II will display the Federal Project Director's monthly status update.

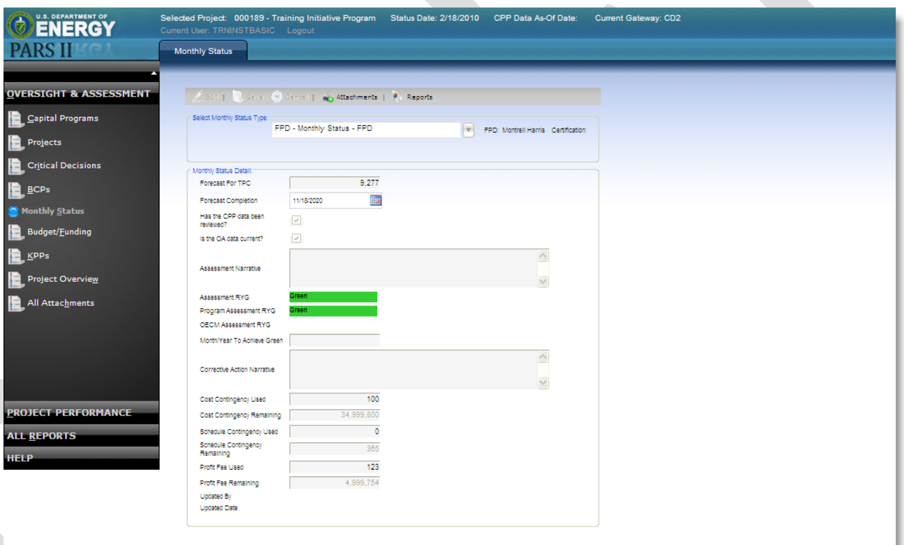


Figure 21 Monthly Status Update - FPD

Fields in the FPD Monthly Status Detail pane include "Forecast for TPC," "Forecast completion," and "Assessment Narrative," where the FPD reports an assessment on the project's current performance.

Before entering a status update, FPDs are expected to review the Contractor Project Performance dashboards and the latest OA data. Selecting the "Has the CPP data been reviewed?" check box and the "Is the OA data Current?" checkbox indicates that the FPD has done so.

The next three fields concern the FPD's "Red-Yellow-Green" (RYG) assessment of the project. The FPD provides a color-coded assessment of the project's progress, and if not "Green," the date the FPD expects the project to attain "Green" status along with a "Corrective Action Narrative" suggesting a plan to attain that status.

Fields for Cost and Schedule Contingencies and Profit Fee reserves are also completed by the FPD prior to assessment.

3.5.1.1 View FPD Monthly Status Update

1. Select **Monthly Status** from the Navigation bar.

2. Verify **FPD** is the selected Monthly Status type.

a) Note the RYG assessment color bands. The first Assessment box is the one pertaining to this screen, in this case, the FPD's RYG assessment. A blank color band indicates that an assessment has not yet been entered into PARS II by that organization level.

3.5.2 Program

With the "Program" entry from the drop-down selected, a user can view the Program's assessment of the project's RYG status and, if not already "Green," the date the Program expects the project to attain "Green" status. Users also view the Program's TPC Forecast, forecast for CD4 completion, and Status Assessment Narrative.

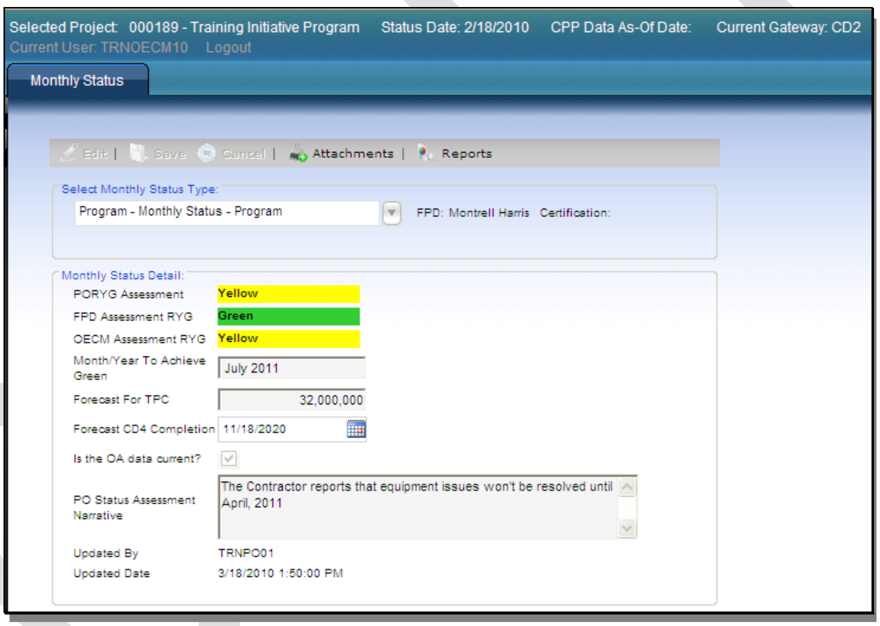


Figure 22 Monthly Status Update - Program Office

3.5.2.1 View Program Office Monthly Status Update

1. Select **Monthly Status** from the Navigation bar.

2. Select **Program Office Monthly Status** from the Monthly Status type dropdown list.

3. Note the RYG assessment color bands. The first Assessment box is the one pertaining to this screen, in this case, the Program Office RYG (PORYG) assessment. A blank color band indicates that an assessment has not yet been entered into PARS II by that organization level.

3.5.3 OECM

Like the FPD and Program Office, the OECM Analyst or Alternate OECM Analyst will have entered an RYG Assessment, the expected date of achieving "Green" status, the TPC forecast, and the forecast for CD4 completion.

The OECM Analyst or Alternate Analyst also enters an Overall Assessment Narrative.

3.5.3.1 View OECM Monthly Status Update

1. Select **Monthly Status** from the Navigation bar.

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

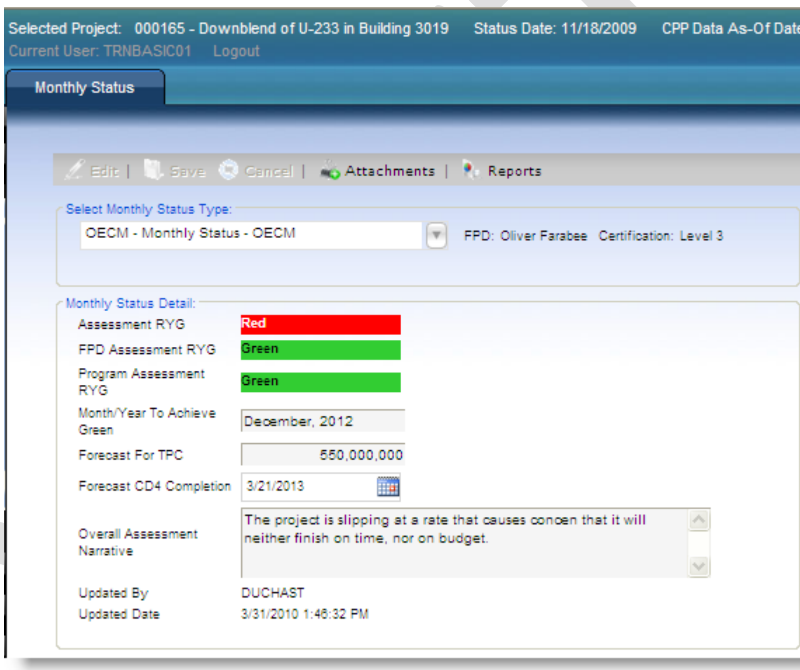


Figure 23 Monthly Status Update - OECM

3. Note the RYG assessment color bands. The first Assessment box is the one pertaining to this screen, in this case, the OECM assessment. A blank color band indicates that an assessment has not yet been entered into PARS II by that organization level.

3.6 Budget/Funding

The "Budget/Funding" tab in the OA module allows users to view by fiscal year, budget submissions or funding allocations that have been entered into PARS II. The "Budget/Funding Selection" dropdown list is pre-populated with the name of the budget/funding profiles: Performance Baseline (PB), Integrated Priorities List (IPL), Office of Management and Budget (OMB), Congressional Budget Request (CBR), CD2, and is dynamically updated when an event occurs, such as a BCP, that may require a new budget submission.

Users select which profile to view, the fiscal year or budget year submittal, Start and End Dates for the years to view. Users click "Reset Grid" from the toolbar to generate and view the funding table.

Selecting an End Date beyond the end of the selected fiscal year will create multiple fiscal year columns in the Budget/Funding grid. In the example below, selecting a start date of Nov 30, 2009, and an end date of Oct 1, 2015 generated columns for FY 11, FY 12, FY 13, FY 14, and FY 15 in the grid.

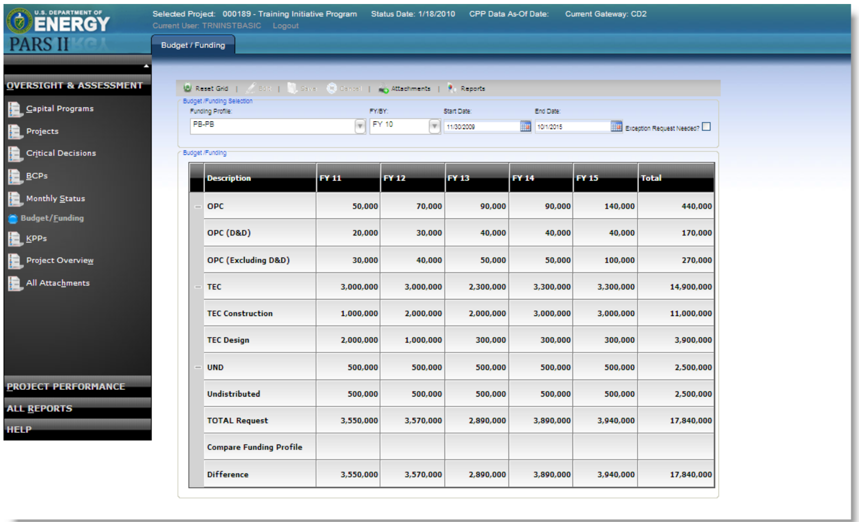


Figure 24 Budget/Funding Profile

When users click the "+" icons beside Other Project Costs (OPC), Total Estimated Cost (TEC), and Undistributed (UND), those rows will expand, revealing rows beneath. To move between Budget/Funding types, users must select a new Funding Profile from the drop-down menu and click "Reset Grid" from the toolbar.

The "Compare Funding Profiles" drop-down menu below the "Total Request" calculation in the grid allows users to compare the current profile with another, and automatically calculates the difference in the Total Request for the two profiles.

Table 8 Budget/Funding Icons - View Mode

ACTIVE ICON	PURPOSE
Reset Grid	"Opens" the budget/funding table grid in View mode, and populates the table with the latest set of data or with zeroes if no data exists.
Attachments	Select and view any attachments that were uploaded to this screen.
Reports	Generate reports, if any, pertaining to Budget Funding.

3.6.1 View Budget/Funding

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

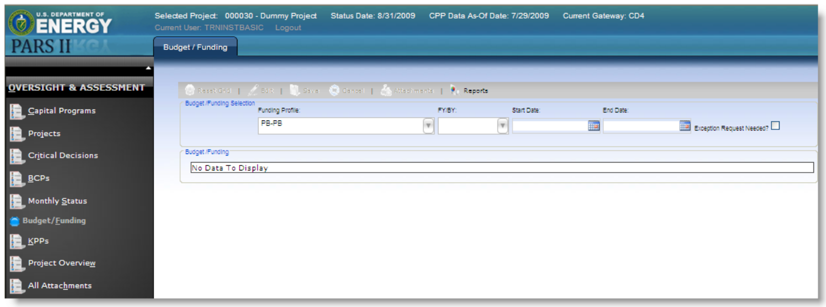
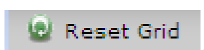
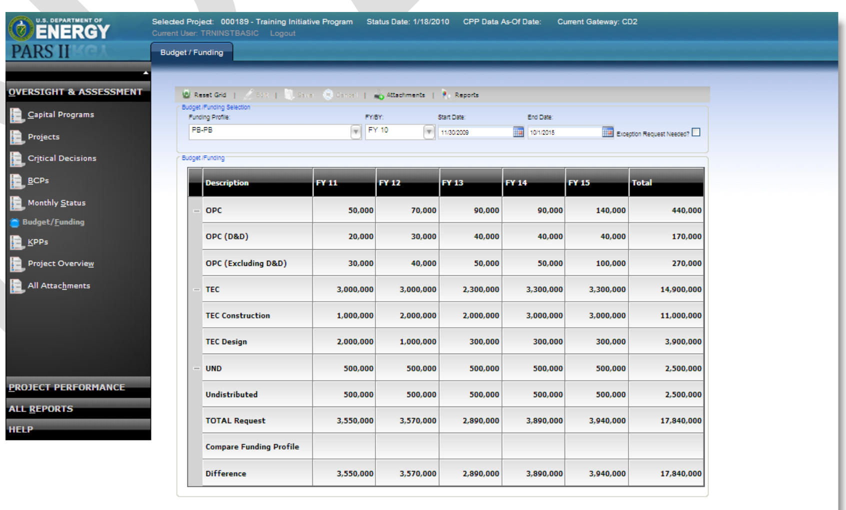


Figure 25 Budget/Funding – No Criteria Selection

2. **Select the criteria** for the budget/funding table to be viewed.
   a. Funding Profile from the dropdown list
   b. FY/BY submission from the dropdown list
   c. Start Date – user choice
   d. End Date – user choice

3. Click 

. The table displays with the selected funding profile for the years between Start Date and End Date.



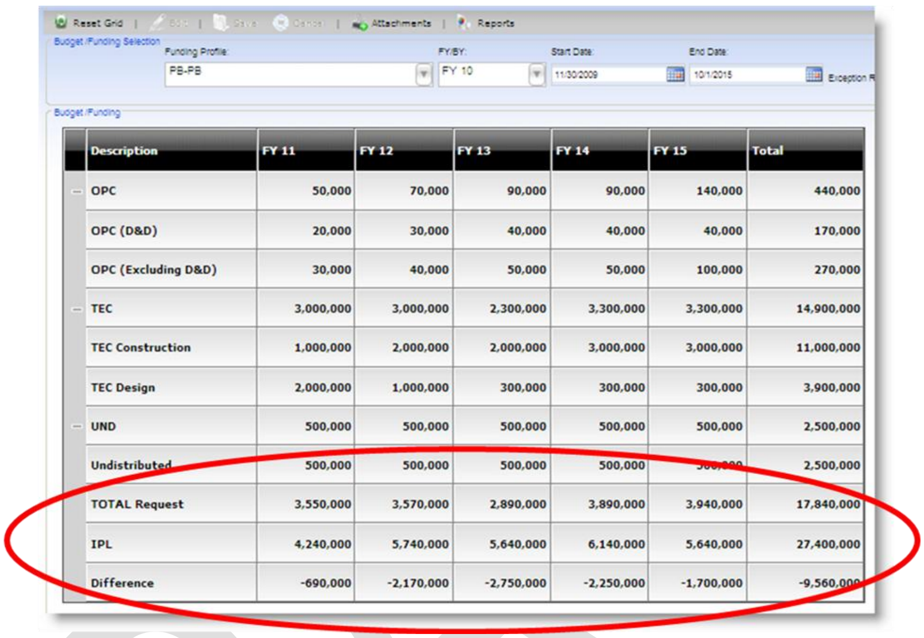
Description	FY 11	FY 12	FY 13	FY 14	FY 15	Total
OPC	50,000	70,000	90,000	90,000	140,000	440,000
OPC (D&D)	20,000	30,000	40,000	40,000	40,000	170,000
OPC (Excluding D&D)	30,000	40,000	50,000	50,000	100,000	270,000
TEC	3,000,000	3,000,000	2,300,000	3,300,000	3,300,000	14,900,000
TEC Construction	1,000,000	2,000,000	2,000,000	3,000,000	3,000,000	11,000,000
TEC Design	2,000,000	1,000,000	300,000	300,000	300,000	3,900,000
UND	500,000	500,000	500,000	500,000	500,000	2,500,000
Undistributed	500,000	500,000	500,000	500,000	500,000	2,500,000
TOTAL Request	3,550,000	3,570,000	2,890,000	3,890,000	3,940,000	17,840,000
Compare Funding Profile						
Difference	3,550,000	3,570,000	2,890,000	3,890,000	3,940,000	17,840,000

Figure 26 Budget/FundingTable

4. Expand ✚ to display detail rows.

3.6.2 Compare Funding Profiles

5. **Double-click the "Compare Funding Profiles"** cell and select a different 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, in this case the PB profile being displayed and the IPL profile selected for comparison.

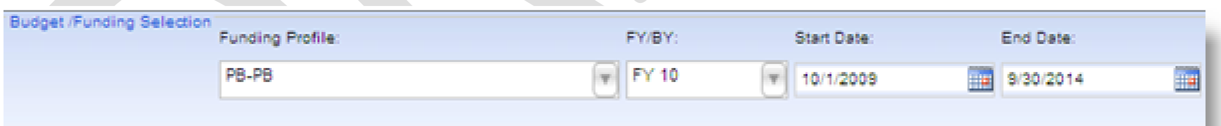


Description	FY 11	FY 12	FY 13	FY 14	FY 15	Total
OPC	50,000	70,000	90,000	90,000	140,000	440,000
OPC (D&D)	20,000	30,000	40,000	40,000	40,000	170,000
OPC (Excluding D&D)	30,000	40,000	50,000	50,000	100,000	270,000
TEC	3,000,000	3,000,000	2,300,000	3,300,000	3,300,000	14,900,000
TEC Construction	1,000,000	2,000,000	2,000,000	3,000,000	3,000,000	11,000,000
TEC Design	2,000,000	1,000,000	300,000	300,000	300,000	3,900,000
UND	500,000	500,000	500,000	500,000	500,000	2,500,000
Undistributed	500,000	500,000	500,000	500,000	[illegible]	2,500,000
TOTAL Request	3,550,000	3,570,000	2,890,000	3,890,000	3,940,000	17,840,000
IPL	4,240,000	5,740,000	5,640,000	6,140,000	5,640,000	27,400,000
Difference	-690,000	-2,170,000	-2,750,000	-2,250,000	-1,700,000	-9,560,000

Figure 27 Compare Funding Profiles (PB and IPL in this case)

6. Reminder: Click 

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



Budget/Funding Criteria Selections

3.7 Key Performance Parameters (KPPs)

By clicking on the "KPPs" tab within the Oversight & Assessment module, the user will bring up a page that allows for viewing and tracking Key Performance Parameters. Users select the KPP to view from the displayed list of KPPs. The "CD or BCP" for the KPP is identified along with the KPP Number and the "Planned Scope."

Once the KPP "Delivered Scope" field has been updated, a selection for whether the KPP was validated will be visible. The KPP list can be sorted and filtered.

Table 9 KPP Icons - View Mode

ACTIVE ICON	PURPOSE
Clear Filter	Restore complete list of KPPs by removing any filter that may have been applied.
Reports	Generate reports, if any, pertaining to KPPs

3.7.1 View KPPs

1. Select **KPPs** from the Navigation Bar.

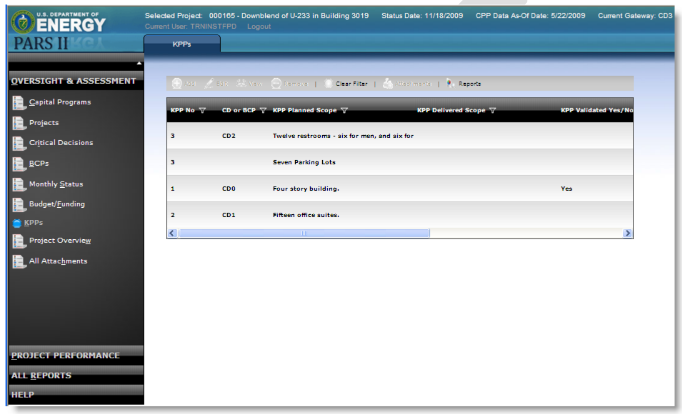


Figure 28 Key Performance Parameter List

2. Highlight a **KPP** and click View.

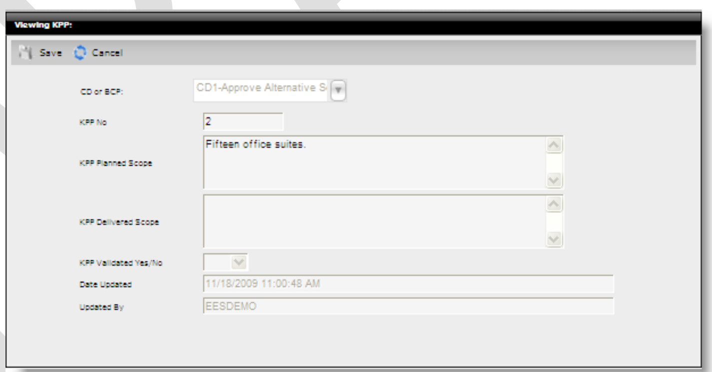


Figure 29 Key Performance Parameter Screen

3. When finished viewing, click Cancel.

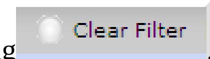
3.7.2 Sort the KPP List

4. Click a column header label to sort the list by that column.

3.7.3 Filter the list of KPPs

5. Click the filter icon  for a column and select **filter value** from the dropdown list. The list regenerates with the filter applied.

Figure 30 Filtered to Show CD2 KPPs

6. Re-generate the full list, by clicking 

. Resorting of the list may be needed.

3.8 Project Overview

The Project Overview is a single screen Excel Report view that provides a summary of a project's status and assessment information. It displays the attributes, primary contacts, current status, cost summary and estimates, data entered at each CD milestone, KPPs, and any BCPs submitted for the project.

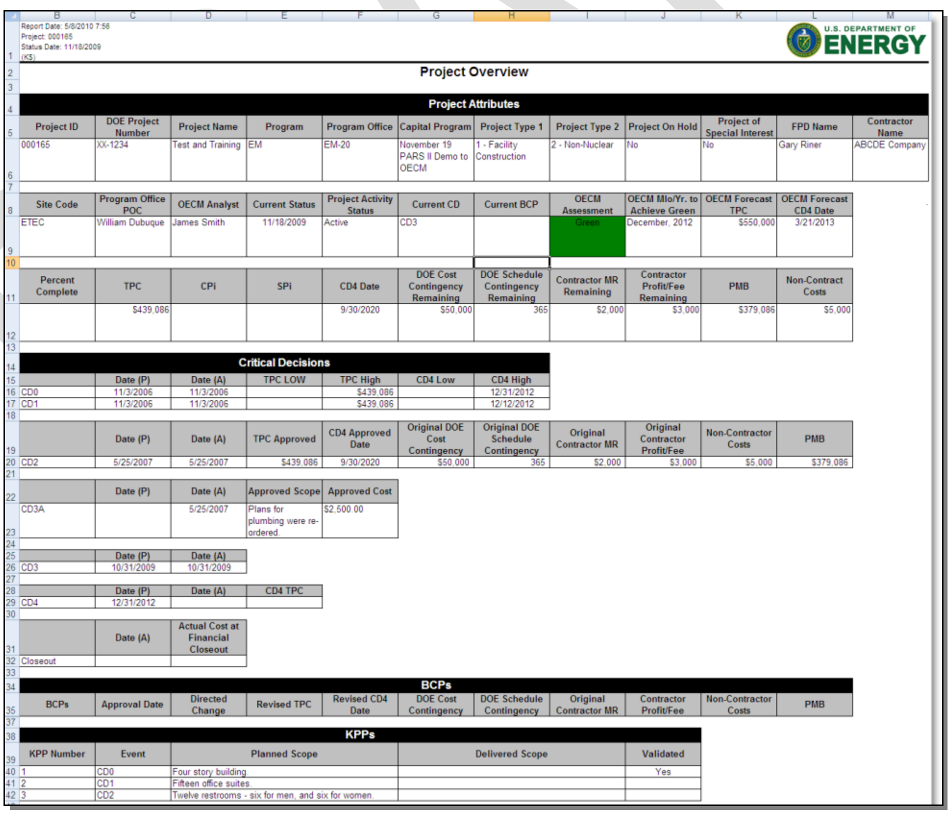


Figure 31 Project Overview Excel Report

3.8.1 Generate Project Overview Report

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

   Note: In addition to Excel, Active-X Control must be installed on user's computer to run this and other PARS II reports.

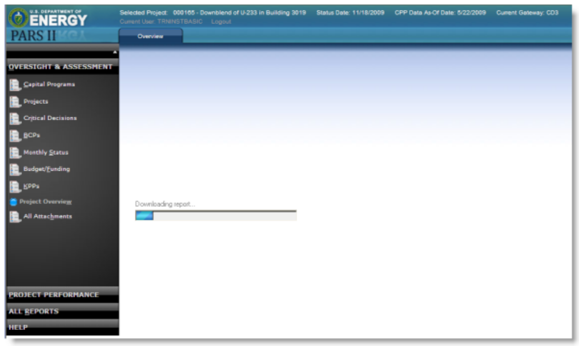


Figure 32 Generating the Project Overview

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

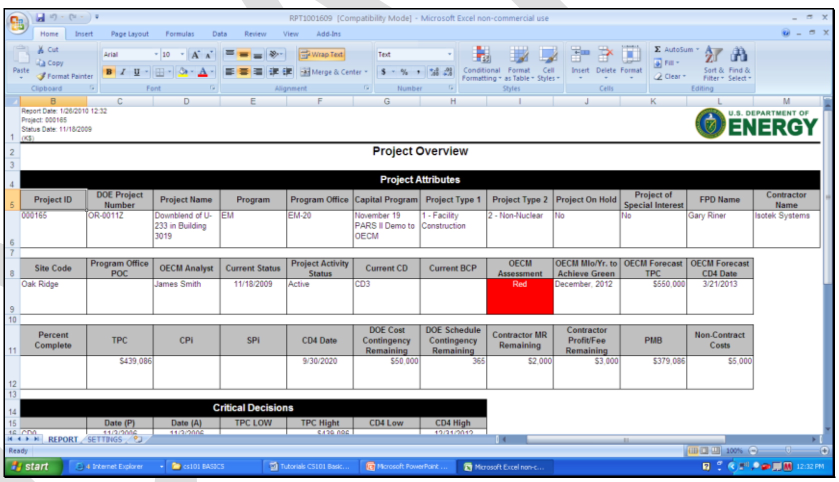


Figure 33 Excel Window with Project Overview Report

3. At this point, users can work with the document in Excel Workbook, including save a copy to user's local drive, edit, and print a copy.

   NOTE: Any changes made to the Excel report are local changes. The PARS II database is not altered.

4. Return to the PARS II task window. Users can re-open the report without having it re-process as long as the user hasn't exited the Overview tab. Do this by clicking Reopen Report.

3.9 All Attachments

There are two ways to access Project Attachments within the PARS II system:

- Via the " ALL Attachments" tab in the Oversight & Assessment module, which provides access to all narratives, documents, and hyperlinks for the selected project
- Via the "Attachments" icon in the toolbar at the top of each OA screen, which provides access to the narratives, documents, and attachments for only the active tab (i.e. "Monthly Updates" or "KPPs," etc.)

Documents appended to records, entries, and contacts are considered attachments, as are narratives entered within the other tabs in the OA module. For example, text from the "Project Description" field on the "Projects" tab or the "Assessment Narrative" field on the "Monthly Status" tab will add a record to the Attachments library under the "Narratives" category.

TIP: Only a user with "write" privileges who submitted an attachment can edit or delete it

The window displays the Type of attachment, its Title, a one-line excerpt under the heading "Narrative/Hyperlink/Document," and the UserID of the individual who appended the document along with the date that it was done.

In addition to providing access to all documents and narratives for the entire project, the "All Attachments" tab opened from the collapsible navigation bar on the left-hand side of the screen provides greater functionality than the toolbar icon. From within this tab, users can sort the list of attachments and apply filters to view only those attachments within a certain category, such as CD level or document type.

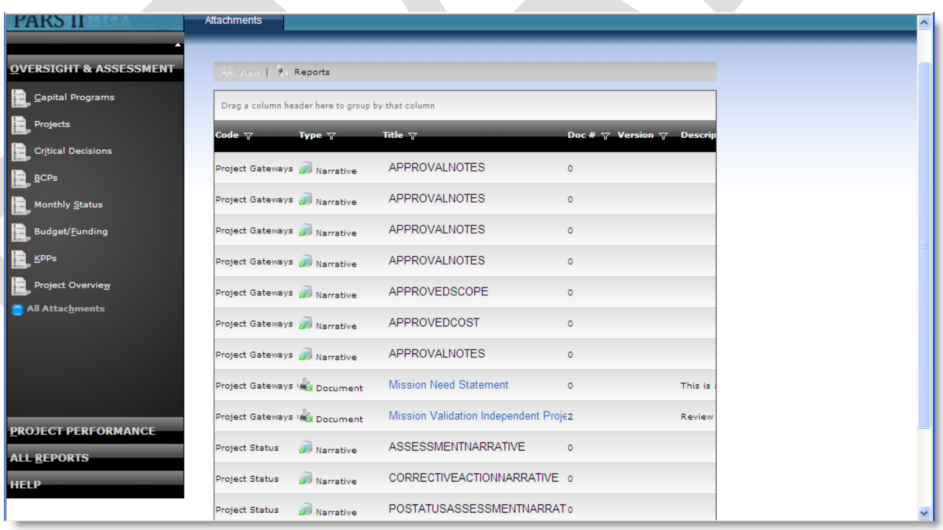


Figure 34 List of All Attachments for a Project

3.9.1 View List of All Attachments for a Project

1. From the Navigation Bar, select **All Attachments**. The Attachments tab displays with a list of all attachments that have been submitted for the selected project. Scroll to see more.

3.9.2 Sort the Attachments List

2. Click a **column header** to sort the list by that column.

3.9.3 Filter the list of Attachments

3. Click the filter icon for a column. A dropdown list displays.

4. Select a filter value from the dropdown list. Those attachments matching that value are listed.

5. **Re-generate** the full list, by clicking the filter icon for the filtered column and selecting **ALL** from the dropdown list that displays under the column header.

3.9.4 View Attachment Content

3. Click the **Title of the attachment** to view. Documents open in the associated application window (e.g. Word, Excel, Adobe Reader), narratives open in a window within PARS II, and Hyperlinks open to the appropriate web page.

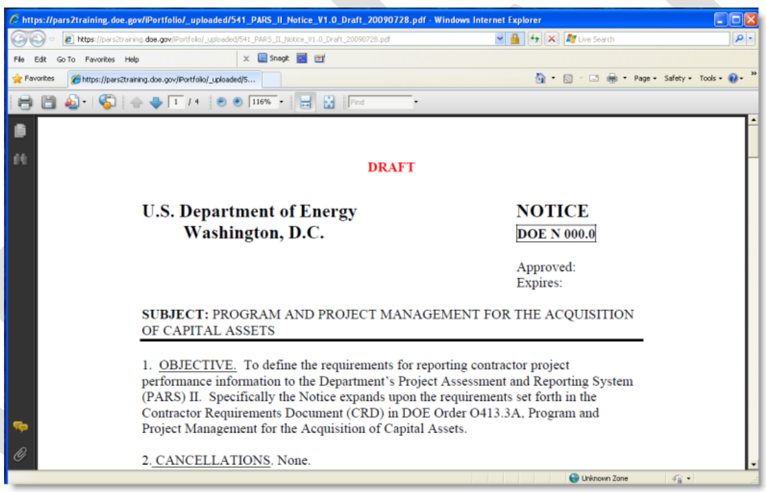


Figure 35 Document Attachment

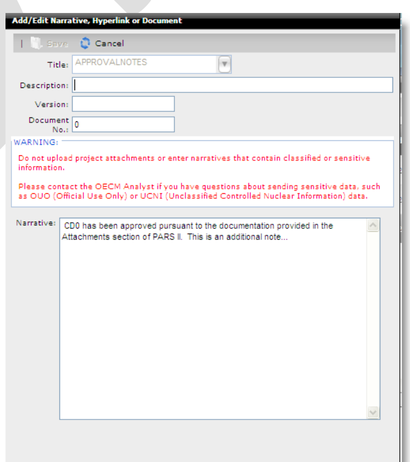


Figure 36 Narrative Attachment

4 PROJECT PERFORMANCE

The Contractor Project Performance module (CPP) is the primary PARS II interface for viewing, analyzing, and reporting contractor project updates for Earned Value, Schedule, Management Reserves, Risk, and Variance reporting data extracted monthly from their respective local EVM systems. It resides below the "Oversight & Assessment" module in the left-hand side collapsible navigation bar.

This module is also the primary PARS II interface for contractors. From here, contractors upload monthly updates. Contractors, as well as all other users, view this data in the project performance dashboards.

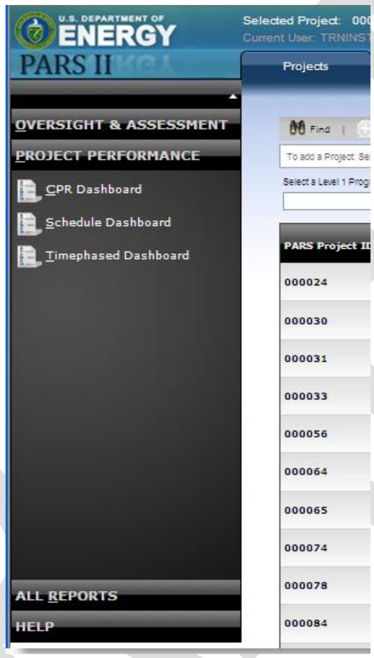


Figure 37 Project Performance Menu Options

4.1 WBS/OBS Data

Through the Project Performance module, users can access the Cost Performance Report (CPR), Schedule, and Timephased data through the respective dashboard tabs in the navigation bar. Top-level dashboards show project data by WBS or OBS number. The CPR dashboard includes the Analysis and IEAC views of the dashboard data.

Clicking on any WBS or OBS number provides drilldown capabilities, allowing users to view detailed Incremental, Cumulative, and At Complete information on lower WBS/OBS levels. The toolbar provides navigation controls and the ability to adjust Red-Yellow-Green thresholds.

Users can filter the data by color using the drop-down Schedule Variance (SV), Cost Variance (CV), and Variance at Complete (VAC) menus. Once a selection is made from one of these menus, clicking the "Refresh" button on the toolbar will perform the filter.

Figure 38 Dashboard Toolbar

Table 10 Dashboard Icons

ACTIVE ICON	PURPOSE
	Provides an express return to the initial WBS/OBS Level after having drilled down to lower levels of WBS/OBS detail
	Shows the PARS II Project ID for the dashboard. It is the same project that was selected from the OA Projects tab.
9/29/2009	Dropdown containing a list of each date (typically one per month) of Contractor submitted data. This option allows users to view data from previous months.
WBS	Dropdown list to select dashboard view by WBS or by OBS number.
CPR	Dropdown list to select dashboard view of CPR, Analysis, or IEAC data.
	Brings up Threshold window where RYG thresholds can be changed for viewing the EV and Schedule dashboards. New settings remain in effect only during the current login session.
	Recycle/Refresh the dashboard when WBS/OBS Level, and/or Red, Yellow, Green filters are selected from column heading dropdown lists.
Drilldown Reports	Displays folder of WBS/OBS Reports to select for viewing or printing.
	Permits drilldown to next level of detail for a WBS/OBS number.
Parent WBS: U.05.02.03.02	Displays on the toolbar when user is drilling down through WBS/OBS levels. Changes dashboard view to the previous (parent) level.

4.2 CPR Dashboard

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

4.2.1 View CPR Dashboard

2. 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

   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.

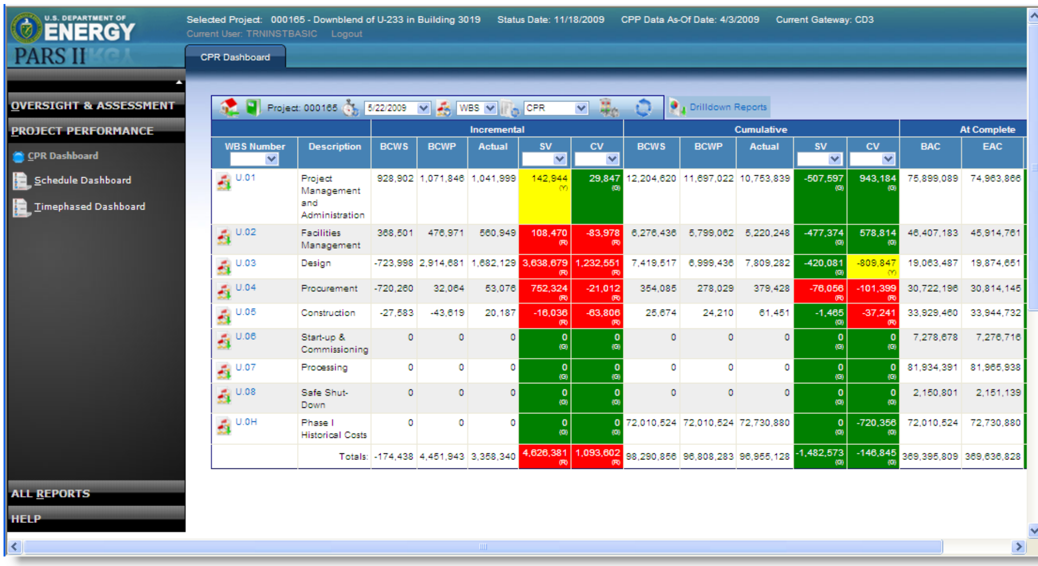
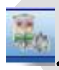


Figure 39 Cost Performance Report (CPR) Dashboard – WBS Table

4.2.2 Check/Modify RYG Threshold Settings

3. Click the **Threshold Setting** icon . View the settings in order to appropriately interpret and analyze the RYG color coding on the dashboard.

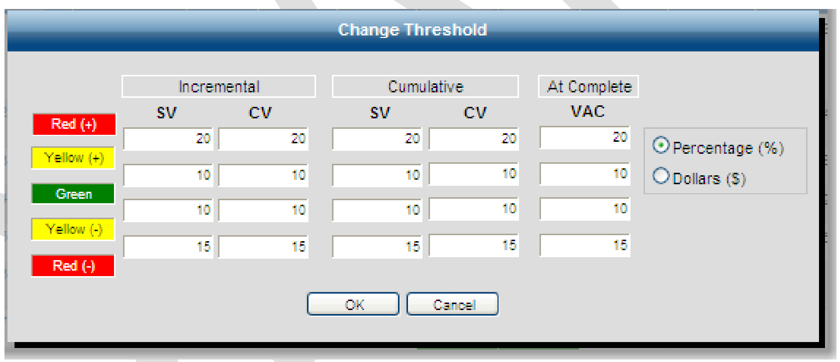


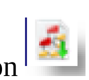
Figure 40 RYG Threshold Settings

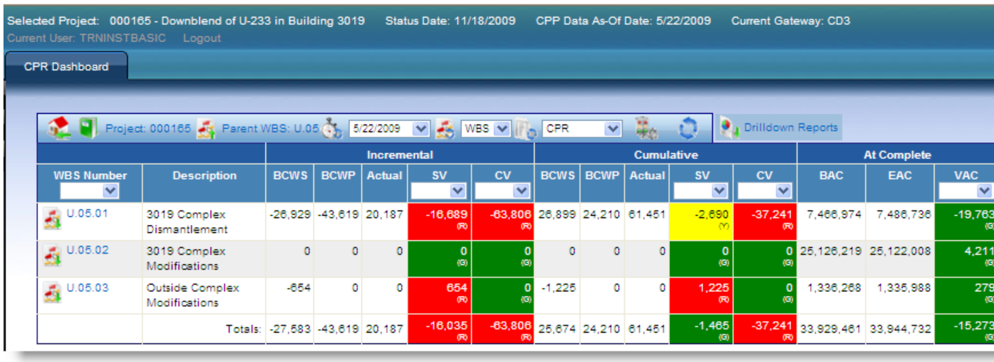
4. Threshold values can be adjusted to do "what if" analysis.
   a. Select Percentage or Dollars radio button.
   b. Click on data cell(s) and key-in new value(s).

NOTE: The changed values will remain throughout the current logon session, including when selecting a different project to view. The thresholds will return to the default settings upon logout.

5. Click **OK to apply changes** or **Cancel** when finished viewing.

4.2.3 Drilldown to Detail

6. Click the WBS/OBS number of any cell containing the drilldown icon  to drilldown to more detail.



		Incremental					Cumulative					At Complete		
WBS Number	Description	BCWS	BCWP	Actual	SV	CV	BCWS	BCWP	Actual	SV	CV	BAC	EAC	VAC
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)
U.05.02	3019 Complex Modifications	0	0	0	0 (G)	0 (G)	0	0	0	0 (G)	0 (G)	25,126,219	25,122,008	4,211 (G)
U.05.03	Outside Complex Modifications	-654	0	0	654 (R)	0 (G)	-1,225	0	0	1,225 (R)	0 (G)	1,336,268	1,335,988	279 (G)
	Totals:	-27,583	-43,619	20,187	-16,035 (R)	-63,806 (R)	25,674	24,210	61,451	-1,465 (G)	-37,241 (R)	33,929,461	33,944,732	-15,273 (G)

Figure 41 WBS Drilldown

7. Drill down until an empty table displays. The previous level is the lowest level of detail available.

8. Return to the previous level by clicking the **Parent WBS number** icon  .

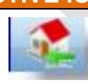
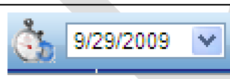
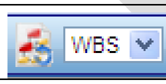
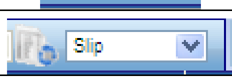
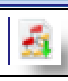
9. Each click of  moves the table up one level.

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

4.3 Schedule Dashboard

The Schedule Dashboard provides slip date and float date reporting by WBS number (and OBS number, if schedule activities are tied to OBS). Slip view shows both Start Date and End Date slip, and float view reflects free and total Baseline Critical and Current Critical float information, all according to the established RYG valuations. Like with the CPR and Timephased dashboards, users may drilldown through WBS and OBS numbers, revealing data for lower WBS/OBS levels.

Table 11 Schedule Dashboard Icons

ACTIVE ICON	PURPOSE
	Provides an express return to the Level 1 WBS/OBS after having drilled down to lower levels of WBS/OBS detail
	Shows the PARS II Project ID for the dashboard. It is the same project that was selected from the OA Projects tab.
	Dropdown containing a list of each date (typically one per month) of Contractor submitted data. This option allows users to view data from previous months.
	Dropdown list to select dashboard view by WBS number or by OBS number (if schedule activities are tied to OBS).
	Dropdown list to select dashboard for Slip Date view or Float Date view.
	Displays folder of WBS/OBS Reports to select for viewing or printing.
	Permits drilldown to next level of detail for a WBS/OBS number.
	Displays on the toolbar when user is drilling down through WBS/OBS levels. Changes dashboard view to the previous (parent) level.

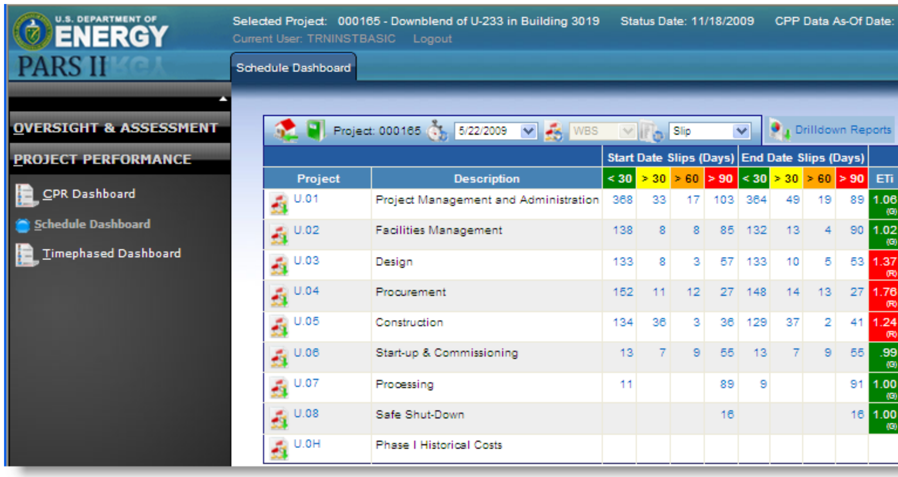


Figure 42 Schedule Dashboard

4.4 Timephased Dashboard

Under the CPP module, users can access Timephased data through the dashboard selection on the navigation bar. Top-level dashboards show project data by WBS or OBS number and, as with the CPR and Schedule dashboards, users may drilldown through WBS and OBS numbers, revealing data for lower detail levels.

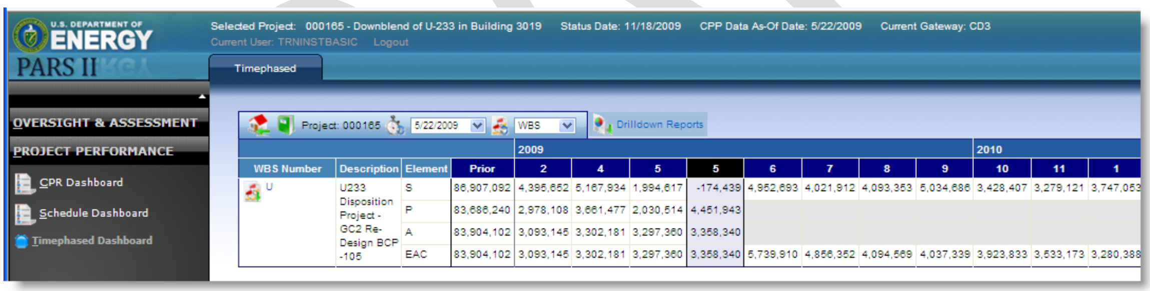


Figure 43 Timephased Dashboard

4.5 Dynamic Drilldown Reports

The right-hand side of the CPR, Schedule, and Timephased dashboard toolbar has a button for “Drilldown Reports.” Clicking this will take the user to a list of pre-formatted Dynamic Drilldown Reports (DDRs) that can be run. These DDRs are configured to report on the current WBS level.

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

2. Select the time period, table, and view.

4.5.1 WBS Reports

3. Click 

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

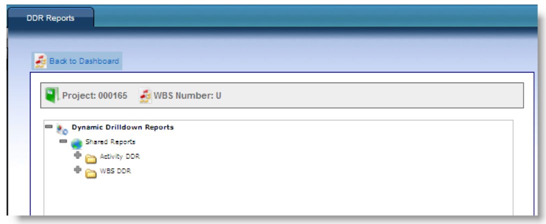


Figure 44 Drilldown Reports Tab

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

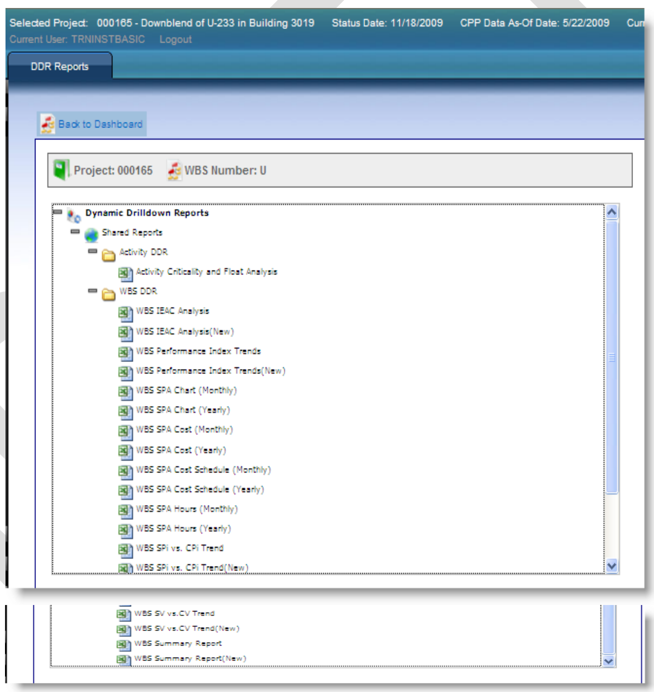


Figure 45 Project Performance WBS Report Listing

5. Click the **Report Title** from the WBS DDR folder. Wait for the report to generate. Status messages display at the bottom of the reports list.

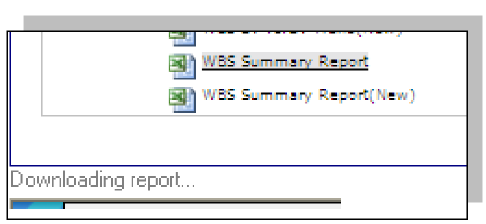


Figure 46 Downloading WBS Summary Report

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

Program Name:	000165
Program Description:	
WBS Number:	U
WBS Description:	U233 Disposition Project - GC2 Re-Design BCP-105

Period:	**2/27/2009**	**4/3/2009**	**5/1/2009**	**5/22/2009**
Cumulative to Date				
BCWS	$91,302,743.37	$96,470,676.89	$98,290,855.40	$98,290,855.40
BCWP	$86,664,348.13	$90,325,825.24	$96,808,282.21	$96,808,282.21
ACWP	$86,997,246.94	$90,299,427.52	$96,955,127.50	$96,955,127.50
SV	($4,638,395.24)	($6,144,851.65)	($1,482,573.19)	($1,482,573.19)
SV%	-5.08%	-6.37%	-1.51%	-1.51%
SPi	0.949	0.936	0.985	0.985
CV	($332,898.81)	$26,397.72	($146,845.29)	($146,845.29)
CV%	-0.38%	0.03%	-0.15%	-0.15%
CPi	0.996	1.000	0.998	0.998
Current Period				
BCWS	$4,395,651.63	$5,167,933.52	($174,438.67)	($174,438.67)
BCWP	$2,978,107.70	$3,661,477.11	$4,451,942.73	$4,451,942.73
ACWP	$3,093,145.13	$3,302,180.58	$3,358,340.44	$3,358,340.44
SV	($1,417,543.93)	($1,506,456.41)	$4,626,381.40	$4,626,381.40
SV%	-32.25%	-29.15%	-2652.15%	-2652.15%
SPi	0.678	0.708	-25.522	-25.522
CV	($115,037.43)	$359,296.53	$1,093,602.29	$1,093,602.29
CV%	-3.86%	9.81%	24.56%	24.56%
CPi	0.963	1.109	1.326	1.326
At Complete				
BAC	$357,764,109.92	$358,554,912.59	$369,395,810.08	$369,395,810.08
EAC	$359,080,970.09	$362,383,150.67	$369,636,828.40	$369,636,828.40
VAC	($1,316,860.17)	($3,828,238.08)	($241,018.32)	($241,018.32)
ACi	0.996	0.989	0.999	0.999
TCPi (To EAC)	0.996	0.986	1.000	1.000
TCPi (To BAC)	1.001	1.000	1.001	1.001
% Scheduled	25.52%	26.91%	26.61%	26.61%

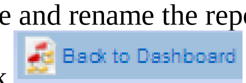
REPORT

Figure 47 WBS Summary Report from Dashboard Drilldown Reports

7. At this point, users can work with the document in Excel Workbook, including save a copy to the user's local drive, edit, and print a copy.

   NOTE: Any changes made to the Excel report are local changes only. The PARS II database is not altered.

8. When finished viewing, **Close** the Excel window. When closing Excel, a reminder displays to save the report (optional). If you save the report, select a folder on your local drive and rename the report.

9. Return to the PARS II task window. When finished running reports, click 

.

4.5.2 OBS Reports

10. To produce OBS reports, select the **OBS** table from the dashboard.

11. Click 

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

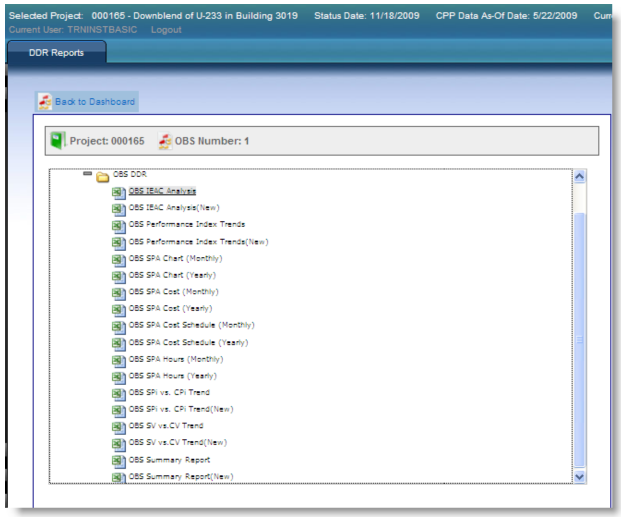
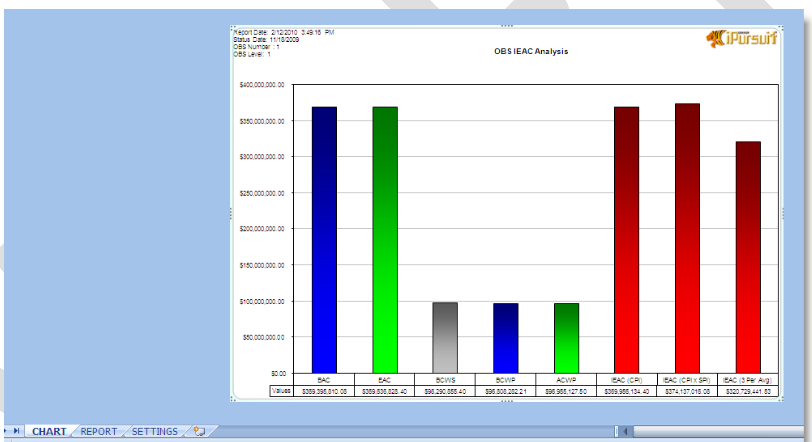


Figure 48 Project Performance OBS Report Listing

12. Select **OBS** report. Wait until the report opens in an Excel window.



OBS IEAC Analysis Report from Dashboard Drilldown Reports

13. When finished viewing, **Close** the Excel window. A reminder displays to save the report (optional). If you save the report, select a folder on your local drive and rename the report.

14. Return to the PARS II task window. When finished running reports, click 

.

NOTE: Currently, the WBS and OBS reports can only be generated from the dashboard tabs under Project Performance.

5 ALL REPORTS

Users have two options for generating Oversight & Analysis reports: through the “Reports” toolbar icon in each of the Oversight & Assessment tabs, or through the “All Reports” module.

1. Throughout PARS II, the “Reports” icon on the toolbar will bring up a list of reports, if any, which are appropriate to the screen currently being viewed by the user.

2. Opening the “All Reports” module from the left-hand side navigation bar gives users access to all built-in OA reports relevant to the open project, and reports which traverse multiple projects within the user’s domain. In the navigation bar, the option “SSS Reports” appears. “SSS” stands for “Sort, Select, and Summarize.” Clicking this will open the list of report templates.

To run a report, users must select the parent folder from the list of report types in the “All Reports” tab (in this case, the “PARS Reports” folder), and click the “+” icon beside the folder. This reveals the preset reports built into the system. Users must click “View” from the toolbar menu to generate thr report. This will open a new Microsoft Excel window with the appropriate report as generated by PARS II.

Appendix B contains the EXCEL settings required for PARS II reports and a sample of each OA report.

5.1 Run a report

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

   NOTE: Some of the OA reports traverse multiple projects, such as Project Summary by Program, so it does not matter what project users have open. But, others, such as the Critical Decisions Report, pertain to a specific project. Check that you have selected the appropriate project on which to report.

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

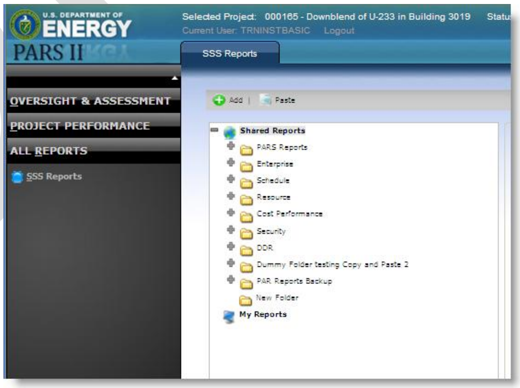


Figure 49 Reports - Sort, Select, Summarize – SSS Tab

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

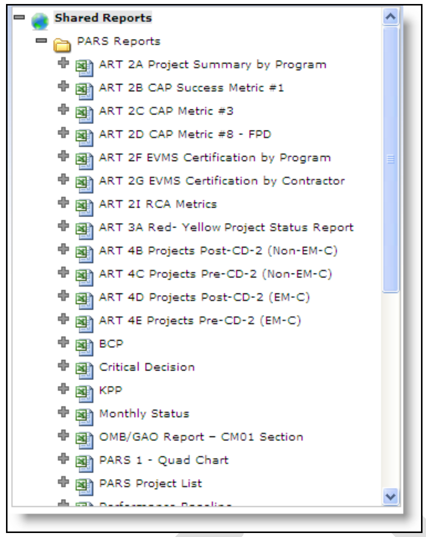


Figure 50 List of PARS Reports

4. Click on the **report title**. The Report Properties window displays on the right-hand side of the screen. Verify the Report Title that displays on the Report Properties window,

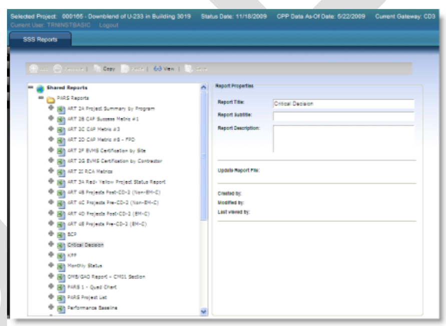
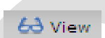


Figure 51 Report Properties

5. Click 

to generate the report. Wait as it processes. Status messages appear above the progress bar 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

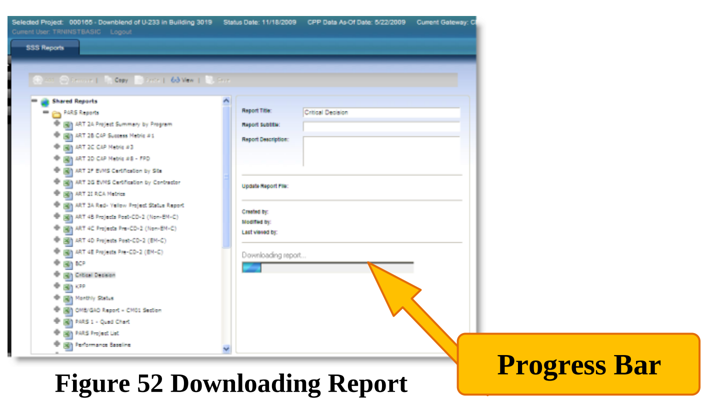
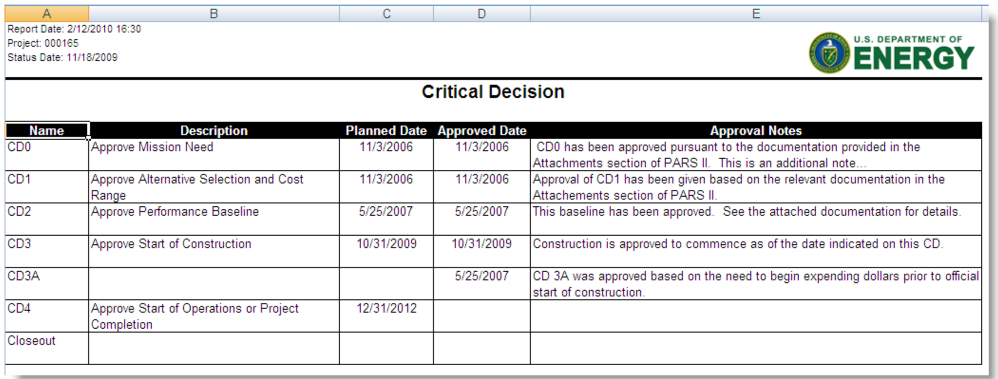


Figure 52 Downloading Report

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

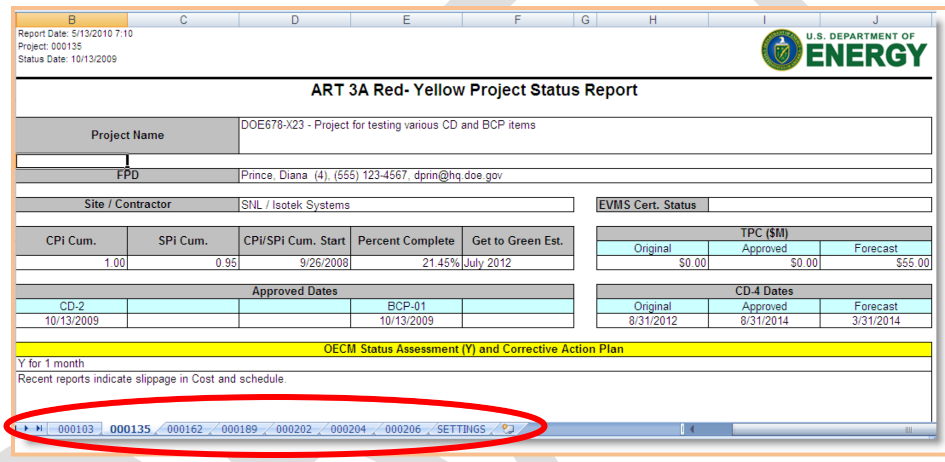

Report Date: 2/12/2010 16:30
Project: 000165
Status Date: 11/18/2009

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.
CD3	Approve Start of Construction	10/31/2009	10/31/2009	Construction is approved to commence as of the date indicated on this CD.
CD3A			5/25/2007	CD 3A was approved based on the need to begin expending dollars prior to official start of construction.
CD4	Approve Start of Operations or Project Completion	12/31/2012		
Closeout				

Figure 53 Critical Decision Report


Report Date: 5/13/2010 7:10
Project: 000135
Status Date: 10/13/2009

U.S. DEPARTMENT OF ENERGY

ART 3A Red- Yellow Project Status Report

Project Name	DOE678-X23 - Project for testing various CD and BCP items
FPD	Prince, Diana (4), (555) 123-4567, dprin@hq.doe.gov
Site / Contractor	SNL / Isotek Systems
EVMS Cert. Status	

CPi Cum.	SPi Cum.	CPi/SPi Cum. Start	Percent Complete	Get to Green Est.
1.00	0.95	9/26/2008	21.45%	July 2012

TPC ($M) Original	Approved	Forecast
$0.00	$0.00	$55.00

Approved Dates CD-2			BCP-01	
10/13/2009			10/13/2009	

CD-4 Dates Original	Approved	Forecast
8/31/2012	8/31/2014	3/31/2014

OECM Status Assessment (Y) and Corrective Action Plan
Y for 1 month
Recent reports indicate slippage in Cost and schedule.

000103 000135 000162 000189 000202 000204 000206 SETTINGS

Figure 54 Report with Multiple Worksheet Tabs

7. At this point, users can work with the document in Excel Workbook, including save a copy, edit, and print a copy.

8. When finished viewing, **Close** the Excel window. A reminder message to save the report displays.

9. Return to PARS II task window. The report can be re-opened without re-processing, if needed.

NOTE: After highlighting a Report Title, click* View *to generate the report.

6 HELP

By clicking the “About” option under the Help module, users can view the Version and Date of the PARS II version active for the logon session.

Figure 55 PARS II Version # and Date

6.1 Helpdesk

Questions or comments about PARS II should be directed to the PARS II Help Desk:

- via email at imanage.eas@hq.doe.gov
- or by calling 301-903-2500
  - select Option 4 - Enterprise Systems iManage, then Option 5 - PARS II

7 ENTER MONTHLY STATUS UPDATE

The Monthly Status tab provides three distinct organizational areas for project status update:

- the FPD
- the Level 1 Program
- OECM

After selecting "Monthly Status" from the Navigation bar, each organizational area can be accessed through a "Monthly Status Type" drop-down menu located just below the toolbar. The reporting fields in the "Monthly Status Detail" pane below will change to reflect only the fields relevant to each type of update.

Users will be able to either edit or view information for each of the three areas depending on the role of the user accessing the tab. For example, FPDs can update information in the FPD section, but are only able to view Program and OECM updates. Similarly, only a Program representative can update the Program section, and only an OECM analyst can update the OECM section.

Updates are entered to reflect the status for the reporting period shown as the Status Date on the Title Bar of the screen. Updates cannot be entered for prior reporting periods.

The Monthly Status tab displays one of three ways.

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

b. For projects that have had on-going reporting in prior months, the status tab displays the most recent data entered in each field. If the Updated by and Updated Date fields are populated – the system automatically does this when a new month's entry is made - then any entries made in the EDIT mode, will overwrite/correct the same month's status information.

c. When a new month's status period has been set, the status tab displays the most recent data entered in each field for projects that have had on-going reporting. The Updated by and Updated Date fields are blank. This indicates that the data has not yet been edited for the new time period.

7.1 FPD

With "FPD" selected in the "Select Monthly Status Type" drop-down, PARS II will display and allow the editing of the Federal Project Director's monthly status update for the current reporting period.

Before entering a status update, FPDs are expected to review the Contractor Project Performance dashboards and the latest OA data. Selecting the "Has the CPP data been reviewed?" check box and the "Is the OA data Current?" checkbox indicates that the FPD has done so.

7.1.1 Review Contractor EV and Schedule Upload

FPDs review the Contractor Project Performance data by viewing and analyzing the Upload Import log for issues that may need correction, and by viewing and analyzing the CPR, Schedule, and Timephased dashboards as described in Chapter 4.

1. Select **Project Performance** from the navigation bar.

2. Select **Project Data Upload** from the Project Performance menu.

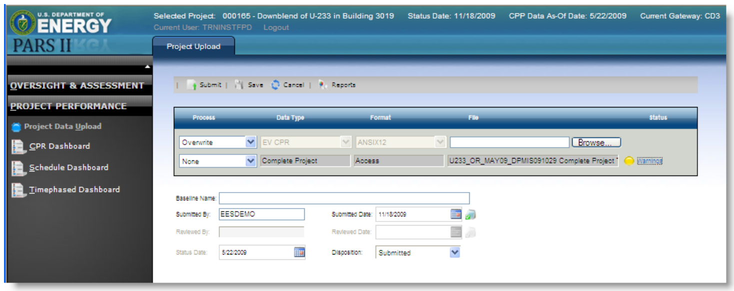


Figure 56 Project Data Upload - FPD

3. Click the  radio button under the status column.

4. View and analyze the Import Error log.

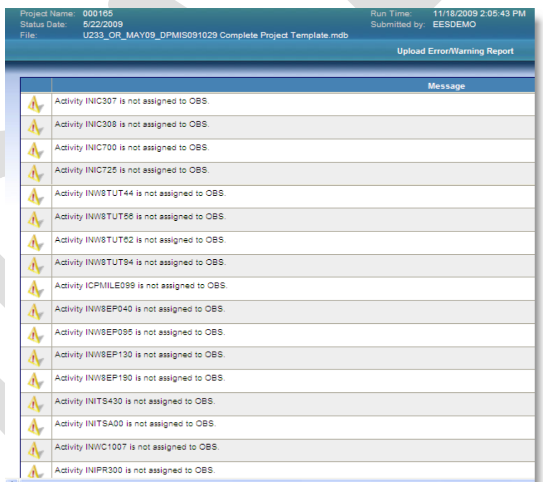


Figure 57 Import Error Log

5. View and analyze the CPR, Schedule, and Timephased dashboards as described in Chapter 4.

7.1.2 Update FPD Monthly Status

Fields in the FPD Monthly Status Detail pane include "Forecast for TPC," "Forecast completion," which can be entered manually or from a selection calendar, and "Assessment Narrative," where the FPD can enter an assessment on the project's current performance.

The next three fields concern the FPD's "Red-Yellow-Green" (RYG) assessment of the project. The system asks the FPD to offer a color-coded assessment of the project's progress, and if not "Green", an estimate of when the project is expected to attain “Green” status, along with a “Corrective Action Narrative” outlining a plan to attain that status.

Fields for Cost and Schedule Contingencies and Profit Fee reserves must also be completed. “Updated By” and “Updated Date” fields are automatically set by the system.

Table 12 Monthly Status Icons - FPD

ACTIVE ICON	PURPOSE
Edit	Edit the Monthly Status
Attachments	View, edit, or add attachments associated with Monthly Status
Reports	Generate reports, if any, pertaining to Monthly Status

1. Select **Monthly Status** from the Navigation Bar. Verify that FPD Monthly Status is selected.

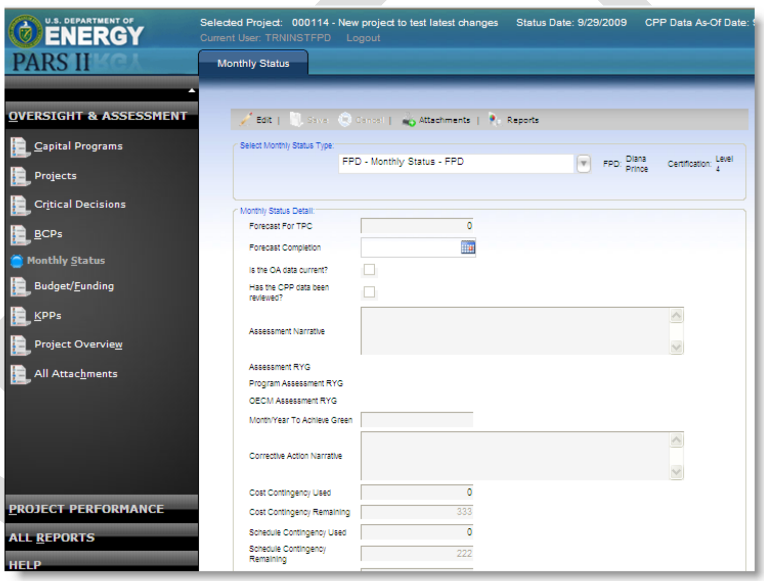


Figure 58 FPD Monthly Status Screen

2. Click Edit to begin entering monthly status information.

3. After reviewing the latest OA data as described in Chapter 3, click checkbox to indicate “**Is the OA Data Current?**” if it is, otherwise leave it blank.

4. After reviewing the latest Contractor upload, click checkbox “**Has the CPP Data been Reviewed?**”

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

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

7.2 Program

With the "Program" entry from the status type drop-down selected, a Program representative can input the Program Office's assessment of the project's RYG status and, if not already "Green," the date the Program Office expects the project to attain "Green" status. Before entering a status update, the Program representative is expected to have viewed and analyzed the latest contractor EV and Schedule upload as described in Chapter 4.

Like the FPD, the Program representative can enter a TPC Forecast, a forecast for CD4 completion, and a Status Assessment Narrative. "Updated By" and "Updated Date" are automatically set by the system.

Table 13 Monthly Status Update Icons - Program

ACTIVE ICON	PURPOSE
Edit	Edit the Monthly Status
Attachments	View, edit, or add attachments associated with Monthly Status
Reports	Generate reports, if any, pertaining to Monthly Status

7.2.1 Update Program Office Monthly Status

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

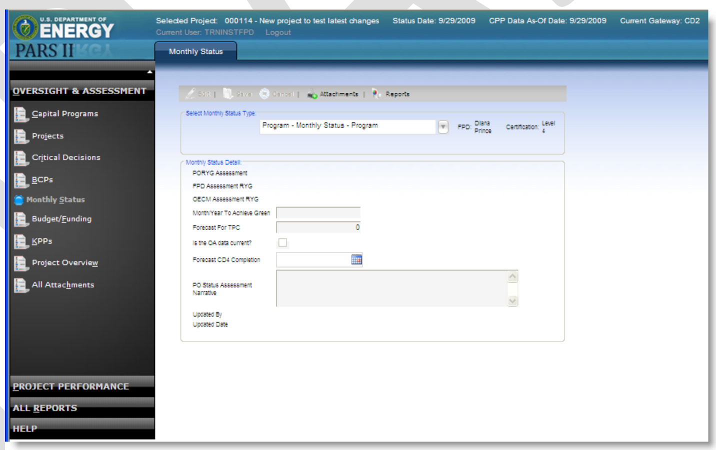


Figure 59 Program Monthly Status Update Screen

2. Click Edit to begin entering monthly status information.
3. Enter/Update fields as needed. Fields in gray are calculated values. Updated by and Updated date are populated by PARS.
4. Click Save. Users are returned to the View mode of the Monthly Status tab.

7.3 OECM

With the "OECM" entry from the status type drop-down selected, the OECM Analyst or Alternate OECM Analyst can enter an assessment of the project's RYG status and, if not already "Green," the date OECM expects the project to attain "Green" status. Before entering a status update, the OECM representative is expected to have viewed and analyzed the latest contractor EV and Schedule upload as described in Chapter 4.

Like the FPD and the Program representative, the OECM analyst can enter a TPC Forecast, a forecast for CD4 completion, and an Overall Assessment Narrative. "Updated By" and "Updated Date" fields are automatically set by the system.

7.3.1 Enter OECM Monthly Status Update

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

2. Select **OECM Monthly Status** from the Select Monthly Status type.

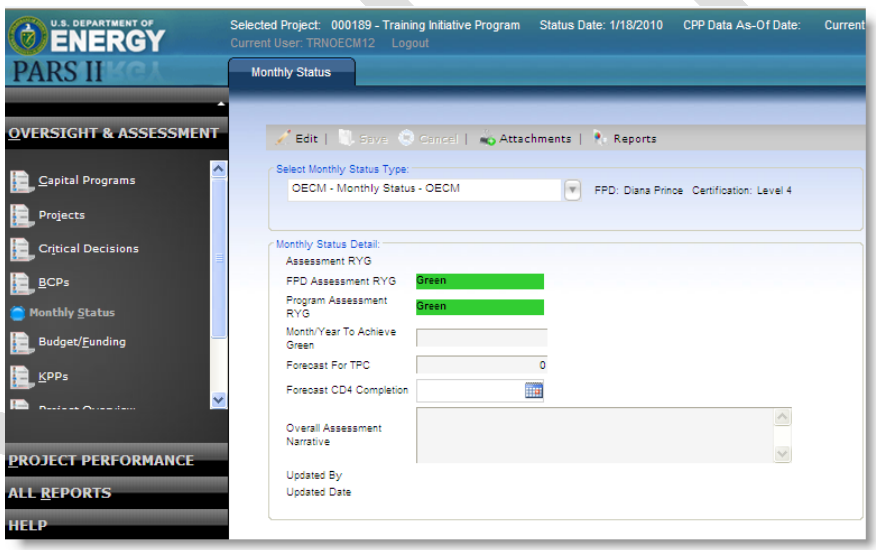


Figure 60 OECM Monthly Status Screen

3. Click  to begin entering monthly status information, and modify status fields as needed.

4. Click . Users are returned to the View mode of the Monthly Status tab.

8 ADD AN ATTACHMENT

Users select the “Attachments” toolbar icon on the Monthly Status Update tab, or any tab that has an “Attachments” icon, to open an Attachments window. The Attachment window displays a list of narratives, hyperlinks, or appended documents pertaining to the active tab. In this window, users with “write” privileges can add new attachments by using the “Add” button on the toolbar. An existing attachment can be edited, or deleted from the toolbar, as well. To exit from this window at any time, click the “Cancel” button on the toolbar.

Note: Only the user who submitted an attachment can edit or delete it.

The “Add” button opens a window where the type of attachment can be selected from a drop-down list and a title can be assigned. A document can be attached, or content can be pasted or typed into the “Narrative” field or “Hyperlink” field..

Table 14 Add Attachment Icons

ACTIVE ICON	PURPOSE
Add	Opens window to select and add a new attachment.
Edit	Permits edit of selected (highlighted) attachment. Only the user who added the attachment, has rights to edit it.
Document	Dropdown to select type of attachment – Document, Narrative, or Hyperlink.
Browse...	Opens window to browse through folders to select file to be attached.
Save	Save the attachment.
Cancel	Exit the window

1. From the Monthly Status Update tab, or any tab that has an “Attachments” icon, click Attachments. The Attachment window displays.

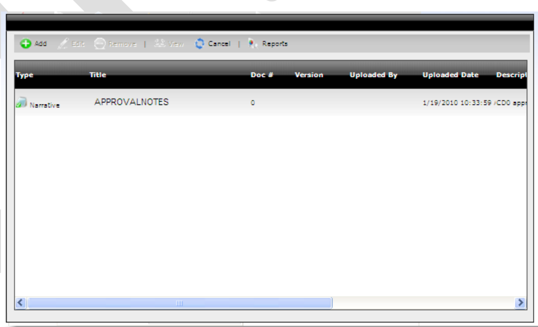


Figure 61 Attachment Window

2. Click **ADD**. The Add/Edit attachment window displays.

3. Select **Type of attachment – Document, Narrative, or Hyperlink** from the dropdown list on the toolbar and follow instructions for whichever type was selected.

8.1.1 Document

4. Enter attachment identification information and **Browse** for a document.

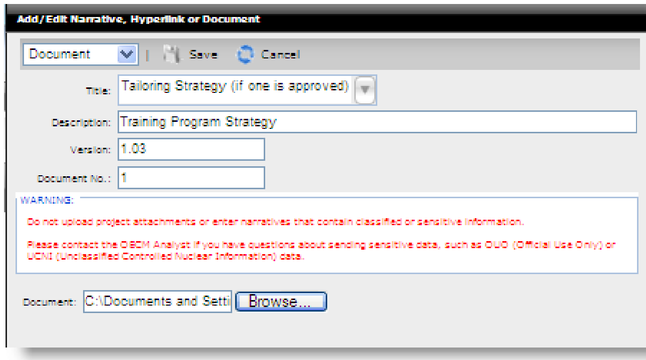


Figure 62 Add Document Attachment

8.1.2 Narrative

5. Enter attachment identification information. **Type** or **Paste** text in the Narrative box..

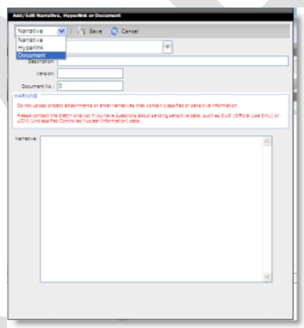


Figure 63 Narrative Attachment

8.1.3 Hyperlink

6. Enter attachment identification information. **Type the Link** in the Hyperlink field.

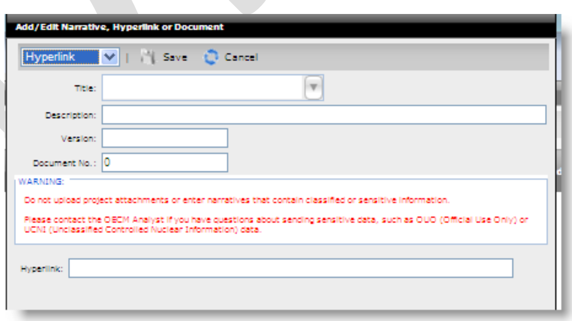


Figure 64 Hyperlink Attachment

7. Click 

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

9 OVERSIGHT AND ASSESSMENT - DATA ENTRY

To create, or edit Capital Programs, Projects, Critical Decisions (CDs), Baseline Change Proposals (BCPs), Budgeting and Funding, and Key Performance Parameters (KPPs), open the “Oversight & Assessment” module.

9.1 Creating and Updating a Capital Program

In order to initiate a project in PARS II, users must first define it’s placement within the PARS II data hierarchy shown in the figure below. This is accomplished using the Capital Programs tab. In the Capital Programs tab users will select Level 1 and 2, and then select an existing Level 3, or create a new Level 3.

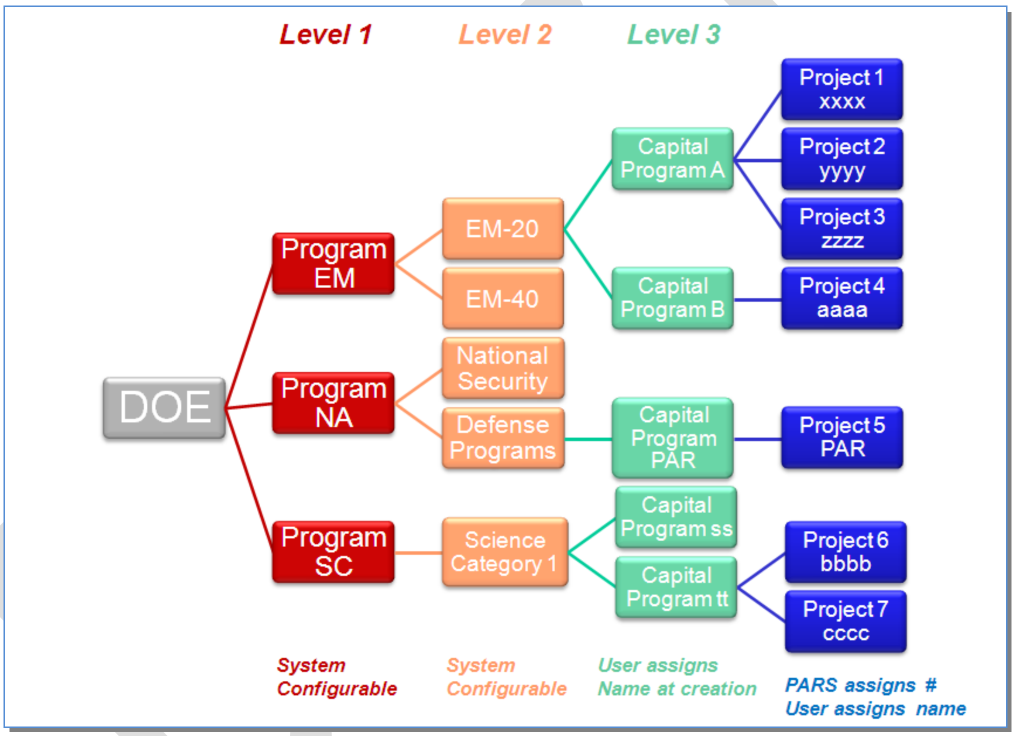


Figure 65 PARS II Data Hierarchy for Capital Programs and Projects

To edit or create a Capital Program, select the “Capital Programs” tab within the Oversight & Assessment module.

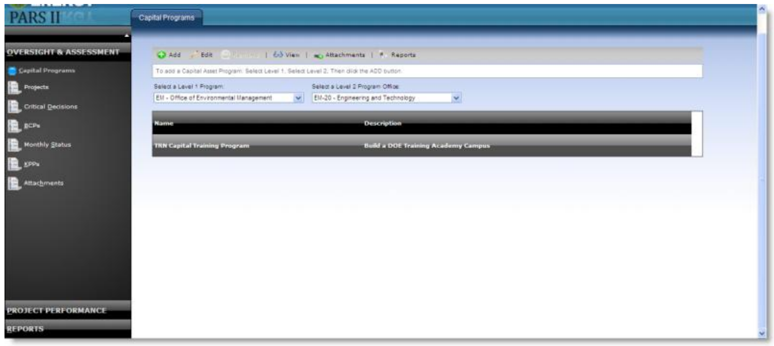


Figure 66 Capital Programs Tab

The drop-down lists for "Level 1" and "Level 2" come pre-populated in PARS II. The system administrator can configure the level 1 and 2 lists to reflect program requirements. Users make a selection from both lists, and the existing Capital Programs within that set will appear in the Name and Description table. To access an existing Capital Program, select it from the table and the toolbar icons will become active.

Table 15 Add Capital Program Icons

ACTIVE ICON	PURPOSE
Add	Create a new Capital Program
Edit	Edit the description of an existing Capital Program. Note that the Capital Program name cannot be changed once it has been created and saved in the ADD function.
View	View the full description of the Capital Program. Selecting "View" shows all of the same information as "Edit," but simply disables the user-input features.
Attachments	Select and view any attachments that were uploaded to this screen.
Reports	Generate reports, if any, pertaining to Capital Programs

9.1.1 Add a Capital Program

1. Select **Capital Programs** from the Navigation Bar.

2. Select a Program from the **Level 1 Program** dropdown.

3. Select the Level 2 category from the **Level 2** dropdown. The Level 2 list is a dependent dropdown, and as such, will contain a list that varies depending on the Program selected in Level 1.

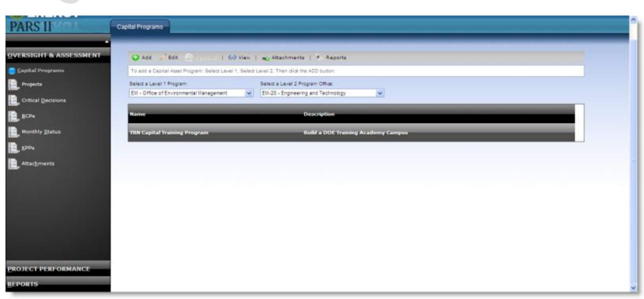


Figure 67 Capital Programs Tab

4. Existing capital programs under the selected Level 1 and Level 2 categories, if any, are listed.

5. Click 

. The adding a New Capital Program Screen displays.

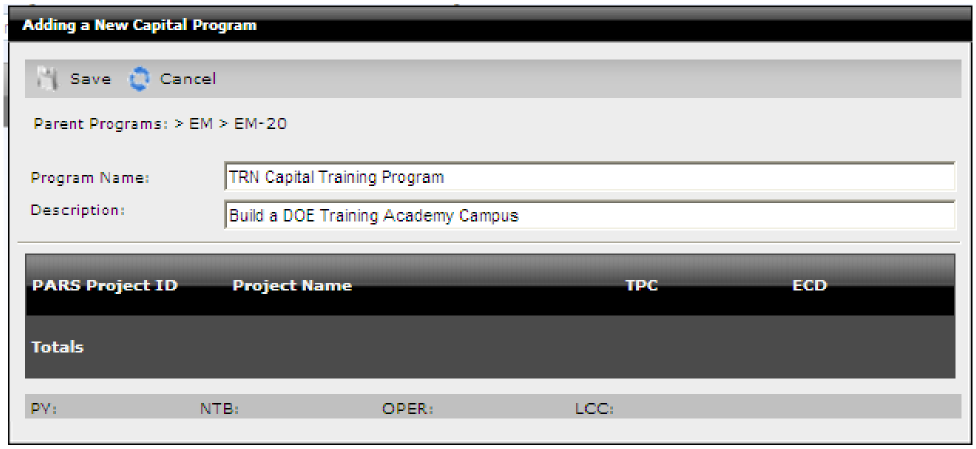


Figure 68 Add a Capital Program Screen

6. Enter the **Program Name** field. This field represents the Capital Program name – Level 3 of the data hierarchy.

   Note: This name cannot be edited after user clicks Save.

7. Enter the **Description** field**.**

8. Click 

. Users are returned to the Capital Programs tab and the new program is added to the list of capital programs for the selected Level 1 program Level 2 categories.

9.2 Creating and Updating a Project

From the "Projects" screen, users can see a list of projects within Capital Programs by making selections from the pre-populated "Level 1 Program," "Level 2 Program Category," and "Level 3 Capital Program" drop-downs.

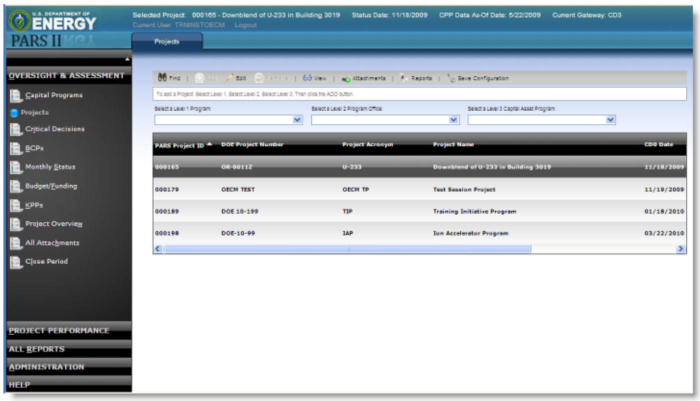


Figure 69 Projects Tab

Table 16 Projects Icons

ACTIVE ICON	PURPOSE
Find	Search for a project or group of projects.
	Search for a project or a group of projects
Add	Create a new project within the selected Capital Program
Edit	Edit the Attributes or Contacts for the selected project
View	View the Attributes of the Project or additional information for Contacts, such as phone, e-mail. Selecting "View" shows all of the same information as "Edit," but simply disables the user-input features.
Attachments	Select and view any attachments that were uploaded to this screen.
Reports	Generate reports, if any, pertaining to the attributes and contacts of the selected Project

.

9.2.1 Adding a New Project

To add a project users must make selections from the pre-populated "Level 1 Program," "Level 2 Program Category," and "Level 3 Capital Program" drop-downs, as there is no project "to find". This ensures that the new project is entered in the appropriate organizational hierarchy and Capital Program.

Note: The appropriate Capital Program must exist or be created before a Project can be created.

To create a new project, click the "Add" icon from the toolbar. The new record provides a blank "Project Attributes" tab, where users can enter basic project naming data, project type, and project category information. Also provided is a blank "Project Contacts" tab.

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

2. From each of the three dropdowns, select the appropriate category for the new project to be added.
   a) Level 1 Program,
   b) Level 2 Category for the Program
   c) and Level 3 Capital Asset Program

   All three categories must be selected. After selecting the three category levels, any existing projects for those categories are listed.

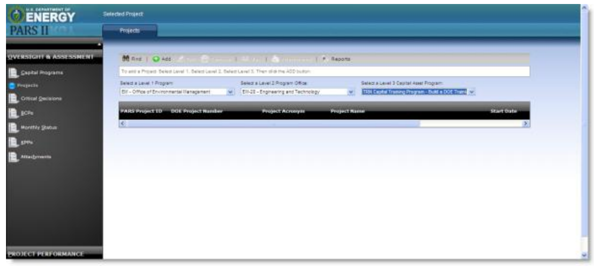
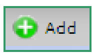


Figure 70 Three Hierarchy Selections for Add a Project

3. Click 

. The **Updating a Project** screen displays with two tabs **--** Project Attributes and Project Contacts.

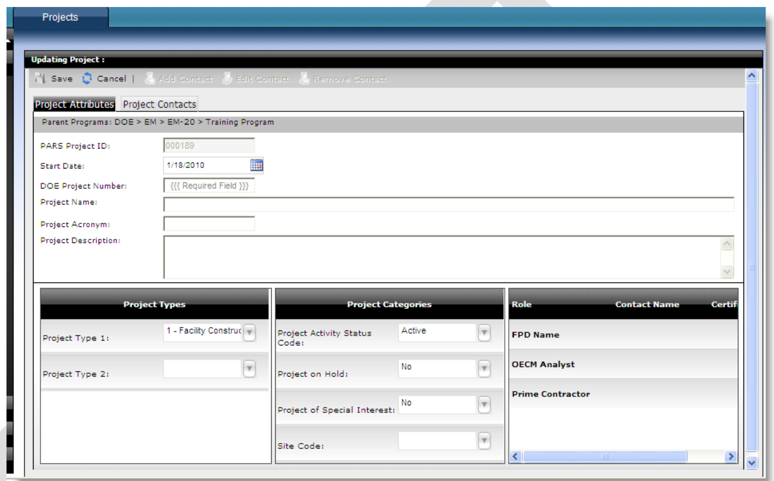


Figure 71 Add a Project Screen

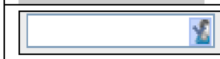
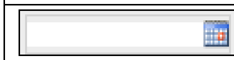
9.2.1.1 Enter Project Attributes

4. Enter Project Attributes information. The PARS Project ID is automatically assigned and serves as the unique database identifier for the project.

   a. The CD 0 Date defaults to today's date. Change the date if it is not correct. This date will also be used to set the initial Monthly Period Status Date that appears on the title bar. The initial Status date is one month forward from the CD0 date.
   b. Enter the DOE Project Number. The DOE Project Number is a "free-text" value and is 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. Enter Project Name field.
   d. Enter Project Acronym.
   e. Enter the Project Description.
   f. Select Project Type 1 from dropdown.
   g. Select Project Type 2 from dropdown.
   h. Select Project Categories.
   i. Select the site code.

9.2.2 Select FPD, OECM, and Primary Contractor Contacts

Table 17 Add/Edit Contacts Icons

ACTIVE ICON	PURPOSE
Find Contact	Search Contacts Address Book for a contact.
Add Contact	Opens window to add a contact by entering role, name, date assigned, or order number.
Edit Contact	Edit the Contact role, date assigned, or order number.
	Type a name or click icon to find name in address book of contacts
	Type date or select from calendar icon. Calendar window closes after a "day" is selected.

5. From the Project Attributes tab, highlight **FPD, or OECM, or Primary Contractor** in the lower right contacts list box. The contact icons on the toolbar are activated. FPD is selected in the case shown here.

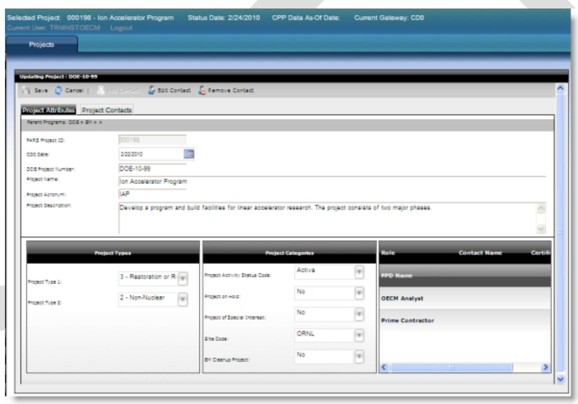


Figure 72 Highlight Contact Role

6. Click Edit Contact. The Contact pop-up box displays with the Role value set to that of the role highlighted in the previous step, in this case, FPD.

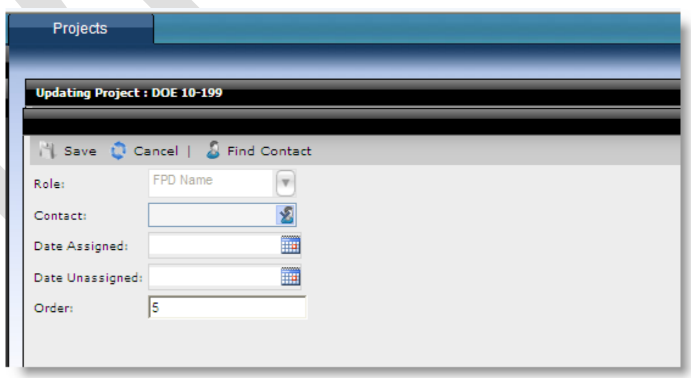


Figure 73 Edit Contact

7. Click Find Contact. The Find Contact screen displays.

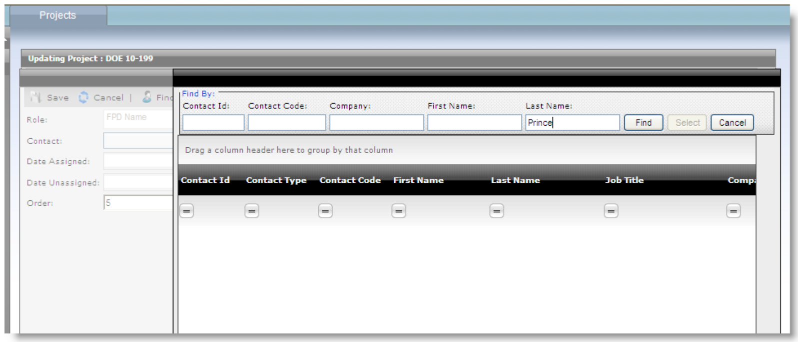


Figure 74 Find Contact Screen

a. **Enter search criteria**. Only contacts who are pre-registered in the PARS II address book can be selected. The contacts address book is maintained by OECM and the system administrator.

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

c. **Highlight Contact** to select.

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

e. Select the **Date Assigned**. Note: the Date Unassigned is set when this contact is no longer associated with the project. The contact and role record is never removed (unless it is a user entry error). This permits retention of history for the project contacts.

f. Enter the **order number** (optional). This number ranks the order in which names are listed in the Contact tab list of contacts. The system assigns a default value for the order. Users have the option of changing the order value.

g. Click 

. Users are returned to the Project Attributes tab. The selected name is now listed in the Contacts box.

9.2.3 Select Other Contacts

8. **Switch to the Project Contacts** tab.

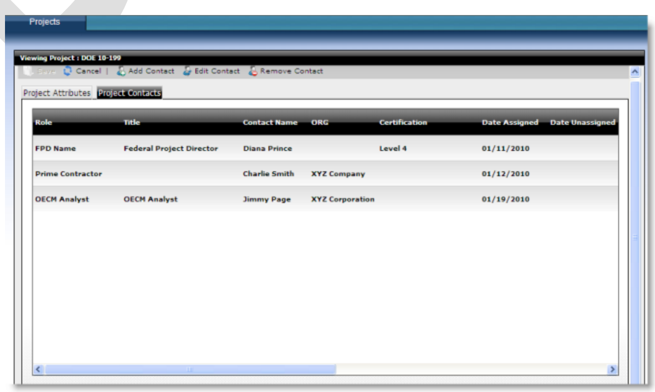
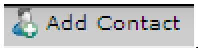


Figure 75 Project Contacts Tab

9. Click 

. The Contact pop-up box displays with ***blank role.***

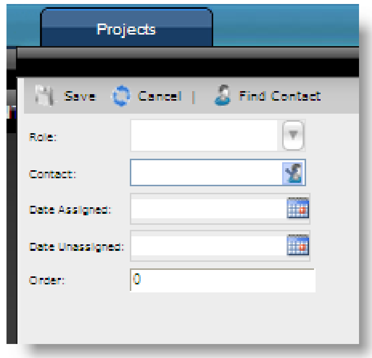


Figure 76 Add Contact Screen

10. **Select the Role** from dropdown list. Alternatively, the role can be typed-in.

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

    a. Enter **search criteria**. Only contacts who are pre-registered in PARS II can be selected. The contacts register is maintained by OECM and the system administrator.
    b. Click **Find.** Wait until the search is complete.
    c. **Highlight contact** entry
    d. Click **SELECT**. Users are returned to the add contacts screen with the selected name filled-in
    e. Select the **Date Assigned**. Note: the Date Unassigned is set when this contact is no longer associated with the project. It is never removed (unless it is a user entry error). This permits retention of history for the project contacts.
    f. Enter the **order number** (optional).
    g. Click 

. Users are returned to the Project Contacts tab. The contact is added to the Contacts list.

12. Click 

to close and exit Add/Update Project.

9.2.4 Updating an Existing Project - Attributes or Contacts

Users can locate projects via the drop-down menus or the “Find” icon in the Projects tab of the Oversight & Assessment module. From the results, click on a project and use the “Edit” icon on the toolbar to access the “Project Attributes” and “Project Contacts” tabs.

1. From the Projects tab, verify that the correct project is selected.

2. Click 

. The Updating Project screen displays with two tabs – Project Attributes and Project Contacts. The Project Attributes tab is the default active tab.

3. Perform any desired edits to the Project Attributes or Project Contacts Tab.

Note: A contact that is no longer associated with the project is not removed. Rather, set the Date Unassigned to indicate that a contact is no longer associated with the project. This permits retention of history for the project contacts.

4. Click Save to close and exit Update Project.

9.3 Critical Decisions

With a project selected, clicking on the “Critical Decisions” tab in the left-hand navigation bar will access a screen allowing users to edit or view CD0, CD1, CD2, CD3A, CD3, CD4, and Closeout information.

Just below the toolbar is a drop-down menu containing each Critical Decision for the project. Below that are panes for “Critical Decision Detail” and “Planned Dates.” Upon selecting a Critical Decision from the drop-down, these fields will either update to reflect previously entered data, or they can be edited using the “Edit” icon from the toolbar.

The “Critical Decision Detail” pane provides fields for the planned date of the CD, the data approved, who approved it, and any approval notes. Also provided are fields for Total Project Cost (TPC) entries, as well as expected CD4 attainment dates.

The “Planned Dates” panel provides fields for the expected dates that each Critical Decision from CD2-Closeout will be attained. All of these fields are editable no matter which Critical Decision is selected.

Table 18 Critical Decision Icons

ACTIVE ICON	PURPOSE
Edit	Permits entering/updating data for the selected CD level.
KPP	Provides a direct link to the KPP Tab listing only those KPPs associated with the current CD screen view.
Attachments	Select and view any attachments that were uploaded to the current CD screen view.
Reports	Generate reports, if any, pertaining to the current CD screen view.

9.3.1 Enter a Critical Decision

1. Select **Critical Decisions** from the Navigation bar. The Critical Decisions tab displays with the default CD level set to the next CD to be entered. For example, if the project is at Gateway CD2, the CD tab opens to CD3a. Users can change the CD level to work with by selecting the appropriate one from the Select Critical Decision dropdown.

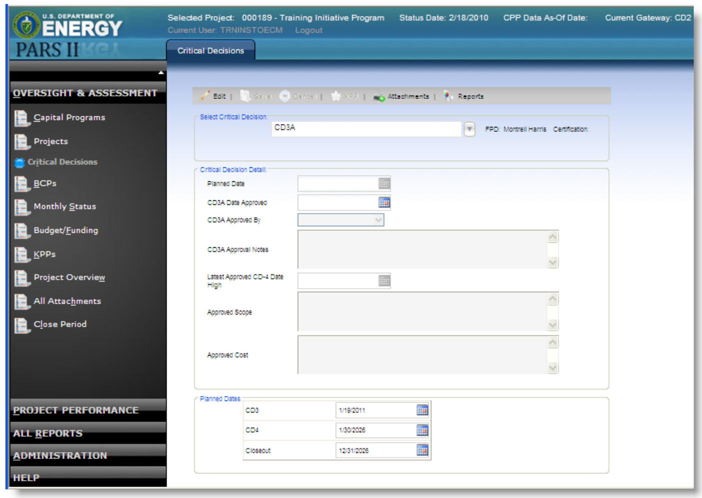


Figure 77 Critical Decisions Tab

2. Verify/Select from the first dropdown list the CD level to enter/update.

3. Click 

. The data fields and additional icons are activated for selection. Data fields vary depending on the CD level selected.

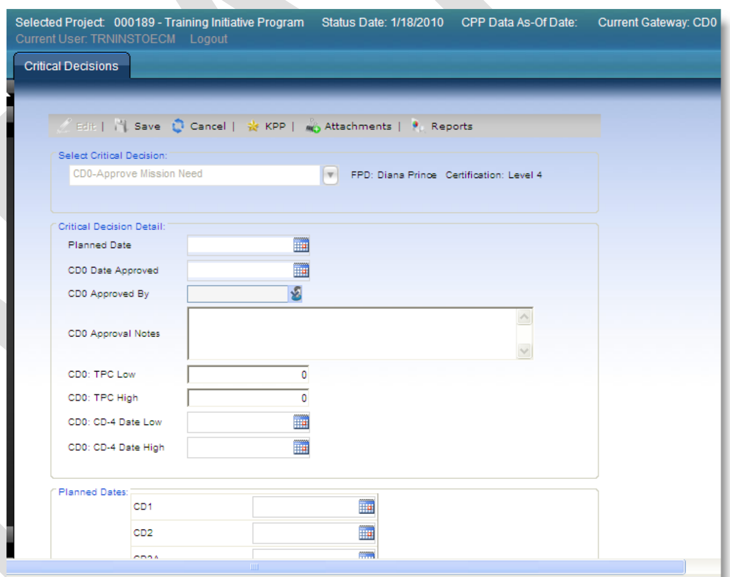
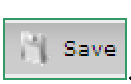


Figure 78 Edit Critical Decisions Screen

4. Complete each data field. Dollars are entered as whole dollars.

5. Enter Planned Dates for reaching other CD levels. All of the Planned dates are editable no matter which Critical Decision is selected from the drop-down list.

6. Click 

. Users are now in View-only mode of the CD tab. Click EDIT to make corrections.

9.4 Baseline Change Proposal (BCP)

The “BCPs” tab allows users to input Baseline Change Proposal information such as the BCP Title and whether or not it is a directed change. Users can update the BCP Submission Date, Approval Date, who approved the change, and any Approval Notes that need to be entered. New TPC and CD4 attainment dates that have been approved as part of the BCP can also be entered in this tab.

Users can access and edit Key Performance Parameters (KPPs) for the BCP. Numbers that do not align with the Performance Baseline will be noted with an error message.

Table 19 BCP Icons

ACTIVE ICON	PURPOSE
Add	Permits entering data for a new BCP.
Edit	Permits updating data for an existing BCP, the one currently selected from the Select BCP dropdown..
KPP	Provides a direct link to the KPP Tab listing only those KPPs associated with the current CD screen view.
Attachments	Select and view any attachments that were uploaded to the current CD screen view.
Reports	Generate reports, if any, pertaining to the current BCP screen view.

9.4.1 Enter a BCP

1. Select **BCPs** from the Navigation Bar. The BCPs tab displays with no data if a BCP has never been entered for the project. Otherwise, the BCP tab displays with the latest BCP data.

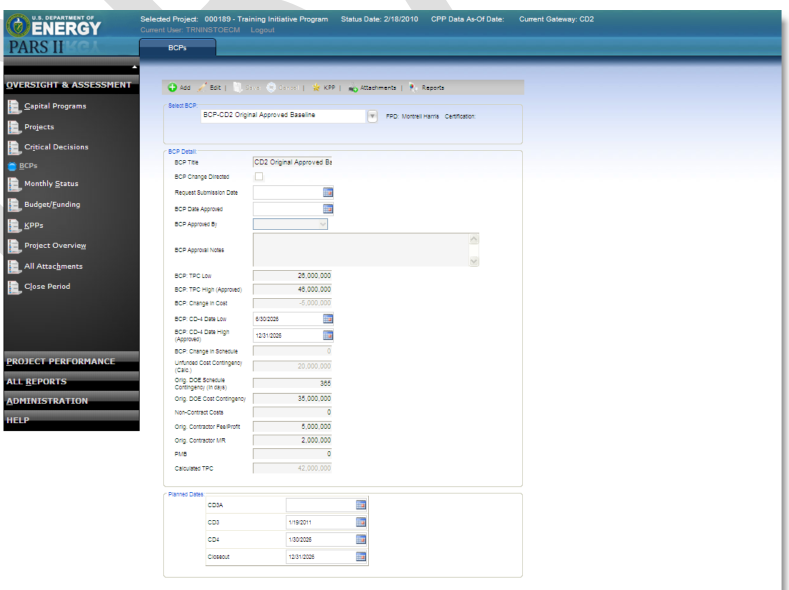


Figure 79 BCP Tab

2. Click Add. The Adding a New BCP screen displays.

3. Enter a **Title to identify the BCP**. This title will be dynamically added to the Select BCP dropdown list.

7. Enter **Dollar values**. Dollars are entered as whole dollars. Grayed boxes are calculated values.

   NOTE: Changes to Dollar values – the first click in a cell highlights the entire value which is replaced as Users type. A second click before typing gives digit-by-digit control.

4. Click Save. Save returns to view-only mode and to the 1st BCP entered for the selected project.

9.5 Budget/Funding Profile

The "Budget/Funding" tab in the OA module pre-populates the "Budget/Funding Selection" dropdown with different types of budget/funding profiles: Integrated Priorities List (IPL), Office of Management and Budget (OMB), APP, CD2, and entries for any BCPs submitted. Once one of these options is selected, users can then enter the appropriate Fiscal Year/Budget Year, Start and End Dates, and select whether or not an Exception Request is needed.

After these selections are made, clicking the "Reset Grid" button on the toolbar will allow users to view financial information that appears in the "Budget/Funding" window. Selecting an End Date beyond the end of the selected fiscal year will create multiple fiscal year columns in the Budget/Funding grid. For example, Selecting FY 11, a start date of Oct. 1, 2010, and an end date of Sept. 30, 2014 will create FY 11, FY 12, FY 13, and FY 14 columns in the grid below.

When users click the "+" icons beside Other Project Costs (OPC), Total Estimated Cost (TEC), and Undistributed (UND), those rows will expand, revealing editable rows beneath. Clicking "Edit" and then double-clicking in these rows under the appropriate fiscal year columns allows users to manually enter the required financial data. Clicking "Save" from the toolbar will commit the changes.

To move between Budget/Funding types, users must select a new Funding Profile from the drop-down menu and click "Reset Grid" from the toolbar.

The "Compare Funding Profiles" drop-down menus below the "Total Request" calculation in the grid allows users to compare the current profile with another, and automatically calculates the difference.

Table 20 Budget/Funding Icons

ACTIVE ICON	PURPOSE
Reset Grid	"Opens" the budget/funding table grid in View mode, and populates the table with the latest set of data or with zeroes if no data exists.
Edit	Enables user-input. Once in Edit mode, double-clicking on an individual cell of the table allows entry of a dollar value. Dollar values should be entered as whole dollars.
Attachments	Select and view any attachments that were uploaded to this screen.
Reports	Generate reports, if any, pertaining to Budget Funding

9.5.1 Enter Budget/Funding Profile

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

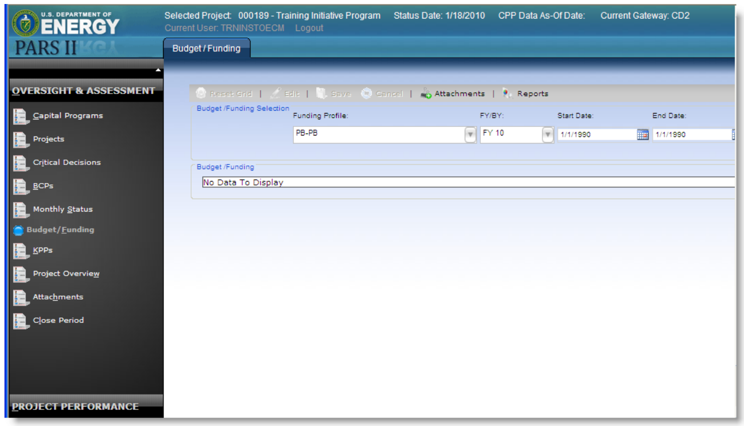


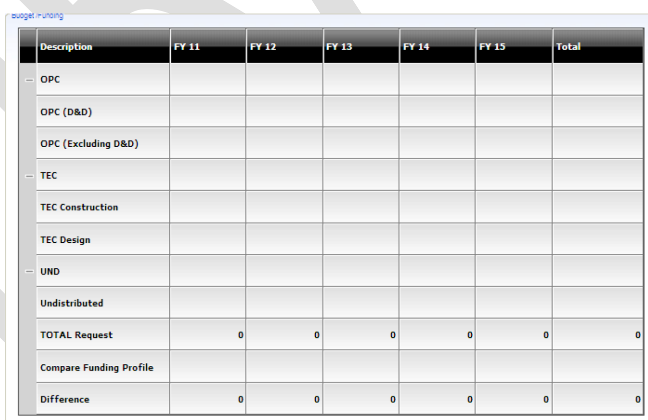
Figure 80 Initial Entry to Budget/Funding

2. Select **Funding Profile** from the first dropdown list.

3. Select the desired **FY** from the FY/BY dropdown.

4. Enter **Start date and End date** for the funding profile table. The Reset Grid icon activates.

5. Click Reset Grid. 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

Figure 81 Budget/Funding Grid

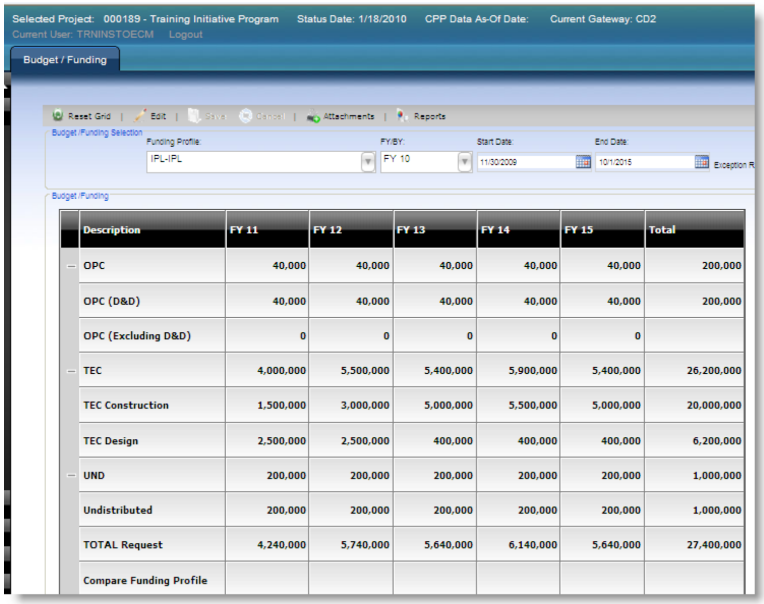
6. Click + sign to expand detail for OPC, TEC, and UND, if needed.

7. Click Edit to begin entering funding values.

8. **Double-click a cell** and enter the whole dollar value for that cell.

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

10. When finished, do a final Save.

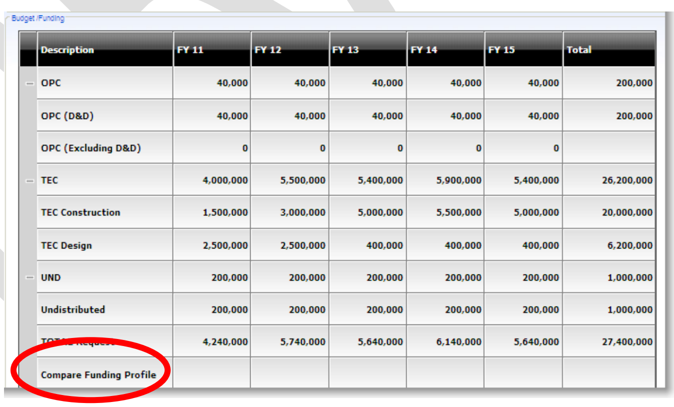


Description	FY 11	FY 12	FY 13	FY 14	FY 15	Total
OPC	40,000	40,000	40,000	40,000	40,000	200,000
OPC (D&D)	40,000	40,000	40,000	40,000	40,000	200,000
OPC (Excluding D&D)	0	0	0	0	0	
TEC	4,000,000	5,500,000	5,400,000	5,900,000	5,400,000	26,200,000
TEC Construction	1,500,000	3,000,000	5,000,000	5,500,000	5,000,000	20,000,000
TEC Design	2,500,000	2,500,000	400,000	400,000	400,000	6,200,000
UND	200,000	200,000	200,000	200,000	200,000	1,000,000
Undistributed	200,000	200,000	200,000	200,000	200,000	1,000,000
TOTAL Request	4,240,000	5,740,000	5,640,000	6,140,000	5,640,000	27,400,000
Compare Funding Profile						

Figure 82 Completed Budget/Funding Grid

9.5.2 Compare Budget/Funding Profiles

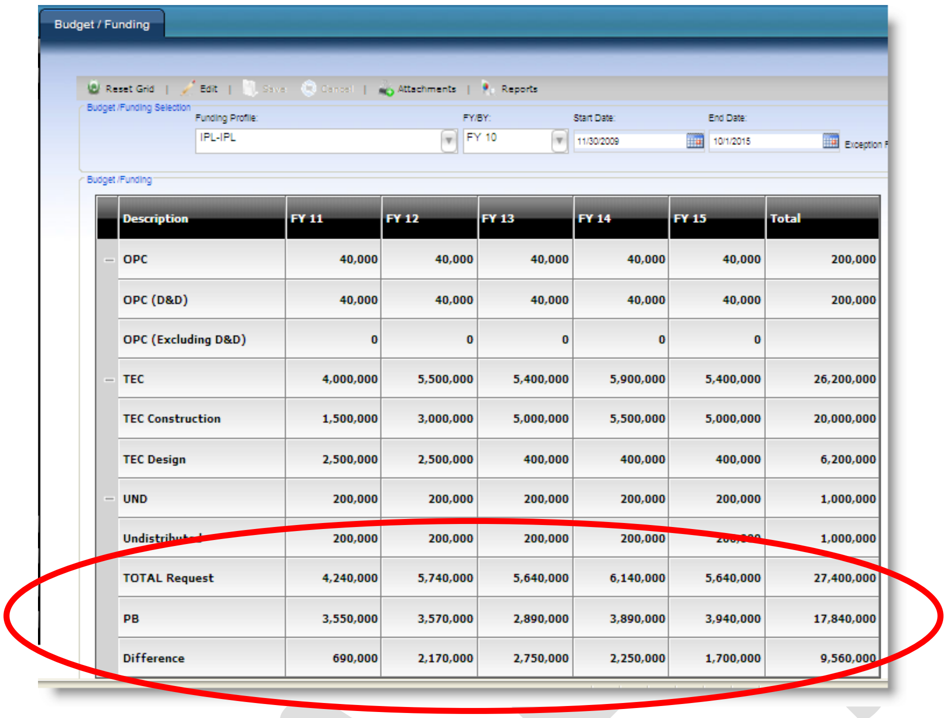
1. From a completed budget/funding table, click the cell labeled **Compare Funding Profile**.



Description	FY 11	FY 12	FY 13	FY 14	FY 15	Total
OPC	40,000	40,000	40,000	40,000	40,000	200,000
OPC (D&D)	40,000	40,000	40,000	40,000	40,000	200,000
OPC (Excluding D&D)	0	0	0	0	0	
TEC	4,000,000	5,500,000	5,400,000	5,900,000	5,400,000	26,200,000
TEC Construction	1,500,000	3,000,000	5,000,000	5,500,000	5,000,000	20,000,000
TEC Design	2,500,000	2,500,000	400,000	400,000	400,000	6,200,000
UND	200,000	200,000	200,000	200,000	200,000	1,000,000
Undistributed	200,000	200,000	200,000	200,000	200,000	1,000,000
TOTAL Request	4,240,000	5,740,000	5,640,000	6,140,000	5,640,000	27,400,000
Compare Funding Profile						

2. From the dropdown list, select **the Profile that is to be compared to the current profile**.

3. PARS II calculates the difference in totals for the two profiles and displays it in the row labeled **Difference.**



Description	FY 11	FY 12	FY 13	FY 14	FY 15	Total
OPC	40,000	40,000	40,000	40,000	40,000	200,000
OPC (D&D)	40,000	40,000	40,000	40,000	40,000	200,000
OPC (Excluding D&D)	0	0	0	0	0	
TEC	4,000,000	5,500,000	5,400,000	5,900,000	5,400,000	26,200,000
TEC Construction	1,500,000	3,000,000	5,000,000	5,500,000	5,000,000	20,000,000
TEC Design	2,500,000	2,500,000	400,000	400,000	400,000	6,200,000
UND	200,000	200,000	200,000	200,000	200,000	1,000,000
Undistributed	200,000	200,000	200,000	200,000	200,000	1,000,000
TOTAL Request	4,240,000	5,740,000	5,640,000	6,140,000	5,640,000	27,400,000
PB	3,550,000	3,570,000	2,890,000	3,890,000	3,940,000	17,840,000
Difference	690,000	2,170,000	2,750,000	2,250,000	1,700,000	9,560,000

Figure 83 Compare Funding Profiles

9.6 Key Performance Parameters (KPPs)

By clicking on the “KPPs” tab within the Oversight & Assessment module, the user will bring up a page that allows for viewing, editing, and tracking Key Performance Parameters. When adding a new KPP, users select the appropriate “CD or BCP” with which the KPP is associated, assign a KPP number, and complete the “Planned Scope” field.

Once the KPP has been attained, usually at CD4, the “Delivered Scope” field must be updated. A selection for whether the KPP was validated or not must be made. The KPP list can be sorted and filtered.

Table 21 KPP Icons

ACTIVE ICON	PURPOSE
Add	Opens window to add a new KPP.
Edit	Opens KPP window of selected (highlighted) KPP for edit.
View	Opens KPP window of selected (highlighted) KPP for view.
Remove	Deletes selected (highlighted) KPP
Clear Filter	Restore complete list of KPPs by removing any filter that may have been applied.
Reports	Generate reports, if any, pertaining to the KPPs

9.6.1 Add a new KPP

1. Select **KPPs** from the Navigation bar. The KPPs tab displays.

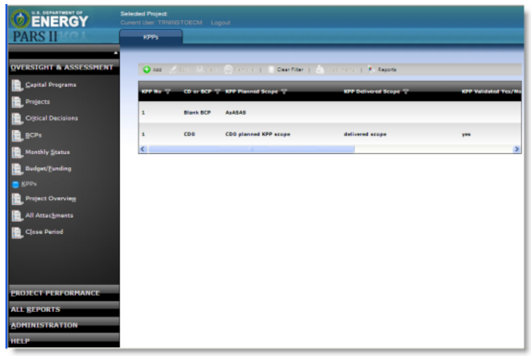


Figure 84 KPP Tab

2. Click 

. The Adding a New KPP screen displays.

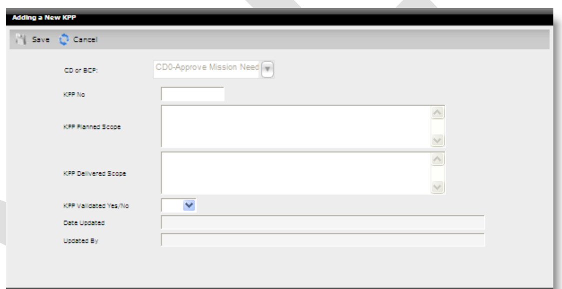


Figure 85 Add KPP Screen

3. If the KPP tab was entered from a CD or BCP screen, then the appropriate CD level or BCP identifier is pre-set in the CD or BCP dropdown list. If the KPP tab was entered from the Navigation Bar, then select **the applicable CD level or BCP Identifier** from the CD or BCP dropdown list.

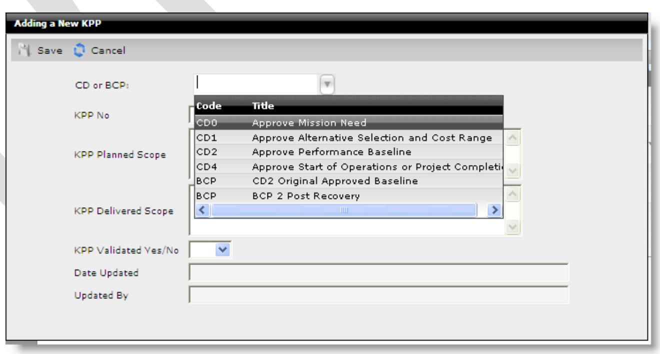


Figure 86 KPP CD or BCP Dynamic Dropdown List

4. Enter the **KPP No**.

5. Enter **KPP Planned Scope**.

6. **KPP Delivered Scope** is left blank since it is not applicable when first creating a new KPP. Typically, the delivered scope is entered when the project reaches the CD-4 milestone.

7. When done, click 

. Users are returned to the KPPs tab. The new KPP is in the list of KPPs.

9.6.2 Edit an Existing KPP

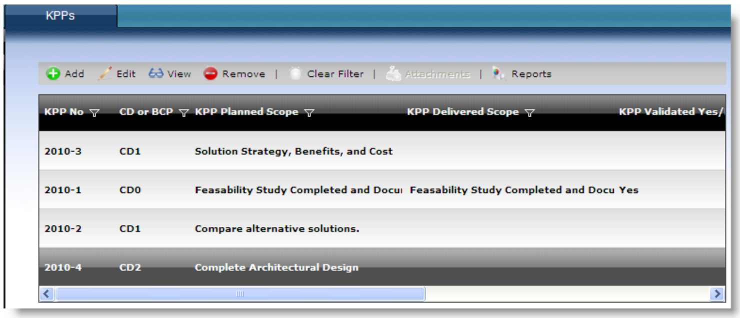


Figure 87 Select Existing KPP

8. To edit the KPP, **Highlight the KPP** and click 

.

9. When finished editing, click 

to retain changes.

9.6.3 Sort the KPP List

10. Click a column header label to sort the list by that column.

9.6.4 Filter the list of KPPs

11. Click the filter icon  for a column and select **filter value** from the dropdown list. The list regenerates with the filter applied.

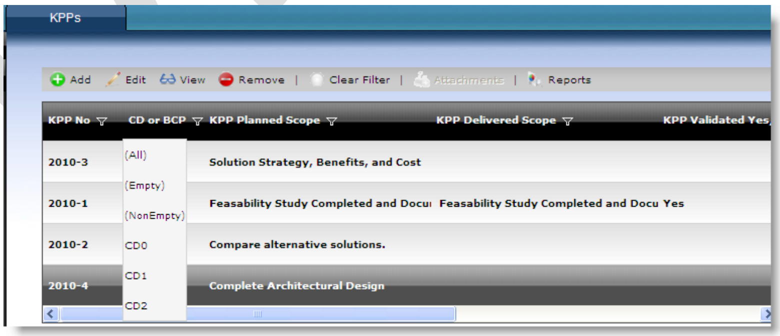
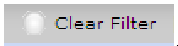


Figure 88 Filter selection for KPP List

12. Re-generate the full list, by clicking 

. Resorting of the list may be needed.

10 CONTRACTOR MONTHLY UPLOAD

Each month, prior to logging into PARS II, and as a process separate from PARS II, contractors will extract the required EV and Schedule reporting data from their respective local project EVM systems. Details for the extract file requirements and extract file templates can be found in the "CPP Upload Requirements" document.

Once logged into PARS II, users will be taken to the Project tab under the Oversight and Assessment module. Typically the Project tab displays with a project already selected from the prior logon session. Users must verify that the currently selected project is the matching project for the EV and Schedule upload, or FIND (see Chapter 2) the project for which data is to be loaded. If a contractor has more than one project, the project selection and upload process is performed (repeated) for each project and its respective extract file.

Table 22 Projects Icons - Contractor

ACTIVE ICON	PURPOSE
Find	Search for a project or group of projects.
View	View the Attributes of the Project or additional information for Contacts, such as phone, e-mail.
Save Configuration	Save the current Sort Sequence of the Project list for use throughout the current session and for subsequent logon sessions.

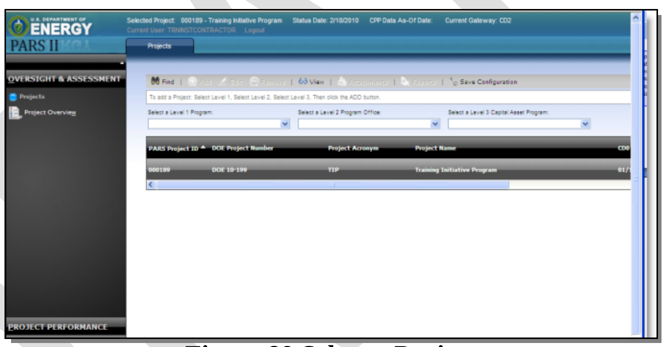


Figure 89 Select a Project

Optionally, Contractors may view a description of the project attributes and a list of the project contacts as defined in PARS II by selecting VIEW from the Projects tab.

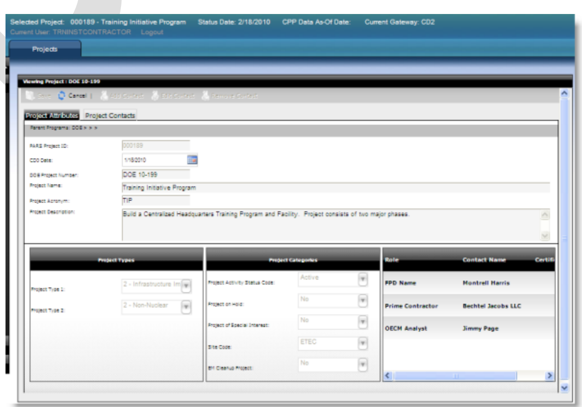


Figure 90 View a Project – Contractor

10.1 Project Performance Tab for Contractors

The primary PARS II interface for Contractors comes in the form of the Contractor Project Performance (CPP) module, labeled “Project Performance”, in the left-hand side collapsible navigation bar. From here, Contractors can upload monthly EV and Schedule data and view project performance, schedule, and timephased performance dashboards.

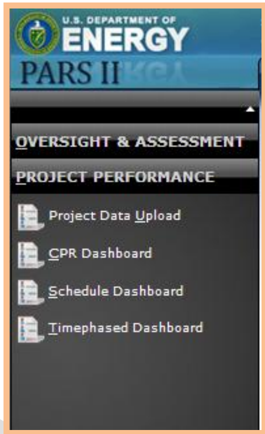


Figure 91 Navigation Bar - Project Performance Menu

PARS II accepts two types of data – EVM CPR 1 and 2 reports in ANSI X12 format, or a complete set of project data in a Microsoft Access file.

NOTE: Currently, contractors must use only the Microsoft Access file for uploading data.

A complete PARS II Microsoft Access template is one that is populated with the following data types for a given reporting period:

1. EV CPR
2. EV Timephased
3. Schedule Activities
4. Schedule Relationships
5. Management Reserve
6. Variance Analysis Report

10.2 Project Data Upload Screen

Upon accessing the Project Performance module, users select “Project Data Upload.”

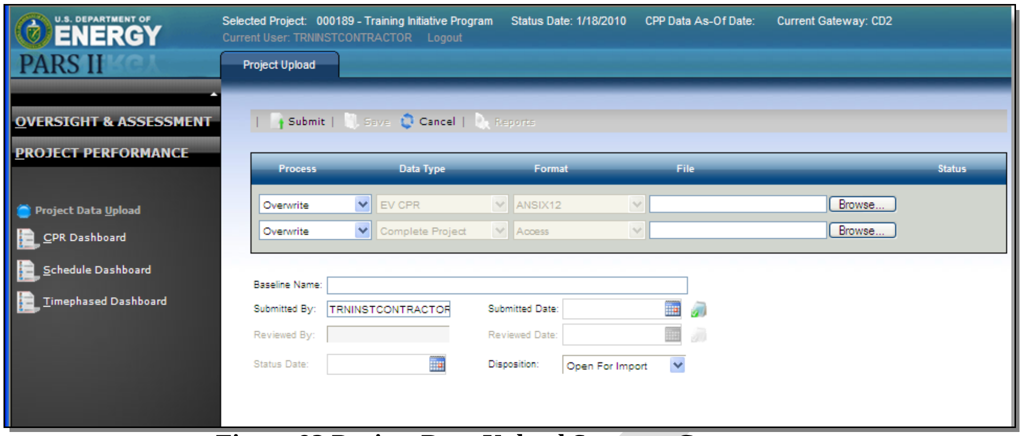
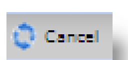


Figure 92 Project Data Upload Screen – Contractor

Table 23 Project Upload Icons - Contractor

ACTIVE ICON	PURPOSE
	Submit the upload of the selected (via Browse) EVM extract file.
	Effect of cancel varies based on when it is clicked. • **Prior to** submittal of a file upload, cancel has no effect, except possible deletion of text entered on this screen. • **After** submittal of an upload file **and before** it has reached status of “Uploaded” or “Processing”, the upload is cancelled and is not in the PARS II database. • **After** submittal of an upload file **and after** it has reached status of “Uploaded” or “Processing”, the data will continue to be processed (validated) and, assuming no fatal errors, will be incorporated into the PARS II database.

On the Project Data Upload tab, the top section of the screen has two line items, each showing a different data format. The first line is for submittal of an ANSI X-12 file, an option not used by PARS II contractors. The other line item data format is the “Access” format. This is the one that DOE contractors use, as it corresponds with the PARS II MS Access data template. The data type and format fields are pre-set and grayed out.

10.2.1 Date Fields

- Status Date - Users begin by setting the Status date. This date must match the contractor’s EVM data “as of date” on the extract file, and is referred to in PARS II as the “CPP as of date.” In PARS II, this date is independent of the status reporting period date, and it may vary from one project to another.
- Submitted Date – the system automatically populates this field with today’s date after the upload is submitted, and populates the “Submitted by“ field with the UserID of the user currently logged into PARS II.
- Reviewed Date – Grayed out for contractors as this is set during the review process for data, and, likewise for Reviewed by.

10.2.2 Process Settings

After the Status date is entered, the "Process" dropdown list is automatically set to "Overwrite". The first, and usually, the only upload for a particular Status date, can be thought of as "overwriting empty tables" with this month's data. Any subsequent upload submittals with the same Status date will overwrite the previous upload for that date.

When the upload process has successfully completed, the "Process" dropdown list is automatically set to "Completed". Upon subsequent entry to the Project Data Upload tab, the "Process" dropdown list is automatically set to "None", indicating there is no further processing required *by the system* as this month's data was successfully incorporated into the PARS II database.

In the event that the contractor needs to perform, or a data reviewer requests a re-submission, then the Status date must remain unchanged and users must manually select "Overwrite".

10.2.3 Disposition Settings

Users submitting uploads do not have to select any options from the Disposition dropdown list. The default selection is set by the system - "Open for Import". When the file is submitted for upload, the disposition automatically changes to "Submitted".

10.2.4 Baseline Name

If the EVM data to be uploaded represents a Baseline, users enter an identifying name in the free-text box labeled "Baseline Name."

10.2.5 Browse and Submit

Users select the EVM extract file to upload from their computer via the "Browse" button. Having entered the status date, Baseline name, if appropriate, and selected the upload file via Browse, users click "Submit" from the toolbar.

At this point, the system will send the template file to the server, where processing will begin. If the contractor closes the browser or logs out while the file is being uploaded to the server, then no data will be transferred to the PARS II database. If, however the contractor closes the browser or logs out after upload to the server, while validation processes and database table loading are occurring, the processing will continue until it is complete on the server side.

Once the uploaded template file has been processed into the database, the "Status" column will reflect either "Warnings" or "Errors" if there are any. If the upload generated no errors or warnings, the "Status" will be "Completed." It is possible to accept data with warnings.

Clicking on this "Errors" or "Warnings" indicator produces a report that describes what errors or warnings were encountered during data processing. "Errors" are defined as issues that prevented data from being placed into the database at all, while "Warnings" are items that the contractor or federal staff should be aware of, but that did not prevent the data from being accepted into the database.

Once the contractor has uploaded the populated PARS II data template for the given reporting period, an email is automatically sent to the FPD and OECM analyst signifying that the upload has taken place. The federal personnel can then review the uploaded data using the PARS II dashboards and reports. The FPD can subsequently denote that a review has taken place by clicking the "Has the CPP data been reviewed" checkbox on the Monthly Status update screen.

10.2.6 Status Settings

During the process of uploading, status settings will progress from Waiting to Uploaded to Processing.

- **WAITING**: for server connection and transmittal of the upload file to the server.

- **UPLOADED**: File has been uploaded to server, table extraction and validation ready to begin.

  NOTE: At this point, users may exit the Project upload screen or logout of PARS II. Processing of the file will continue.

- **PROCESSING**: Performing table/data extraction, validation checks, and PARS II database loading. This process may take minutes or, for very large tables, more than an hour. Users may logout of PARS II and processing will continue.

When the processing is done, the Status result will be set to one of the following, and remain at that setting until another upload is performed for the selected project.

- **WARNING** –Passed Major, but not minor validation checks, resulting in a successful upload and incorporation of EVM data into the PARS II database. This is the typical result expected for most uploads. Clicking the Yellow Radio button will open a window containing the list of warnings

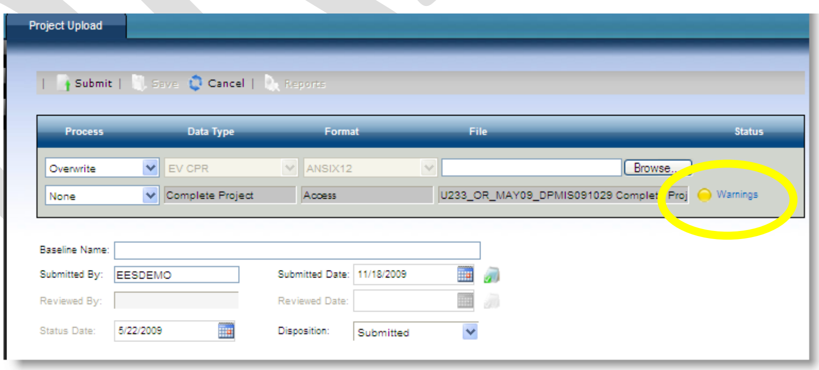


Figure 93 Upload Warning Status

- **ERROR** – Failed one or more major Validation Checks, resulting in an unsuccessful upload. EVM data is not incorporated into the PARS II database.

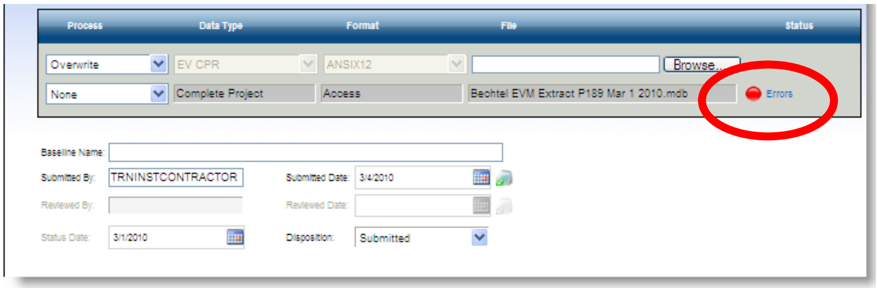


Figure 94 Upload Error Status

- **COMPLETED** – Passed all validation checks, resulting in a successful upload and incorporation of EVM data into the PARS II database.

10.2.7 Monthly Data Upload Process

1. Select **Project Data Upload** under the Project Performance module.
2. Enter **Status Date** (upcoming change for this label to **CPP as of date**). This date must match the contractor's EVM data "as of date" on the extract file, and is referred to in PARS II as the "CPP as of date."
3. If the EVM data to be uploaded represents a Baseline, enter an **identifying name** in the free-text box labeled "Baseline Name."
4. Click the **Browse** button and **select the file** to be uploaded.
5. Click **Submit**.
6. Do not exit this screen or logout until after the Status is set to, or has passed, the **Uploaded** stage.

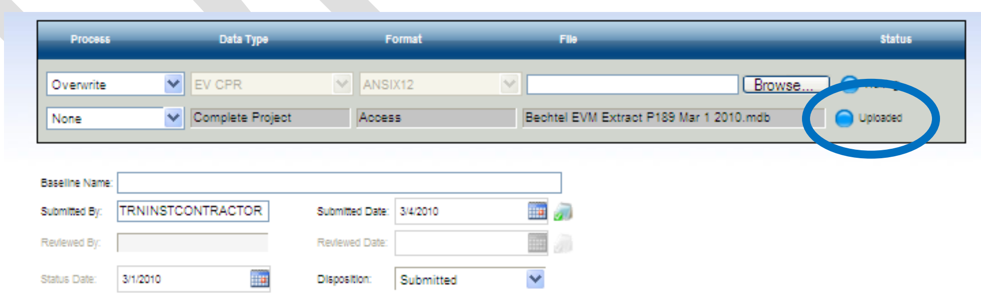


Figure 95 Uploaded Status

7. When the processing is complete, view the Import Log for messages, by clicking the Warning or Error radio button under the status heading.

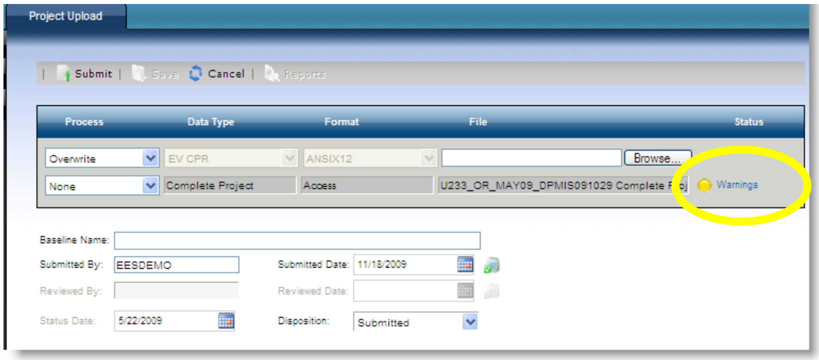
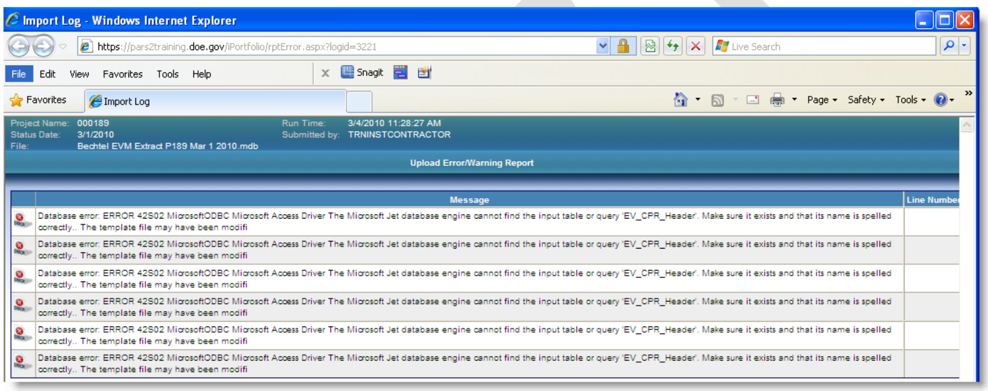


Figure 96 Warning Status

8. The Import Log with Warning/Error messages displays.



9. Close the Import Log window when finished viewing.

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APPENDIX A ACCESS RIGHTS

PARS II is configured for distinct types of user roles. The following is a breakdown of the types of user roles and the access rights for each group.

Table 24 User Roles and Access Rights

USER TYPE	ACCESS RIGHTS
Acquisition Executive (AE)	▪ Use iProgram application in this container (i.e. logon access) ▪ Allows the user to view projects ▪ Create and run reports ▪ Allows the user to view attachments ▪ Allows the user to view BCPs ▪ Allows the user to view Project Contacts ▪ Allows the user to view gateway/critical decisions ▪ Allows the user to view KPPs ▪ Allows the user to view capital programs ▪ Allows the user to view all monthly status
Alternate OECM Analyst (AOA)	▪ Allows the user to add attachments ▪ Allows the user to add BCPs ▪ Allows the user to add project contacts ▪ Allows the user to add KPPs ▪ Allows the user to add capital programs ▪ Allows the user to add projects ▪ Allows the user to delete their own attachments ▪ Allows the user to edit their own attachments ▪ Allows the user to edit BCPs ▪ Allows the user to edit project contacts ▪ Allows the user to edit gateway/critical decisions ▪ Allows the user to edit KPPs ▪ Allows the user to edit monthly OECM status ▪ Allows the user to edit capital programs ▪ Allows the user to edit monthly program status ▪ Allows the user to edit projects ▪ Use iProgram application in this container (i.e. logon access) ▪ Allows the user to view projects ▪ Create and run reports ▪ Set status date ▪ Upload review ▪ Allows the user to view attachments ▪ Allows the user to view BCPs ▪ Allows the user to view Project Contacts ▪ Allows the user to view gateway/critical decisions ▪ Allows the user to view KPPs

USER TYPE	ACCESS RIGHTS
	▪ Allows the user to view capital programs ▪ Allows the user to view all monthly status
Contractor Analyst (CA)	▪ Use iProgram application in this container (i.e. logon access) ▪ Allows the user to view dashboards
Contracting Office Representative (COR)	▪ Use iProgram application in this container (i.e. logon access) ▪ Allows the user to view projects ▪ Create and run reports ▪ Allows the user to view attachments ▪ Allows the user to view BCPs ▪ Allows the user to view project contacts ▪ Allows the user to view gateway/critical decisions ▪ Allows the user to view KPPs ▪ Allows the user to view capital programs ▪ Allows the user to view all monthly status
Contractor Project Manager (CPM)	▪ Use iProgram application in this container (i.e. logon access) ▪ Allows the user to view projects ▪ Project upload ▪ Allows the user to view dashboards ▪ Allows the user to add attachments ▪ Allows the user to edit their own attachments ▪ Allows the user to delete their own attachments
Deputy Federal Project Director (DFPD)	▪ Allows the user to add attachments ▪ Allows the user to delete their own attachments ▪ Allows the user to edit their own attachments ▪ Allows the user to edit monthly FPD status ▪ Use iProgram application in this container (i.e. logon access) ▪ Project upload ▪ Allows the user to view projects ▪ Create and run reports ▪ Allows the user to view attachments ▪ Allows the user to view BCPs ▪ Allows the user to view Project Contacts ▪ Allows the user to view gateway/critical decisions ▪ Allows the user to view KPPs ▪ Allows the user to view capital programs ▪ Allows the user to view all monthly status
Federal Project Directors (FPD)	▪ Allows the user to add attachments ▪ Allows the user to delete their own attachments

USER TYPE	ACCESS RIGHTS
	▪ Allows the user to edit monthly FPD status ▪ Allows the user to view projects ▪ Project upload ▪ Create and run reports ▪ Allows the user to view attachments ▪ Allows the user to view BCPs ▪ Allows the user to view Project Contacts ▪ Allows the user to view gateway/critical decisions ▪ Allows the user to view KPPs ▪ Allows the user to view capital programs ▪ Allows the user to view all monthly status
Federal Program Manager (FPM)	▪ Allows the user to add attachments ▪ Allows the user to delete their own attachments ▪ Allows the user to edit their own attachments ▪ Allows the user to edit monthly program status ▪ Use iProgram application in this container (i.e. logon access) ▪ Allows the user to view projects ▪ Create and run reports ▪ Allows the user to view attachments ▪ Allows the user to view BCPs ▪ Allows the user to view Project Contacts ▪ Allows the user to view gateway/critical decisions ▪ Allows the user to view KPPs ▪ Allows the user to view capital programs ▪ Allows the user to view all monthly status
Interested Party (IP)	▪ Use iProgram application in this container (i.e. logon access) ▪ Create and run reports
OECM Analyst (OA)	▪ Allows the user to add attachments ▪ Allows the user to add BCPs ▪ Allows the user to add project contacts ▪ Allows the user to add KPPs ▪ Allows the user to add capital programs ▪ Allows the user to add projects ▪ Allows the user to delete their own attachments ▪ Allows the user to edit their own attachments ▪ Allows the user to edit BCPs ▪ Allows the user to edit project contacts ▪ Allows the user to edit gateway/critical decisions ▪ Allows the user to edit KPPs ▪ Allows the user to edit monthly OECM status ▪ Allows the user to edit capital programs ▪ Allows the user to edit projects

USER TYPE	ACCESS RIGHTS
	▪ Use iProgram application in this container (i.e. logon access) ▪ Allows the user to view projects ▪ Create and run reports ▪ Upload review ▪ Allows the user to view attachments ▪ Allows the user to view BCPs ▪ Allows the user to view project contacts ▪ Allows the user to view gateway/critical decisions ▪ Allows the user to view KPPs ▪ Allows the user to view capital programs ▪ Allows the user to view all monthly status
Program Analyst (PA)	▪ Allows the user to add attachments ▪ Allows the user to delete their own attachments ▪ Allows the user to edit their own attachments ▪ Allows the user to edit monthly program status ▪ Use iProgram application in this container (i.e. logon access) ▪ Allows the user to view projects ▪ Create and run reports ▪ Allows the user to view attachments ▪ Allows the user to view BCPs ▪ Allows the user to view Project Contacts ▪ Allows the user to view gateway/critical decisions ▪ Allows the user to view KPPs ▪ Allows the user to view capital programs ▪ Allows the user to view all monthly status
Program Manager (PM)	▪ Allows the user to add attachments ▪ Allows the user to delete their own attachments ▪ Allows the user to edit their own attachments ▪ Allows the user to edit monthly program status ▪ Use iProgram application in this container (i.e. logon access) ▪ Allows the user to view projects ▪ Create and run reports ▪ Allows the user to view attachments ▪ Allows the user to view BCPs ▪ Allows the user to view Project Contacts ▪ Allows the user to view gateway/critical decisions ▪ Allows the user to view KPPs ▪ Allows the user to view capital programs ▪ Allows the user to view all monthly status

USER TYPE	ACCESS RIGHTS
Program Point of Contact (PPC)	▪ Use iProgram application in this container (i.e. logon access) ▪ Allows the user to view projects ▪ Create and run reports ▪ Allows the user to view attachments ▪ Allows the user to view BCPs ▪ Allows the user to view Project Contacts ▪ Allows the user to view gateway/critical decisions ▪ Allows the user to view KPPs ▪ Allows the user to view capital programs ▪ Allows the user to view all monthly status
System Administrator	▪ Allows the user to view projects ▪ Full access and control user access to system features

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APPENDIX B PARS II OA REPORTS

Excel 2007 Settings for PARS II Reports

1. In Excel 2007, click the Office Icon in the upper left corner
2. Select Excel Options at the bottom of the menu.
3. In the Excel Options screen, select Trust Center on the left (second from bottom) and click the Trust Center Settings button.
4. In the Trust Center screen, under Macro Settings, select "Disable all macros except digitally signed macros" and click OK.
5. Click OK on the Excel Options screen.

After generating a PARS II report in Excel, if there is a Security Warning bar directly under the office tool bar, then:

1. Click the Options button. A "Security Alert - Macros & ActiveX" screen will open.
2. Select "Trust all documents from this publisher" and click OK.
3. Close Excel.
4. View the report again and verify that the report is displaying correctly now, and there is no security warning bar.

Sample Reports

ART 2A Project Summary by Program

RPT1001688 [Compatibility Mode]

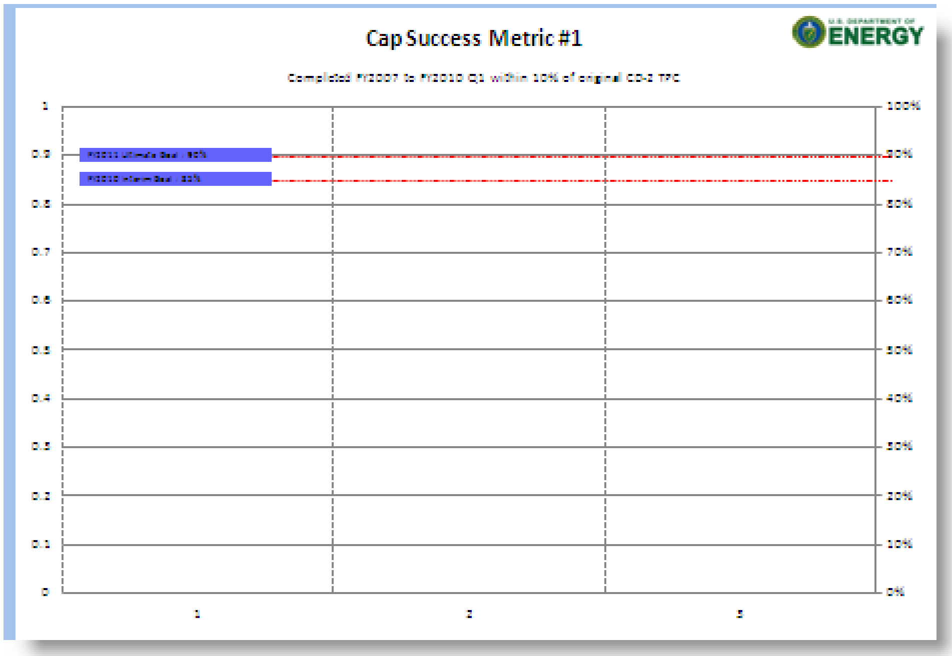
Report Date: 5/12/2010 8:35

U.S. DEPARTMENT OF ENERGY

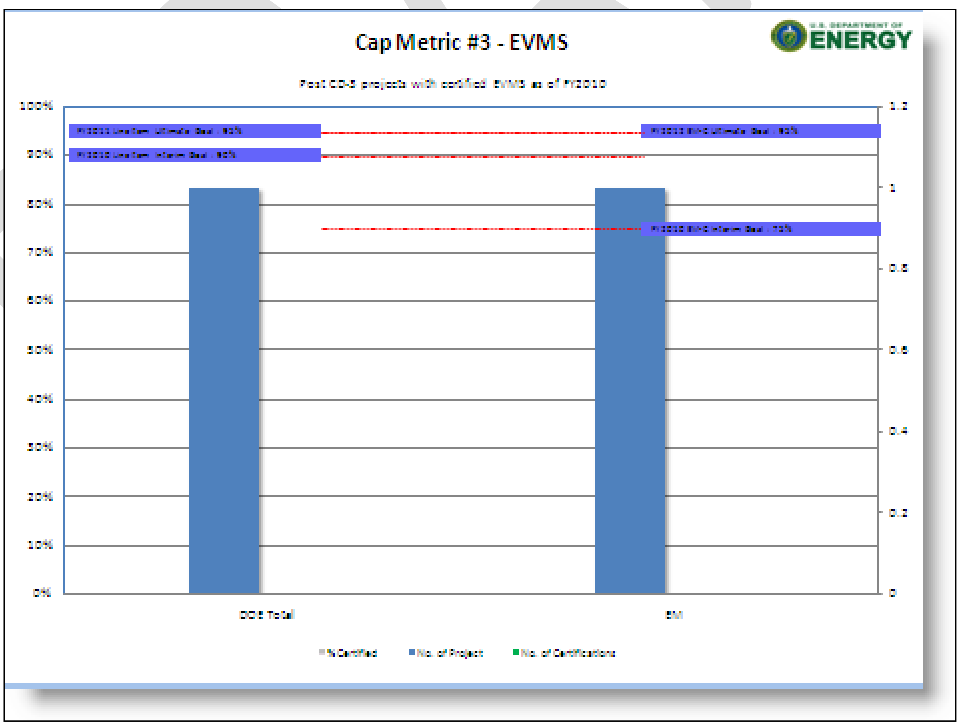
Project Summary by Program
(Current baseline)

Program	Total $(M) No. Projects Pre CD-2		Total $(M) No. Projects Post CD-2		Total $(M) No. Projects Post CD-2 Green		Total $(M) No. Projects Post CD-2 Yellow		Total $(M) No. Projects Post CD-2 Red		% of $ Value Post CD-2 with Acceptable	% of $ No. Post CD-2 with Acceptable
	$(M)	No.	$(M)	No.	$(M)	No.	$(M)	No.	$(M)	No.		
EM	$0.0	15	$485.1	13	$439.1	1	$46.0	2			100%	23%
NA	$13.0	1	$0.1	3		1	$0.0	1			0%	67%
Capital Asset Projects Sub-total	$13.0	16	$485.2	16	$439.1	2	$46.0	3			100%	31%
EM Clean-up Programs Sub-total												
DOE Total	$13.0	16	$485.2	16	$439.1	2	$46.0	3			100%	31%

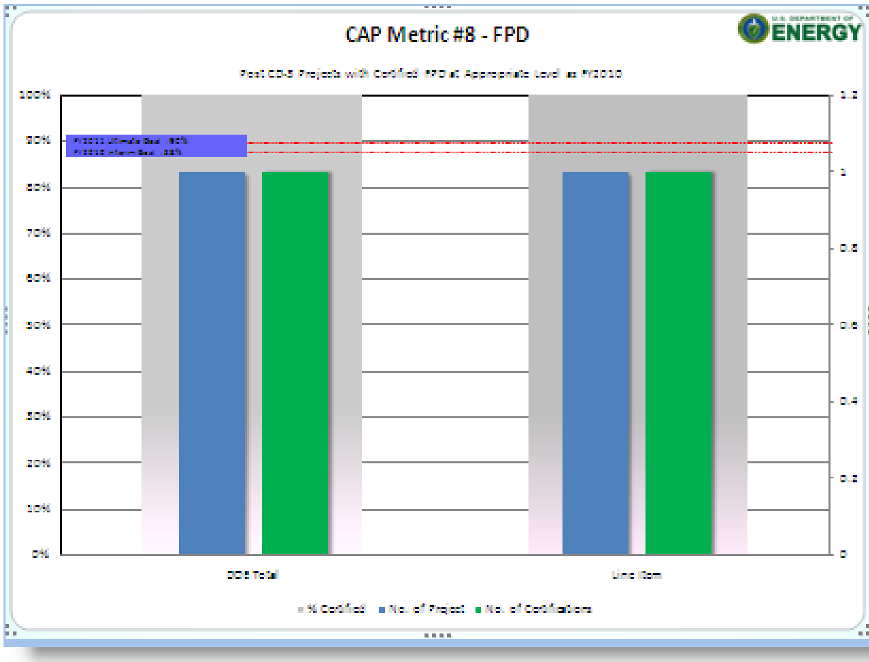
ART 2B CAP Success Metric #1



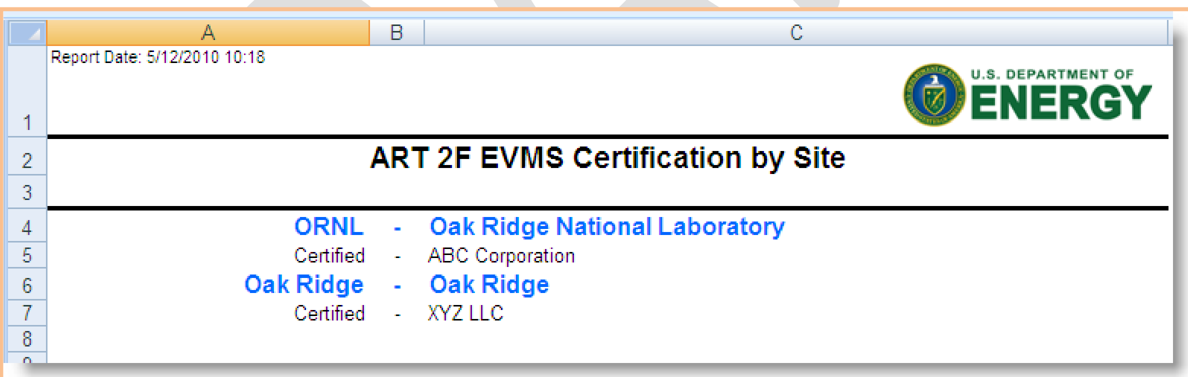
ART 2C CAP Metric #3



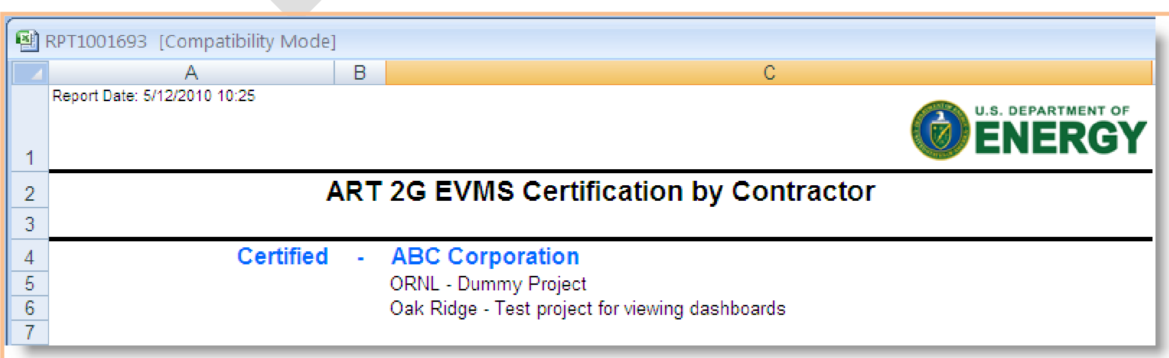
ART 2D CAP Metric #8 - FPD



ART 2F EVMS Certification by Site



ART 2G EVMS Certification by Contractor



ART 2I RCA Metrics

Report Date: 5/12/2010 10:27

U.S. DEPARTMENT OF ENERGY

RCA CAP METRICS (BY NO. PROJECTS)

	01 02			03 CM7B CM8C			CM2B CM8A			CM2C CM8B			CM3			CM7C			CM7D		
Program	Completed within 10% or 25% TPC (CD-4 in FY08-08)			Has certified EVMS (Post CD-2 >= $20M)			Has certified FPD (Post CD-1)			Has certified FPD at appropriate level (Post CD-2)			Completed within TPC (CD-4 in FY08)			Completed within 12 months (CD-4 in FY08-08, CD-3 to 4 <= 5 yrs)			Completed within 20% of schedule (CD-4 in FY08-08, CD-3 to 4 > 5 yrs)		
	Total	Yes	%	Total	Yes	%	Total	Yes	%	Total	Yes	%	Total	Yes	%	Total	Yes	%	Total	Yes	%
EM							36	36	100.00%	34	34	100.00%									
NA							3	2	66.67%												
EM Clean-up Programs																					
SUB-TOTAL	0	0		9	9	100.00%	2	2	100.00%	11	8	72.73%	0	0		0	0		0	0	
CAPITAL ASSET PROJECTS																					
SUB-TOTAL	0	0		0	0		39	38	97.44%	34	34	100.00%	0	0		0	0		0	0	
EM Clean-up Programs																					
SUB-TOTAL	0	0		0	0		0	0		0	0		0	0		0	0		0	0	
DOE TOTAL																					
TOTAL	0	0		0	0		39	38	97.44%	34	34	100.00%	0	0		0	0		0	0	

ART 3A Red- Yellow Project Status Report

B C D E F G H I J

Report Date: 5/13/2010 7:10
Project: 000135
Status Date: 10/13/2009

U.S. DEPARTMENT OF ENERGY

ART 3A Red- Yellow Project Status Report

Project Name	DOE678-X23 - Project for testing various CD and BCP items
FPD	Prince, Diana (4), (555) 123-4567, dprin@hq.doe.gov
Site / Contractor	SNL / Isotek Systems
EVMS Cert. Status	

CPi Cum.	SPi Cum.	CPi/SPi Cum. Start	Percent Complete	Get to Green Est.
1.00	0.95	9/26/2008	21.45%	July 2012

TPC ($M)		
Original	Approved	Forecast
$0.00	$0.00	$55.00

Approved Dates				
CD-2			BCP-01	
10/13/2009			10/13/2009	

CD-4 Dates		
Original	Approved	Forecast
8/31/2012	8/31/2014	3/31/2014

OECM Status Assessment (Y) and Corrective Action Plan

Y for 1 month
Recent reports indicate slippage in Cost and schedule

000103 | 000135 | 000162 | 000189 | 000202 | 000204 | 000206 | ETTINGS

ART 4B Projects Post-CD-2 (Non-EM-C) Report

Report Date: 5/13/2010 7:16

U.S. DEPARTMENT OF ENERGY

ART 4B Projects Post-CD-2 (Non-EM-C)

Project Name FPD, CPD Level, Phone, E-mail	Site / Contractor EVMS Cert. Status	TPC ($M) at CD-2	TPC ($M) Current	CPi Cum.	SPi Cum.	Overall Assessment	Comments
PROGRAM : EM							
EM - DOE 10-01 - Ion Accelerator Program Page, Jimmy (3), (123) - , g.goodwin@dekkerltd.com	ORNL / Bechtel Jacobs LLC	$46.00	$46.00			Y	Recent reports indicate slippage in Cost and schedule
EM - DOE 10-04 - Ion Accelerator Program Page, Jimmy (3), (123) - , g.goodwin@dekkerltd.com	Oak Ridge / Bechtel Jacobs LLC	$1.00	$1.00			Y	OK
EM - DOE 10-199 - Training Initiative Program Page, Jimmy (3), (123) - , g.goodwin@dekkerltd.com	ETEC / Bechtel Jacobs LLC	$46.00	$46.00			Y	Recent reports indicate slippage in Cost and schedule.
EM - EM123-T789 - New Project to make three Wilson, JJ (4), ( ) - ,		$0.00	$0.00	0.99	0.94		
EM - EM123-T789 - New Project to make three Wilson, JJ (4), ( ) - ,		$0.00	$0.00	0.99	0.94		
EM - JJP-1234 - Test project for viewing dashboards Prince, Diana (4), (555) 123-4567, dprin@hq.doe.gov	Oak Ridge / Pantex Certified	$0.00	$0.00	1	0.95		
EM - TESTVK02 - TEST - VKOTRLA - 09/17/09 - REDUX Page, Jimmy (3), (123) - , g.goodwin@dekkerltd.com		$0.01	$0.01	1	0.95	Y	Recent reports indicate slippage in Cost and schedule
EM - XX-1234 - Test and Training Riner, Gary L.. (4), ( ) - ,	ETEC / ABCDE Company	$439.09	$439.09	1	0.98	G	The project is slipping at a rate that causes concen that it will neither finish on time, nor on budget.
EM - doe-10-88 - Ion Accelerator Program Page, Jimmy (3), (123) - , g.goodwin@dekkerltd.com	ORNL / Bechtel Jacobs LLC						
EM Sub Total :		$532.10	$532.10				
PROGRAM : NA							
NA - ATTTest - AAPPTest Prince, Diana (4), (555) 123-4567, dprin@hq.doe.gov		$0.13	$0.13				
NA - DOE678-X23 - Project for testing various CD and BCP items Prince, Diana (4), (555) 123-4567, dprin@hq.doe.gov	SNL / Isotek Systems	$0.00	$0.00	1	0.95	Y	Recent reports indicate slippage in Cost and schedule.
NA - PN-126 - Name-126						G	
NA Sub Total :		$0.13	$0.13				

ART 4C Projects Pre-CD-2 (Non-EM-C)

ART 4C Projects Pre-CD-2 (Non-EM-C)

Project Name FPD, CPD Level, Phone, E-mail	Site / Contractor EVMS Cert. Status	CD-0 Cost Range ($M)	CD-1 Cost Range ($M)	Comments
PROGRAM : EM				
EM - AXZ123 - Project for testing Close Period	LBNL /	to	to	
EM - CPP123 - Project for CPP upload Prince, Diana (4), (555) 123-4567, dprin@hq.doe.gov	BNL / Isotek Systems	to	to	Recent reports indicate slippage in cost and schedule.
EM - DOE 10-02 - Ion Accelerator Program Page, Jimmy (3), (123) - , g.goodwin@dekkerltd.com	ORNL / Bechtel Jacobs LLC	$25.00 to $45.00	$42.00 to $46.00	
EM - DOE 10-JP - Ion Accelerator Program Page, Jimmy (3), (123) - , g.goodwin@dekkerltd.com	ORNL / Bechtel Jacobs LLC	$25.00 to $45.00	to	Recent reports indicate slippage in Cost and Schedule.
EM - DOE-10-01 - Ion Accelerator Program Page, Jimmy (3), (123) - , g.goodwin@dekkerltd.com	Ames /	$25.00 to $45.00	to	
EM - DOE-555 - test Harris, Montrell (3), (301) 903-5555, harris@xyz	Ames /	to	to	Progressing
EM - FXD-4267V - Project to cleanup environmental site Prince, Diana (4), (555) 123-4567, dprin@hq.doe.gov		$0.00 to $0.00	to $0.00	sfsasssf
EM - OECM TEST - Test Session Project	Carlsbad /	to	to	
EM - TESTMV - TESTMV	SLAC /	to	to	
EM - WV-8697 - Dummy Project Prince, Diana (4), (555) 123-4567, dprin@hq.doe.gov	ORNL / Pantex Certified	$0.00 to $0.00	to $0.00	
EM - WV-8697 - Dummy Project Prince, Diana (4), (555) 123-4567, dprin@hq.doe.gov	ORNL / Pantex Certified	$0.00 to $0.00	$0.00 to $0.00	
EM Sub Total :		$75.00 to $135.00	$42.00 to $46.00	
PROGRAM : NA				
NA - BD-Test - BD-Test Project Prince, Diana (4), (555) 123-4567, dprin@hq.doe.gov		$1.20 to $1.50	$12.00 to $13.00	
NA Sub Total :		$1.20 to $1.50	$12.00 to $13.00	

REPORT SETTINGS

ART 4D Projects Post-CD-2 (EM-C)

Report Date: 5/13/2010 7:35

U.S. DEPARTMENT OF ENERGY

ART 4D Projects Post-CD-2 (EM-C)

Project Name FPD, CPD Level, Phone, E-mail	Site / Contractor EVMS Cert. Status	TPC ($M) at CD-2	TPC ($M) Current	CPi Cum.	SPi Cum.	Overall Assessment	Comments

ART 4E Projects Pre-CD-2 (EM-C)

Report Date: 5/13/2010 8:34
Project: 000165
Status Date: 11/18/2009

U.S. DEPARTMENT OF ENERGY

ART 4E Projects Pre-CD-2 (EM-C)

Project Name FPD, CPD Level, Phone, E-mail	Site / Contractor EVMS Cert. Status	CD-0 Cost Range ($M)	CD-1 Cost Range ($M)	Comments

Critical Decision Report

Report Date: 5/12/2010 11:15
Project: 000165
Status Date: 11/18/2009

U.S. DEPARTMENT OF ENERGY

Critical Decision

Name	Description	Planned Date	Approved Date	Approval Notes
CD 0	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...
CD 1	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.
CD 2	Approve Performance Baseline	5/25/2007	5/25/2007	This baseline has been approved. See the attached documentation for details.
CD 3A			5/25/2007	CD 3A was approved based on the need to begin expending dollars prior to official start of construction.
CD 3	Approve Start of Construction	10/31/2009	10/31/2009	Construction is approved to commence as of the date indicated on this CD.
CD 4	Approve Start of Operations or Project Completion	12/31/2012		
Closeout				

KPP Report

Report Date: 5/12/2010 11:42
Project: 000159
Status Date: 2/5/2010

U.S. DEPARTMENT OF ENERGY

Project KPP

KPP Number	CD or BCP	Planned Scope	Delivered Scope	KPP Validated
2010-4	CD2	Complete Architectural Design		
2010-5	CD2	Construct 5 story building		

BCP Report

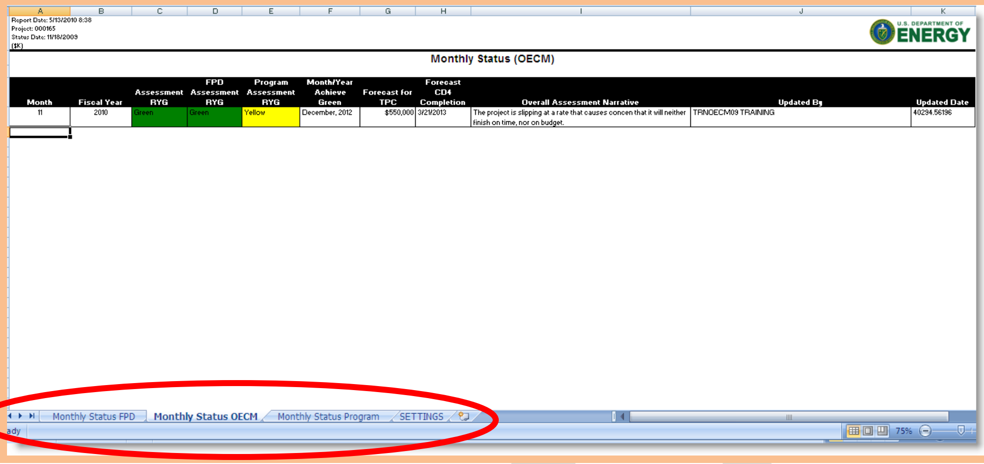
Report Date: 5/12/2010 12:18
Project: 000189
Status Date: 11/18/2009

U.S. DEPARTMENT OF ENERGY

Project BCP

	CD2 Original Approved Baseline	BCP 2 Post Recovery
Change Directed	No	Yes
Request Submission Date		1/19/2010
BCP Date Approved		1/20/2010
BCP Approved By		George Jefferson
BCP Approval Notes		
BCP: TPC High (Approved)	$46,000.00	$51,000.00
BCP: Change in Cost	-$5,000.00	$5,000.00
BCP: CD-4 Date High (Approved)	12/31/2026	12/31/2026
BCP: Change in Schedule		
Orig. DOE Schedule Contingency (in days)	365	365
Orig. DOE Cost Contingency	$35,000.00	$40,000.00
Non-Contract Costs		
Orig. Contractor Fee/Profit	$5,000.00	$5,000.00
Orig. Contractor MR	$2,000.00	$2,000.00
PMB		
Calculated TPC	$42,000.37	$47,000.37

Monthly Status Report



Report Date: 5/13/2010 8:38
Project: 000165
Status Date: 11/18/2009
($K)

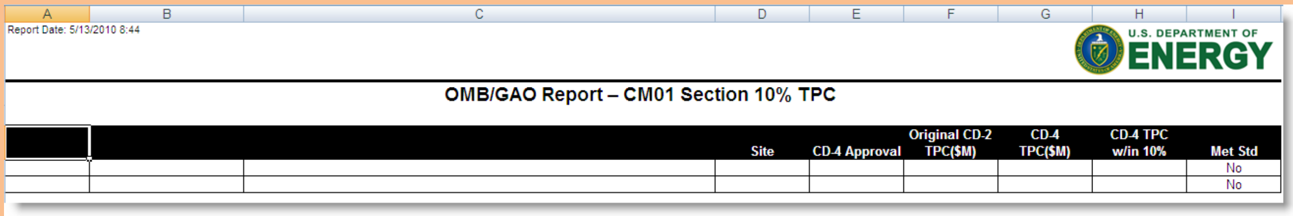
U.S. DEPARTMENT OF ENERGY

Monthly Status (OECM)

Month	Fiscal Year	Assessment RYG	FPD Assessment RYG	Program Assessment RYG	Month/Year Achieve Green	Forecast for TPC	Forecast CD4 Completion	Overall Assessment Narrative	Updated By	Updated Date
11	2010	Green	Green	Yellow	December, 2012	$550,000	3/21/2013	The project is slipping at a rate that causes concen that it will neither finish on time, nor on budget.	TRNOECM09 TRAINING	40294.56196

Monthly Status FPD | Monthly Status OECM | Monthly Status Program | SETTINGS

OMB/GAO Report – CM01 Section



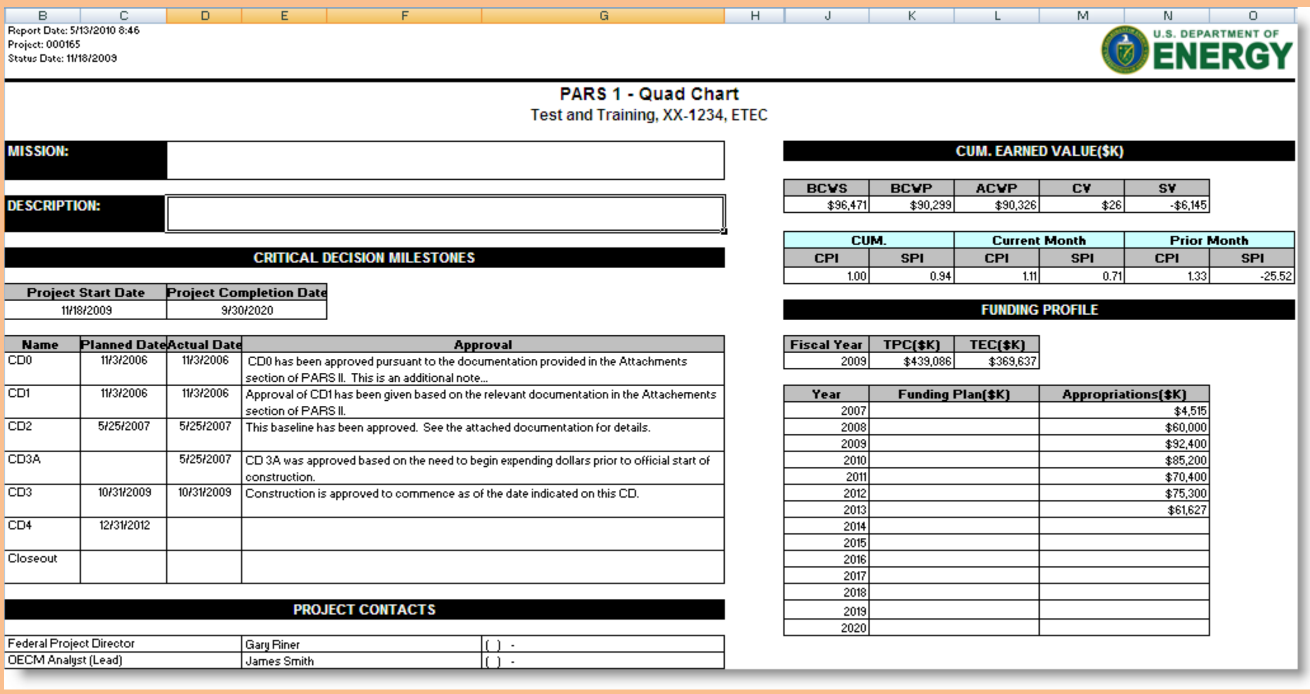
Report Date: 5/13/2010 8:44

U.S. DEPARTMENT OF ENERGY

OMB/GAO Report – CM01 Section 10% TPC

			Site	CD-4 Approval	Original CD-2 TPC($M)	CD-4 TPC($M)	CD-4 TPC w/in 10%	Met Std
								No
								No

PARS 1 - Quad Chart



Report Date: 5/13/2010 8:46
Project: 000165
Status Date: 11/18/2009

U.S. DEPARTMENT OF ENERGY

PARS 1 - Quad Chart
Test and Training, XX-1234, ETEC

MISSION:

DESCRIPTION:

CRITICAL DECISION MILESTONES

Project Start Date	Project Completion Date
11/18/2009	9/30/2020

Name	Planned Date	Actual Date	Approval
CD0	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	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	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	10/31/2009	10/31/2009	Construction is approved to commence as of the date indicated on this CD.
CD4	12/31/2012		
Closeout			

PROJECT CONTACTS

Federal Project Director	Gary Riner	( ) -
OECM Analyst (Lead)	James Smith	( ) -

CUM. EARNED VALUE($K)

BCWS	BCWP	ACWP	CV	SV
$96,471	$90,299	$90,326	$26	-$6,145

CUM.		Current Month		Prior Month	
CPI	SPI	CPI	SPI	CPI	SPI
1.00	0.94	1.11	0.71	1.33	-25.52

FUNDING PROFILE

Fiscal Year	TPC($K)	TEC($K)
2009	$439,086	$369,637

Year	Funding Plan($K)	Appropriations($K)
2007		$4,515
2008		$60,000
2009		$92,400
2010		$85,200
2011		$70,400
2012		$75,300
2013		$61,627
2014		
2015		
2016		
2017		
2018		
2019		
2020		

PARS Project List Report

Report Date: 5/13/2010 8:53

PARS Project List

Project Id	Project Number	Project Name	Site	Managing Office	Capital Program	Project Status
000030	WV-8697	Dummy Project	ORNL	EM	Dummy Capital Program	Active
000033	EM123-T789	New Project to make three		EM	Dummy Capital Program	Active
000056	UPLOADTEST	UPLOADTEST		NA	No Nukes	
000074	TESTMV	TESTMV	SLAC	EM	Dummy-PRG-ERP	Active
000078	DOE Number	Project with the possibility of being orphaned		EM	Clean	
000084	FXD-4267V	Project to cleanup environmental site		EM	Clean	Active
000094	DOE7-XVT	Project to add CD entries		EM	Dirty	
000103	TESTVK02	TEST - VKOTRLA - 09/17/09 - REDUX		EM	Dummy-PRG-ERP	Active
000114	JJP-1234	Test project for viewing dashboards	Oak Ridge	EM	Dummy Capital Program	Active
000126	PN-126	Name-126		NA	Nukes	Active
000127	ULTEST	ULTEST		NA	No Nukes	
000135	DOE678-X23	Project for testing various CD and BCP items	SNL	NA	No Nukes	Active
000148	AXZ123	Project for testing Close Period	LBNL	EM	CA for Removal	Active
000162	CPP123	Project for CPP upload	BNL	EM	CA for Removal	Active
000165	XX-1234	Test and Training	ETEC	EM	November 19 PARS II Demo to OECM	Active
000167	BD-Test	BD-Test Project		NA	No Nukes	Active

REPORT DATA SETTINGS TEMPLATE

ady

Performance Baseline Report

Report Date: 5/13/2010 9:11
Project: 000165
Status Date: 11/18/2009
($K)

Performance Baseline

Budget Fiscal Year	TPC Current	TPC at CD2	TEC Current	TEC at CD2	BAC Current	BAC CD2
2009	$439,086	$439,086	$369,637		$369,396	

Project Attachments Report

Report Date: 5/13/2010 9:25
Project: 000165
Status Date: 11/18/2009

Project Attachments

Attachment Title	Description	Uploaded By	Uploaded Date	Updated By	Date Updated	Type
Acquisition Executive Delegation memos	fhffhfh	Steven Ducharme	4/26/2010	Steven Ducharme	4/26/2010	Document
OVERALLASSESSMENTNARRATIVE		EES Demo User	11/18/2009	TRNOECM09 TRAINING	4/26/2010	Narrative
ANALYSTSDETAILEDCOMMENTS		EES Demo User	11/18/2009	TRNOECM09 TRAINING	4/26/2010	Narrative
POSTATUSASSESSMENTNARRATIVE		EES Demo User	11/18/2009	TRNINSTBASIC TRAINING	2/8/2010	Narrative
CORRECTIVEACTIONNARRATIVE		EES Demo User	11/18/2009	EES Demo User	12/3/2009	Narrative
ASSESSMENTNARRATIVE		EES Demo User	11/18/2009	EES Demo User	12/3/2009	Narrative
Mission Validation Independent Project Review	Review	EES Demo User	11/19/2009	EES Demo User	11/19/2009	Document
APPROVALNOTES			11/18/2009		11/19/2009	Narrative
APPROVALNOTES			11/18/2009		11/18/2009	Narrative
APPROVALNOTES			11/18/2009		11/18/2009	Narrative
Mission Need Statement	This is a document uploaded regarding the mission need.	EES Demo User	11/18/2009	EES Demo User	11/18/2009	Document

Project Contacts Report

Report Date: 5/13/2010 9:57
Project: 000165
Status Date: 11/18/2009

Project Contacts

Entity Name	Type	First Name	Last Name	Company	Address	Address 2	City	State	Zip Code	Phone	Extension	Email	Role Code	Role Contact Type	Role Title	Certification	Certification Title	Date Certified
Gary Riner		Gary	Riner		123 W. Laurel Ave.					( ) -			FPD Name	CONTACT	Federal Project Director	Level 4	TPC exceeding $400 million (M)	1/16/2007
James Smith		James	Smith	MY COMPANY						( ) -			OECM Analyst	CONTACT	OECM Analyst (Lead)			
ABCDE Company				ABCDE Company	20440 Century Blvd		Germantown	MD	20874	( ) -			Prime Contractor	CONTRACTOR	Prime Contractor			
William Dubuque		William	Dubuque							( ) -			Program Mgr (Lead)	CONTACT	Program Manager (Lead)			

Project Detail Report

A B C D E

Report Date: 5/13/2010 10:01
Project: 000165
Status Date: 11/18/2009

Project Summary

DOE Project ID	XX-1234
DOE Project Name	Test and Training
Managing Office Code	EM
Site Code	ETEC
Capital Program	November 19 PARS II Demo to OECM
Project Status	Active
Project Start Date	11/18/2009
Type 1	1 - Facility Construction - Facility Construction
Type 2	2 - Non-Nuclear - Non-Nuclear
City, State	
Project Start at CD2	5/25/2007
Project Description Short	
Last Update	3/26/2010
Updated by	TRNINSTADMIN TRAINING

Project Summary / Project Attachments / BCP / KPP / Project Contacts / Critical Decision / Monthly Status FPD / Monthly Status OECM / Monthly Status Pro

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Project Overview Report

Report Date: 5/13/2010 10:06
Project: 000165
Status Date: 11/18/2009
(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
000165	XX-1234	Test and Training	EM	EM-20	November 19 PARS II Demo to OECM	1 - Facility Construction	2 - Non-Nuclear	No	No	Gary Riner	ABCDE Company

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
ETEC	William Dubuque	James Smith	11/18/2009	Active	CD3		Green	December, 2012	$550,000	3/21/2013

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
26.21%	$439,086	1.00	0.98	9/30/2020	$50,000	365	$2,000	$3,000	$379,086	$5,000

Critical Decisions

	Date (P)	Date (A)	TPC LOW	TPC High	CD4 Low	CD4 High
CD0	11/3/2006	11/3/2006		$439,086		12/31/2012
CD1	11/3/2006	11/3/2006		$439,086		12/12/2012

	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	5/25/2007	5/25/2007	$439,086	9/30/2020	$50,000	365	$2,000	$3,000	$5,000	$379,086

	Date (P)	Date (A)	Approved Scope	Approved Cost
CD3A		5/25/2007	Plans for plumbing were re-ordered.	$2,500.00

	Date (P)	Date (A)
CD3	10/31/2009	10/31/2009

	Date (P)	Date (A)	CD4 TPC
CD4	12/31/2012		

	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	PMB

KPPs

KPP Number	Event	Planned Scope	Delivered Scope	Validated

Project Summary Report

Report Date: 5/13/2010 10:10
Project: 000165
Status Date: 11/18/2009

U.S. DEPARTMENT OF ENERGY

Project Summary

DOE Project ID	XX-1234
DOE Project Name	Test and Training
Managing Office Code	EM
Site Code	ETEC
Capital Program	November 19 PARS II Demo to OECM
Project Status	Active
Project Start Date	11/18/2009
Type 1	1 - Facility Construction - Facility Construction
Type 2	2 - Non-Nuclear - Non-Nuclear
City, State	#N/A
Project Start at CD2	5/25/2007
Project Description Short	#N/A
Last Update	3/26/2010
Updated by	TRNINSTADMIN TRAINING

APPENDIX C ACRONYMS

BCP	Baseline Change Proposal
CBR	Congressional Budget Request
CD	Critical Decision
COTS	Commercial-off-the-Shelf
CPP	Contractor Project Performance
CPR	Cost Performance Report
DDR	Dynamic Drilldown Reports
ECD	Estimated Completion Date
EV	Earned Value
EVM	Earned Value Metrics
FPD	Federal Project Director
FPM	Federal Project Manager
IEAC	Independent Estimate at Completion
IPL	Integrated Priorities List
KPP	Key Performance Parameter
OA	Oversight and Assessment
OBS	Organizational Breakdown Structure
OECM	Office of Engineering and Construction Management
OMB	Office of Management and Budget
OPC	Other Project Costs
PARS	Project Assessment and Reporting
PB	Performance Baseline
RYG	Red-Yellow-Green
SSS	Sort, Select, and Summarize
TEC	Total Estimated Cost
TPC	Total Project Cost
UND	Undistributed
WBS	Work Breakdown Structure