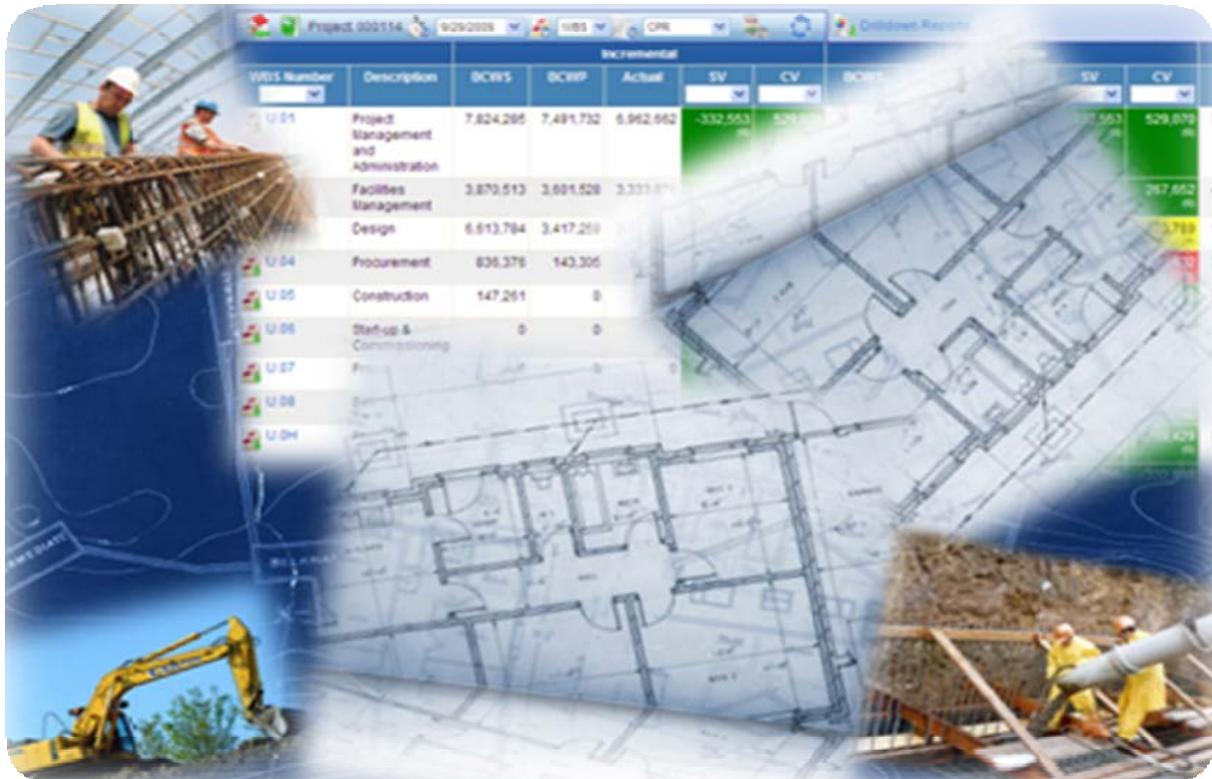


PARS II

Project Assessment and Reporting System



PARS II 102 Monthly Updating and Reporting Training Workbook V1.0



Department of Energy

May 10, 2010



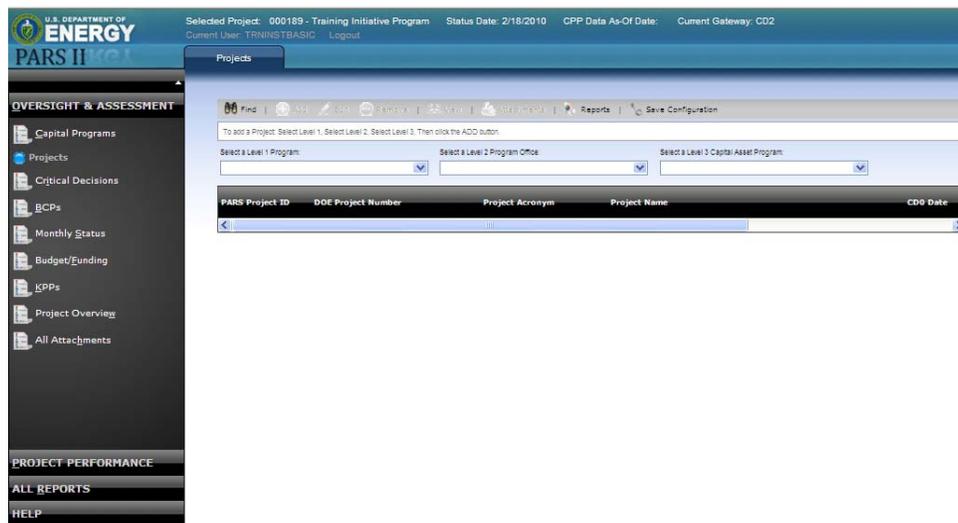
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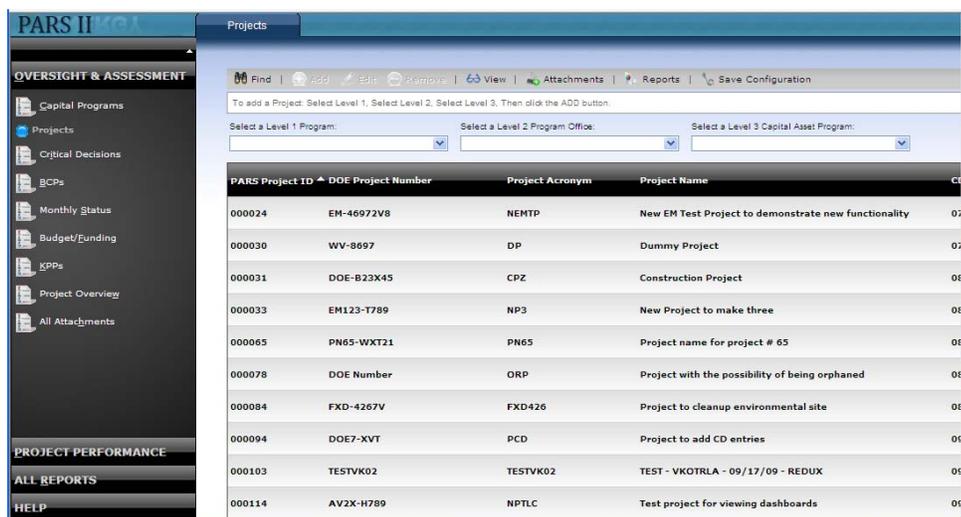
OVERSIGHT and ASSESSMENT

Exercise 1 Find and View a Project

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



Project Tab – Empty Project List



Project Tab – Multiple Projects in the List

2. Click . The Find screen displays.

The screenshot shows a search interface with the following fields and sections:

- Search By:** Search (icon), Cancel (icon)
- Program Name:** [Text Input]
- PARS Project ID:** [Text Input]
- Project Acronym:** [Text Input]
- Project Name:** [Text Input]
- DOE Project Number:** [Text Input]
- Contact First Name:** [Text Input]
- Contact Last Name:** [Text Input]
- Project Types:**
 - Project Type 1: [Dropdown]
 - Project Type 2: [Dropdown]
 - Project Type 3: [Dropdown]
- Project Categories:**
 - Project Activity Status Code: [Dropdown]
 - Project on Hold: [Dropdown]
 - Project of Special Interest: [Dropdown]

FIND Screen

3. Enter **Prince** in the Last Name field to search for all projects for which Diana Prince has a role.

This screenshot is identical to the previous one, but the **Contact Last Name** field now contains the text "Prince".

FIND Screen with Search Criteria

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

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

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

The screenshot shows the PARS II web application interface. On the left is a navigation menu with sections: OVERSIGHT & ASSESSMENT (Capital Programs, Projects, Critical Decisions, BCPs, Monthly Status, Budget/Funding, KPPs, Project Overview, All Attachments), PROJECT PERFORMANCE, ALL REPORTS, and HELP. The main content area is titled 'Projects' and contains a search bar with instructions: 'To add a Project: Select Level 1, Select Level 2, Select Level 3, Then click the ADD button.' Below the search bar are three dropdown menus for 'Select a Level 1 Program:', 'Select a Level 2 Program Office:', and 'Select a Level 3 Capital Asset Program:'. The main area displays a table of project data:

PARS Project ID	DOE Project Number	Project Acronym	Project Name	
000024	EM-46972V8	NEMTP	New EM Test Project to demonstrate new functionality	03
000030	WV-8697	DP	Dummy Project	03
000031	DOE-B23X45	CPZ	Construction Project	06
000033	EM123-T789	NP3	New Project to make three	06
000084	FXD-4267V	FXD426	Project to cleanup environmental site	06
000094	DOE7-XVT	PCD	Project to add CD entries	06
000114	AV2X-H789	NP TLC	Test project for viewing dashboards	06
000135	DOE678-X23	NANN	Project for testing various CD and BCP items	10
000162	CPP123	PCPPU	Project for CPP upload	11
000167	BD-Test	BDTP1	BD-Test Project	11

Result of Search

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

Sort the Project List

6. Click the column heading for **Project Acronym** to sort the list by that column. The sort will be ascending as indicated by the upward arrowhead. A second click on the column heading will change the sort to descending.

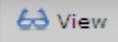
Note:

7. Click **SAVE Configuration** to save this sort arrangement. Throughout this session and for subsequent logon sessions, PARS II will use the saved sort arrangement.
8. Change the sort back to **PARS Project ID** in ascending order and click **SAVE Configuration** to save this sort arrangement.

Select a Project

9. Highlight **PARS Project ID 000135**. Wait while the project data is loaded and notice the change in the Project Title line at the top of the screen.

View a Project

10. Click  **View**. The Viewing Project screen displays with two tabs – Project Attributes and Project Contacts.

Project Attributes and Contacts

11. View the information on the Project Attributes tab.

Viewing Project : WV-8697

Parent Programs: DOE >>>

PARS Project ID: 000030
CDO Date: 7/29/2009
DOE Project Number: WV-8697
Project Name: Dummy Project
Project Acronym: DP
Project Description: This is a dummy project

Project Types	Project Categories	Role	Contact Name
Project Type 1: 1 - Facility Construc	Project Activity Status Code: Active	OECM Analyst	Patrick Ewing
Project Type 2: 1 - Nuclear	Project on Hold: No	FPD Name	Diana Prince
	Project of Special Interest: No	OECM Analyst	
	Site Code: ORNL		
	EM Cleanup Project: No		

Project Attributes Tab

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

Selected Project: 000030 - Dummy Project Status Date: 8/31/2009 CPP Data As-Of Date: 7/29/2009 Current Gateway: CD4
Current User: TRNINSTBASIC Logout

Viewing Project : WV-8697

Role	Title	Contact Name	ORG	Certification	Date Assigned	Date Unassigned
AE	Sales Manager	John Watson	Dekker		08/27/2009	
OECM Analyst	Program Manager	Patrick Ewing			06/21/2009	
FPD Name	Federal Project Director	Diana Prince		Level 4	08/11/2009	
OECM Analyst						
Prime Contractor		Charlie Smith	XYZ Company			

Project Contacts Tab

13. Answer the following questions.

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

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

c. Who is the Acquisition Executive? _____

14. When finished viewing, click 

On Your Own Workshop

1. Find and select **PARS Project ID 165**. *Be sure to blank out any prior search items.*
2. View the Project Attributes.
3. View the Project Contacts.
4. Answer the following questions about this project.
 - a. Who is the FPD? _____
 - b. At what Site is this project located? _____
 - c. What is the CD Level of this project? _____

Exercise 2 CD Milestones, Attachments, KPPs and BCPs

View Critical Decision Milestones

1. Verify the selected project is **PARS Project ID 165**.
2. Select **Critical Decisions** from the Navigation Bar. Regardless of what CD-level for the selected project displays first, you can change it to view information for any CD level.

The screenshot shows the PARS II web application interface. The top navigation bar includes the U.S. Department of Energy logo, the project name "PARS II 102", and various status fields: "Selected Project: 000165 - Downblend of U-233 in Building 3019", "Status Date: 11/18/2009", "CPP Data As-Of Date: 5/22/2009", and "Current Gateway: CD3". The user is identified as "Current User: TRNINSTRBASIC". The left sidebar contains a navigation menu with options like "Capital Programs", "Projects", "Critical Decisions", "BCPs", "Monthly Status", "Budget/Funding", "KPPs", "Project Overview", and "All Attachments". The main content area is titled "Critical Decisions" and features a "Select Critical Decision" dropdown menu set to "CD4-Approve Start of Operations or Project Complete". Below this, the "Critical Decision Detail" section displays fields for "Planned Date" (12/31/2012), "CD4 Date Approved", "CD4 Approved By", "CD4 Approval Notes", "TPC High" (0), and "KPP Scope Narrative" (Complete). A "Planned Dates" section at the bottom includes a "Closeout" field.

Critical Decision Tab – CD4

3. Select **CD2** from the Select Critical Decision dropdown list.

The screenshot shows the PARS II web application interface with the "Critical Decisions" tab selected. The "Select Critical Decision" dropdown menu is now set to "CD2-Approve Performance Baseline". The "Critical Decision Detail" section displays a comprehensive list of metrics and their values: "Planned Date" (8/28/2007), "CD2 Date Approved" (8/28/2007), "CD2 Approved By" (Gary Riner), "CD2 Approval Notes" (This baseline has been approved. See the attached documentation for details), "CD2 TPC Low" (0), "CD2 TPC High (Approved)" (438,000,000), "CD2 CD-4 Date Low (Approved)" (8/30/2008), "CD2 CD-4 Date High (Approved)" (8/30/2008), "Unfunded Cost Contingency (C&A)" (430,000,000), "Orig. DOE Schedule Contingency (in days)" (365), "Orig. DOE Cost Contingency" (50,000,000), "Non-Contract Costs" (5,000,000), "Orig. Contractor Fee/Profit" (3,000,000), "Orig. Contractor SIR" (2,000,000), "RMB" (378,000,000), and "Calculated TPC" (438,000,000). The "Planned Dates" section at the bottom includes a table with columns for CD level and date: CD3A (10/9/2009), CD3 (10/9/2009), CD4 (12/31/2012), and Closeout.

Critical Decision Tab – CD2

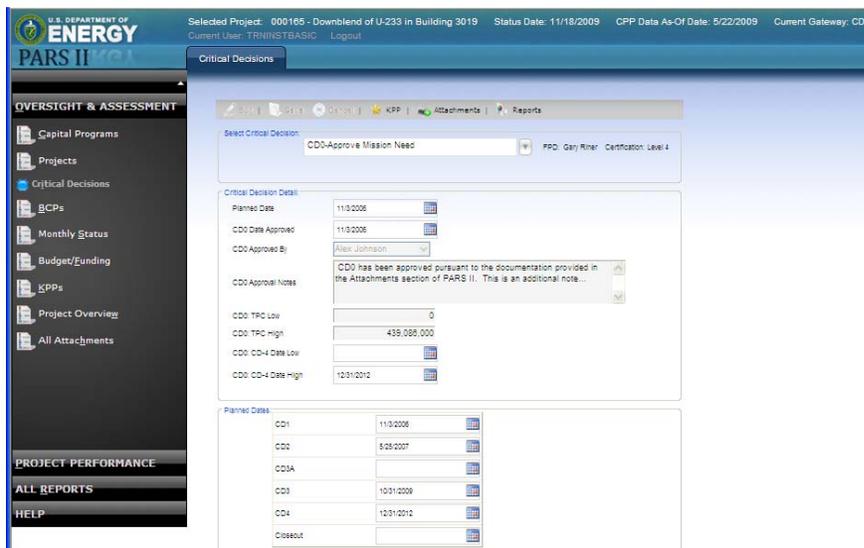
4. View the CD2 data. NOTE the following:
 - a. There are additional entries at this level.
 - b. Dollar Values shown in light grey are calculated values.
 - c. The Planned Dates section only displays future level CD dates relative to the current CD view.

5. For **PARS Project ID 165**, answer the following questions.

- a. Who approved CD3? _____ When? _____
- b. What was the Planned Date for CD3? _____
- c. What was the Planned Date for CD1? _____

View Attachments

6. Select **CD0-Approve Mission Need** from the Critical Decision dropdown list.



Critical Decision Tab

Attachments Submitted with a Particular Tab/Screen

7. Click . The Attachment List window displays with the list of attachments pertaining to (submitted for) CD0.

Type	Title	Doc #	Version	Created By	Created Date	Descrip
Document	Mission Need Statement	0	1	EES Demo User	11/18/2009 8:56:11	This is
Document	Mission Validation Independent Proj2		1	EES Demo User	11/19/2009 10:32	Review
Narrative	APPROVALNOTES	0			11/18/2009 9:53	CD0 ha

Attachment List Associated with Selected Critical Decision

List of All Attachments for a Project

- 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.

Code	Type	Title	Doc #	Version	Descrip
Project Gateways	Narrative	APPROVALNOTES	0		
Project Gateways	Narrative	APPROVALNOTES	0		
Project Gateways	Narrative	APPROVALNOTES	0		
Project Gateways	Narrative	APPROVALNOTES	0		
Project Gateways	Narrative	APPROVEDSCOPE	0		
Project Gateways	Narrative	APPROVEDCOST	0		
Project Gateways	Narrative	APPROVALNOTES	0		
Project Gateways	Document	Mission Need Statement	0		This is
Project Gateways	Document	Mission Validation Independent Proj2			Review
Project Status	Narrative	ASSESSMENTNARRATIVE	0		
Project Status	Narrative	CORRECTIVEACTIONNARRATIVE	0		
Project Status	Narrative	POSTATUSASSESSMENTNARRAT	0		

List of All Attachments for a Project

- Scroll to see entire list.

Sort the Attachments List (optional)

- Click the **column header label**  to sort the list by Type of Attachment.

Selected Project: 000165 - Downblend of U-233 in Building 3019 Status Date: 11/18/2009 CPP Data As-Of Date: 11/18/2009
Current User: TRNINSTOECM Logout

Attachments

View | Reports

Drag a column header here to group by that column

Code	Type	Title	Doc #	Version	Description
Project Gateways	Document	Mission Validation Independent Proj2			Review
Project Gateways	Document	Mission Need Statement	0		This is
Project Status	Narrative	ASSESSMENTNARRATIVE	0		
Project Gateways	Narrative	APPROVEDSCOPE	0		
Project Status	Narrative	CORRECTIVEACTIONNARRATIVE	0		
Project Status	Narrative	OVERALLASSESSMENTNARRATIO	0		
Project Status	Narrative	POSTATUSASSESSMENTNARRAT	0		
Project Gateways	Narrative	APPROVALNOTES	0		
Project Gateways	Narrative	APPROVALNOTES	0		

Sorted by Type of Attachment

Filter the list of Attachments (optional)

- Click the filter icon  for the **Code** column. A dropdown list displays under the Code column header.

Selected Project: 000165 - Downblend of U-233 in Building 3019 Status Date: 11/18/2009 CPP Data As-Of Date: 11/18/2009
Current User: TRNINSTOECM Logout

Attachments

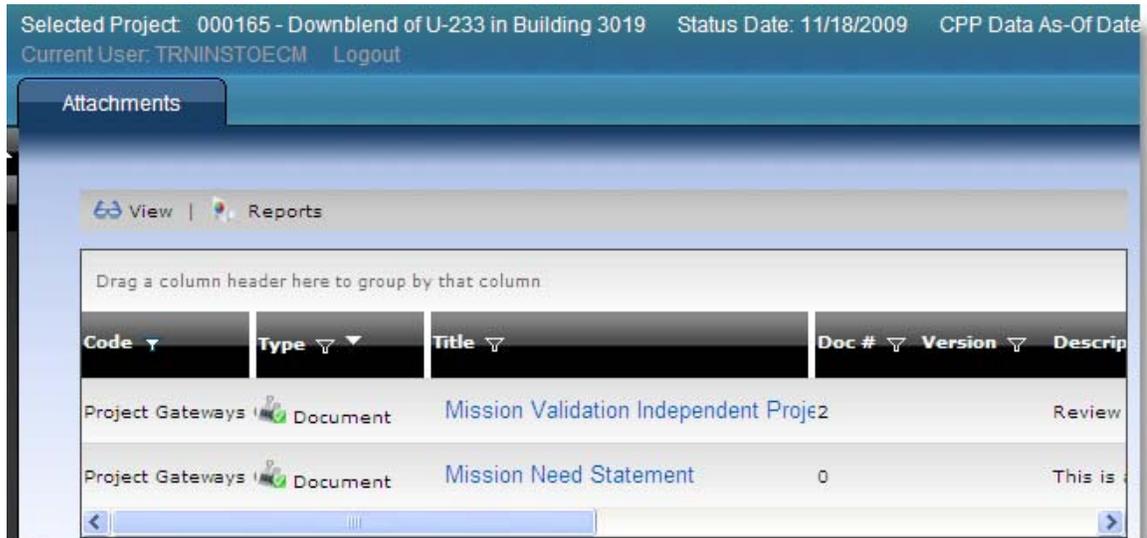
View | Reports

Drag a column header here to group by that column

Code	Type	Title	Doc #	Version	Description
(All)	Document	Mission Validation Independent Proj2			Review
(Empty)	Document	Mission Need Statement	0		This is
(NonEmpty)	Narrative	ASSESSMENTNARRATIVE	0		
Project Gateways	Narrative	APPROVEDSCOPE	0		
Project Gateways CDO	Narrative	CORRECTIVEACTIONNARRATIVE	0		
Project Status	Narrative	OVERALLASSESSMENTNARRATIO	0		
Project Status	Narrative	POSTATUSASSESSMENTNARRAT	0		

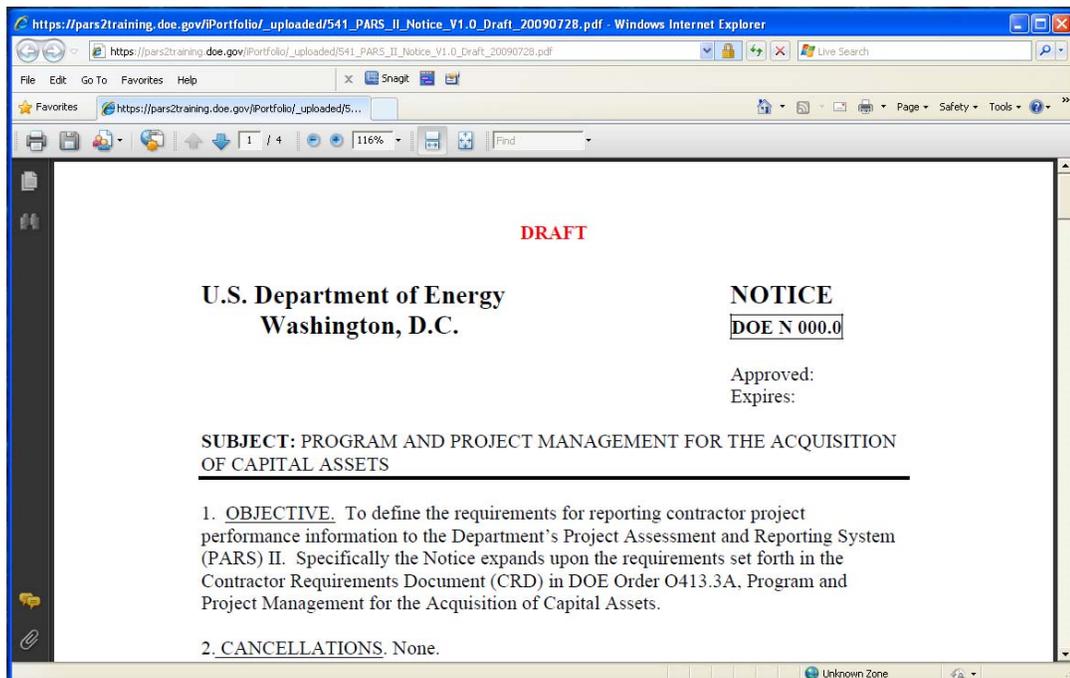
Filter Dropdown for Code Column

12. Select **Project Gateways CD0**. Those attachments submitted for CD0 for the project are listed.



Result of Filtering the Attachment List

13. Click the Title of the attachment, **Mission Need Statement**. A new window opens displaying the selected attachment.



Attachment Content

The attachment opens within the application associated with the type of document, such as Word, Excel, or Adobe Reader. This particular attachment is a PDF file and opens in Adobe Reader. At this point, you can work with the document as you would any other using Adobe Reader – peruse the document, search for keywords, save a copy, print a copy.

14. When finished viewing and working with the document, **Close** the window.

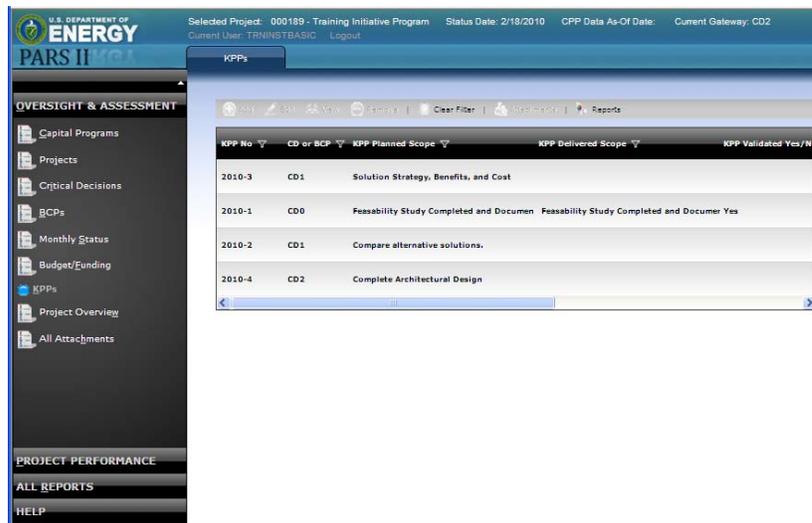
15. Who uploaded this attachment and when? _____

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

View Key Performance Parameters (KPPs)

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

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



KPP No	CD or BCP	KPP Planned Scope	KPP Delivered Scope	KPP Validated Yes/No
2010-3	CD1	Solution Strategy, Benefits, and Cost		
2010-1	CD0	Feasibility Study Completed and Documented	Feasibility Study Completed and Documented	Yes
2010-2	CD1	Compare alternative solutions.		
2010-4	CD2	Complete Architectural Design		

Key Performance Parameter List

19. Highlight **KPP No 2010-1 for CD0** and click .

Key Performance Parameter Screen

20. When finished viewing, click .

Baseline Change Proposals (BCPs)

21. Verify the selected project is **PARS Project ID 189**.

22. Select **BCPs** from the Navigation Bar and select **BCP – BCP 2 POST Recovery for 189** from the BCP dropdown list.

Budget Change Proposal - BCP

23. View the data.

- a. BCP Title
- b. Checkbox indicating whether or not the change was directed.
- c. BCP Submission Date, Approval Date, and who approved the change
- d. Any Approval Notes that were entered
- e. New TPC and CD4 attainment dates that have been approved as part of the BCP.

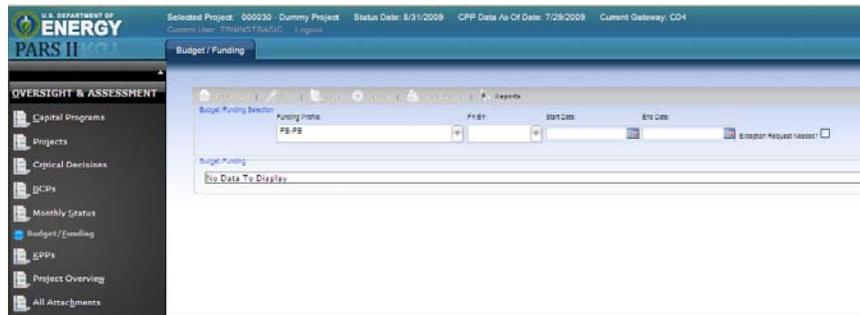
24. What is the change in cost? _____ In schedule? _____

25. Click  to access Key Performance Parameters (KPPs) for the BCP.

26. Are there any new KPPs for this baseline change? _____

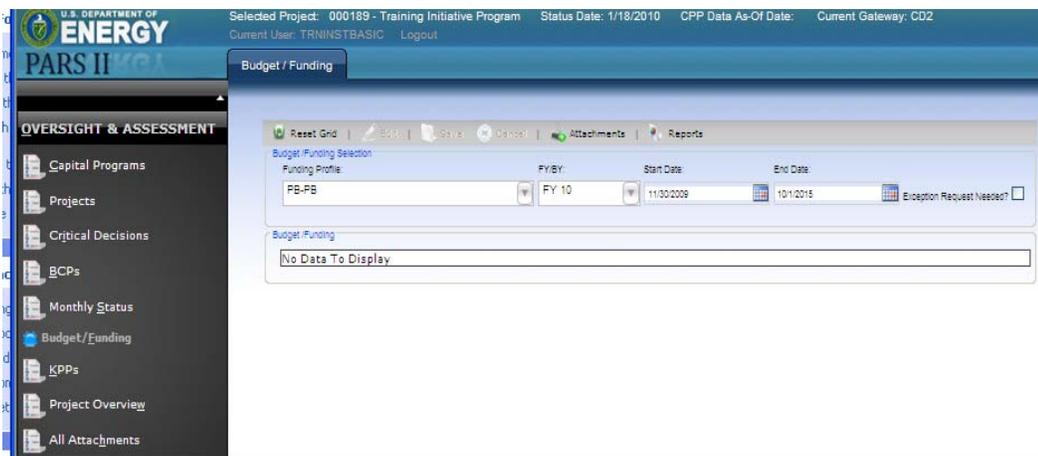
Exercise 3 Budget/Funding Profile

1. Verify the selected project is **PARS Project ID 189**
2. Select **Budget/Funding** from the Navigation Bar. Funding Profile criteria must be entered in order to display data.

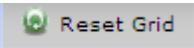


Budget/Funding – No Criteria Selections

3. Select the criteria for the budget/funding table to be viewed.
 - a. Funding Profile – **PB-PB**
 - b. FY/BY – **FY10**
 - c. Start Date – **11/30/2009**
 - d. End Date – **10/1/2015**



Budget/Funding – With Criteria Selections

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

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

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

Budget/Funding Table

- Expand to display detail rows.

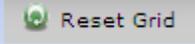
Compare Funding Profiles

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

Description	FY 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
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

Compare Funding Profiles

- View the Budget/Funding data.

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

Budget/Funding Selection

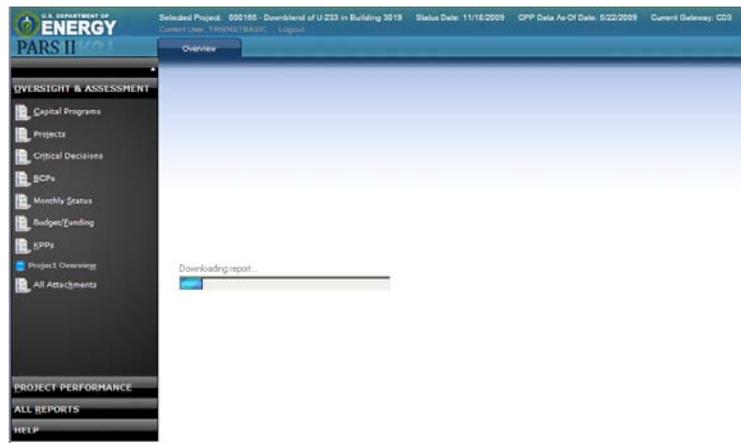
Funding Profile:	FY/BY:	Start Date:	End Date:
PB-PB	FY 10	10/1/2009	9/30/2014

Budget/Funding Criteria Selections

Exercise 4 Project Overview

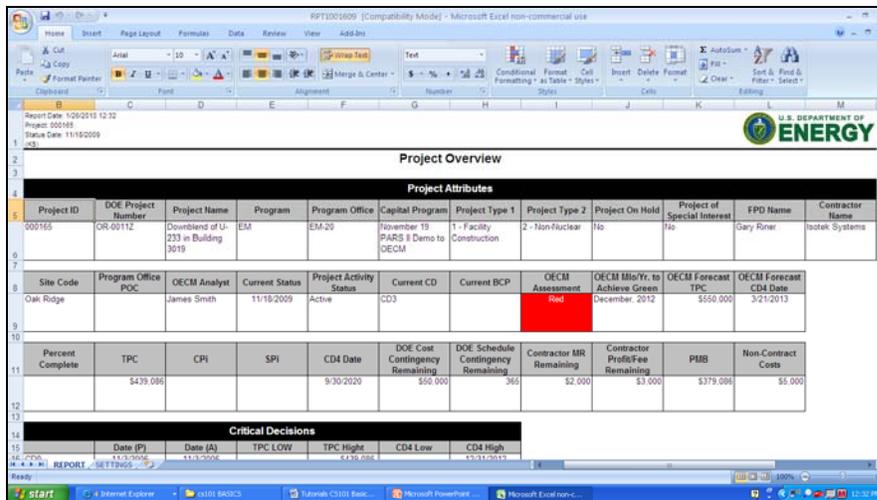
1. FIND and SELECT **PARS Project ID 165**.
2. Click **Project Overview** from the Navigation Bar. The Overview tab displays. Wait while the Overview report is being processed. The Downloading Report progress bar is displayed.

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



Generating the Project Overview

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



Report Date: 1/22/2010 8:50
Project: 000165
Status Date: 11/18/2009
(KS)

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 Interest	FPD Name	Contractor Name
000165	OR-00112	Downblend of U-233 in Building 3019	EM	EM-20	November 19 PARS II Demo to OECM	1 - Facility Construction	2 - Non-Nuclear	No	No	Gary Rimer	Isotek Systems

Site Code

Site Code	Program Office POC	OECM Analyst	Current Status	Project Activity Status	Current CD	Current BCP	OECM Assessment	OECM Mto/Yr. to Achieve Green	OECM Forecast TPC	OECM Forecast CD4 Date
Oak Ridge		James Smith	11/18/2009	Active	CD3		Red	December, 2012	\$550,000	3/21/2013

Percent Complete

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

Critical Decisions

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

BCPs

BCPs	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

KPPs

KPP Number	Event	Planned Scope	Delivered Scope	Validated
1	CD0	Four story building		Yes
2	CD1	Fifteen office suites		
3	CD2	Twelve restrooms - six for men, and six for women.		

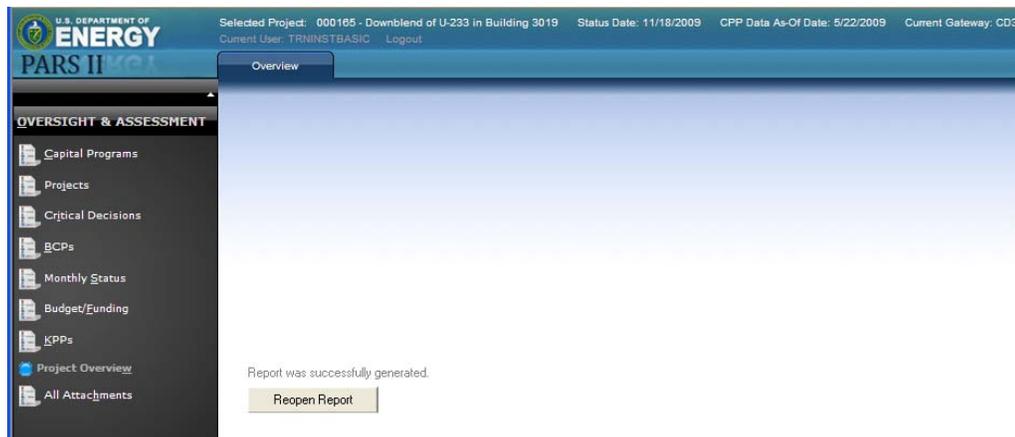
Excel Window with Project Overview Report

Full Report of Project Overview

-
- At this point, you can work with the table as you would any other Excel Workbook, including save a copy or print a copy.
 - When finished viewing, **Close** the Excel window. When you close Excel, you will be asked if you want to save changes. Basically, it is a reminder to save the report (optional), even if you didn't make changes.



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



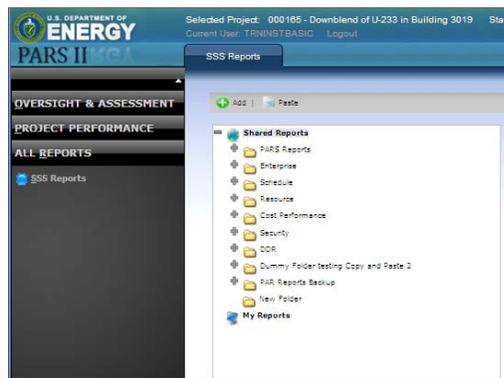
Reopen Report

Exercise 5 Reports for Oversight and Assessment

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

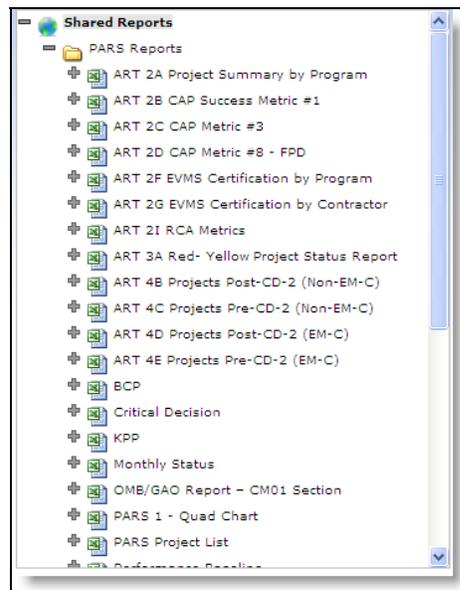
NOTE: Some of the OA reports pertain to a specific project. Check that you have selected the appropriate project on which to report.

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



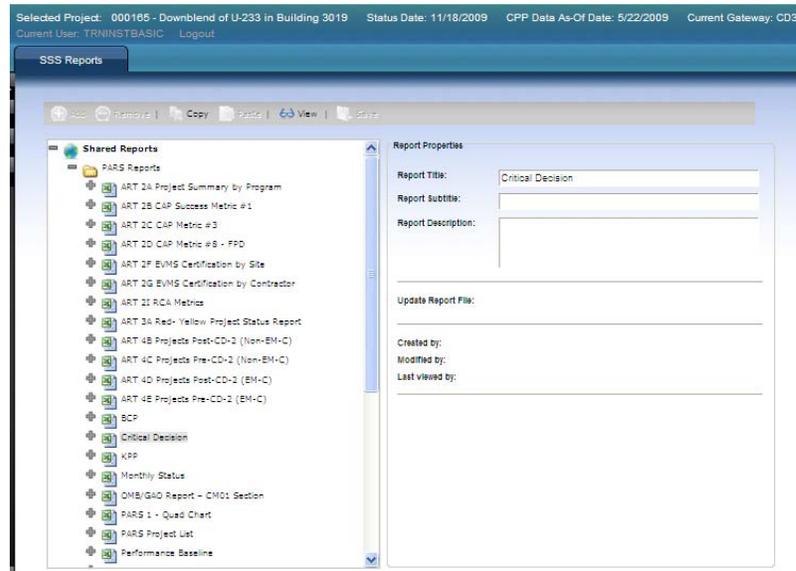
Reports - Sort, Select, Summarize – SSS Tab

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



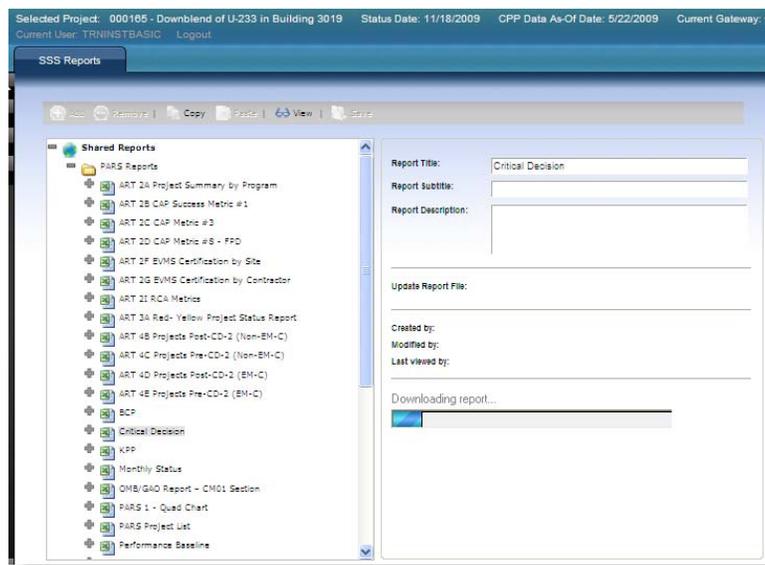
List of PARS Reports

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



Report Properties

- Click  to generate the report. Wait as it processes. Status messages appear indicating the following (some may occur too rapidly to see):
 - Loading –PARS II is loading the report definition and data query.
 - Downloading (generating report)
 - Opening Excel
 - Formatting report



Report Selected for View and Downloading

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

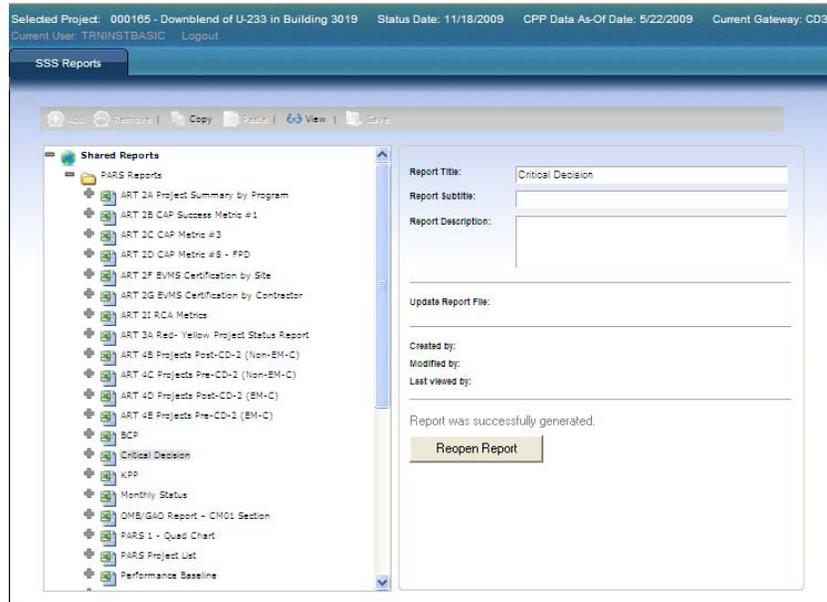
Critical Decision				
Name	Description	Planned Date	Approved Date	Approval Notes
CD0	Approve Mission Need	11/3/2006	11/3/2006	CD0 has been approved pursuant to the documentation provided in the Attachments section of PARS II. This is an additional note...
CD1	Approve Alternative Selection and Cost Range	11/3/2006	11/3/2006	Approval of CD1 has been given based on the relevant documentation in the Attachments 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				

Critical Decision Report

- 7. At this point, you can work with the document as you would any other Excel Workbook, including save a copy, edit, and print a copy.
- 8. When finished viewing, **Close** the Excel window. When you close Excel, you will be asked if you want to save changes. Basically, it is a reminder to save the report (optional), even if you didn't make changes.



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



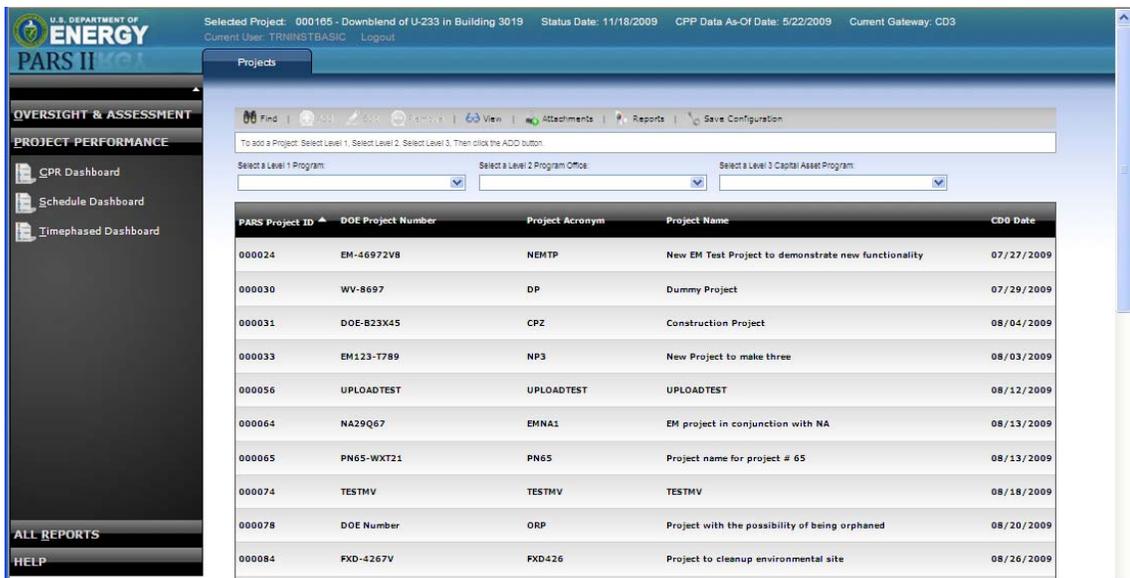
Option to Re-Open Report

Reminder: After highlighting a Report Title, you must click  View to generate the report.

PROJECT PERFORMANCE - CONTRACTOR EV AND SCHEDULE DATA

Exercise 6 Working with Dashboards

1. Verify the selected project is **PARS Project ID 165**.
2. Select **Project Performance** from the Navigation Bar. The Oversight and Assessment option collapses and the Project Performance option expands.



The screenshot displays the PARS II web application interface. The top navigation bar includes the U.S. Department of Energy logo, the text "PARS II", and a "Projects" dropdown menu. Below the navigation bar, the "PROJECT PERFORMANCE" section is expanded, showing a list of dashboard options: "CPR Dashboard", "Schedule Dashboard", and "Timephased Dashboard". The "ALL REPORTS" and "HELP" options are also visible at the bottom of the navigation bar. The main content area shows a table of project data with columns for PARS Project ID, DOE Project Number, Project Acronym, Project Name, and CDO Date. The table contains 11 rows of project information.

PARS Project ID	DOE Project Number	Project Acronym	Project Name	CDO Date
000024	EM-46922V8	NEMTP	New EM Test Project to demonstrate new functionality	07/27/2009
000030	WV-8697	DP	Dummy Project	07/29/2009
000031	DOE-823X45	CP2	Construction Project	08/04/2009
000033	EM123-T789	NP3	New Project to make three	08/03/2009
000056	UPLOADTEST	UPLOADTEST	UPLOADTEST	08/12/2009
000064	NA29Q67	EMNA1	EM project in conjunction with NA	08/13/2009
000065	PN65-WXT21	PN65	Project name for project # 65	08/13/2009
000074	TESTMV	TESTMV	TESTMV	08/18/2009
000078	DOE Number	ORP	Project with the possibility of being orphaned	08/20/2009
000084	PXD-4267V	PXD426	Project to cleanup environmental site	08/26/2009

Project Performance Menu Options

View CPR Dashboard

3. Select **CPR Dashboard** from the Project Performance option on the Navigation Bar. The CPR dashboard displays with the following default settings:
 - a. Time period → latest Contractor Upload Date
 - b. Table → WBS
 - c. Dashboard View → CPR

U.S. DEPARTMENT OF ENERGY
PARS II

Selected Project: 000165 - Downblend of U-233 in Building 3019 Status Date: 11/18/2009 CPP Data As-Of Date: 4/3/2009 Current Gateway: CD3
Current User: TRNINSTBASIC Logout

CPR Dashboard

Project: 000165 5/22/2009 WBS CPR Drilldown Reports

WBS Number	Description	Incremental					Cumulative					At Complete	
		BCWS	BCWP	Actual	SV	CV	BCWS	BCWP	Actual	SV	CV	BAC	EAC
U.01	Project Management and Administration	828,902	1,071,846	1,041,999	142,944	29,847	12,204,620	11,697,022	10,753,839	-507,597	943,184	75,899,089	74,963,866
U.02	Facilities Management	368,501	476,971	560,949	108,470	-83,978	6,276,436	5,799,062	5,220,248	-477,374	578,814	46,407,183	45,914,761
U.03	Design	-723,998	2,914,681	1,662,129	3,638,679	1,232,551	7,419,517	6,999,436	7,809,282	-420,081	-309,847	19,063,487	19,874,651
U.04	Procurement	-720,260	32,064	53,076	752,324	-21,012	354,085	278,029	379,428	-76,056	-101,399	30,722,196	30,814,145
U.05	Construction	-27,583	-43,619	20,187	-16,036	-63,806	25,674	24,210	61,451	-1,465	-37,241	33,929,460	33,944,732
U.06	Start-up & Commissioning	0	0	0	0	0	0	0	0	0	0	7,278,678	7,278,716
U.07	Processing	0	0	0	0	0	0	0	0	0	0	81,934,391	81,965,938
U.08	Safe Shut-Down	0	0	0	0	0	0	0	0	0	0	2,150,801	2,151,139
U.0H	Phase I Historical Costs	0	0	0	0	0	72,010,524	72,010,524	72,730,880	0	-720,356	72,010,524	72,730,880
Totals:		-174,438	4,451,943	3,359,340	4,626,381	1,093,602	98,290,856	96,808,283	96,955,128	-1,482,573	-146,845	369,395,809	369,636,828

ALL REPORTS
HELP

Cost Performance Report (CPR) Dashboard – WBS Table

Selected Project: 000165 - Downblend of U-233 in Building 3019 Status Date: 11/18/2009 CPP Data As-Of Date: 5/22/2009 Current Gateway: CD3
Current User: TRNINSTBASIC Logout

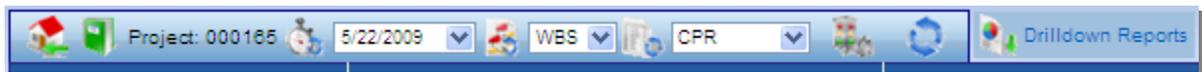
CPR Dashboard

Project: 000165 5/22/2009 WBS CPR Drilldown Reports

WBS Number	Description	Incremental					Cumulative					At Complete		
		BCWS	BCWP	Actual	SV	CV	BCWS	BCWP	Actual	SV	CV	BAC	EAC	VAC
U.01	Project Management and Administration	828,902	1,071,846	1,041,999	142,944	29,847	12,204,620	11,697,022	10,753,839	-507,597	943,184	75,899,089	74,963,866	935,224
U.02	Facilities Management	368,501	476,971	560,949	108,470	-83,978	6,276,436	5,799,062	5,220,248	-477,374	578,814	46,407,183	45,914,761	492,423
U.03	Design	-723,998	2,914,681	1,662,129	3,638,679	1,232,551	7,419,517	6,999,436	7,809,282	-420,081	-309,847	19,063,487	19,874,651	-811,164
U.04	Procurement	-720,260	32,064	53,076	752,324	-21,012	354,085	278,029	379,428	-76,056	-101,399	30,722,196	30,814,145	-91,949
U.05	Construction	-27,583	-43,619	20,187	-16,036	-63,806	25,674	24,210	61,451	-1,465	-37,241	33,929,460	33,944,732	-15,272
U.06	Start-up & Commissioning	0	0	0	0	0	0	0	0	0	0	7,278,678	7,278,716	1,901
U.07	Processing	0	0	0	0	0	0	0	0	0	0	81,934,391	81,965,938	-31,547
U.08	Safe Shut-Down	0	0	0	0	0	0	0	0	0	0	2,150,801	2,151,139	-338
U.0H	Phase I Historical Costs	0	0	0	0	0	72,010,524	72,010,524	72,730,880	0	-720,356	72,010,524	72,730,880	-720,356
Totals:		-174,438	4,451,943	3,359,340	4,626,381	1,093,602	98,290,856	96,808,283	96,955,128	-1,482,573	-146,845	369,395,809	369,636,828	-241,018

Cost Performance Report (CPR) Dashboard – Full View

4. 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.



Selected Project: 000165 - Downblend of U-233 in Building 3019 Status Date: 11/18/2009 CPP Data As-Of Date: 5/22/2009 Current Gateway: CD3
 Current User: TRNINSTBASIC Logout

CPR Dashboard

Project: 000165 5/22/2009 WBS CPR Drilldown Reports

WBS Number	Description	Incremental				Cumulative				
		BCWP	Actual	SV	CV	BCWS	BCWP	Actual	SV	CV

Time Period Dropdown

Selected Project: 000165 - Downblend of U-233 in Building 3019 Status Date: 11/18/2009 CPP Data As-Of Date: 5/22/2009 Current Gateway: CD3
 Current User: TRNINSTBASIC Logout

CPR Dashboard

Project: 000165 5/22/2009 WBS WBS WBS WBS CPR Drilldown Reports

WBS Number	Description	Incremental				Cumulative				
		BCWS	BCWP	Actual	SV	CV	BCWS	BCWP	Actual	SV

WBS and OBS Table Dropdown

Selected Project: 000165 - Downblend of U-233 in Building 3019 Status Date: 11/18/2009 CPP Data As-Of Date: 5/22/2009 Current Gateway: CD3
 Current User: TRNINSTBASIC Logout

CPR Dashboard

Project: 000165 5/22/2009 WBS WBS WBS WBS WBS WBS CPR Analysis IEAC Drilldown Reports

WBS Number	Description	Incremental				Cumulative				
		BCWS	BCWP	Actual	SV	CV	BCWS	BCWP	Actual	SV

Dashboard View Dropdown

5. Select **OBS** for the 5/22/2009 CPR dashboard.

Selected Project: 000165 - Downblend of U-233 in Building 3019 Status Date: 11/18/2009 CPP Data As-Of Date: 5/22/2009 Current Gateway: CD3
 Current User: TRNINSTBASIC Logout

CPR Dashboard

Project: 000165 5/22/2009 OBS CPR Drilldown Reports

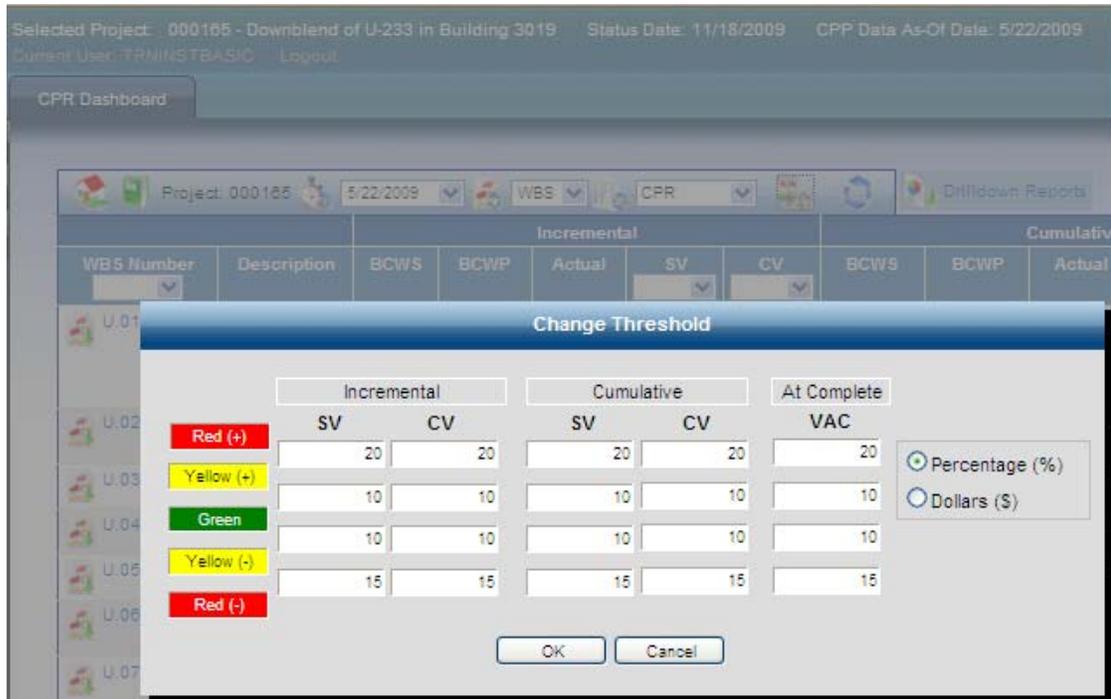
OBS Number	Description	Incremental				Cumulative				At Complete				
		BCWS	BCWP	Actual	SV	CV	BCWS	BCWP	Actual	SV	CV	BAC	EAC	VAC
1-1	Deputy Project Manager	-786,464	1,113,009	1,248,815	1,899,483 (R)	-135,806 (G)	13,701,120	12,737,005	11,334,956	-964,115 (G)	1,402,049 (G)	191,732,803	190,423,024	1,309,778 (G)
1-2	Business Manager	315,297	282,458	311,332	-32,839 (R)	-28,874 (R)	3,898,989	3,855,806	3,927,398	-43,184 (G)	-71,593 (G)	25,022,518	25,104,470	-81,952 (G)
1-3	EPPC Manager	296,718	3,056,475	1,798,193	2,759,757 (R)	1,258,282 (R)	8,680,222	8,204,948	8,961,893	-475,275 (G)	-756,945 (G)	80,629,965	81,378,453	-748,488 (G)
1-4	Historical	0	0	0	0 (G)	0 (G)	72,010,624	72,010,624	72,730,880	0 (G)	-720,356 (G)	72,010,624	72,730,880	-720,356 (G)
	Totals:	-174,439	4,451,942	3,358,340	4,626,381 (R)	1,093,602 (R)	98,290,855	96,808,283	96,955,127	-1,482,574 (G)	-146,845 (G)	369,395,810	369,636,927	-241,018 (G)

Cost Performance Report (CPR) Dashboard – OBS Table

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

Check RYG Threshold Settings

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



RYG Threshold Settings

8. Threshold values can be adjusted to do “what if” analysis. The changed values will remain throughout the current login session, including if you select a different project to view. The thresholds will return to the initial settings when you logout.
9. Click **Cancel** when finished viewing.

Drilldown to Detail

10. You can click on the ID value of any cell containing the drilldown icon  to drilldown to more detail. Click the **WBS # U.05** . The next level of WBS detail displays.

Selected Project: 000165 - Downblend of U-233 in Building 3019 Status Date: 11/18/2009 CPP Data As-Of Date: 5/22/2009 Current Gateway: CD3
 Current User: TRNINSTBASIC Logout

CPR Dashboard

Project: 000165 Parent WBS: U.05 5/22/2009 WBS CPR Drilldown Reports

WBS Number	Description	Incremental					Cumulative					At Complete		
		BCWS	BCWP	Actual	SV	CV	BCWS	BCWP	Actual	SV	CV	BAC	EAC	VAC
U.05.01	2019 Complex Dismantlement	-26,929	-43,619	20,187	-16,689	-63,806	26,899	24,210	61,451	-2,690	-37,241	7,466,974	7,486,736	-19,763
U.05.02	2019 Complex Modifications	0	0	0	0	0	0	0	0	0	25,126,219	25,122,008	4,211	
U.05.03	Outside Complex Modifications	-654	0	0	654	0	-1,225	0	1,225	0	1,336,268	1,336,988	279	
Totals:		-27,583	-43,619	20,187	-16,035	-63,806	25,674	24,210	61,451	-1,465	-37,241	33,829,461	33,944,732	-15,273

WBS Drilldown

11. Click **WBS # U.05.02**.
12. Continue drilling down until an empty table displays. The previous level is the lowest level of detail available.

Selected Project: 000165 - Downblend of U-233 in Building 3019 Status Date: 11/18/2009 CPP Data As-Of Date: 5/22/2009 Current Gateway: CD3
 Current User: TRNINSTBASIC Logout

CPR Dashboard

Project: 000165 Parent WBS: U.05.02.03.02 5/22/2009 WBS CPR Drilldown Reports

WBS Number	Description	Incremental					Cumulative					At Complete		
		BCWS	BCWP	Actual	SV	CV	BCWS	BCWP	Actual	SV	CV	BAC	EAC	VAC

End of WBS Detail

13. Return to the previous level by clicking on the **Parent WBS number icon**  on the icon bar.
14. Each click of  moves the table up one level.
15. For an express return to the first level, click the Home icon, 

Filter Dashboard Data

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

WBS Number	Description	Incremental					Cumulative					At Complete		
		BCWS	BCWP	Actual	SV	CV	BCWS	BCWP	Actual	SV	CV	BAC	EAC	VAC

17. Select **Level 3** from the **WBS Number** dropdown and **Red** from the **Cumulative CV** dropdown.

18. Click **Recycle**  to re-generate the dashboard with the selected filters. Only the Level 3 WBSs that have a Cumulative Cost Variance in the Red are displayed.

Selected Project: 000185 - Downblend of U-233 in Building 3019 Status Date: 11/18/2009 CPP Data As-Of Date: 5/22/2009 Current Gateway: CD3
Current User: TRNINSTBASIC Logout

CPR Dashboard

Project: 000185 5/22/2009 WBS: Level 3 CPR Drilldown Reports

WBS Number	Description	Incremental					Cumulative					At Complete		
		BCWS	BCWP	Actual	SV	CV	BCWS	BCWP	Actual	SV	CV	BAC	EAC	VAC
U.03.01	Dissolution and Downblending Design (GC-1)	-709,730	971,725	1,184,870	1,881,455	-213,145	2,640,127	2,422,380	3,138,741	-217,746	-716,361	8,773,349	9,491,389	-718,040
U.03.02	Drying and Packaging (GC-2)	-227	423,721	-9,192	423,948	432,913	1,967,495	1,967,495	2,370,025	0	-402,530	1,967,495	2,370,025	-402,530
U.03.03	Supporting Systems Design Specifications and Analysis	5,103	0	4,135	-5,103	-4,135	129,880	56,942	30,785	-70,938	28,157	179,366	151,316	28,051
U.03.04	Supporting Systems Engineering, Testing & Design Optimization	-1,626,698	5,200	8,239	1,631,899	-3,038	132,290	112,652	158,758	-19,638	-46,105	2,476,761	2,623,016	-46,255
U.03.05	Design Change Report	0	18,240	50,549	18,240	-32,309	942,172	942,172	729,210	0	212,961	942,172	729,210	212,961
U.04.01	Procure Process Fabrications	-720,260	32,064	53,076	752,324	-21,012	354,085	278,029	379,428	-76,056	-101,399	30,722,198	30,814,145	-91,949
U.05.01	3019 Complex Dismantlement	-26,929	-43,619	20,187	-16,689	-63,806	26,899	24,210	61,451	-2,650	-37,241	7,486,974	7,486,736	-19,763

Filtered One-Level WBS

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

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

CPR Dashboard

Project: 000165 5/22/2009 WBS CPR Drilldown Reports

WBS Number	Description	Incremental					Cumulative					At Complete		
		BCWS	BCWP	Actual	SV	CV	BCWS	BCWP	Actual	SV	CV	BAC	EAC	VAC
U.01.01.01	Management and Administration	74,759	74,759	118,866	0	-44,108	804,774	804,774	1,045,219	0	-240,446	5,092,288	5,336,444	-244,157
U.01.01.03	Finance and Accounting	16,626	16,626	8,254	0	7,371	160,501	160,501	84,461	0	76,039	1,032,866	967,343	75,522
U.01.01.07	Engineering & Systems Integration	70,632	65,227	60,846	-5,304	4,383	744,931	750,551	556,324	5,620	195,227	5,334,949	5,140,576	194,371
U.01.01.09	Document Control	32,603	32,603	26,266	0	6,338	334,914	334,914	232,959	0	102,016	2,176,193	2,075,337	100,855
U.01.01.10	Training	44,182	44,182	51,710	0	-7,528	453,850	453,850	545,897	0	-92,047	2,920,649	3,014,161	-93,512
U.01.01.11	Records Management	9,659	11,194	16,299	1,535	-5,105	166,319	124,903	158,418	-41,416	-33,515	577,991	611,641	-33,650
U.01.02.02	Environment Safety and Health (ES&H)	175,716	177,135	113,050	1,419	64,084	1,983,232	1,957,888	1,481,040	-25,344	476,848	13,890,484	13,418,396	472,088
U.02.03.02	Waste Sampling & Characterization	22,489	36,490	15,527	14,001	20,964	194,543	194,543	141,113	0	53,431	1,688,785	1,670,493	18,292
U.02.03.03	Waste Transportation, Storage & Disposal	23,803	22,676	11,067	-1,127	11,609	163,555	155,946	193,055	-7,619	-37,109	8,317,263	8,368,418	-51,156
U.02.03.05	3074 & 3136 D & D Waste	12,504	4,092	0	-8,412	4,092	20,460	4,092	1,470	-16,368	2,622	262,376	263,077	-701
U.03.01	Dissolution and Downblending Resins (DC-1)	-709,730	971,725	1,184,870	1,881,455	-213,145	2,640,127	2,422,380	3,138,741	-217,746	-716,361	8,773,349	9,491,389	-718,040

Filtered Multi-Level WBS

View Schedule Dashboard

21. Select **Schedule Dashboard** under Project Performance on the Navigation Bar.

U.S. DEPARTMENT OF ENERGY PARS II

Selected Project: 000165 - Downblend of U-233 in Building 3019 Status Date: 11/18/2009 CPP Data As-Of Date: 5/22/2009

Current User: TRINSTBASIC Logout

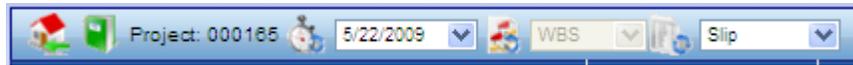
Schedule Dashboard

Project: 000165 5/22/2009 WBS Slip Drilldown Reports

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

Schedule Dashboard - Slip Dates View

22. The Schedule dashboard has fewer options, but operates in a manner similar to the CPR dashboard. Note that only WBS is appropriate for the Schedule dashboard and, thus, this option is grayed-out.



You may:

- Select a different time period
- Select Slip date view or Float date view
- Drilldown through WBS detail

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

Selected Project: 000165 - Downblend of U-233 in Building 3019 Status Date: 11/18/2009 CPP Data As-Of Date: 5/22/2009 Current Gateway: CD3
Current User: TRNINSTBASIC Logout

Schedule Dashboard

Project: 000165 5/22/2009 WBS Float Drilldown Reports

Project	Description	Baseline Critical (Free Float)				Current Critical (Free Float)				Baseline Critical (Total Float)				Current Critical (Total Float)				ETI
		> 60	≤ 60	≤ 30	≤ 0	> 60	≤ 60	≤ 30	≤ 0	> 60	≤ 60	≤ 30	≤ 0	> 60	≤ 60	≤ 30	≤ 0	
U.01	Project Management and Administration	52	7	18	469	84	3	8	552	394	57	55	40	317	56	44	210	1.06
U.02	Facilities Management	52	8	13	181	38	4	8	207	215	15	1	23	136	8	7	105	1.02
U.03	Design	55	55	73	286	18	4	27	186	192	143	123	34	31	9	14	181	1.37
U.04	Procurement	15	3	14	209	12	1	17	186	196	15	3	27	115	28	22	51	1.76
U.05	Construction	29	8	17	258	18	7	15	204	250	30	5	27	114	34	51	45	1.24
U.06	Start-up & Commissioning	13	3	7	64	11	4	7	123	36	9	26	16	92	3	2	48	.99
U.07	Processing	11		6	89	10		5	87	17	1	5	83	12	1	1	88	1.00
U.08	Safe Shut-Down	2	1	1	12	2	1	1	12	2	3	1	10	1	4		11	1.00
U.0H	Phase I Historical Costs																	

Schedule Dashboard - Float Dates View

View Timephased Dashboard

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

U.S. DEPARTMENT OF ENERGY
PARS II

Selected Project: 000165 - Downblend of U-233 in Building 3019 Status Date: 11/18/2009 CPP Data As-Of Date: 5/22/2009 Current Gateway: CD3
Current User: TRNINSTBASIC Logout

Timephased

OVERSIGHT & ASSESSMENT

PROJECT PERFORMANCE

- CPR Dashboard
- Schedule Dashboard
- Timephased Dashboard

Project: 000165 5/22/2009 WBS Drilldown Reports

WBS Number	Description	Element	Prior	2009												2010
				2	4	5	5	6	7	8	9	10	11	1		
U	U233 Disposition Project - SC2 Re-Design BCP -105	S	86,907,092	4,395,652	5,167,934	1,994,617	-174,438	4,952,693	4,021,912	4,093,353	5,034,686	3,428,407	3,279,121	3,747,053		
		P	83,686,240	2,978,108	3,661,477	2,030,614	4,451,943									
		A	83,904,102	3,093,146	3,302,181	3,297,360	3,358,340									
		EAC	83,904,102	3,093,146	3,302,181	3,297,360	3,358,340	5,739,910	4,856,352	4,094,569	4,037,339	3,923,833	3,633,173	3,280,388		

Timephased Dashboard- WBS Table

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

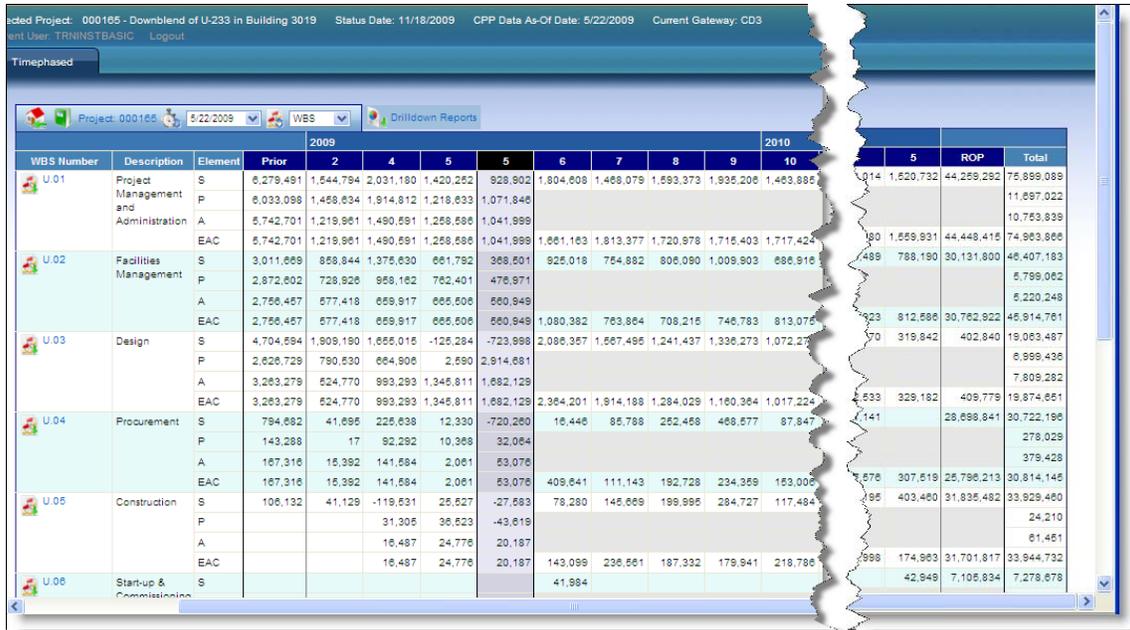


You may:

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

26. Scroll right to see complete table.

27. Click drilldown icon  for WBS Number U.



WBS Number	Description	Element	Prior	2009						2010						ROP	Total
				2	4	5	5	6	7	8	9	10	11	5			
U.01	Project Management and Administration	S	8,279,491	1,544,794	2,031,180	1,420,252	928,902	1,804,608	1,469,079	1,593,373	1,935,206	1,483,885	1,914	1,620,732	44,259,292	75,889,089	
		P	6,033,098	1,458,634	1,914,812	1,218,633	1,071,846										11,697,022
		A	5,742,701	1,219,961	1,490,591	1,258,598	1,041,989										10,753,839
U.02	Facilities Management	EAC	5,742,701	1,219,961	1,490,591	1,258,598	1,041,989	1,661,163	1,813,377	1,720,978	1,715,403	1,717,424	1,880	1,559,931	44,448,415	74,963,866	
		S	3,011,669	858,844	1,375,630	661,792	368,501	825,018	754,882	806,090	1,009,803	686,916	1,489	788,190	30,131,800	46,407,183	
		P	2,872,602	728,928	958,162	762,401	476,971										5,799,062
U.03	Design	A	2,756,457	577,418	659,917	655,506	560,949	1,080,382	763,864	708,215	746,783	813,075	1,323	812,586	30,762,922	45,914,761	
		EAC	4,704,694	1,909,190	1,655,015	-125,284	-723,998	2,086,357	1,567,495	1,241,437	1,336,273	1,072,273	1,170	319,842	402,840	19,063,487	
		P	2,626,729	790,530	664,906	2,590	2,914,681										6,969,436
U.04	Procurement	A	3,263,279	524,770	993,293	1,345,811	1,682,129	2,364,201	1,914,188	1,284,029	1,160,364	1,017,224	1,533	329,182	409,779	19,874,651	
		EAC	3,263,279	524,770	993,293	1,345,811	1,682,129	2,364,201	1,914,188	1,284,029	1,160,364	1,017,224	1,533	329,182	409,779	19,874,651	
		S	794,692	41,695	225,638	12,330	-720,260	16,448	85,788	252,458	468,577	87,847	1,141		28,698,841	30,722,196	
U.05	Construction	P	143,288	17	92,292	10,368	32,064									278,029	
		A	167,316	15,392	141,584	2,061	93,076									379,428	
		EAC	167,316	15,392	141,584	2,061	93,076	409,841	111,143	192,728	234,359	153,005	1,576	307,519	25,796,213	30,814,145	
U.06	Start-up & Commissioning	S	106,132	41,129	-119,531	25,527	-27,593	78,280	145,669	199,995	284,727	117,484	1,895	403,460	31,835,482	33,929,400	
		P			31,305	36,523	-43,619									24,210	
		A			16,487	24,776	20,187									61,461	
U.06	Start-up & Commissioning	EAC			16,487	24,776	20,187	143,099	236,561	187,332	179,941	218,786	1,998	174,903	31,701,817	33,944,732	
		S						41,994							42,949	7,105,834	
		P														7,278,678	

WBS Drilldown – Timephased Dashboard

On Your Own Workshop

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

Exercise 7 Reports for Contractor Data

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

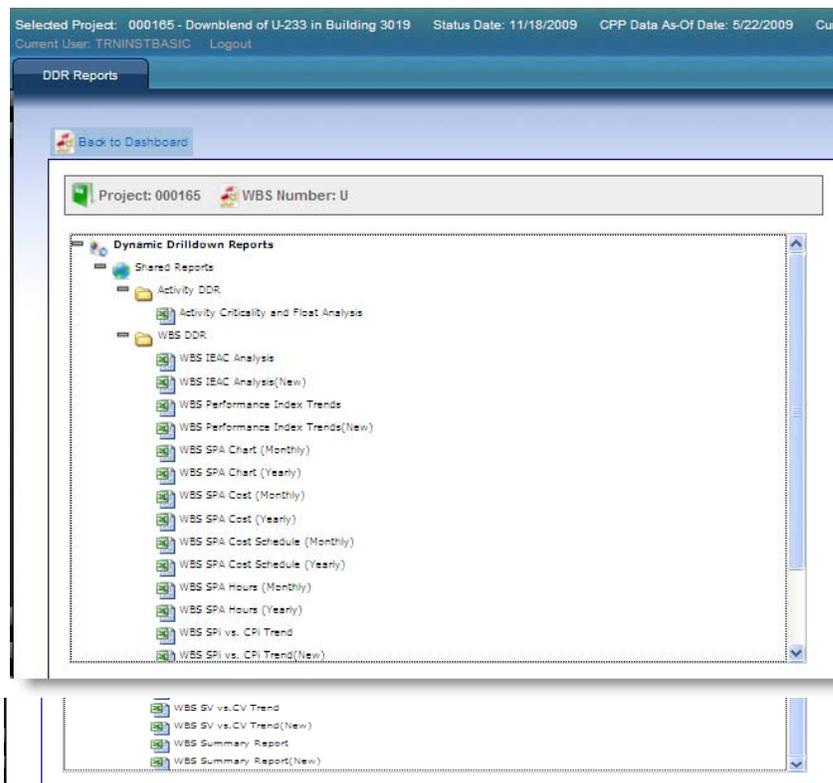
WBS Reports

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



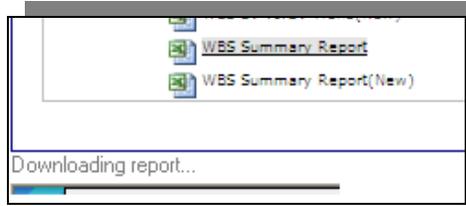
Drilldown Reports Tab

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

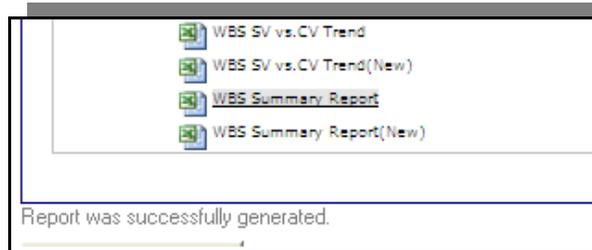


Project Performance WBS Report Listing

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



Downloading Report



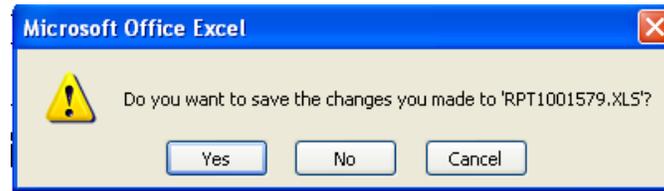
Report Generated

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

Report Date: 2/12/2010 1:33:02 PM				
Program Name: 000165				
Status Date: 11/18/2009				
Form: WBS Summary Report				
WBS Summary Report				
3	Program Name:	000165		
4	Program Description:			
5	WBS Number:	U		
6	WBS Description:	U233 Disposition Project - GC2 Re-Design BCP-105		
8	Period:	2/27/2009	4/3/2009	5/1/2009
9	Cumulative to Date			
10	BCWS	\$31,302,743.37	\$36,470,676.89	\$38,290,855.40
11	BCWP	\$26,664,348.13	\$30,325,825.24	\$36,808,282.21
12	ACWP	\$26,997,246.94	\$30,299,427.52	\$36,955,127.50
13	SV	(\$4,638,395.24)	(\$6,144,851.65)	(\$1,482,573.19)
14	SV%	-5.08%	-6.37%	-1.51%
15	SPI	0.949	0.936	0.985
16	CV	(\$332,898.81)	\$26,397.72	(\$146,845.29)
17	CV%	-3.88%	0.03%	-0.15%
18	CPI	0.996	1.000	0.998
19	Current Period			
20	BCWS	\$4,395,651.63	\$5,167,933.52	(\$174,438.67)
21	BCWP	\$2,978,107.70	\$3,661,477.11	\$4,451,942.73
22	ACWP	\$3,093,145.13	\$3,302,180.58	\$3,358,340.44
23	SV	(\$1,417,543.93)	(\$1,506,456.41)	\$4,626,381.40
24	SV%	-32.25%	-29.15%	-2652.15%
25	SPI	0.678	0.708	-25.522
26	CV	(\$115,037.43)	\$359,296.53	\$1,093,602.29
27	CV%	-3.86%	3.81%	24.56%
28	CPI	0.963	1.109	1.326
29	At Complete			
30	BAC	\$357,764,103.92	\$358,554,912.59	\$363,395,810.08
31	EAC	\$359,080,370.09	\$362,383,150.67	\$369,636,828.40
32	VAC	(\$1,316,866.17)	(\$3,828,238.08)	(\$241,018.32)
33	ACi	0.996	0.989	0.999
34	TCPI (To EAC)	0.996	0.986	1.000
35	TCPI (To BAC)	1.001	1.000	1.001
36	% Scheduled	25.52%	26.91%	26.61%

WBS Summary Report from Dashboard Drilldown Reports

7. At this point, you can work with the table as you would any other Excel Workbook, including save a copy or print a copy.
8. When finished viewing, **Close** the Excel window. When you close Excel, you will be asked if you want to save changes. Basically, it is a reminder to save the report (optional), even if you didn't make changes.



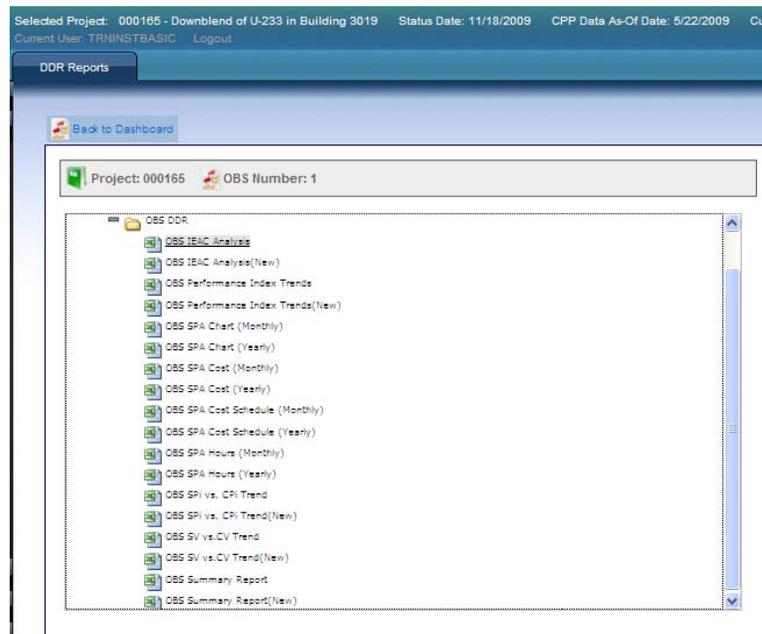
9. Return to the PARS II task window.

10. When you are finished running WBS reports, click .

OBS Reports

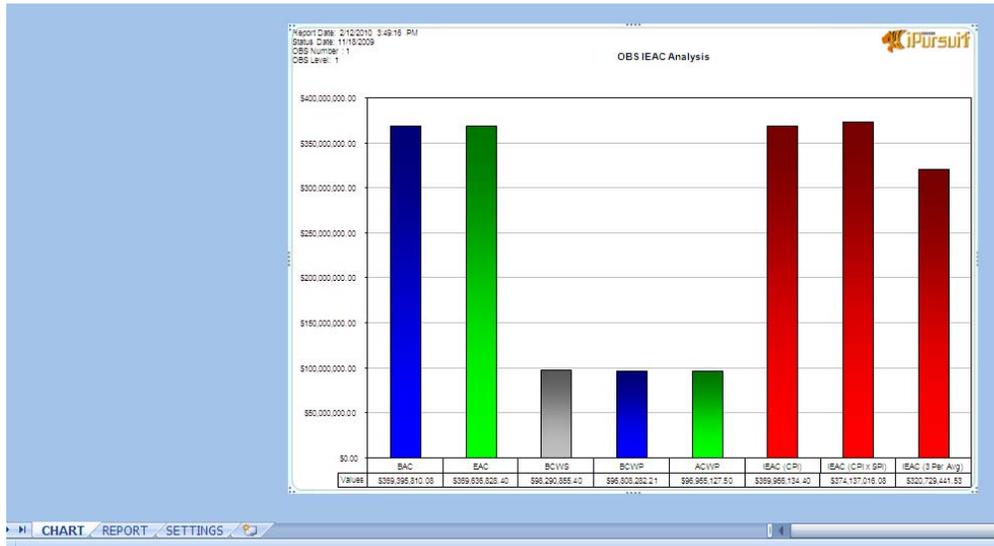
11. To produce OBS reports, select the **OBS** table from the dashboard.

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



Project Performance OBS Report Listing

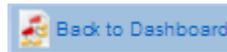
13. Select **OBS IEAC Analysis** report. Wait until the report opens in an Excel window.



OBS IEAC Analysis Report from Dashboard Drilldown Reports

14. Return to the PARS II task window.

15. When you are finished running OBS reports, click



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

Exercise 8 Monthly Status Assessment Updates

1. FIND and SELECT **PARS Project ID 189**.
2. Select **Monthly Status** from the Navigation bar. The first set of data that displays is the FPD monthly status update.

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

U.S. DEPARTMENT OF ENERGY
PARS II

Selected Project: 000189 - Training Initiative Program Status Date: 2/18/2010 CPP Data As-Of Date: Current Gateway: CD2
Current User: TRNNSTBASIC Logout

Monthly Status

OVERSIGHT & ASSESSMENT

- Capital Programs
- Projects
- Critical Decisions
- BCPs
- Monthly Status
- Budget/Funding
- KPPs
- Project Overview
- All Attachments

PROJECT PERFORMANCE

ALL REPORTS

HELP

Select Monthly Status Type: FPD - Monthly Status - FPD FPD Monthly Status Certification

Monthly Status Detail:

Forecast For TPC: 9,277

Forecast Completion: 11/18/2020

Has the CPP data been reviewed?

Is the QA data current?

Assessment Narrative: [Text Area]

Assessment RYG: Green

Program Assessment RYG: Green

QC/M Assessment RYG: [Blank]

Month/Year To Achieve Green: [Blank]

Corrective Action Narrative: [Text Area]

Cost Contingency Used: 100

Cost Contingency Remaining: 34,999,800

Schedule Contingency Used: 0

Schedule Contingency Remaining: 365

Profit Fee Used: 123

Profit Fee Remaining: 4,999,754

Updated By: [Blank]

Updated Date: [Blank]

Monthly Status Update - FPD

View FPD Monthly Status Update

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

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

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

- a. Forecast for TPC and Forecast Completion.
- b. The RYG assessment color bands. The FPD, Program Office, and OECM analyst make an independent determination of the RYG standing. The first Assessment box (unlabelled) is the one pertaining to this screen, in this case, the FPD's RYG assessment. A blank color band indicates that an RYG assessment has not yet been entered into PARS II by that organization level.
- c. If the FPD Assessment is Yellow or Red, then the Month/Year to Achieve Green should be entered and a Corrective Action Narrative.
- d. Cost Contingency Used, Schedule Contingency Used, and Profit Fee Used are entered by the FPD. The grayed-out fields are calculated values.

View Program Monthly Status Update

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

Selected Project: 000189 - Training Initiative Program Status Date: 2/18/2010 CPP Data As-Of Date: Current Gateway: CD2
 Current User: TRNOECM10 Logout

Monthly Status

Edit | Save | Cancel | Attachments | Reports

Select Monthly Status Type:
 Program - Monthly Status - Program FPD: Montrell Harris Certification:

Monthly Status Detail:

PORYG Assessment	Yellow
FPD Assessment RYG	Green
OECM Assessment RYG	Yellow
Month/Year To Achieve Green	July 2011
Forecast For TPC	32,000,000
Forecast CD4 Completion	11/18/2020
Is the OA data current?	<input checked="" type="checkbox"/>
PO Status Assessment Narrative	The Contractor reports that equipment issues won't be resolved until April, 2011
Updated By	TRNPO01
Updated Date	3/18/2010 1:50:00 PM

Monthly Status Update – Program Office

7. Items to note:
 - a. There are fewer data elements on the Program Monthly Status screen

- b. The RYG order is different. The first RYG assessment box is that of the Program and is labeled PORYG.
- c. Since PORYG Assessment is Yellow, Month/Year to Achieve Green has an entry.
- d. It is optional for the Program to review CPP data, so that question is not included on the Program screen.

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

View the OECM Monthly Status Update

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

OECM Monthly Status Screen

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

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

Part 6A – Enter FPD Monthly Status Update

Part 6B – Enter Program Monthly Status Update

Part 6C – Enter OECM Monthly Status Update

PART 6A Enter FPD Monthly Status

1. Find and select **your class-assigned PARS Project ID**.
2. Select **Monthly Status** from the Navigation Bar.
3. Verify **FPD Monthly Status** displays in the Monthly Status type dropdown selection.

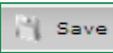
The screenshot shows the 'Monthly Status' form in the PARS II system. The form is titled 'Monthly Status Update - FPD'. It includes a navigation bar on the left with options like 'OVERSIGHT & ASSESSMENT', 'PROJECT PERFORMANCE', 'ALL REPORTS', and 'HELP'. The main form area has a dropdown menu for 'Select Monthly Status Type' set to 'FPD - Monthly Status - FPD'. Below this, there are several input fields and checkboxes. The 'Forecast For TPC' field is set to 9,277. The 'Forecast Completion' date is 11/18/2010. There are two checkboxes: 'Has the CPP data been reviewed?' and 'Is the OA data current?'. The 'Assessment Narrative' field is empty. The 'Assessment RYG' field is set to 'Green'. The 'Program Assessment RYG' field is set to 'Green'. The 'QECM Assessment RYG' field is empty. The 'Month/Year to Achieve Green' field is empty. The 'Corrective Action Narrative' field is empty. There are several calculated fields: 'Cost Contingency Used' (100), 'Cost Contingency Remaining' (34,999,000), 'Schedule Contingency Used' (0), 'Schedule Contingency Remaining' (365), 'Profit Fee Used' (123), and 'Profit Fee Remaining' (4,999,754). The form also includes an 'Edit' button and a 'Reports' button.

Monthly Status Update - FPD

4. Click  to begin entering monthly status information.
5. Click checkbox to indicate “**Is the OA Data Current?**”
6. Click checkbox “**Has the CPP Data been Reviewed?**”
7. Enter/Update fields as needed. Fields in gray are calculated values.
 - a. Enter or insert **first sentence** in the Assessment Narrative:

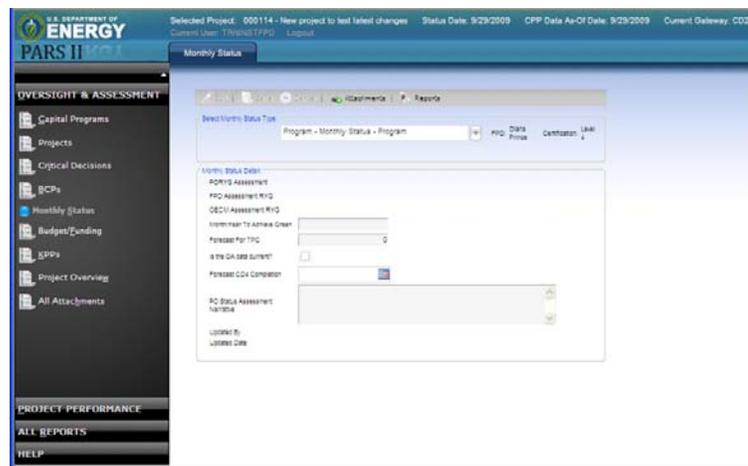
Assessment for training class.
 - b. Change **Assessment RYG** to **Yellow**.
 - c. Enter **July 2011** as the **Month/Year to Achieve Green**.
 - d. Enter **Corrective Action Narrative**:

Issuing Bids for extra equipment and staff.

- e. Enter dollar values.
- 8. Click . You are returned to the View mode of the Monthly Status tab.

PART 6B Enter Program Monthly Status

- 1. Find and select **your class-assigned PARS Project ID**.
- 2. Select **Monthly Status** from the Navigation Bar.
- 9. Select **Program Monthly Status** from the Monthly Status type dropdown selection.



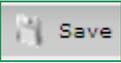
Monthly Status Update – Program Office

- 3. Click  to begin entering monthly status information.
- 4. Enter/Update fields as needed. Fields in gray are calculated values. Updated by and Updated date are populated by PARS.
 - a. Change **Assessment RYG** to **Yellow**.
 - b. Enter **October 2011** as the **Month/Year to Achieve Green**.
 - c. Enter **52,000,000** for Forecast for TPC.
 - d. Click checkbox to indicate **“Is the OA Data Current?”**

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

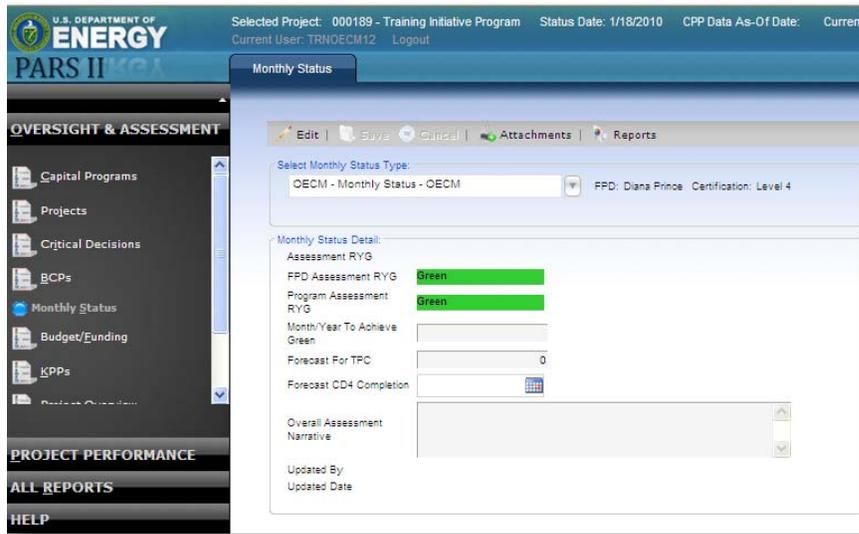
5. Enter the **Overall Assessment Narrative**:

Recent reports indicate slippage in Cost and schedule

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

PART 6C Enter OEMC Monthly Status

1. FIND and SELECT your **Assigned PARS Project ID**.
2. Select **Monthly Status** from the Navigation Bar.
3. Select **OECM Monthly Status** from the Select Monthly Status type dropdown list.

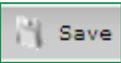


OECM Monthly Status Screen

4. Click  to begin entering monthly status information.
5. Select **Yellow** from Assessment RYG dropdown list.
6. Enter **July 2012** as the Month/Year to Achieve Green.
7. Enter **55,000,000** for Forecast for TPC.
8. Enter **March 31, 2014** for Forecast CD-4 Completion.

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

Recent reports indicate slippage in Cost and schedule

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

