CA Clarity™ PPM

Earned Value Manager Product Guide - On Premise

Service Pack 02.0.01

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Chapter 1: CA Clarity PPM Earned Value Manager

This section contains the following topics:

Earned Value Manager Overview

Use the PPM Earned Value Manager add-in to manage your internal, U.S. federal government contract programs as part of an ANSI-748 compliant earned value management system. Use Earned Value Manager to ensure that your IT projects are following earned value principles defined in the ANSI/EIA standard 748-A (American National Standards Institute/Electronic Industries Alliance standard).

Earned Value Manager helps to organize your deliverables and track earned value using ANSI-748 compliance constructs. If your organization uses earned value methodology for measuring project performance, you can take advantage of the constructs to track earned value on contract programs.

CA Clarity PPM is one part of the overall earned value management system. You can use other supporting software systems to manage compliance points, such as Microsoft Excel spreadsheets or Word documents.

How to Get Started with Earned Value Manager

Before you start using Earned Value Manager:

1. Complete the administrative tasks:

   - Set up the rate matrices.

   - Set up the burdening matrices.

   - Set up the earned value reporting periods.

- Set up the responsible OBS structure.

- Set up the performing OBS structure.

  Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

2. If you are posting actuals:

   - Using CA Clarity PPM timesheets, set up timesheet options.

     For more information, see the *Administration Guide*.

   - Using financial transactions, set up your entity and its financial attributes.

     For more information, see the *Financial Management User Guide*.

3. Review the project management earned value settings, including the project and the default earned value (EV) calculation method for the project task.

   For more information, see the *Project Management User Guide*.

4. Schedule one or more instances of the Update Earned Value History – Contracts job based on the organization earned value reporting periods.

   Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

Contract Audit Overview

Audit provides a way to track the history of specific activities for a contract. CA Clarity PPM administrator sets up and enables audit, and determines the fields to audit and the information to store in the audit.

If audit is enabled for contracts and with the requisite access rights, the Audit menu displays when the contract is open. Use the contract audit page to view a log of change, addition, or deletion records for the fields specified for auditing.

For more information, see the *Basics User Guide*.

Contract Processes

You can use processes to automate certain elements of earned value management. CA Clarity PPM administrator defines the contract type-specific processes, or global processes designed to work on a specific contract from the Administration Tool.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

For more information, see the *Basics User Guide*.

Earned Value Manager XOGs

You can process the following data objects or transactions into and out of CA Clarity PPM using the XML Open Gateway (XOG):

- Agency

- Contract

    This object XOG includes all of the child CWBS objects: contract work breakdown structure (CWBS) elements, summary level planning packages (SLPP), control accounts (CA), and work packages (WP).

- Burdening matrix

- Burdening class

Note: If you process contracts that contain work packages linked to projects or project tasks, the information representing the links are included. But copies of the referenced projects are not included. You require to XOG the referenced projects separately.

The following XOG sample files are included when you install the PPM Earned Value Manager add-in:

- agencies_read.xml

- agencies_write.xml

- burdening_class_write.xml

- burdening_classes_read.xml

- burdening_matrices_read.xml

- burdening_matrix_write.xml

- contracts_read.xml

- contracts_write.xml

The XOG sample files are located in the following directory:
`<extract folder>\package\xog`

Where <extract folder> is the name of the folder to where you extracted the .jar file.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

Access to Earned Value Manager

Your access rights determine your access to PPM Earned Value Manager. So also to the Earned Value Manager features. In the absence of requisite privileges, you cannot view and use some of the features, pages, and fields.

Your CA Clarity PPM administrator assigns access rights, or your contract program manager can do so to a specific contract. Additionally, you would require access rights to several other CA Clarity PPM features, such as project management to access the information they contain.

Install the Add-in

For complete instructions on how to install an add-in, see the *Installation Guide*.

Chapter 2: Contracts

This section contains the following topics:

How to Work with Contracts

You can define the contracts into which your organization enters with U.S. federal government agencies. Contracts are the top level of earned value data aggregations and all reporting requirements. Contract information is the basis for the earned value calculations that are used to track the overall performance of programs. The contract data is also important for reporting and is included in the contract performance reports (CPR).

Contracts comprise:

- Contract work breakdown structure (CWBS) elements

- Summary level planning packages (SLPP)

- Control accounts (CA)

- Work packages (WP)

The following outlines the expected process when working with contracts:

1. Create the agency.

2. Create the contract.

3. Associate the agency to the contract.

4. Build the control work breakdown structure (CWBS) hierarchy.

    a. Create the CWBS elements having control accounts.

b.   Create the summary level planning packages (SLPP).

c.   Identify the contract work breakdown structure (CWBS) elements having control accounts.

d.   Create your control accounts.

e.   Define the work packages for the control accounts.

5.   Link the work packages to projects or project tasks.

6.   Baseline the contract.

7.   With budgets authorized and work authorization approved:

   ■   Update the control accounts

   ■   Update the work packages

8.   Post actuals against project tasks.

   For more information, see the *Basics User Guide*.

9.   Update earned value totals to reflect current earned value metrics.

10. Update historical earned value for each reporting period.

11. Set the contract performance report (CPR) parameters.

12. Run the EVM CPR Report Data Generation job.

   Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

13. Review the CPR reports.

14. Monitor contract performance.

Create Contracts

Create contracts as part of the bidding and planning process for contracts. You can enter information about the U.S. federal government agency and details about the contract using the create contract page.

Note: The agency record you want to associate with this contract must be active in order for it to be available for selection. By default, when you create a new agency, the agency is active.

Follow these steps:

1.   Open Administration, and from Earned Value Management, click Contracts.

   The list page appears.

2.   Click New.

   The create page appears.

3. Complete the following fields in the General section:

   Contract Name

   Defines the contract name.

   Contract Number

   Defines the contract unique identifier.

   Program Name

   Defines the value that the contract performance reports (CPR) for the CPR report header.

   Description

   Defines the contract description.

   Program Manager

   Defines the name of the contract program manager. Select a contract program manager in the Program Manager field.

   Default: The name of the resource currently logged in.

   Earned Value Reporting Period

   Defines the assigned reporting period for the contract. Once the update earned value history of contracts job runs, the field is locked.

   Default: Unlocked

   Contract Currency Code

   Defines the currency code associated with the contract. Once the contract is saved, the currency code cannot be modified.

   Contract Type

   Specifies the contract type.

   Values: Cost plus award fee, Cost plus fixed fee, Cost sharing, Firm fixed price, Firm fixed price level of effort term contracts, Firm fixed price with economic price adjustment, Fixed price incentive, Fixed price re-determinable, Grants and cooperative agreements, IDIQ, Letter contracts, Modifications, Non procurement instruments, Orders under BOAs, Other Transactions, Technology investment agreements, and Time and material

   Phase

   Defines the current contract program phase.

   Values: Concept, O&S (sustainment), Planning, Production, or RDT&E

   Share Ratio

   Defines the cost share ratio as defined in the negotiated contract terms.

Start Date

Defines the planned start date for the contract work.

Finish Date

Defines the planned start date for the contract work.

Definitized Date

Defines the date of signing the contract.

Status

Defines the current contract program status.

Values: Unapproved or Approved

Default: Unapproved

Contract OBS

Defines the organizational department, or subcontractor/ vendor group responsible for delivering the work within the contract.

Active

Specifies if the contract is active. You can only delete inactive contracts.

Default: Selected

4. Select an agency in the Agency field to define the agency associated with the contract, and save.

View a List of and Open Contracts

View a list of active contracts on the contracts list page.

Follow these steps:

1. Open Home, and from Earned Value Management, click Contracts.

   The list page appears.

2. Click the name of the contract to open it.

   The properties page appears.

Associate Contracts to Earned Value Reporting Periods

The earned value reporting period defines the frequency and the interval for the Update Earned Value History - Contracts job. The information helps in recording the historical earned value snapshots of performance and save snapshot in the earned value history table. When using earned value methodologies to analyze contract performance, the job uses the earned value reporting period to take a snapshot.

Historical reporting data is generated based on a contract association with the period. The contract program manager associates the contract with the appropriate period. The earned value reporting period drives the reporting data that shows up on the CPR reports.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

Follow these steps:

1. Open the contract to associate a reporting period.

    The properties page appears.

2. Complete the following field in the General section:

    Earned Value Reporting Period

    Defines the assigned reporting period for the contract. Once the update earned value history of contracts job runs, the field is locked.

    Default: Unlocked

    If a work package is linked to a project or project task, CA Technologies recommends that you associate the same earned value reporting period to the project, or project task as you associate with the contract.

    Note: See the *Project Management User Guide* for more information.

3. Save the changes.

Associate Agencies to Contracts

Agencies are the U.S. federal government agencies with whom your organization enters into contracts. You can associate an agency with multiple contracts. But can associate only one contract to one agency. Use the properties page of the contract to define the relationship between the contract and the agency.

You can only associate active agencies to contracts. An agency does not display in the agency list signifies an inactive.

Follow these steps:

1. Open the contract to associate an agency.

   The properties page appears.

2. Complete the following field in the Agency section:

   Agency

   > Defines the name of the agency associated with the contract. Select an active agency in the Agency field.

3. Save the changes.

Contract Pricing

Part of your organization bidding on a contract is to determine the total cost of the work and profit or fee for the contract. The contract costs are aggregated based on industry-standard pricing categories, and the aggregated values display on the contract pricing properties page.

The pricing categories include:

Total Contract Price

> Defines the total contract price based on the following formula:
> `Total Contract Price = Total Contract Cost + Profit/Fee`

Total Contract Cost

> Defines the sum of all budgets for work on a contract. The sum includes the negotiated contract cost (NCC) plus the estimated cost of Authorized Unpriced Work (AUW). The total contract cost (TCC) is always equal to the contract budget base (CBB), except where there is an over target baseline (OTB).

Contract Budget Base

> Performance Management Baseline + Management Reserve. Defines the contract budget base based on the following formula:
> `Contract Budget Base = Negotiated Contract Cost (NCC) + the Authorized Unpriced Work (AUW).`

Performance Measurement Baseline

> BAC (burdened except for FEE) + Undistributed Budget (UB). The Performance Measurement Baseline (PMB) is a time-phased budget plan against which project performance is measured. The budgets that are assigned to scheduled control accounts and the applicable UB form the performance measurement baseline.

> For future effort that is not planned to the control-account level, the PMB also includes budgets assigned to higher-level CWBS elements. The PMB is the sum of all the distributed budgets plus and UB. The sum does not include any management or contingency reserves, isolated above the PMB.

Distributed Budgets

BAC for all CWBS elements. Distributed budget is a time-phased budget distributed to control accounts (CA). Or to a higher level WBS element, or functional elements (also called summary level account budgets).

Undistributed Budgets

Defines the broadly defined activities not distributed to control accounts. Enter the value manually.

Management Reserve (MR)

Defines the amount held separately from your contract budget base for changes in the work going to be executed on the contract. Throughout the course of a contract, as scope changes occur, money is taken out of the Management Reserve (MR) and distributed to the control accounts. Each time money is taken out of the MR, a log entry is added. The log is provided to track the money earned and spent in the management of the contract. Enter the value manually.

Manage Contract Undistributed Budgets and Management Reserve

Update the undistributed budget (UB) and management reserve (MR) values before generating the contract performance report (CPR) data. Update these values based on your UB log and MR logs, kept for every contract.

Follow these steps:

1. Open the contract.

   The properties page appears.

2. Define the following values in the Pricing section of the page:

   Undistributed Budgets

   Defines the undistributed budget for broadly defined activities not distributed to control accounts. Enter the value manually.

   Management Reserve (MR)

   Defines the amount held separately from your contract budget base for changes in the work going to be executed on the contract. Throughout the course of a contract, as scope changes occur, money is taken out of the Management Reserve (MR) and distributed to the control accounts. Each time money is taken out of the MR, a log entry is added. The log is provided to track the money spent and earned in the management of the contract. Enter the value manually.

3. Save the changes.

View Contract Pricing

The contract pricing displays values based on the current contract baseline plus the values from the properties page of contract pricing.

Follow these steps:

1. Open the contract.

   The properties page appears.

2. Open the Contract menu, and click Pricing.

   The contract pricing properties page appears.

Performance Measurement Baselines

Contract baselines are snapshots of the contract total effort and total costs at the moment of capture. This snapshot includes the effort and cost for all control accounts and summary level planning packages associated with the contract work breakdown structure (CWBS).

The control account baseline is the summary of the baseline data for each of the control account work packages.

A contract baseline:

- Baselines all projects and in the case of master projects, their subprojects, based on the tasks that are linked to contract work packages.

- Rolls up baseline and earned value data from task data up to the work package to the control accounts.

- Rolls up control account baseline data to the CWBS element.

- Aggregates CWBS element data to the contract level.

The Baseline at Completion (BAC) is calculated and stored with and without burdens. Earned value is calculated on unburdened BAC and contract pricing is shown by using the burdened BAC costs. Total Burdened BAC is calculated using the following formula:
BAC = (Cost of Actual Work + Burdened Cost) + (Cost of Remaining Work + Burdened Cost)

Baseline Currency

When baseline and earned value metrics are calculated for a contract. The data is calculated and written to the contract baseline and to the contract earned value history tables using the contract currency.

Baselines and Work Packages

Creating a contract baseline automatically creates a project-level baseline for the projects associated with the contract through work packages. Link the work package to the project, or project tasks to create the association.

Create New Contract Baselines

You can create an unlimited number of baselines for a contract. Take an initial baseline before resources enter time on a work package task. After you create the initial baseline, you can create additional ones at various intervals. Intervals, such as mid-way through the contract, when different phases complete, and at the contract end. The initial baseline allows you to compare estimates to actuals once the contract is under way. You can only mark one baseline as the current baseline.

Follow these steps:

1. Open the contract.

    The properties page appears.

2. Open the Properties menu, and click Baseline.

    The contract baseline properties page appears.

3. Click New.

    The baseline revision properties page appears.

4. Complete the following fields:

    Revision Name

    Defines the baseline revision name.

    Example:

    Initial Baseline, Mid-Term Baseline, or Final Baseline.

    Revision ID

    Defines the baseline revision unique identifier.

    Example:

    The baseline version number, such as v1 or v5.

    Description

    Defines the baseline revision description.

    Current Revision

    Specifies to make this baseline the current baseline. This field is unlocked only when multiple baseline revisions exist.

    Default: Selected

5. Save the changes.

Define which Baseline is Current

The baseline last created becomes the current contract baseline, by default. If you have defined only one baseline, the baseline is marked as the current baseline. To change the current baseline, open the baseline, select the Current Revision field, and save the baseline revision.

The current contract baseline is used to display data on the properties page of contract pricing and on the CPR reports. For example, the CPR Format 3 report displays baseline data at the beginning and end of the reporting period, and lists all the baselines between those two dates.

Follow these steps:

1. Open the contract.

    The properties page appears.

2. Click Baseline.

    The contract baseline properties page appears.

3. Open the baseline.

    The baseline revision properties page appears.

4. Select the Current Revision field, and save.

Edit Baselines

Use the properties page of baseline revision to edit the baseline revision name, ID, and description. You can also view the baseline revision start date, finish date, usage data, and BCWP on the page.

Follow these steps:

1. Open the contract to edit a baseline.

    The properties page appears.

2. Click Baseline.

    The baseline properties page appears.

3. Click the name of a baseline revision.

    The baseline revision properties page appears.

4. Complete the following fields:

Revision Name

Defines the baseline revision name.

Example:

Initial Baseline, Mid-Term Baseline, or Final Baseline.

Revision ID

Defines the baseline revision unique identifier.

Example:

The baseline version number, such as v1 or v5.

Description

Defines the baseline revision description.

Baseline Start

Displays the date of starting the contract at the time of baselining.

Baseline Finish

Displays the date of finishing the contract at the time of baselining.

Baseline Usage

Displays the system-generated usage at the time you baseline using the following formula:
Usage = Total of Actuals + ETC

BCWP

Displays the system-calculated value of Budgeted Cost of Work Performed (BCWP). The value is calculated and recorded when you baseline a project, or when you update earned value totals. BCWP is also referred to as the earned value (EV). BCWP represents the amount of the budgeted cost (BAC) completed based on performance as measured using the Task EV Calculation method.

Calculations are made based on the level at which the calculation is made. BCWP is calculated at the following levels:

■ Task. BCWP is based on the selected EV calculation method.

■ Project. BCWP is the sum of BCWP for all WBS Level 1 tasks in the project.

Current Baseline Required: Yes

Current Revision

Specifies to make the baseline the current baseline. The field is unlocked only when multiple baseline revisions exist.

Default: Selected

5. Save the changes.

Delete Baselines

Deleting the current baseline and with another baseline revision existing, the remaining baseline becomes the current revision. You require to have the Contract - Baseline Delete access right to delete contract baselines.

Follow these steps:

1. Open the contract.

   The properties page appears.

2. Click Baseline.

   The baseline properties page appears.

3. Select the check box next to the baseline, and click Delete.

   The confirmation page appears.

4. Click Yes.

Contract Work Breakdown Structure (CWBS)

Contracts are made up of a set of deliverables that are organized into a contract work breakdown structure (CWBS). The contract program manager creates the CWBS based on the hierarchy of the deliverables. Often the CWBS hierarchy is created as part of the contract negotiation process.

A CWBS consists of one CWBS root node element and a user-defined hierarchy of CWBS elements below it. Define the nodes down to the level of the lowest deliverable. The CWBS elements appear on the hierarchy in the order you create them. Each CWBS branch can have different node levels. Levels are automatically assigned to CWBS elements based on their position in the CWBS hierarchy. The order indicates their relationship with each other. Level 1 is reserved for the CWBS root node element.

Part of building the CWBS hierarchy is identifying the CWBS elements requiring control accounts and summary level planning packages.

Create CWBS Elements

Identify the CWBS elements that have control accounts and summary level planning packages (SLPP). The new CBS elements are added to the CWBS hierarchy. You can add any number of CWBS elements to the CWBS hierarchy.

Follow these steps:

1. Open Home, and from Earned Value Management, click Contracts.

   The contracts page appears.

2. Click the WBS icon next to the contract.

   The contract WBS page appears.

3. Click New.

   The create page appears.

4. Complete the following fields in the General section:

   CWBS Element Name

   Defines the CWBS element name.

   CWBS Element ID

   Defines the CWBS element unique identifier.

5. Complete the following fields in the CWBS Dictionary section:

   Dictionary Description

   Defines the detailed CWBS data dictionary description.

6. Save the changes.

View a List of and Open CWBS Elements

You can view all the CWBS elements, such as summary level planning packages, control accounts, and work packages using the contract WBS page. The page helps to design a hierarchical (parent-child) relationship between the CWBS elements you create. Create and reorder CWBS elements from the page. You cannot delete control accounts, summary level planning packages, and work packages from this page.

You can view the CWBS element names, the number of CWBS levels, and the CWBS element IDs using the contract WBS page.

Follow these steps:

1. Open Home, and from Earned Value Management, click Contracts.

   The list page appears.

2. Click the WBS icon next to the contract.

   The contract WBS page appears, which lists the contract work breakdown structure elements.

3. Expand the CWBS hierarchy to locate the CWBS element, and click the name of the CWBS element.

   The properties page appears.

Edit CWBS Elements

To edit the CWBS elements, you require the Contract - Edit access right.

Follow these steps:

1. Open the CWBS element.

   The properties page appears.

2. Edit the following fields in the General section:

   CWBS Element Name

   Defines the CWBS element name.

   CWBS Element ID

   Defines the CWBS element unique identifier.

3. Edit the following fields in the CWBS Dictionary section:

   Dictionary Description

   Defines the detailed CWBS data dictionary description.

4. Save the changes.

Indent and Outdent CWBS Elements in Contract Work Breakdown Structures

You can create hierarchical relationships between CWBS elements. Indent an element to make it a subordinate of an element.

Use indent and outdent to designate individual CWBS elements as parent or children. Parent CWBS elements are top-level elements that have child CWBS elements associated with them. Child CWBS elements are nested beneath parent CWBS elements. You can create a parent-child hierarchical grid by indenting or outdenting CWBS elements.

Rules for Indenting and Outdenting

- You cannot indent or outdent the CWBS root node element.

- You can indent an element multiple times. However, a higher level element requires to be exactly one indent level above the element indented. An element cannot be indented multiple times when a higher-level element is not immediately one level above it.

- You can only outdent elements to the level 2 position as the CWBS root node element is at the level 1 position.

- Only one level 1 element exists and that position is reserved for the CWBS root node element.

- If the element to be outdented has subordinate elements, the subordinate elements automatically follow to their parent.

- You can select multiple CWBS elements to indent or outdent.

- If you cannot indent a CWBS element, an error message appears. If you select multiple CWBS elements for indenting and one of them cannot be indented, an error message appears and none of the selected CWBS elements are indented. The same rule applies for outdenting.

Follow these steps:

1. Open Home, and from Earned Value Management, click Contracts.

   The list page appears.

2. Click the WBS icon next to the contract.

   The contract WBS page appears.

3. Select the element to indent or outdent, click CWBS Layout>>, and do one of the following:

   - Select Indent.

     The page refreshes and the element is folded one level under the nearest higher-level element. A plus (+) sign appears next to the higher level element.

   - Select Outdent.

     The page refreshes and the element appears as outdented relative to the element above it.

   The element is indented or outdented.

Move CWBS Elements

You can move elements up or down in the CWBS hierarchy.

If you move a CWBS element, the summary level planning package, control accounts, and work packages are moved with the CWBS element. You cannot move SLPPs and control accounts to another CWBS element. You can only move CWBS elements.

Example

A parent CWBS element named Housing contains CWBS elements called Foundation and Framing. The elements are split into control accounts which have work packages associated with them. Reorder the CWBS elements to create the parent/child relationships in the CWBS hierarchy.

Follow these steps:

1. Open the contract.

   The properties page appears.

2. Click Contract WBS.

   The contract WBS page appears.

3. Select the check box next to the element, click CWBS Layout>>, and select Move.

   The move CWBS elements page appears. The name of the CWBS element being moved appear at the top of the page.

4. Select the CWBS element to place above or beneath the CWBS element, and do one of the following:

   ■ Click Insert Before to move the CWBS element above the selection.

   ■ Click Insert After to move is below the selection.

   The contract WBS page appears. The CWBS element displays in its new location in the hierarchy.

Expand and Collapse the Contract Work Breakdown Structure

You can expand and collapse multiple branches of the CWBS hierarchy. Also, view elements that are in multiple branches of the hierarchy. You can see the complete picture of your CWBS, or you can collapse some CWBS elements and expand others.

Expand the Contract Work Breakdown Structure View

You can expand the CWBS root node element to view the top-level branches. Indented CWBS elements are folded one level under the nearest higher-level CWBS element. A plus (+) sign appears in front of the higher-level CWBS element.

Follow these steps:

1. Open the contract.

   The properties page appears.

2. Click Contract WBS.

   The contract WBS page appears, displaying only the top-level CWBS root node element.

3. Click the plus (+) sign next to each CWBS element.

   The higher-level summary element is expanded, and the lower-level elements that are indented beneath it display on the page.

Collapse the Contract Work Breakdown Structure View

The collapsed view helps you to view a small group of CWBS elements (a parent and descendents) alone. To view the CWBS hierarchy in its expanded state in the contract WBS page, click the minus (–) sign next to each summary element. The lower-level CWBS elements collapse under the higher-level summary CWBS element.

Delete CWBS Elements

You cannot delete CWBS elements that have a baseline, or if earned value history is generated. Nor can you delete the CWBS root node element.

Follow these steps:

1. Open the contract.

   The properties page appears.

2. Click Contract WBS.

   The contract WBS page appears.

3. Select the check box next to the CWBS element, and click Delete.

   The confirmation page appears.

4. Click Yes.

Contract Work Breakdown Structure (CWBS) Dictionary

The CWBS dictionary contains a detailed description for each deliverable. This dictionary provides a definition of the work to accomplish. The CWBS dictionary is system generated as you create and add CWBS elements to the CWBS hierarchy.

View the CWBS Dictionary Descriptions

You can edit CWBS dictionary descriptions on the CWBS element, or directly in the dictionary. The dictionary is a working document. As scope shifts or other changes occur, update the deliverable descriptions in the data dictionary.

Follow these steps:

1. Open the contract.

   The properties page appears.

2. Click CWBS Dictionary.

   The CWBS dictionary properties page appears.

Edit the CWBS Dictionary Descriptions

You can edit descriptions on the CWBS element or directly in the dictionary. The dictionary is a working document. As scope shifts or other changes occur, update the deliverable descriptions in the data dictionary.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

Follow these steps:

1. Open the contract.

   The properties page appears.

2. Click CWBS Dictionary.

   The CWBS dictionary properties page appears.

3. Edit the following fields:

   CWBS Element Name

   Defines the control work breakdown structure element name.

   CWBS Element ID

   Defines the control work breakdown structure element unique identifier.

   CWBS Element Dictionary Description

   Defines the detailed control work breakdown structure element data dictionary description.

4. Save the changes.

Print CWBS Dictionary Descriptions

To print the CWBS dictionary descriptions, run the contract WBS dictionary report.

Monitor CWBS Element Performance

You can monitor CWBS element performance using the CWBS Element Dashboard page. This page displays the Earned Value History - CWBS portlet, which displays earned value history data based on the control accounts and summary level planning packages associated to the CWBS element. As time progresses, each new reporting period is displayed on the graph.

Optionally, you can show projected data on the graph. To have this earned value data display, ask your CA Clarity PPM administrator to set the Update Earned Value History - Contracts job parameters for project ACWP, BCWP and BCWS and then run the job.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

You can customize this page by adding or removing portlets. Do this from the CWBS Element Layout portlet page Dashboard content in Studio.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

Calculate Earned Value Metrics on Contracts

You can calculate historical earned value metrics based on the contract associated earned value reporting period. Also, update a contract current earned value metrics at any time. Do this manually, or run the Update Earned Value Totals - Contracts job at scheduled times. Both the methods refresh the earned value (EV) metrics and display on CWBS elements, control accounts, and work packages.

The earned value reporting period defines the frequency and the interval for the Update Earned Value History - Contracts job. The aim is to take historical earned value snapshots of performance and save snapshot in the earned value history table.

For more information, see the *Administration Guide*.

Manually Update Earned Value Data from the Contract Work Breakdown Structure

You can manually update the earned value data for a contract using the contract WBS page.

Follow these steps:

1. Open the contract to calculate earned value.

   The properties page appears.

2. Click Contract WBS.

   The contract WBS page appears.

3. Click Update Earned Value.

   A snapshot of the current earned value for the contract is saved.

Manually Update Earned Value Data from the Baseline Page

You can manually update an earned value data for a contract from the properties page of contract baseline.

Note: You require at least one baseline for the Update Earned Value button to display on the page.

Follow these steps:

1. Open the contract to calculate earned value.

   The properties page appears.

2. Click Baseline.

   The baseline properties page appears.

3. Click Update Earned Value.

   A snapshot of your contract current earned value is saved.

Schedule Jobs to Calculate Earned Value Metrics

The Update Earned Value Totals – Contracts job calculates earned value metrics for contracts. You or your administrator can schedule this job to run at regularly scheduled times.

For more information, see the *Administration Guide*.

Monitor Contract Performance

Use the contract dashboard page to monitor contract performance. The page displays the EV History portlet. The display includes the earned value history data based on the contract earned value reporting period and the contract earned value history table. With time, each new reporting period is displayed on the graph.

Optionally, you can show projected data on the graph. Your CA Clarity PPM administrator requires to set the Update Earned Value History - Contracts job parameters for project ACWP, BCWP, and BCWS. Then, run the job to view the earned value history data.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

Add or remove portlets to customize the page using the contract layout portlet page Dashboard content in Studio.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

Deactivate Contracts

By default, when you create a contract, the contract is active. Deactivate contracts if they are no longer used. Only an inactive contract can be deleted.

Follow these steps:

1. Open the contract.

   The properties page appears.

2. Clear the check box next to the Active field

3. Save the changes.

   The contract is inactive.

Activate Contracts

By default, when you create a new contract, the contract is active. You can reactivate inactive contracts at any time.

Follow these steps:

1. Open the contract.

   The create page appears.

2. Select the check box next to the Active field

3. Save the changes.

   The contract is active.

Delete Contracts

You cannot delete contracts that are active or that have a baseline. Instead, deactivate the contracts not in use.

Follow these steps:

1. Open Home, and from Earned Value Management, click Contracts.

   The list page appears.

2. Select the check box next to the contract, and click Delete.

   The confirmation page appears.

3. Click Yes.

Chapter 3: Agencies

Create and define agency records for the U.S. federal government agencies, or other organizations with which your organization does business. Once you have created and defined the agency records, you can associate the agencies to the contracts.

This section contains the following topics:

Create Agency Records

Define the basic contact information for the U.S. federal government agency, or other organization with whom you engage in contracts. Use the *create agency* page to define the agency and associate the agency to the contract.

Follow these steps:

1. Open Home, and from Earned Value Management, click Agencies.

    The list page appears.

2. Click New.

    The create page appears.

3. Complete the following fields:

    Agency Name

    Defines the agency name.

    Agency ID

    Defines the agency unique identifier.

    Address 1

    Defines the first line of the agency address.

    Address 2

    Defines the second line of the agency address.

    City

    Defines the city for the location.

State

Defines the state for the location.

Postal Code

Defines the ZIP Code for the location.

Country

Defines the country for the location.

Phone

Defines the telephone number for the location.

Fax

Defines the facsimile number for the location.

Primary Contact

Defines the agency primary contact name.

Primary Contact Phone

Defines the agency primary contact phone number.

Primary Contact Email

Defines the agency primary contact email address.

Secondary Contact

Defines the agency secondary contact name.

Secondary Contact Phone

Defines the agency secondary contact phone number.

Secondary Contact Email

Defines the agency secondary contact email address.

Active

Defines if the agency can be associated with a contract. You can only associate active agencies with contracts.

Default: Selected

4. Save the changes.

The agency is created and displayed on the agencies list page.

View a List of and Open Agency Records

You can view a list of agency records on the agencies list page.

Follow these steps:

1. Open Home, and from Earned Value Management, click Agencies.

   The list page appears.

2. Click the name of the agency to open the agency record.

   The properties page appears.

Edit Agency Records

Follow these steps:

1. Open the agency record.

   The properties page appears.

2. Edit the following fields:

   Agency Name

   > Defines the agency name.

   Agency ID

   > Defines the agency unique identifier.

   Address 1

   > Defines the first line of the agency address.

   Address 2

   > Defines the second line of the agency address.

   City

   > Defines the city for the location.

   State

   > Defines the state for the location.

   Postal Code

   > Defines the ZIP Code for the location.

   Country

   > Defines the country for the location.

   Phone

   > Defines the telephone number for the location.

   Fax

   > Defines the facsimile number for the location.

Primary Contact

Defines the agency primary contact name.

Primary Contact Phone

Defines the agency primary contact phone number.

Primary Contact Email

Defines the agency primary contact email address.

Secondary Contact

Defines the agency secondary contact name.

Secondary Contact Phone

Defines the agency secondary contact phone number.

Secondary Contact Email

Defines the agency secondary contact email address.

Active

Defines that the agency can be associated with a contract. You can only associate active agencies to contracts.

Default: Selected

3. Save the changes.

Activate Agency Records

You can only associate active agencies with contracts. A new agency is active by default. If an agency is inactive, you can reactivate it at any time.

Follow these steps:

1. Open the agency record.

   The properties page appears.

2. Select the check box next to the Active field.

3. Save the changes.

   The agency is active.

More information:

Associate Agencies to Contracts

Deactivate Agency Records

Deactivate agencies if they are no longer in use. An inactive agency record can be deleted.

You can deactivate agencies that are associated with contracts.

Follow these steps:

1. Open the agency record.

    The properties page appears.

2. Clear the check box next to the Active field.

3. Save the changes.

    The agency is inactive.

Delete Agency Records

You can delete agency records when the following conditions are true:

-   The agency record is inactive.
-   The agency is not associated with a contract.

Follow these steps:

1. Open the agency record.

    The list page appears.

2. Filter the list for inactive agencies.

    A list of inactive agencies displays.

3. Select the check box next to the name of the agency record, and click Delete.

    The confirmation page appears.

4. Click Yes.

Chapter 4: Summary Level Planning Packages (SLPP)

This section contains the following topics:

Create SLPPs

Create SLPPs using the CWBS element summary planning packages list page. Create them at the lowest level of the CWBS hierarchy at which is the control account. This helps for future work and you draw down the SLPP budget into a control account work package.

Follow these steps:

1. Open the contract.

    The properties page appears.

2. Click Contract WBS.

    The contract WBS page appears.

3. Expand the CWBS hierarchy to locate the CWBS element for the new SLPP, and click the name of the CWBS element.

    The properties page appears.

4. Click Summary Planning Packages.

    The list page appears.

5. Click New.

    The create page appears.

6. Complete the following fields:

    Summary Planning Package Name

       Required. Defines the SLPP name.

    Summary Planning Package ID

       Required. Defines the SLPP unique identifier.

Budget

Defines the SLPP assigned budgeted amount. When you take a contract baseline, the value is used for the SLPP Budget At Completion (BAC).

Description

Defines the SLPP description.

Start

Required. Defines the SLPP start date.

Finish

Required. Defines the SLPP finish date.

OBS

Defines the SLPP OBS Unit. This value is used for aggregation of earned value metrics and baseline data on the CPR Format 2 report.

7. Save the changes.

The SLPP is created and displays on the CWBS element summary planning packages list page.

View Summary Level Planning Packages (SLPP) Remaining Budget

You can view the SLPP remaining budget on the properties page of summary planning package.

Viewing SLPPs With Remaining Budget

When an SLPP balance goes down to zero, the SLPP has no remaining budget. The summary planning package list page displays SLPPs having a budget greater than zero. To view all SLPPs, set the Has Remaining Budget filter field to All and filter the list.

For more information, see the *Basics User Guide*.

Follow these steps:

1. Open the contract.

The properties page appears.

2. Click Contract WBS.

The contract WBS page appears.

3. Expand the CWBS hierarchy to locate the CWBS element for the SLPP, and then click the name of the CWBS element.

    The properties page appears.

4. Click Summary Planning Packages.

    The list page appears.

5. Click the name of the SLPP.

    The properties page appears, displaying the remaining budget (BAC) in the Budget field.

How to Draw Down SLPP Budget into Work Packages

You can draw a budget down from your SLPP into a control account work package. Draw the budget for the future work but before you start the work.

Drawing down the budget is not an automated process. You require to draw manually a portion of it, or the entire amount of the SLPP budget down to the work package. Use the following process to draw down your SLPPs and transfer the budget into a planning work package:

1. Open and edit the CWBS element that owns the SLPP.

2. Open and edit the control account for the CWBS element.

3. Create a work package for the control account.

4. Do one of the following:

    ■ For planning work packages, manually enter the budget amount that you are drawing down from the SLPP.

    ■ For any other work package type, link the work package to the appropriate project or task.

5. Manually reduce the SLLP budget by the amount you are drawing down into the work package.

Manually Enter Work Package Budget Amount Drawn Down from SLPP

You can manually enter the budget amount for the planning work packages that are being drawn from the summary level planning package (SLPP). Enter the budget amount on the properties page of work packages.

Follow these steps:

1. Open the contract.

    The properties page appears.

2. Click Contract WBS.

    The WBS contract page appears.

3. Click the name of the CWBS element.

    The properties page appears.

4. Click Control Accounts.

    The control accounts page of CWBS element appears.

5. Click the name of the control account.

    The properties page appears.

6. Click Work Packages.

    The list page appears.

7. Click the name of the planning work package to edit.

    The properties page appears.

8. In the Earned Value Management section, enter the budget amount in the Budget (BAC) field, and save.

Manually Reduce SLPP Budget

Specify the budget amount to be drawn from the SLPP into the work package. Then, manually reduce the SLPP budget by the amount you entered in the work package. Use the Budget field on the properties page of summary planning package to report the amount.

Follow these steps:

1. Open the contract.

    The properties page appears.

2. Click Contract WBS.

    The WBS contract page appears.

3. Expand the CWBS hierarchy to locate the CWBS element for the SLPP, and then click the name of the CWBS element.

    The properties page appears.

4. Click Summary Planning Packages.

    The list page appears.

5. Click the name of the SLPP to reduce the budget.

    The properties page appears.

6. Edit the remaining budget (BAC) in the Budget field, and save.

   The SLPP budget is reduced by the amount you are drawing down.

Delete Summary Level Planning Packages (SLPP)

A summary level planning packages (SLPP) converted into a work package can be deleted. You require the Contract - Edit access right to delete SLPPs. You cannot delete SLPPs that have a baseline, even if the current balance is zero.

Follow these steps:

1. Open the contract.

   The properties page appears.

2. Click Contract WBS.

   The contract WBS page appears.

3. Expand the CWBS hierarchy to locate the CWBS element for the SLPP, and click the name of the CWBS element.

   The properties page appears.

4. Click Summary Planning Packages.

   The list page appears.

5. Select the check box next to the SLPP, and click Delete.

   The confirmation page appears.

6. Click Yes.

Chapter 5: Control Accounts (CA)

Control accounts (CA), or cost accounts, represent the work that supports a deliverable. CA helps to aggregate and report on earned value for their associated work packages.

This section contains the following topics:

Create Control Accounts

You can create control accounts (CA) in the CWBS element for the deliverable activities that will occur within the upcoming reporting periods. Create control accounts on the lowest level CWBS root node element.

As control accounts are formed, the contract program manager can distribute the contract undistributed budget to the control accounts. During the execution of a contract, you can create additional control accounts as deliverables represented by summary level planning packages (SLPP) due.

Important! Create the contract and the lowest level CWBS root node element on your CWBS hierarchy pertaining to the control account before creating the control account.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

Follow these steps:

1. Open the contract.

   The properties page appears.

2. Click Contract WBS.

   The contract WBS page appears.

3. Expand the CWBS hierarchy to locate the CWBS element associated to the new control account, and click the CWBS element name.

   The properties page appears.

4. Click Control Accounts.

    The list page appears.

5. Click New.

    The create page appears.

6. Complete the following fields:

    Control Account Name

    Defines the control account name.

    Required: Yes

    Control Account ID

    Defines the control account unique identifier.

    Required: Yes

    Description

    Defines the control account description.

    OBS

    Defines the organizational department, or subcontractor/ vendor group responsible for delivering the work within the control account. Select a unit from the same OBS structure as you selected for the contract. If you select a different unit, the baseline, and earned value metrics do not aggregate in the CPR reports.

    Required: Yes

    Control Account Manager

    Defines the name of the control account manager (CAM). The resource is typically a member of the control account OBS unit.

    Required: Yes

    Earned Value Analyst

    Defines the name of the control account earned value analyst.

    Financial Analyst

    Defines the name of the control account financial analyst.

    Scheduler

    Defines the name of the control account scheduler.

    Status

    Specifies the control account status.

    Values: Rejected, Unapproved, or Approved

    Default: Not selected

Authorized Budget (BAC)

Defines the control account authorized budget (BAC). You require to manually enter the value. Use the field to monitor the progress of the authorized budget against the work package aggregated BAC. A variance can indicate corrective action is required.

Budget (BAC)

Displays an aggregation of the sum of BAC of all the control account work packages.

Start Date

Defines the control account planned start date.

Finish Date

Defines the control account planned finish date.

7. Save the changes.

View a List of and Open Control Accounts

View a list of control accounts across all contracts using the control accounts list page. You cannot create or delete control accounts from the list page.

Follow these steps:

1. Open the control account.

   The control accounts page appears.

2. Click the name of the control account to open.

   The properties page of the control accounts appears.

Follow these steps:

1. Open the CWBS element.

   The properties page appears.

2. Click Control Accounts.

   The CWBS control accounts page appears.

3. Click the name of the control account to open.

   The properties page appears.

Edit Control Accounts

Follow these steps:

1. Open the control account.

   The control accounts page appears.

2. Click the name of the control account to edit.

   The properties page appears.

3. Edit the following fields:

   Control Account Name

   Required. Defines the control account name.

   Control Account ID

   Required. Defines the control account unique identifier.

   Description

   Defines the control account description.

   OBS

   Required. Defines the organizational department, or subcontractor/ vendor group responsible for delivering the work within the control account. Select a unit from the same OBS structure as you selected for the contract. If you select a different unit, the baseline, and earned value metrics do not aggregate in the CPR reports.

   Control Account Manager

   Required. Defines the name of the control account manager (CAM). The resource is typically a member of the control account OBS unit.

   Earned Value Analyst

   Defines the name of the control account earned value analyst.

   Financial Analyst

   Defines the name of the control account financial analyst.

   Scheduler

   Defines the name of the control account scheduler.

   Status

   Specifies the control account status.

   Values: Rejected, Unapproved, or Approved

   Default: Not selected

Authorized Budget (BAC)

Defines the control account authorized budget (BAC). Manually enter the value. Use the field to monitor the progress of the authorized budget against the work package aggregated BAC. A variance can indicate the necessity for corrective action.

Budget (BAC)

Read-only. Displays the aggregate BAC of all the control account work packages.

Start Date

Defines the control account planned start date.

Finish Date

Defines the control account planned finish date.

4. Save the changes.

View Control Account Authorized Budget

Often the control account authorized budget (BAC) is driven by a bottom up number. In this case, enter the control account BAC after you define, schedule, and scope all of the control account's work packages. Use the control account Budget (BAC) field to compare the work package current aggregated BAC against your authorized budget. This display-only field displays an aggregation of the sum of BAC of all the control account's work packages.

Follow these steps:

1. Open Home, and from Earned Value Management, click Control Accounts.

   The control accounts page appears.

2. Click the name of the control account.

   The properties page appears.

3. View the authorized budget in the Budget (BAC) field, and save.

Control Account Baselines

Control accounts are baselined when you baseline the contract.

Enter Reprogramming Adjustments for Control Accounts

During the course of executing a contract, reprogramming adjustments maybe required. The reprogramming decisions result in adjustments to individual control accounts. A reprogramming adjustment is represented as budget, cost, and schedule variances within an Over Target Baseline (OTB), or Over Target Schedule (OTS). Use the fields on the properties page of reprogramming adjustments to enter the total changes for a control account. The values appear on the CPR Format 1 report, in Section 8 - Columns 12a, 12b and 13.

Follow these steps:

1. Open the control account.

    The properties page appears.

2. Open the Control Accounts menu and click Reprogramming Adjustments.

    The reprogramming adjustments properties page appears.

3. Complete the following fields:

    Cost Variance

    Defines the reprogramming adjustment cost variance aggregated from all costs recorded against control accounts at this level.

    Schedule Variance

    Defines the reprogramming adjustment schedule variance aggregated from all costs recorded against control accounts at this level.

    Budget

    Defines the reprogramming adjustment budget aggregated from all costs recorded against control accounts at this level.

4. Save the changes.

Monitor Control Account Performance

Use the control account dashboard page to monitor control account performance. The page displays the EV History portlet, which contains the earned value history data based on the work packages. As time progresses, each new reporting period is displayed on the graph.

Optionally, you can show projected data on the graph. Your CA Clarity PPM administrator sets up the Update Earned Value History - Contracts job parameters to project ACWP, BCWP, and BCWS. Then, you can run the job to view the earned value history.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

To customize the page, add or remove portlets using the dashboard of the control account layout portlet page in Studio.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

Delete Control Accounts

You cannot delete control accounts that are active or have a baseline. When you delete a control account that has defined work packages, the associated work packages are also deleted.

Follow these steps:

1. Open the contract.

   The properties page appears.

2. Click Contract WBS.

   The contract WBS page appears.

3. Expand the CWBS hierarchy to locate the CWBS element associated with the control account, and click the name of the CWBS element.

   The properties page appears.

4. Open the Control Accounts menu.

   The properties page appears.

5. Select the check box next to the control account, and click Delete.

   The confirmation page appears.

6. Click Yes.

Chapter 6: Work Packages (WP)

Work packages represent the actual work associated with a deliverable. Work packages are associated with control accounts. Create the packages as part of the bidding process to establish your initial contract baseline for cost.

Some work packages are linked to project or project tasks. Earned value from the project or task is updated. Then, rolled up to the work package when the Update Earned Value Totals - Contracts job and the Update Earned Value History - Contracts jobs run.

This section contains the following topics:

How to Work with Work Packages

Use the following process to work with work packages:

1. Create the contract.

2. Build the CWBS.

3. Define the control accounts.

4. Break down the deliverables and work within each control account.

5. For future work, create a planning work package.

6. For near-term work:

   ■ Create a work package.

   ■ Link it to a project or a project task.

Work Package Types

The following work package types provide a general guideline for the types of resource costs that you can track in a particular work package type.

Planning

Defines a work package as a container package used for work. The package is scheduled no earlier than three months from the current reporting period. Planning work packages do not have any schedule or resources assigned. They are on hold until the control account manager is ready to assign scope to them. Planning work packages only require to store the dollar amount for the budget for a future scope of work. You can change the work package type to another work package type at a later date.

Labor

Defines a work package for the labor cost element. You can link labor work packages to projects or project tasks.

Sub-Contracted Labor

Defines a work package for labor cost elements, but is for internal contracted labor instead of internal employees. You can link sub-contractor labor work packages to projects or project tasks.

Other Direct Costs

Defines a work package not for assigned labor resources. All that matters are the dollars. No scheduling of hours takes place. You can link other direct costs work packages to project tasks to which expense resources are assigned.

Material

Defines a work package not for assigned labor resources, and only has a dollar amount. You can link material work packages to project tasks to which material resources are assigned.

Sub-Contractor

Defines a work package for external sub-contractors to submit their actuals as dollar amounts, not hours. Scheduling time for external sub-contractors is not required. You can link sub-contractor work packages to project tasks that track costs from external sub-contractors.

Project

Defines a work package that represents all costs in the associated project. Use project work packages for the work packages that you link to projects. The control account manager expects project work packages to have more than one cost type in the total costs and earned value metrics.

Planning Work Packages

Planning work packages are logical aggregations of far-term work within a control account that you can identify and budget. But the work packages are not yet defined into work packages. You can define planning work packages for work is scheduled no earlier than three months from the current reporting period. You can later draw down the planning work package budget to create a work package. You can also define the package type and link it to a project or project task in the project schedule.

You can identify planning work packages during the initial baseline planning to establish the time phasing of the major activities within a control account. Also, helps to specify the number of resources required for their performance.

Create Work Packages for Control Accounts

You can create work packages for control accounts using the control account work packages list page. You can update the earned value metrics by running the Update Earned Value Totals - Contracts job.

Important! Create the contract, the CWBS elements, and the control account before creating the work package.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

Follow these steps:

1. Open Home, and from Earned Value Management, click Control Accounts.

    The control accounts page appears.

2. Click the Work Packages icon.

    The list page appears.

3. Click New.

    The create page appears.

4. Complete the following fields:

    Work Package Name

    Defines the work package name.

    Work Package ID

    Defines the work package unique identifier.

Work Package Type

Defines the work package associated cost element. The type is a planning work package. However, you can select any type as appropriate.

Values: Labor, Sub-Contracted Labor, Material, Sub-Contractor, Other Direct Costs, Planning Package, and Project

SOW Number

Defines the Statement of Work (SOW) number.

CLIN

Defines the Contract Line Item Number (CLIN).

CLIN Status

Defines the Contract Line Item Number (CLIN) status.

Values:

■ Authorized – Definitized. Defines authorized work of the contractual agreement.

■ Authorized - Not Definitized. Defines work, such as additional agreements or changes, for which firm contract prices are not agreed to in writing by the parties to the contract.

■ Forecast - Not Yet Authorized. Defines changes that the U.S. federal government agency or the contractor proposes. But the contracting officer does not direct the changes.

■ Forecast - All Other Work. Defines additional work anticipated to be performed. But the same is not included in a firm proposal, which the contractor expects to submit to the U.S. federal government agency within a reasonable time.

Start Date

Defines the planned date for starting work package.

Finish Date

Defines the planned date for finishing work package.

5. Save the changes.

The work package is created and displays in the list on the work packages page of control accounts.

View a List of and Open Work Packages

View a list of a work packages defined for the control account on the work packages page of control account.

Follow these steps:

1. Open Home, and from Earned Value Management, click Control Accounts.

    The control accounts page appears.

2. Click the Work Packages icon next to the control account associated with the work package.

    The list page appears.

3. Click the name of the work package to open.

    The properties page appears.

Edit Work Packages

TO edit work packages, you require the Contract - Edit access right to the work package associated contract.

Follow these steps:

1. Open the work package.

    The properties page appears.

2. Edit the following fields:

    Work Package Name

    Defines the work package name.

    Work Package ID

    Defines the work package unique identifier.

    Work Package Type

    Defines the work package associated cost element. The type is a planning work package. However, you can select any type as appropriate.

    Values: Labor, Sub-Contracted Labor, Material, Sub-Contractor, Other Direct Costs, Planning Package, and Project

    SOW Number

    Defines the Statement of Work (SOW) number.

    CLIN

    Defines the Contract Line Item Number (CLIN).

    CLIN Status

    Defines the Contract Line Item Number (CLIN) status.

Values:

- Authorized – Definitized. Defines authorized work of the contractual agreement.

- Authorized - Not Definitized. Defines work, such as additional agreements or changes, for which firm contract prices are not agreed to in writing by the parties to the contract.

- Forecast - Not Yet Authorized. Defines changes that the U.S. federal government agency or the contractor proposes. But the contracting officer does not direct the changes.

- Forecast - All Other Work. Defines additional work anticipated to be performed. But not included in a firm proposal, which the contractor expects to submit to the U.S. federal government agency within a reasonable time.

Start Date

Defines the planned date for starting the work package.

Finish Date

Defines the planned date for finishing the work package.

3. Save the changes.

Link Work Packages to Projects or Project Tasks

You can link work packages to the projects or project tasks that represent the implementation details for delivering the work. You assign, schedule, and accumulate costs for the performing organization resources from the project and its tasks. Baseline and earned value (EV) metrics are aggregated from the project tasks into the work package based on their association to the work package. Earned value is reported on the scheduled work delivered by the control account.

You establish the link from the work package to the project or tasks. You can view the EV data in the Earned Value Management section of the properties page.

You can link the work package to the project if you are only concerned with top level metrics, or you can separate your work package deliverables into separate tasks on a project.

Important! If you link a work package to a project, do not link the project tasks or subprojects to other work packages. The project aggregates and rolls up all its tasks and subproject metrics to its linked work package.

Follow these steps:

1. Open Home, and from Earned Value Management, click Control Accounts.

   The list page appears.

2. Click the Work Packages icon next to the control account associated with the work package.

   The list page appears.

3. Click the name of the work package to link to a project.

   The properties page appears.

4. Click Link.

   The link page appears.

5. Click Link to Project.

   The select page project appears.

6. Select the project, and click Select.

   The properties page appears, displaying the name of the linked project in the Associated Project/Task field.

Follow these steps:

1. Open Home, and from Earned Value Management, click Control Accounts.

   The list page appears.

2. Click the Work Packages icon next to the control account associated with the work package.

   A list of work packages defined for the control account is displayed in the work packages list page.

3. Click the name of the work package to link to a project task.

   The properties page appears.

4. Click Link.

   The link page appears.

5. Click Link to Task.

   The select page appears.

6. Select the project, and click Next.

   The select page appears.

7. Select the task, and click Select.

   The work package properties page appears displaying the name of the linked project task in the Associated Project/Task field.

View Work Package Earned Value Data

You can view earned value (EV) data for non-planning work packages in the Earned Value Management section of the work package properties page. This section only displays on the page after you link the work package to a project or project task.

To update the work package earned value metrics, run the Update Earned Value Totals - Contracts job.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

Follow these steps:

1. Open Home, and from Earned Value Management, click Control Accounts.

   The control account page appears.

2. Click the Work Packages icon next to the control account associated with the work package.

   The list page appears, displaying a list of work packages defined for the control account.

3. Click the name of the work package to view.

   The properties page appears.

4. View the following in the Earned Value Management section of the page:

   EV Calculation Method

   Displays the default earned value calculation method used when calculating earned value (EV).

   Budget (BAC)

   Displays the value of Budget at Completion (BAC), which is the budgeted total cost at the time of the baseline, based on the following formula:
   ```
   ((Actuals + Remaining Work) x Billing Rate) taken at time of baseline
   ```
   The work package budget BAC is used and rolled up to the control account aggregated budget BAC amount, with any other associated work package.

   Actual Cost (ACWP)

   Displays the system-calculated value of Actual Cost Of Work Performed (ACWP). The value is the total direct cost incurred in performing work during a specified duration based on posted actuals.

Earned Value (BCWP)

Displays the system-calculated value of Budgeted Cost of Work Performed (BCWP).

Chapter 7: Burdening

This section contains the following topics:

Burdening Overview

Burdening is a critical component of earned value management systems. Use burdening matrices to calculate and measure the indirect costs of contracts — costs that you cannot specifically attribute to an individual contract.

You can define burdened costs that are added to the direct cost. Burdening costs are aggregated and reported into one of the burdening types.

How to Set Up and Use Burdening Matrices

Use the following process to set up the burdening matrices:

1. Create the burdening classes.

2. Create the burdening matrices.

3. Create the roles that are used in burdening matrix levels.

4. Create and define the burdening matrix levels.

5. Associate the burdening matrix to the project.

6. Apply burdening in earned value calculations.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

For more information about managing resources, see the *Resource Management User Guide*.

Burdening Types

You can associate multiple burdening classes to the same burdening type. The burdening type controls the reporting of burdening costs on the contract performance reports (CPR). You cannot create additional burdening types.

The following burdening types are provided:

G&A

Defines the type for General and Administration burdened costs.

COM

Defines the type for Cost of Money (COM) burdened costs.

Fee

Defines the type for profit/fee burdened costs.

Overhead

Defines the type for overhead burdened costs.

Burdening Classes

Use burdening classes to categorize burden costs for reporting purposes. Burdening classes are used in burdening matrix levels and are referenced in burdening matrices for transaction processing. Once you have created the burdening classes and the burdening matrix, associate the burdening classes to the burdening matrix levels.

Burdening classes are one of the types of the financial classes available in CA Clarity PPM. The following static burdening classes, or burdening types, are provided with the PPM Earned Value Manager:

G&A

Defines the class for General and Administration (G&A) burdened costs.

COM

Defines the class for Cost of Money (COM) burdened costs.

Fee

Defines the class for profit/fee (FEE) burdened costs.

Overhead

Defines the class for overhead (OVERHEAD) burdened costs.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

Create Burdening Classes

Follow these steps:

1. Open Administration, and from Finance, click Setup.

    The financial organizational structure page appears.

2. In the Classifications section, click Burdening Classes.

    The burdening classes page appears.

3. Click New.

    The properties page appears.

4. Complete the following fields:

    Burdening Class

    > Defines a unique burdening class ID.
    >
    > **Limits:** 18 characters
    >
    > **Required:** Yes

    Description

    > Defines the detailed description for the burdening class.
    >
    > **Limits:** 32 characters
    >
    > **Required:** Yes

    Burdening Type

    > Defines the type for the burdening class. The burdening type controls the reporting of burdening costs on contract performance reports (CPR).
    >
    > **Values:** COM, Fee, G&A, or Overhead
    >
    > **Required:** Yes

    Active

    > Indicates if this burdening class is activated.
    >
    > **Default:** Selected

5. Save the changes.

    The burdening classes page appears, displaying the new burdening class.

Edit Burdening Classes

You can modify inactive and user-defined burdening classes. Inactive burdening classes are classes not used in earned value calculations. You cannot modify the static burdening classes, such as G&A, COM, Fee, and Overhead.

Important! If the burdening class is associated with a burdening matrix level, do not modify the burdening class. Modifying assigned burdening classes causes validation errors.

Follow these steps:

1. Open Administration, and from Finance, click Setup.

   The financial organizational structure page appears.

2. In the Classifications section, click Burdening Classes.

   The burdening classes page appears.

3. Click the name of the burdening class.

   The properties page appears.

4. Complete the following fields:

   Burdening Class

   Read-only. Defines a unique burdening class ID.

   Limits: 18 characters

   Description

   Defines the detailed description for the burdening class.

   Limits: 32 characters

   Burdening Type

   Read-only if the burdening class is referenced by an active burdening matrix. Defines the type for the burdening class. The burdening type controls how burdening costs are reported on contract performance reports (CPR).

   Values: COM, Fee, G&A, or Overhead

   Active

   Read-only if the burdening class is referenced by an active burdening matrix. Indicates if the burdening class is activated.

5. Save the changes.

Delete Burdening Classes

You can delete burdening classes using the burdening classes page. You cannot delete burdening classes that are:

- Active
- Not defined by you

- Static (G&A, COM, Fee, or Overhead)

- Associated with an active burdening matrix

Important! Attempting to delete assigned burdening classes causes errors.

About Inactive Burdening Classes

Inactive burdening classes are the ones not used in earned value calculations.

Follow these steps:

1. Open Administration, and from Finance, click Setup.

   The financial organizational structure page appears.

2. In the Classifications section, click the Burdening Classes link.

   The burdening classes page appears.

3. Select the check box next to the burdening class, and click Delete.

   The confirmation page appears.

4. Click Yes.

Burdening Matrices

Burdening matrices are made up of multiple rows of burdening levels. First create the burdening matrix and then define the burdening matrix levels.You can create any number of burdening matrices for each project transaction type.

Create Burdening Matrices

When you create a burdening matrix it is inactive until it used in an earned value calculation. You cannot set matrices to active or inactive.

Follow these steps:

1. Open Administration, and from Finance, click Burdening Matrix.

   The list page appears.

2. Click New.

   The create page appears.

3. Complete the following fields:

   Burdening Matrix Name

   Defines the unique name for the burdening matrix.

   Limits: 32 characters

   Burdening Matrix ID

   Defines the unique identifier for the burdening matrix.

   Currency

   Defines the default currency used when defining this matrix flat rate burdening amount. The field appears only if multi-currency is enabled. This field displays only if the burdening matrix is associated with a project for burdening calculations.

   Default: System Currency

   Description

   Defines the description for the burdening matrix.

   Limits: 32 characters

4. Save the changes.

   The burdening matrix is created and displays on the burdening matrix list page.

View a List of and Open Burdening Matrices

You can view a list of the burdening matrices on the burdening matrix list page.

Follow these steps:

1. Open Administration, and from Finance, click Burdening Matrix.

   The list page appears.

2. Click the name of the burdening matrix to open.

   The general page appears.

Edit Burdening Matrices

Follow these steps:

1. Open the burdening matrix.

   The burdening matrix page appears.

2. Edit the following fields:

Burdening Matrix Name

Defines the unique name for the burdening matrix.

Limits: 32 characters

Burdening Matrix ID

Defines the unique identifier for the burdening matrix.

Currency

Defines the default currency used when defining the matrix flat rate burdening amount. The field appears only if multi-currency is enabled. This field displays only if the burdening matrix is associated with a project for burdening calculations.

Default: System Currency

Description

Defines the description for the burdening matrix.

Limits: 32 characters

3. Save the changes.

Delete Burdening Matrices

You can delete inactive burdening matrices and the ones not associated with a project.

About Inactive Burdening Matrices

Inactive burdening matrices are the ones not used in earned value calculations.

Follow these steps:

1. Open Administration, and from Finance, click Burdening Matrix.

   The list page appears.

2. Click the check box next to the burdening matrix you want to delete, and click Delete.

   The confirmation page appears.

3. Click Yes.

Burdening Levels

Burdening levels are the individual rates and rules you define for a burdening matrix used when applying rates to transactions. Burdening matrices are made up of one or more levels of burdening.

The contract direct costs are burdened based on the associated burdening class. The burdening level-associated burdening classes act as filters for identifying the matching transactions. When a transaction contains attributes matching the criteria defined in the burdening matrix, the burdened costs are applied with the specified rates at each burdening level from the top down.

Create Burdening Levels

You can create levels of burdening for a burdening matrix using the create burdening level page. Burdening levels are auto numbered starting at level zero (0). Level 0 is the highest level in the matrix, and is equal to the direct cost. Level one (1) is the starting level you can create. The additional burdening levels, when created, get incremented.

You can select the level at which the rate is applied. By default, burdening level burdening rate is applied to the matrix base rate. The base rate is the direct cost passed from the project by multiplying the resource units with the rate specified in the rate matrix. If you do not create and define additional burdening levels, the direct cost is applied to level zero (0). As you create additional levels, you can define at which level the rate is applied.

You can only add levels sequentially after the lowest level (most recently added level), and not between levels. You cannot sort the list of burdening levels.

To apply different burdening rates or rules to a role or group of roles, create burdening levels for each burdening class and rule combination. First specify the role or group, and then define the rates and rules to apply to the role or group.

Follow these steps:

1. Open the burdening matrix.

    The general page appears.

2. Click Levels.

    The levels page appears.

3. Click New.

    The create page appears.

4. Complete the following fields:

Level

Defines the level number for the burdening level.

Default: The next level in the series

Burdening Class

Defines the burdening class associated with the level. Select a burdening class. Required when a burdening class is created. Display only after the level is created.

Role(s)

Required. Defines the resource role to which the burdening cost is applied. Select a role in the Role(s) field. You can apply this burdening rate and rule to one or more resource roles.

Rate Type

Required. Defines the rate is applied for the burdening level.

Values:

- Percentage. Defines the burdening as a percentage, which is calculated using the rate matrix defined currency based on the following formula:

Burden Value = Burden value of referenced level * rate (%)

- Flat Amount. Defines the burdening as an absolute amount, which is calculated using the rate matrix defined currency based on the following compound formula:

Burden Value = Accumulated burdened value of referenced level + flat amount

Default: Percentage

Flat Amount

Defines the flat amount from which to calculate and apply to the burdening rate for this level. Complete this field if you select flat amount as the rate type.

Percentage

Defines the percentage from which to calculate and apply to the burdening rate for this level. Complete this field if you select percentage as the rate type.

Applied At Level

Required. Defines the lower level rate to which the burdening rate is applied. When you set the level to zero (0), the direct cost is applied. The applied at level number is required to be less than the burdening level number.

Burdening Formula

Required. Defines the burdening formula for the level. The burdening amount at each level is calculated based on the burdening formula. A running total amount is calculated that accumulates the burdening from the matrix burdening levels.

Values:

■ Simple. The burdening is applied to the value of the level defined in the Applied At Level field.

■ Compound. The burdening is applied to the running total amount of the level defined in the Applied At Level field.

Default: Simple

5. Save the changes.

The new burdening level is created and displays on the burdening matrix levels page.

View a List of and Open Burdening Levels

Each new burdening matrix level displays as a row on the burdening matrix levels page. You can view a list of burdening levels on the page.

Follow these steps:

1. Open Administration, and from Finance, click Burdening Matrix.

The list page appears.

2. Click the name of the burdening matrix to open.

The general page appears.

3. Click Levels.

The levels page appears.

4. Click the Properties icon next to the name of the level to open.

The escalations properties page appears.

Delete Burdening Levels

You can only delete the maximum burdening level in a matrix. Suppose, the matrix is associated with a project and the level with a burdening matrix used in burdened cost calculations. The burdening level cannot be deleted.

Follow these steps:

1. Open the burdening matrix.

    The general page appears.

2. Click Levels.

    The levels page appears.

3. Click the check box next to the level, and click Delete.

    The confirmation page appears.

4. Click Yes.

Burdening Level Escalation Table

Use the burdening level escalation table on the burdening level properties page to create the escalation matrix using:

- Time varying burdening levels.

- Adding rows to the burdening escalation table.

Add Rows to the Burdening Level Escalation Table

By default, an empty row displays in the table on the burdening level properties page. Complete the row and add additional rows.

Follow these steps:

1. Open the burdening matrix.

    The burdening matrix page appears.

2. Click Levels.

    The levels page appears.

3. Click the Properties icon next to the number of the level to add an escalation table row.

    The properties page appears, displaying a list of burdening rate escalation rows and an empty escalation row.

4. Complete the empty escalation row, click New Row to add, and define another row to the burdening escalation table.

    A new row is added to the table.

5. Save the changes.

Edit Burdening Levels

Follow these steps:

1. Open the burdening level.

   The escalations properties page appears.

2. Click General.

   The properties page appears.

3. Edit the following fields:

   Level

   Displays the level number.

   Burdening Class

   Defines the burdening class associated with the level. Select a burdening class. Required when creating a burdening class. Display only after the level is created.

   Role(s)

   Required. Defines the role to which the burdening cost is applied. Click the Browse icon to select the role. You can apply this burdening rate and rule to one or more roles.

   Rate Type

   Required. Defines how the rate is applied for the burdening level.

   Values:

   ■ Percentage. Defines the burdening as a percentage, which is calculated using the rate matrix defined currency based on the following formula:

   ```
   Burden Value = Burden Value of referenced level * rate (%)
   ```

   ■ Flat Amount. Defines the burdening as an absolute amount, which is calculated using the rate matrix defined currency based on the following compound formula:

   ```
   Burden Value = Burden Value of referenced level + flat amount
   ```

   Default: Percentage

   Flat Amount

   Defines the flat amount from which to calculate and apply to the burdening rate for this level. Complete this field if you select flat amount as the rate type.

   Percentage

   Defines the percentage from which to calculate and apply to the burdening rate for the level. Complete this field if you select percentage as the rate type.

Applied At Level

Required. Defines the lower level rate to which the burdening rate is applied. When the level is set to zero (0), the direct cost is applied.

Burdening Formula

Required. Defines the burdening formula for the level. The burdening amount at each level is calculated based on the burdening formula. A running total amount is calculated that accumulates the burdening from the matrix burdening levels.

Values:

- Simple. The burdening is applied to the value of the level defined in the Applied At Level field.

- Compound. The burdening is applied to the running total amount of the level defined in the Applied At Level field.

   Default: Simple

4. Save the changes.

Time Vary Burdening Levels

Burdening can change over time. Therefore, you can define the time varying burdening, or the escalation rate for a particular burdening class, at each burdening level. Use the rows in the escalation table on the burdening level properties page to time vary the burdening.

The burdening level rate type dictates the type used for the escalation table. If you do not define an escalation row for a date, the associated burdening level rate is applied to the date. Escalation matrices cannot have date gaps, or zero values.

Example

If your burdening rate escalated each month, add a new row for each month and define the rate for the month.

Follow these steps:

1. Open the burdening matrix.

   The general page appears.

2. Click Levels.

   The list page appears.

3. Click the Properties icon next to the number of the level to vary the time.

   The properties page appears.

4. Complete the following fields:

Start

Defines the date of starting to apply the escalation rate.

Finish

Defines the last date until which the escalation rate is applied.

Percentage

Displayed if the burdening level rate type is percentage. Defines the percentage to calculate and apply to the burdening rate for the level.

Amount

Displayed if the burdening level rate type is flat amount. Defines the flat amount to calculate and apply to the burdening rate for the level.

5. Save the changes.

Associate Burdening Matrices with Projects

Associate a burdening matrix with a project to calculate its indirect cost. The project is required to associate directly with a control account work package, or associated through selected tasks. A work package actual and remaining costs are burdened based on the matrix associated with the project.

You can associate:

- The same burdening matrix to one or more projects.

- The same burdening matrix to all four resource types.

- Individual matrices to each resource type.

Important! Before you can associate a burdening matrix with a project resource type, first create the burdening matrices.

For more information, see the *Project Management User Guide*.

For more information, see the *Basics User Guide*.

Follow these steps:

1. Open Home, and from Portfolio Management, click Projects.

   The properties page appears.

2. Click the name of the project to associate with a burdening matrix.

   The properties page appears.

3. Open the Properties menu and click EVM Burdening.

   The list page appears.

4. Edit the following fields:

5. For the Labor, Material, Equipment, and Expenses resource types, enter the following burdening information:

   Burdening Matrix

   Defines the burdening matrix used to calculate the indirect cost amount of the transaction entry. Search for and add the burdening matrix to calculate project rates.

   Exchange Rate Type

   Displayed only when multiple currencies are available. Defines the exchange rate type that is used for transactions entered against the project. When the project is approved, you cannot modify the exchange rate type.

   Values:

   - Average. The blended derived rate over time, typically weekly or monthly.

   - Fixed. The fixed rate that does not change over a defined period.

   Spot. The variable rate that changes over the course of a day.

6. Save the changes.

Disassociate Burdening Matrices from Projects

If a matrix is unused in burdened cost calculations, only then can you disassociate burdening matrices from a project resource type.

Follow these steps:

1. Open Home, and from Portfolio Management, click Projects..

   The properties page appears.

2. Click the name of the project to disassociate from a burdening matrix.

   The properties page appears.

3. Open the Properties menu, and click EVM Burdening.

   The list page appears.

4. Select the check box next the resource type, and click Disassociate.

   The matrix is disassociated from the resource type.

How to Apply Burdening in Earned Value Calculations

Indirect costs are calculated by burdening rates to the project cost base (that is direct cost). The burdening matrix values are converted into the contract defined currency and the burdened costs are returned in that currency. The burdening is applied to the total cost (cost rate * unit) and not the per unit cost rate.

Matrix levels are used in burdened cost calculations. Burdened costs are stored based on the role and rate type you define for the burden matrix levels.

Use the following process to apply burdening in earned value calculations:

1. Create and define one or more cost/rate matrices.

2. Create the burdening classes.

3. Create the burdening matrices.

4. Create the project.

5. Financially enable the project.

6. Set the project EV calculation method.

7. Associate the cost/rate matrices to the project four resource types.

8. Associate burdening matrices to the project.

9. Assign staff to project tasks.

10. Create a cost plan using the team allocations.

11. Schedule the Rate Matrix Extraction job.

12. Baseline the project.

13. Calculate and record earned value data.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

For more information, see the *Project Management User Guide*.

Chapter 8: Reports

Reports are documents that organize and display extracted data into meaningful information. With reports, you can capture and analyze data related to your work. You can run and view out-of-the-box reports or reports designed for your specific needs.

For more information, see the *Administration Guide*.

This section contains the following topics:

Report Submissions

The contract program manager is required to submit the CPR reports at least once a month to the U.S. federal government agency which owns the contract and to the other federal earned value oversight organizations. Submit the data as described in the specification in DI-MGMT-81466A.

The CPR report data is captured in a format that you can use for reporting. You can extract the data by contract and reporting period. You can submit reports yourself, or you can engage CA Technical Services (CATS) for more assistance with report submissions.

For more information, see the *Personalizing CA Clarity PPM User Guide*.

Set the Contract Performance Report (CPR) Parameters

Each contract performance report (CPR) contains the same header information for a given contract. Use the contract CPR header fields on the reports page of contract properties to define the common fields that are consistent across the CPR report header. Update the fields for every reporting period.

This page provides sections for each of the CPR formats. Use the fields to enter reporting data specific to the current reporting period.

Follow these steps:

1. Open the contract.

   The properties page appears.

2. Open the Properties menu, and click CPR Reports.

   The contract properties reports page appears.

3. Complete the following fields in the CPR Header section:

   Security Classification

   Defines the level of security for the contract and the CPR report data.

   Values: Competition Sensitive, Confidential, Secret, Top Secret, Unclassified

   Dollars Reported In

   Defines the reporting precision factor of the money fields on the CPR reports.

   Values: Billions, Dollars, Hundreds, Millions, Thousands

   Contractor Name

   Defines the contractor name.

   CPR Report Layout: Block 1.a

   Address 1

   Defines the first line of the contract address.

   CPR Report Layout: Block 1.b

   Address 2

   Defines the second line of the contract address.

   CPR Report Layout: Block 1.b

   City

   Defines the contract city location.

   CPR Report Layout: Block 1.b

   State

   Defines the contract state location.

   CPR Report Layout: Block 1.b

   Postal Code

   Defines the contract postal code.

   CPR Report Layout: Block 1.b

   Country

   Defines the contract country location.

   CPR Report Layout: Block 1b

EVMS Acceptance

Specifies if your Earned Value Management System is evaluated and accepted as an approved U.S. federal government EVMS.

Default: Cleared

EVMS Acceptance Date

If your Earned Value Management System is accepted, enter the acceptance date. If you accept EVMS, the date is displayed on the CPR reports.

Default: Cleared

4. Complete the following fields in the CPR Format 1 and 2 section:

Authorized Contractor Representative

Defines the authorized contractor representative name.

CPR Report Layout: Block 7.a

Title

Defines the title of the person who is authorized to submit the report.

CPR Report Layout: Block 7.b

5. Save the changes.

Generate the Contract Performance Report Data

You can generate the CPR data and then electronically submit the report. The EVM CPR Report Data Generation job calculates and generates the CPR report data.

For more information, see the *Administration Guide*.

About SLPPs

Use Summary Level Planning Packages (SLPP) to plan future work and track effort for long-term contract programs. SLPPs have an allocated budget, but do not have a detailed work or task plan. The budget for this far-term effort requires being at a level above the control account. But not at such a level that the budget is considered an undistributed budget.

You can track the SLPP effort by its association to a CWBS element. Define summary level planning packages for CWBS elements that will be delivered in the future. Future work is typically work that is scheduled no earlier than 12 months from the current reporting period.

You can convert SLPP into control accounts or into work packages on an existing control account associated to a CWBS element.

SLPPs are a type of summary planning package for those deliverable Budgets (BAC) that are in the far future. BAC is rolled up to the CWBS as part of the Performance Measurement Baseline (PMB). BAC is evenly distributed between the SLPP start and finish date.

Appendix A: Access Rights

This section contains the following topics:

EVM Access Rights

Earned Value Manager-specific access rights are necessary to create, edit, view, and delete earned value information.

Agency - Create

Allows you to create agencies. This right includes the page navigation right.

Type: Global

Agency - Edit

Allows you to edit a specific agency. This right does not include the Agency - Navigate access right.

Type: Instance

Agency - Edit Access Rights

Allows you to edit access rights for a specific agency. This right does not include the Agency - Navigate or the Agency - View access rights.

Type: Instance

Agency - Edit - All

Allows you to edit all agencies. This right includes the Agency - View - All access right.

Type: Global

Agency - Navigate

Allows you to navigate to agency pages. You need additional rights to view individual agencies.

Type: Global

Agency - View

Allows you to view a specific agency. This right does not include the Agency - Navigate access right.

Type: Instance

Agency - View Access Rights

Allows you to view access rights for a specific Agency. This right does not include the Agency - Navigate or the Agency - View access right.

Type: Instance

Agency - View Access Rights - All

Allows you to view access rights for all agencies. This right does not include the Agency - Navigate or the Agency - View access rights.

Type: Global

Agency - View - All

Allows you to view all agencies. This right includes the Agency - Navigate access right.

Type: Global

Contract - Baseline Delete

Allows you to delete baselines for a specific contract. This right requires you to have the Contract - Edit access right.

Type: Instance

Contract - Baseline Delete - All

Allows you to delete baselines for all contracts. This right requires you to have the Contract - Edit access right.

Type: Global

Contract - Baseline Edit

Allows you to create and edit the baseline for a specific contract. This right requires you to have the Contract - Edit access right.

Type: Instance

Contract - Baseline Edit - All

Allows you to create and edit baselines for all contracts. This right requires you to have the Contract - Edit access right.

Type: Global

Contract - Create

Allows you to create contracts. This right includes the page navigation right.

Type: Global

Contract - Edit

Allows you to edit a specific contract. This right does not include the Contract - Navigate access right. This right includes the ability to edit and delete CWBS elements, control accounts, SLPPs and work packages for a specific contract.

Type: Instance

Contract - Edit - All

Allows you to edit all contracts. This right includes the ability to delete contracts and the Contracts - View - *All* access right. This right includes the ability to edit and delete CWBS elements, control accounts, summary level planning packages (SLPP), and work packages.

Type: Global

Contract - Edit Access Rights

Allows you to edit access rights for a specific contract. This right does not include the Contract - Navigate or the Contract - View access rights.

Type: Instance

Contract - Edit Access Rights - All

Allows you to edit access rights for all contracts. This right does not include the Contract - Navigate or the Contract - View access rights.

Type: Global

Contract - Edit only

Allows you to edit but not delete a specific contract. This right does not include the Contract - Navigate access right. This right includes the ability to edit but not delete CWBS elements, control accounts, SLPPs and work packages for a specific contract.

Type: Instance

Contract - Edit only - All

Allows you to edit but not delete all contracts. Includes the Contracts - View - All access right. This right includes the ability to edit but not delete CWBS elements, control accounts, SLPPs and work packages.

Type: Global

Contract - Manager (Auto)

Automatic access right granted to the manager of a specific contract. This right includes the ability to edit and delete CWBS elements, control accounts, SLPPs, and work packages on a specific contract.

Type: Instance

Contract - Navigate

Allows you to navigate to Contract pages. You need additional access rights to view individual contracts.

Type: Global

Contract - View

Allows you to view a specific contract. The right does not include the Contract - Navigate access right.

Type: Instance

Contract - View - All

Allows you to view all contracts. This right includes the Contract - Navigate access right.

Type: Global

Contract - View Access Rights

Allows you to view access rights for a specific contract. This right does not include the Contract - Navigate or the Contract - View access rights.

Type: Instance

Contract - View Access Rights - All

Allows you to view access rights for all contracts. This right does not include the Contract - Navigate or the Contract - View access rights.

Type: Global

Control Account - Create

Allows you to create control accounts. This right includes the ability to create work packages.

Type: Global

Control Account - Edit

Allows you to edit a specific control account. This right does not include the Control Account - Navigate access right. The right includes the ability to edit and delete work packages on a specific control account.

Type: Instance

Control Account - Edit - All

Allows you to edit all control accounts. This right includes the Control Account - View - All access right. The right includes the ability to edit and delete all work packages.

Type: Global

Control Account - Edit Access Rights

Allows you to edit access rights for a specific control account. The right does not include the Control Account - Navigate or Control Account - View access right.

Type: Instance

Control Account - Edit Access Rights - All

Allows you to edit access rights for all control accounts. This right does not include the Control Account - Navigate or the Control Account - View access rights.

Type: Global

Control Account - Manager (Auto)

Automatic right granted to the manager of a specific control account. This right includes the ability to create, edit, and delete work packages on a specific control account.

Type: Instance

Control Account - Navigate

Allows you to navigate to control account pages. You need additional access rights to view individual control accounts.

Type: Global

Control Account - View

Allows you to view a specific control account. This right does not include the Control Account - Navigate access right. The right includes the ability to view work packages on a specific control account.

Type: Instance

Control Account - View Access Rights

Allows you to view access rights for a specific control account. This right does not include the Control Account - Navigate or the Control Account - View access rights.

Type: Instance

Control Account - View Access Rights - All

Allows you to view access rights for all control accounts. This right does not include the Control Account - Navigate or the Control Account - View access right.

Type: Global

Control Account - View - All

Allows you to view all control accounts. This right includes the Control Account - Navigate access right. This right includes the ability to view all work packages.

Type: Global

Report and Job Access Rights

To manage any EVM report or job, you must have the following access rights. Your CA Clarity PPM administrator can assign access rights at the instance, global, or OBS Unit level.

Jobs - Access

Allows users access to jobs pages. Additional rights such as the Jobs - Run - All right or instance level rights such as the Job - Run right, Job - View Output right, or Job - Edit Properties right are required.

Type: Global

Job - Edit Properties

Allows users to view and edit the job properties for specific jobs. This right also lets users reschedule jobs and view output.

Type: Global

Job - Run

Allows users to access and run jobs, edit job properties, and view job output.

Requires: Jobs - Access right

Type: Global

Jobs - Run - All

Allows users to run any job. This right also allows users to schedule of any job, edit of job properties for any job and view the output of any job.

Jobs - View Output

Allows users to view the output of the jobs to which they have access.

Requires: Jobs - Access right

Type: Global

Jobs - View Output - All

Allows users to view the output of any job.

Requires: Jobs - Access right

Report - Run

Allows users to run specific reports, edit properties and review output.

Requires: Reports - Access right

Type: Instance

Reports - Access

Allows users to access reports pages and the My Reports portlet. This access right is dependent on one of the following access rights being granted to a user:

■   The *Reports - Run - All* access right

■   Instance level access rights such as *Report - Run*, *Report - View Output*, or *Report - Edit Properties*

Type: Global

Reports - Run - All

Allows you to run any report. This right also allows users to schedule, edit properties, and view the output of any report. The access is dependent on being granted Reports - Access right.

Type: Global

Reports - View Output - All

Allows users to view the output of any report.

Requires: Reports - Access right

Reports and Jobs - Administrator Access

Allows users to view report and job definitions. With this right, users can also view reports and jobs categories.

Type: Global

Reports and Jobs - Create Definition

Allows users to create, edit, and view report or job definitions.

Requires: Report and Jobs - Administrator Access right

Type: Global

Reports and Jobs - Edit Definition

Allows users to view and change reports and job definitions.

Requires: Reports and Jobs - Administrator right

Type: Instance

Reports and Jobs - Edit Definition - All

Allows users to edit any report or job definition.

Requires: Report and Jobs - Administrator Access right

Type: Global

Appendix B: Earned Value Manager Report Descriptions

This section contains the following topics:

Contract Performance Report (CPR) Format 1 - WBS

Description

The CPR format 1 includes current period, cumulative, and at complete values for each CWBS element. The report also contains header data showing quantity, targets, ceilings, and estimate at completion (EAC) calculations. Also contains data about budget, pricing, management reserve (MR) and undistributed budget (UB).

Prerequisites

- Access rights are assigned to run jobs and reports, and to view contract data.

- CPR data for each contract is entered.

The EVM CPR report data generation job is run.

Parameters

Report(s)

Specifies the contracts, appearing in the report, to which you have at least view access. Select contracts by report period in the Report(s) field.

Report Fields

CLASSIFICATION

Displays the security classification for this report.

Values: Competition Sensitive, Confidential, Secret, Top Secret, Unclassified, and any customer-defined classifications.

Database Table and Column: CPR_BASE.CLASSIFICATION

DOLLARS IN

Displays the cost field format on the CPR report.

Values: Dollars, Hundreds, Thousands, Millions, and Billions

Table and Column: CPR_FORMAT_1.REPORT_UNIT

1. CONTRACTOR

a. Name

Displays the name of the organization submitting the report.

Table and Column: CPR_BASE.CONTRACTOR_NAME

b. Location

–   Address. Displays the organization address (lines 1 and 2).

–   City. Displays the city in which the organization resides.

–   State. Displays the state in which the organization resides.

–   Postal Code. Displays the organization zip code.

–   Country. Displays the country in which the organization is located.

Database Tables and Columns: CPR_BASE.ADDRESS_1, CPR_BASE.ADDRESS_2, CPR_BASE.CITY, CPR_BASE.STATE, CPR_BASE.POSTAL_CODE, CPR_BASE.COUNTRY

2. CONTRACT

a. Name

Displays the contract name.

Database Table and Column: CPR_BASE.CONTRACT_NAME

b. Number

Displays the contract unique ID.

Database Table and Column: CPR_BASE.CONTRACT_NUMBER

c. Type

Displays the contract type value. Only one type per contract is allowed.

Table and Column: CPR_BASE.CONTRACT_TYPE

d. Share Ratio

Displays the cost share ratio as defined in the negotiated contract terms.

Database Table and Column: CPR_BASE.CONTRACT_SHARE_RATIO

3. PROGRAM

a. Name

Displays the program name.

Database Table and Column: CPR_BASE.PROGRAM_NAME

b. Phase

Displays the program phase.

Database Table and Column: CPR_BASE.PROGRAM_PHASE

c. EVMS Acceptance

Displays an X next to NO or YES indicating whether EVMS is accepted or not. If accepted, then the date of EVMS acceptance is also displayed.

Database Table and Column: CPR_BASE.EVMS_ACCEPTANCE, CPR_BASE.EVMS_ACCEPT_DATE

4. Reporting Period

a. From

Displays the starting date for this reporting period.

Database Table and Column: CPR_BASE.PERIOD_FROM

b. To

Displays the end date for this reporting period.

Database Table and Column: CPR_BASE.PERIOD_TO

5. CONTRACT DATA

a. Quantity

Prod. Line 1 displays the production quantity.

R&D. Line 2 displays the research and development quantity.

Database Table and Column: CPR_FORMAT_1.QUANTITY_PROD, CPR_FORMAT_1.QUANTITY_RD

b. Negotiated Cost

Displays the total negotiated contract cost including MR. This is a calculated value based on the current baseline.

Database Table and Column: CPR_FORMAT_1.NEGOTIATED_COST

c. Est. Cost Authorized Unpriced Work

Displays the estimated cost of unpriced work, where value in this block and column of this report matches the value referenced in block 5.d of the CPR Format 3 report.

Database Table and Column: CPR_FORMAT_1.UNPRICED_WORK

d. Target Profit Fee

Displays the targeted profit fee. This value is displayed as:

baseline burden fees / percent, where percent is a calculated value based on contract fee / total contract cost.

Database Table and Column: CPR_FORMAT_1.TARGET_PROFIT_FEE

e. Target Price

Displays the target contract price. This is a calculated value based on the current baseline.

Database Table and Column: CPR_FORMAT_1.TARGET_PRICE

f. Estimate Price

Displays the same value as block 6.c of this report.

Database Table and Column: CPR_FORMAT_1.EST_PRICE

g. Contract Ceiling

Displays the contract ceiling.

Database Table and Column: CPR_FORMAT_1.CONTRACT_CEILING

h. Est. Contract Ceiling

Displays the estimated contract ceiling.

Database Table and Column: CPR_FORMAT_1.EST_CONTRACT_CEILING

i. Date of OTB/OTS

Displays the OTB/OTS date.

Database Table and Column: CPR_FORMAT_1.OTB_OTS_DATE

6. ESTIMATED COST AT COMPLETION

a. Best Case

Displays the best case, estimated cost at completion.

Database Table and Column: CPR_FORMAT_1.BEST_EST_AT_COMPLETION

b. Worst Case

Displays the worst case, estimated cost at completion.

Database Table and Column: CPR_FORMAT_1.WORST_EST_AT_COMPLETION

c. Most Likely

Management Estimate at Completion (1). Displays the most likely, estimated cost at completion.

Database Table and Column:
CPR_FORMAT_1.MOST_LIKELY_EST_AT_COMPLETION

Contract Budget Base (2). Displays the most likely budget base. This is a calculated value based on (block 5.b) + (block 5.c).

Database Table and Column: CPR_FORMAT_1.MOST_LIKELY_BUDGET_BASE

Variance (3). Displays the most likely variance. This is a calculated value based on (block 6.c.2) - (block 6.c.1).

Database Table and Column: CPR_FORMAT_1.MOST_LIKELY_VARIANCE

7. AUTHORIZED CONTRACTOR REPRESENTATIVE

a. Name

Displays the name of person authorized to submit the report to the U.S. Government or Prime contractor (that is, the organization who holds the contract).

Database Table and Column:
CPR_FORMAT_1.AUTH_CONTRACTOR_REP_NAME

b. Title

Displays the title of the person who is authorized to submit the report.

Database Table and Column: CPR_FORMAT_1.AUTH_CONTRACTOR_REP_TITLE

d. Date Signed

Displays the server date when the report was generated.

Database Table and Column: CPR_FORMAT_1.AUTH_CONTRACTOR_REP_DATE

8. PERFORMANCE DATA

Item (1)

Each item is represented by the following type:

a.   Work Breakdown Structure (columns 2-16). Type 1

Displays the CWBS and Control Accounts based on the CWBS levels selected when the job is run. Each CWBS element and control accounts are listed on separate line. The [OH] OVERHEAD line reports the burdening costs for the Overhead Burdening Element and is based on the burden type of Overhead.

b. Cost of Money (columns 2-16). Type 2

Displays the Cost of Money burdened as a total of all line items in block 8.a for the burdening type of COM.

c. General & Administrative (columns 2-16). Type 3

Displays General and Administrative as a total for all line items in block 8.a for the burdening type of G&A.

d. Undistributed Budget (columns 14-16). Type 4

Displays the Undistributed Budget per contract baseline (column 14), EAC (column 15), and Variance (column 16).

e. Subtotal (Performance Measurement Baseline) (columns 2-16). Type 5

Displays the subtotals for all previous line items.

f. Management Reserve (columns 13-14). Type 6

Displays the sum of money in the Management Reserve during the reporting period as a part of the reprogramming effort (column 13), and the reserve at the end of the reporting period (column 14) per the current contract baseline.

g. Total (columns 2-16). Type 7

Database Tables and Columns: PERFORMANCE_ITEM_1.TYPE, PERFORMANCE_ITEM_1.SEQUENCE, PERFORMANCE_ITEM_1.NAME PERFORMANCE_ITEM_1.LEVEL, where:

− TYPE is the numerical representation of the item.

− SEQUENCE is the order of the line item.

− NAME is the name of line item.

− LEVEL is the CBWS level.

Current Period

Budgeted Cost--Work Scheduled (2)

Displays budgeted cost for work scheduled (BCWS).

Database Table and Column: PERFORMANCE_ITEM_1.CP_BC_WS

Budgeted Cost--Work Performed (8)

Displays the cumulative budget cost for work performed (BCWP).

Database Table and Column: PERFORMANCE_ITEM_1.CP_BC_WP

Actual Cost Work Performed (4)

Displays the Actual cost of work performed (ACWP).

Database Table and Column: PERFORMANCE_ITEM_1.CP_ACWP

Variance--Schedule (5)

Displays the schedule variance. This value is calculated based on BCWP - BCWS.

Database Table and Column: PERFORMANCE_ITEM_1.CP_V_S

Variance--Cost (6)

Displays the cost variance. This is value is calculated based on BCWP - ACWP.

Database Table and Column: PERFORMANCE_ITEM_1.CP_V_C

Cumulative To Date

Budgeted Cost--Work Scheduled (7)

Displays the cumulative budgeted cost for work scheduled (BCWS).

Database Table and Column: PERFORMANCE_ITEM_1.CTD_BC_WS

Budgeted Cost--Work Performed (8)

Displays the cumulative budget cost for work performed (BCWP).

Database Table and Column: PERFORMANCE_ITEM_1.CTD_BC_WP

Actual Cost Work Performed (9)

Displays the cumulative actual cost of work performed (ACWP).

Database Table and Column: PERFORMANCE_ITEM_1.CTD_ACWP

Variance--Schedule (10)

Displays the cumulative schedule variance. This is a calculated value based on cumulative BCWP - cumulative BCWS.

Database Table and Column: PERFORMANCE_ITEM_1.CTD_V_S

Variance--Cost (11)

Displays the cumulative cost variance. This is a calculated value based on cumulative BCWP - cumulative ACWP.

Database Table and Column: PERFORMANCE_ITEM_1.CTD_V_C

Reprogramming Adjustments

Cost Variance (12a)

Displays the reprogramming adjustment cost variance aggregated from all costs recorded against control accounts at this level.

Database Table and Column: PERFORMANCE_ITEM_1.RA_CV

Schedule Variance (12b)

Displays the reprogramming adjustment schedule variance aggregated from all costs recorded against control accounts at this level.

Database Table and Column: PERFORMANCE_ITEM_1.RA_SV

Budget (13)

Displays the reprogramming adjustment budget aggregated from all costs recorded against control accounts at this level.

Database Table and Column: PERFORMANCE_ITEM_1.RA_B

At Completion

Budgeted (14)

Displays the current baseline at completion (BAC) for this line item.

Database Table and Column: PERFORMANCE_ITEM_1.AC_B

Estimated (15)

Displays the estimate at completion (EAC) for the line item. Values are calculated based on the EAC selection in the CPR reports page of contract properties.

Values:

EAC. ACWP + ((BAC - BCWP) / CPIC)

EAC(T). AC + ETC

EAC(AT). (ACWP + (BAC - BCWP))

Database Table and Column: PERFORMANCE_ITEM_1.AC_E

Variance (16)

Displays the variance. This value is calculated using BAC - EAC.

Database Table and Column: PERFORMANCE_ITEM_1.AC_V

9. RECONCILIATION TO CONTRACT BUDGET BASE

Cumulative To Date

a. Variance Adjustment

Variance--Schedule (10)

Displays the total from block 8.g.12b.

Database Table and Column:
RECON_TO_CONTRACT_BGT_BASE.VARIANCE_SCHEDULED

Variance--Cost (11)

Displays the total from Block 8.g.12a

Database Table and Column:
RECON_TO_CONTRACT_BGT_BASE.VARIANCE_COST

b. Total Contract Variance

Variance--Schedule (10)

Displays the sum of (block 8.g.10) + (block 9.a.10).

Database Table and Column:
RECON_TO_CONTRACT_BGT_BASE.TOTAL_VARIANCE_SCHEDULED

Variance--Cost (11)

Displays the sum of (block 8.g.11) + (block 9.a.11).

Database Table and Column:
RECON_TO_CONTRACT_BGT_BASE.TOTAL_VARIANCE_COST

At Completion

b. Total Contract Variance

Budgeted (14)

Displays the value from block 6.c.2.

Database Table and Column:
RECON_TO_CONTRACT_BGT_BASE.TOTAL_BUDGET_AT_COMPLETION

Estimated (15)

Displays the value from block 6.c.1.

Database Table and Column:
RECON_TO_CONTRACT_BGT_BASE.TOTAL_EST_AT_COMPLETION

Variance(16)

Displays the difference between (block 9.b.14) - (block 9.b.15).

Database Table and Column:
RECON_TO_CONTRACT_BGT_BASE.TOTAL_VARIANCE_AT_COMPLETION

Contract Performance Report (CPR) Format 2 - Organizational Categories

Description

The CPR format 2 includes current period, cumulative, and at complete values for each organization unit assigned to a CWBS element or control account. It also contains header data showing quantity, targets, ceilings, and estimate at completion (EAC) calculations. This report also contains data about budget, pricing, management reserve (MR) and undistributed budget (UB).

This report is similar to the CPR format 1, except that it is organized by OBS unit.

Prerequisites

- Access rights are assigned to run jobs and reports, and to view contract data.
- CPR data for each contract is entered.
- The EVM CPR report data generation job is run.

Parameters

Report(s)

Specifies the contracts, appearing in the report, to which you have at least view access. Select contracts by report period in the Report(s) field.

Report Fields

CLASSIFICATION

Displays the security classification for this report.

Values: Competition Sensitive, Confidential, Secret, Top Secret, Unclassified, and any customer-defined classifications.

Database Table and Column: CPR_BASE.CLASSIFICATION

DOLLARS IN

Displays the cost field format on the CPR report.

Values: Dollars, Hundreds, Thousands, Millions, and Billions

Table and Column: CPR_FORMAT_2.REPORT_UNIT

1. CONTRACTOR

a. Name

Displays the name of the organization submitting the report.

Table and Column: CPR_BASE.CONTRACTOR_NAME

b. Location

– Address. Displays the organization address (lines 1 and 2).

– City. Displays the city in which the organization resides.

– State. Displays the state in which the organization resides.

– Postal Code. Displays the organization zip code.

– Country. Displays the country in which the organization is located.

Database Tables and Columns: CPR_BASE.ADDRESS_1, CPR_BASE.ADDRESS_2, CPR_BASE.CITY, CPR_BASE.STATE, CPR_BASE.POSTAL_CODE, CPR_BASE.COUNTRY

2. CONTRACT

a. Name

Displays the contract name.

Database Table and Column: CPR_BASE.CONTRACT_NAME

b. Number

Displays the contract unique ID.

Database Table and Column: CPR_BASE.CONTRACT_NUMBER

c. Type

Displays the contract type value. Only one type per contract is allowed.

Table and Column: CPR_BASE.CONTRACT_TYPE

d. Share Ratio

Displays the cost share ratio as defined in the negotiated contract terms.

Database Table and Column: CPR_BASE.CONTRACT_SHARE_RATIO

3. PROGRAM

a. Name

Displays the program name.

Database Table and Column: CPR_BASE.PROGRAM_NAME

b. Phase

Displays the program phase.

Database Table and Column: CPR_BASE.PROGRAM_PHASE

c. EVMS Acceptance

Displays an X next to NO or YES indicating whether EVMS is accepted or not. If accepted, then the date of EVMS acceptance is also displayed.

Database Table and Column: CPR_BASE.EVMS_ACCEPTANCE, CPR_BASE.EVMS_ACCEPT_DATE

4. Report Period

a. From

Displays the starting date for this reporting period.

Database Table and Column: CPR_BASE.PERIOD_FROM

b. To

Displays the end date for this reporting period.

Database Table and Column: CPR_BASE.PERIOD_TO

5. PERFORMANCE DATA

Item (1)

Each item is represented by the following type;

a. Organizational Category (columns 2-16). Type 1

Each OBS unit associated with a CWBS element and control account is listed on separate line. The [OH] OVERHEAD line reports the burdening costs for the Overhead Burdening Element and is based on the burden type of Overhead.

b. Cost of Money (columns 2-16). Type 2

Displays the Cost of Money burdened as a total of all line items in section 8a for the burdening type of COM.

c. General & Administrative (columns 2-16). Type 3

Displays General and Administrative as a total for all line items in section 8a for the burdening type of G&A.

d. Undistributed Budget (columns 14-16). Type 4

Displays the Undistributed Budget per contract baseline (column 14), EAC (column 15), and Variance (column 16).

e. Subtotal (Performance Measurement Baseline) (columns 2-16). Type 5

Displays the subtotals for all previous line items.

f. Management Reserve (column 14). Type 6

Displays the sum of money in the Management Reserve during the reporting period as a part of the reprogramming effort (column 13), and the reserve at the end of the reporting period (column 14) per the current contract baseline.

g.   Total (columns 2-14). Type 7

Database Tables and Columns: PERFORMANCE_ITEM_2.TYPE, PERFORMANCE_ITEM_2.SEQUENCE, PERFORMANCE_ITEM_2.NAME, PERFORMANCE_ITEM_2.ITEM_LEVEL, where:

– TYPE is the numerical representation of the item.

– SEQUENCE is the order of the line item.

– NAME is the name of line item.

– ITEM_LEVEL is the OBS level.

Current Period

Budgeted Cost--Work Scheduled (2)

Displays budgeted cost for work scheduled (BCWS).

Database Table and Column: PERFORMANCE_ITEM_2.CP_BC_WS

Budgeted Cost--Work Performed (3)

Displays budget cost for work performed (BCWP).

Database Table and Column: PERFORMANCE_ITEM_2.CP_BC_WP

Actual Cost Work Performed (9)

Displays the cumulative actual cost of work performed (ACWP).

Database Table and Column: PERFORMANCE_ITEM_2.CP_ACWP

Variance--Schedule (5)

Displays the schedule variance. This value is calculated based on BCWP - BCWS.

Database Table and Column: PERFORMANCE_ITEM_2.CP_V_S

Variance--Cost (6)

Displays the cost variance. This is value is calculated based on BCWP - ACWP.

Database Table and Column: PERFORMANCE_ITEM_2.CP_V_C

Cumulative To Date

Budgeted Cost--Work Scheduled (7)

Displays the cumulative budgeted cost for work scheduled (BCWS).

Database Table and Column: PERFORMANCE_ITEM_2.CTD_BC_WS

Budgeted Cost--Work Performed (8)

Displays the cumulative budget cost for work performed (BCWP).

Database Table and Column: PERFORMANCE_ITEM_2.CTD_BC_WP

Budgeted Cost--Work Performed (3)

Displays budget cost for work performed (BCWP).

Database Table and Column: PERFORMANCE_ITEM_2.CTD_ACWP

Variance--Schedule (10)

Displays the cumulative schedule variance. This is a calculated value based on cumulative BCWP - cumulative BCWS.

Database Table and Column: PERFORMANCE_ITEM_2.CTD_V_S

Variance--Cost (11)

Displays the cumulative cost variance. This is a calculated value based on cumulative BCWP - cumulative ACWP.

Database Table and Column: PERFORMANCE_ITEM_2.CTD_V_C

Reprogramming Adjustments

Cost Variance (12a)

Displays the reprogramming adjustment cost variance aggregated from all costs recorded against control accounts at this level.

Database Table and Column: PERFORMANCE_ITEM_2.RA_CV

Schedule Variance (12b)

Displays the reprogramming adjustment schedule variance aggregated from all costs recorded against control accounts at this level.

Database Table and Column: PERFORMANCE_ITEM_2.RA_SV

Budget (13)

Displays the reprogramming adjustment budget aggregated from all costs recorded against control accounts at this level.

Database Table and Column: PERFORMANCE_ITEM_2.RA_B

At Completion

Budgeted (14)

Displays the current baseline at completion (BAC) for this line item.

Database Table and Column: PERFORMANCE_ITEM_2.AC_B

Estimated (15)

Displays the estimate at completion (EAC) for the line item. Values are calculated based on the EAC selection in the CPR reports page of contract properties.

Values:

EAC. ACWP + ((BAC - BCWP) / CPIC)

EAC(T). AC + ETC

EAC(AT). (ACWP + (BAC - BCWP))

Database Table and Column: PERFORMANCE_ITEM_2.AC_E

Variance (16)

Displays the variance. This value is calculated using BAC - EAC.

Database Table and Column: PERFORMANCE_ITEM_2.AC_V

Contract Performance Report (CPR) Format 3 - Baseline

Description

The CPR format 3 provides a forecast of monthly changes to the baseline, management reserve (MR), and undistributed budget (UB) for the entire contract. It also contains header data showing the schedule dates for the contract.

Prerequisites

- Access rights are assigned to run jobs and reports, and to view contract data.
- CPR data for each contract is entered.
- The EVM CPR report data generation job is run.

Parameters

Report(s)

Specifies the contracts, appearing in the report, to which you have at least view access. Select contracts by report period in the Report(s) field.

Report Fields

CLASSIFICATION

Displays the security classification for this report.

Values: Competition Sensitive, Confidential, Secret, Top Secret, Unclassified, and any customer-defined classifications.

Database Table and Column: CPR_BASE.CLASSIFICATION

DOLLARS IN

Displays the cost field format on the CPR report.

Values: Dollars, Hundreds, Thousands, Millions, and Billions

Database Table and Column: CPR_FORMAT_3.REPORT_UNIT

1. CONTRACTOR

a. Name

Displays the name of the organization submitting the report.

Table and Column: CPR_BASE.CONTRACTOR_NAME

b. Location

– Address. Displays the organization address (lines 1 and 2).

– City. Displays the city in which the organization resides.

– State. Displays the state in which the organization resides.

– Postal Code. Displays the organization zip code.

– Country. Displays the country in which the organization is located.

Database Tables and Columns: CPR_BASE.ADDRESS_1, CPR_BASE.ADDRESS_2, CPR_BASE.CITY, CPR_BASE.STATE, CPR_BASE.POSTAL_CODE, CPR_BASE.COUNTRY

2. CONTRACT

a. Name

Displays the contract name.

Database Table and Column: CPR_BASE.CONTRACT_NAME

b. Number

Displays the contract unique ID.

Database Table and Column: CPR_BASE.CONTRACT_NUMBER

c. Type

Displays the contract type value. Only one type per contract is allowed.

Table and Column: CPR_BASE.CONTRACT_TYPE

d. Share Ratio

Displays the cost share ratio as defined in the negotiated contract terms.

Database Table and Column: CPR_BASE.CONTRACT_SHARE_RATIO

3. PROGRAM

a. Name

Displays the program name.

Database Table and Column: CPR_BASE.PROGRAM_NAME

b. Phase

Displays the program phase.

Database Table and Column: CPR_BASE.PROGRAM_PHASE

c. EVMS Acceptance

Displays an X next to NO or YES indicating whether EVMS is accepted or not. If accepted, then the date of EVMS acceptance is also displayed.

Database Table and Column: CPR_BASE.EVMS_ACCEPTANCE, CPR_BASE.EVMS_ACCEPT_DATE

4. REPORTING PERIOD

a. From

Displays the starting date for this reporting period.

Database Table and Column: CPR_BASE.PERIOD_FROM

b. To

Displays the end date for this reporting period.

Database Table and Column: CPR_BASE.PERIOD_TO

5. CONTRACT DTA

a. Original Negotiated Cost

Displays the total contract cost as of the original, first baseline. This total includes management reserve (MR), but excludes profit/fee.

Database Table and Column: CPR_FORMAT_3.ORIGINAL_NEGOTIATED_COST

b. Negotiated Contract Changes

Displays the sum of all baseline changes between the first baseline and the current baseline. This value is calculated based on Current Contract BAC - First Contract Baseline BAC.

Database Table and Column: CPR_FORMAT_3.NEGOTIATED_CHANGES

c. Current Negotiated Cost

Displays the total negotiated contract cost including MR. This is a calculated value based on the current baseline, or the sum of (block 5.a) + (block 5.b).

Database Table and Column: CPR_FORMAT_3.CURRENT_NEGOTIATED_CHANGES

d. Estimated Cost of Authorized Unpriced Work

Displays the estimated cost of unpriced work. This value is the same as the value found in block 5.c in the CPR Format 1 report.

Database Table and Column: CPR_FORMAT_3.EST_COST_AUTH_UNPRICED_WORK

e. Contract Budget Base

Displays a calculated value based on (block 5.c) + (block 5.d).

Database Table and Column: CPR_FORMAT_3.CONTRACT_BUDGET_BASE

f. Total Allocated Budget

Displays the contract's total BAC + MR + UB. This value includes burdens, but excludes the fee. This total should be the same value as block 8.g.14 in the *CPR Format 1* report.

Database Table and Column: CPR_FORMAT_3.TOTAL_ALLOCATED_BUDGET

g. Difference

Displays the calculated value based on the difference of (block 5.e) - (block 5.f).

Database Table and Column: CPR_FORMAT_3.DIFFERENCE

h. Contract Start Date

Displays the date the contract starts.

Database Table and Column: CPR_FORMAT_3.CONTRACT_START_DATE

i. Contract Definitization Date

Displays the date the contract was definitized.

Database Table and Column:
CPR_FORMAT_3.CONTRACT_DEFINITIZATION_DATE

j. Planned Completion Date

Displays the date the contract is planned to complete.

Database Table and Column: CPR_FORMAT_3.PLANNED_COMPLETION_DATE

k. Contract Completion Date

Displays the contracted completion date.

Database Table and Column: CPR_FORMAT_3.CONTRACT_COMPLETION_DATE

l. Estimated Completion Date

Displays the date when the organization will most likely achieve the EAC cost found in block 6.c.1 of the *CPR Format 1* report.

Database Table and Column:
CPR_FORMAT_3.ESTIMATED_COMPLETION_DATE

6. PERFORMANCE DATA

Item (1)

Each item is represented by the following type:

a. PERFORMANCE MEASUREMENT BASELINE *Beginning of Period* (columns 2-16) Type 1

Displays the BCWS from the contract baseline, current as of the start of the reporting period.

b. BASELINE CHANGES AUTHORIZED DURING REPORT PERIOD (column 16) Type 2

Displays each baseline between the baseline of block 6.a and the baseline of block 6.c.

c. Performance Measurement Baseline End of Period (columns 2-16) Type 3

Displays the BCWS from the contract baseline, current as of the end of the reporting period.

Database Tables and Columns: PERFORMANCE_ITEM_3.NAME, PERFORMANCE_ITEM_3.SEQUENCE, PERFORMANCE_ITEM_3.TYPE, where

– NAME is the name of the line item. For block 6.a.1, this is blank.

– SEQUENCE is the order of the line item.

– TYPE is the numerical representation of the item.

7. Management Reserve (columns 2-16)

Displays the management reserve balance as of the end of the reporting period. Values should be the same as those reported on the CPR Format 1 and CPR Format 2 reports. These values are calculated when the EVM CPR report data generation job is run.

Database Tables and Columns: PERFORMANCE_ITEM_3.NAME, PERFORMANCE_ITEM_3.SEQUENCE,

PERFORMANCE_ITEM_3.TYPE, where TYPE us 4.

8. TOTAL

Displays the sum of (block 6.c.16) + (block 7.16). This value should match the value reported in block 8.g.14 of the CPR Format 1 report.

Database Tables and Columns: PERFORMANCE_ITEM_3.NAME, PERFORMANCE_ITEM_3.SEQUENCE,

PERFORMANCE_ITEM_3.TYPE, where TYPE is 5.

BCWS Cumulative To Date (2)

For block 6.a and block 6.c, displays the cumulative BCWS to-date. This value is calculated when the EVM CPR report data generation job is run.

Database Table and Column: PERFORMANCE_ITEM_3.BCWS_CUMULATIVE

BCWS For Report Period (3)

For block 6.a and block 6.c, displays the reporting period BCWS . This value is calculated when the EVM CPR report data generation job is run.

Database Table and Column: PERFORMANCE_ITEM_3.BCWS_REPORT_PERIOD

BUDGETED COST FOR WORK SCHEDULED (BCWS) (Non-Cumulative)

SIX MONTH FORECAST +1 (4)

For block 6.a and block 6.c, displays the next month BCWS. This value is calculated when the EVM CPR report data generation job is run.

Database Table and Column:
PERFORMANCE_ITEM_3.BCWS_6M_FORECAST_1

SIX MONTH FORECAST +2 (5)

For block 6.a and block 6.c, displays the BCWS for the second month after the current one. This value is calculated when the EVM CPR report data generation job is run.

Database Table and Column:
PERFORMANCE_ITEM_3.BCWS_6M_FORECAST_2

SIX MONTH FORECAST +3 (6)

For block 6.a and block 6.c, displays the BCWS for the third month after the current one. This value is calculated when the EVM CPR report data generation job is run.

Database Table and Column:
PERFORMANCE_ITEM_3.BCWS_6M_FORECAST_3

SIX MONTH FORECAST +4 (7)

For block 6.a and block 6.c, displays the BCWS for the fourth month after the current one. This value is calculated when the EVM CPR report data generation job is run.

Database Table and Column:
PERFORMANCE_ITEM_3.BCWS_6M_FORECAST_4

SIX MONTH FORECAST +5 (8)

For block 6.a and block 6.c, displays the BCWS for the fifth month after the current one. This value is calculated when the EVM CPR report data generation job is run.

Database Table and Column:
PERFORMANCE_ITEM_3.BCWS_6M_FORECAST_5

SIX MONTH FORECAST +6 (9)

For block 6.a and block 6.c, displays the BCWS for the sixth month after the current one. This value is calculated when the EVM CPR report data generation job is run.

Database Table and Column:
PERFORMANCE_ITEM_3.BCWS_6M_FORECAST_6

ENTER SPECIFIED PERIODS (columns 10-13)

For block 6.a and block 6.c, displays the BCWS for the next user-specified periods (that is month, quarter, or annual) after column 9, where each subsequent column represents the next period. These values are calculated when the EVM CPR report data generation job is run.

Database Table and Column:
PERFORMANCE_ITEM_3.BCWS_SP_FORECAST_1,
PERFORMANCE_ITEM_3.BCWS_SP_FORECAST_2,
PERFORMANCE_ITEM_3.BCWS_SP_FORECAST_3,
PERFORMANCE_ITEM_3.BCWS_SP_FORECAST_4

ENTER SPECIFIED PERIODS-TC (14)

For block 6.a and block 6.c, displays the remaining BCWS from column 13 to the end of the contract. This value is calculated when the EVM CPR report data generation job is run.

Database Table and Column:
PERFORMANCE_ITEM_3.BCWS_SP_FORECAST_5

Undistributed Budget (15)

For block 6.a and block 6.c, displays the undistributed budget associated with this baseline. This value is calculated when the EVM CPR report data generation job is run.

Database Table and Column:
PERFORMANCE_ITEM_3.UNDISTRIBUTED_BUDGET

Total Budget (16)

Displays the total budget at completion (BAC). For block 6.b line items, displays the total BAC associated with that baseline. These values are calculated when the EVM CPR report data generation job is run.

Database Table and Column: PERFORMANCE_ITEM_3.TOTAL_BUDGET

Forecast Column Headings (columns 4-15)

The PERFORMANCE_DATA_HEADER_3 table contains the column headings generated when the EVM CPR report data generation job is run.

Contract Performance Report (CPR) Format 4a - Staffing (BAC)

Description

The CPR format 4a provides a forecast of staffing by person-months and OBS units. The report contains header data, such as schedule dates for the contract and contains program variance thresholds for month, cumulative, and at-complete percentages and values.

Budget at complete (BAC) can be in months, days, or hours.

Prerequisites

- Access rights are assigned to run jobs and reports, and to view contract data.
- CPR data for each contract is entered.
- The EVM CPR report data generation job is run.

Parameters

Report(s)

Specifies the contracts, appearing in the report, to which you have at least view access. Select contracts by report period in the Report(s) field.

Report Fields

CLASSIFICATION

Displays the security classification for this report.

Values: Competition Sensitive, Confidential, Secret, Top Secret, Unclassified, and any customer-defined classifications.

Database Table and Column: CPR_BASE.CLASSIFICATION

1. CONTRACTOR

a. Name

Displays the name of the organization submitting the report.

Table and Column: CPR_BASE.CONTRACTOR_NAME

b. Location

- Address. Displays the organization address (lines 1 and 2).
- City. Displays the city in which the organization resides.
- State. Displays the state in which the organization resides.
- Postal Code. Displays the organization zip code.

–   Country. Displays the country in which the organization is located.

Database Tables and Columns: CPR_BASE.ADDRESS_1, CPR_BASE.ADDRESS_2, CPR_BASE.CITY, CPR_BASE.STATE, CPR_BASE.POSTAL_CODE, CPR_BASE.COUNTRY

2. CONTRACT

a. Name

Displays the contract name.

Database Table and Column: CPR_BASE.CONTRACT_NAME

b. Number

Displays the contract unique ID.

Database Table and Column: CPR_BASE.CONTRACT_NUMBER

c. Type

Displays the contract type value. Only one type per contract is allowed.

Table and Column: CPR_BASE.CONTRACT_TYPE

d. Share Ratio

Displays the cost share ratio as defined in the negotiated contract terms.

Database Table and Column: CPR_BASE.CONTRACT_SHARE_RATIO

3. PROGRAM

a. Name

Displays the program name.

Database Table and Column: CPR_BASE.PROGRAM_NAME

b. Phase

Displays the program phase.

Database Table and Column: CPR_BASE.PROGRAM_PHASE

c. EVMS Acceptance

Displays an X next to NO or YES indicating whether EVMS is accepted or not. If accepted, then the date of EVMS acceptance is also displayed.

Database Table and Column: CPR_BASE.EVMS_ACCEPTANCE, CPR_BASE.EVMS_ACCEPT_DATE

4. REPORT PERIOD

a. From

Displays the starting date for this reporting period.

Database Table and Column: CPR_BASE.PERIOD_FROM

b. To

Displays the end date for this reporting period.

Database Table and Column: CPR_BASE.PERIOD_TO

5. PERFORMANCE DATA

ORGANIZATIONAL CATEGORY (1) (columns 2-16)

Displays staffing metrics that the OBS unit aggregates. Team Member Staffing OBS define the OBS unit. The OBS units that display vary depending on the OBS level selected when the EVM CPR report data generation job is run.

Database Table and Column: PERFORMANCE_ITEM_4A.TYPE, PERFORMANCE_ITEM_4A.SEQUENCE, PERFORMANCE_ITEM_4A.NAME, and PERFORMANCE_ITEM_4A.ITEM_LEVEL, where

– TYPE is 1. The numerical representation for Organizational Category.

– SEQUENCE is the order of the line item.

– NAME is the name of the OBS unit.

– ITEM_LEVEL is the OBS level.

6. TOTAL DIRECT (columns 2-16)

Displays the total of the OBS staffing BAC metrics for each column.

Database Table and Column: PERFORMANCE_ITEM_4A.TYPE, where TYPE is 2.

Planned Current Period (2)

Displays the BAC staffing in man-months, hours or days for the current reporting period. These values are calculated when the EVM CPR report data generation job is run based on the BAC usage for each assignment and aggregated based on the Team Staffing OBS unit assigned to the team record. If the Team Staffing OBS is blank, the head count is not included in this report.

Database Table and Column: PERFORMANCE_ITEM_4A.PLANNED_CURRENT_PERIOD

Planned End of Current Period (*Cumulative*) (3)

Displays the cumulative through the end of the reporting period.

Database Table and Column: PERFORMANCE_ITEM_4A.PLANNED_END_CURRENT_PERIOD

FORECAST (*Non-Cumulative*)

SIX MONTH FORECAST +1 (4)

Displays the staffing forecast (BAC) for the next month.

Database Table and Column: PERFORMANCE_ITEM_4A.M_FORECAST_1

SIX MONTH FORECAST +2 (5)

Displays the staffing forecast (BAC) for the second month after the current one.

Database Table and Column: PERFORMANCE_ITEM_4A.M_FORECAST_2

SIX MONTH FORECAST +3 (6)

Displays the staffing forecast (BAC) for the third month after the current one.

Database Table and Column: PERFORMANCE_ITEM_4A.M_FORECAST_3

SIX MONTH FORECAST +4 (7)

Displays the staffing forecast (BAC) for the fourth month after the current one.

Database Table and Column: PERFORMANCE_ITEM_4A.M_FORECAST_4

SIX MONTH FORECAST +5 (8)

Displays the staffing forecast (BAC) for the fifth month after the current one.

Database Table and Column: PERFORMANCE_ITEM_4A.M_FORECAST_5

SIX MONTH FORECAST +6 (9)

Displays the staffing forecast (BAC) for the sixth month after the current one.

Database Table and Column: PERFORMANCE_ITEM_4A.M_FORECAST_6

ENTER SPECIFIED PERIODS (columns 10-13)

Displays the staffing forecast (BAC) for the next user-specified periods (that is month, quarter, or annual) after column 9, where each subsequent column represents the next period. These values are calculated when the EVM CPR report data generation job is run.

Database Table and Column: PERFORMANCE_ITEM_4A.SP_FORECAST_1, PERFORMANCE_ITEM_4A.SP_FORECAST_2, PERFORMANCE_ITEM_4A.SP_FORECAST_3, PERFORMANCE_ITEM_4A.SP_FORECAST_4

ENTER SPECIFIED PERIODS (14)

Displays the remaining BAC from column 13 to the end of the contract. This value is calculated when the EVM CPR report data generation job is run.

Database Table and Column: PERFORMANCE_ITEM_4A.SP_FORECAST_5

AT COMPLETION (15)

Displays the total staffing (BAC) for the entire OBS unit. This value is calculated when the EVM CPR report data generation job is run.

Database Table and Column: PERFORMANCE_ITEM_4A.AT_COMPLETION

Forecast Column Headings (columns 4-15)

The PERFORMANCE_DATA_HEADER_4A table contains the column headings generated when the EVM CPR report data generation job is run.

Contract Performance Report (CPR) Format 4b - Staffing (EAC)

Description

The CPR format 4b provides a forecast of staffing by person-months and OBS units. This report contains header data, such as schedule dates for the contract and contains program variance thresholds for month, cumulative, and at-complete percentages and values.

Estimate at complete (EAC) can be in months, days, or hours.

Prerequisites

- Access rights are assigned to run jobs and reports, and to view contract data.
- CPR data for each contract is entered.
- The EVM CPR report data generation job is run.

Parameters

Report(s)

Specifies the contracts, appearing in the report, to which you have at least view access. Select contracts by report period in the Report(s) field.

Report Fields

CLASSIFICATION

Displays the security classification for this report.

Values: Competition Sensitive, Confidential, Secret, Top Secret, Unclassified, and any customer-defined classifications.

Database Table and Column: CPR_BASE.CLASSIFICATION

1. CONTRACTOR

a. Name

Displays the name of the organization submitting the report.

Table and Column: CPR_BASE.CONTRACTOR_NAME

b. Location

- – Address. Displays the organization address (lines 1 and 2).

- – City. Displays the city in which the organization resides.

- – State. Displays the state in which the organization resides.

- – Postal Code. Displays the organization zip code.

- – Country. Displays the country in which the organization is located.

Database Tables and Columns: CPR_BASE.ADDRESS_1, CPR_BASE.ADDRESS_2, CPR_BASE.CITY, CPR_BASE.STATE, CPR_BASE.POSTAL_CODE, CPR_BASE.COUNTRY

2. CONTRACT

a. Name

Displays the contract name.

Database Table and Column: CPR_BASE.CONTRACT_NAME

b. Number

Displays the contract unique ID.

Database Table and Column: CPR_BASE.CONTRACT_NUMBER

d. Share Ratio

Displays the cost share ratio as defined in the negotiated contract terms.

Database Table and Column: CPR_BASE.CONTRACT_SHARE_RATIO

3. PROGRAM

a. Name

Displays the program name.

Database Table and Column: CPR_BASE.PROGRAM_NAME

b. Phase

Displays the program phase.

Database Table and Column: CPR_BASE.PROGRAM_PHASE

c. EVMS Acceptance

Displays an X next to NO or YES indicating whether EVMS is accepted or not. If accepted, then the date of EVMS acceptance is also displayed.

Database Table and Column: CPR_BASE.EVMS_ACCEPTANCE, CPR_BASE.EVMS_ACCEPT_DATE

4. REPORT PERIOD

a. From

Displays the starting date for this reporting period.

Database Table and Column: CPR_BASE.PERIOD_FROM

b. To

Displays the end date for this reporting period.

Database Table and Column: CPR_BASE.PERIOD_TO

5. PERFORMANCE DATA

ORGANIZATIONAL CATEGORY (1) (columns 2-16)

Displays staffing metrics that the OBS unit aggregates. Team Member Staffing OBS define the OBS unit. The OBS units that display vary depending on the OBS level selected when the EVM CPR report data generation job is run.

Database Table and Column: PERFORMANCE_ITEM_4B.TYPE, PERFORMANCE_ITEM_4B.SEQUENCE, PERFORMANCE_ITEM_4B.NAME, and PERFORMANCE_ITEM_4B.ITEM_LEVEL, where

- TYPE is 1. The numerical representation for Organizational Category.

- SEQUENCE is the order of the line item.

- NAME is the name of the OBS unit.

- ITEM_LEVEL is the OBS level

6. TOTAL DIRECT (columns 2-16)

Displays the total of the OBS staffing BAC metrics for each column.

Database Table and Column: PERFORMANCE_ITEM_4B.TYPE, where TYPE is 2.

Actual Current Period (2)

Displays the EAC staffing in man-months, hours, or days for the current reporting period. These values are calculated when the EVM CPR report data generation job is run based on the EAC usage for each assignment. The values are aggregated based on the Team Staffing OBS unit assigned to the team record.

EAC = Usage Task Assignments, where Usage = Actual Units + ETC Units.

If the Team Staffing OBS is blank, then head count is not included in this report.

Database Table and Column:
PERFORMANCE_ITEM_4B.ACTUAL_CURRENT_PERIOD

Actual End of Current Period (CUM) (3)

Displays the cumulative through the end of the reporting period.

Database Table and Column:
PERFORMANCE_ITEM_4B.ACTUAL_END_CURRENT_PERIOD

FORECAST (Non-Cumulative)

SIX MONTH FORECAST +1 (4)

Displays the staffing forecast (EAC) for the next month.

Database Table and Column: PERFORMANCE_ITEM_4B.M_FORECAST_1

SIX MONTH FORECAST +2 (5)

Displays the staffing forecast (EAC) for the second month after the current one.

Database Table and Column: PERFORMANCE_ITEM_4B.M_FORECAST_2

SIX MONTH FORECAST +3 (6)

Displays the staffing forecast (EAC) for the third month after the current one.

Database Table and Column: PERFORMANCE_ITEM_4B.M_FORECAST_3

SIX MONTH FORECAST +4 (7)

Displays the staffing forecast (EAC) for the fourth month after the current one.

Database Table and Column: PERFORMANCE_ITEM_4B.M_FORECAST_4

SIX MONTH FORECAST +5 (8)

Displays the staffing forecast (EAC) for the fifth month after the current one.

Database Table and Column: PERFORMANCE_ITEM_4B.M_FORECAST_5

SIX MONTH FORECAST +6 (9)

Displays the staffing forecast (EAC) for the sixth month after the current one.

Database Table and Column: PERFORMANCE_ITEM_4B.M_FORECAST_6

ENTER SPECIFIED PERIODS (columns 10-13)

Displays the staffing forecast (EAC) for the next user-specified periods that is month, quarter, or annual after column 9. Each subsequent column represents the next period. These values are calculated when the EVM CPR report data generation job is run.

Database Table and Column: PERFORMANCE_ITEM_4B.SP_FORECAST_1, PERFORMANCE_ITEM_4B.SP_FORECAST_2, PERFORMANCE_ITEM_4B.SP_FORECAST_3, PERFORMANCE_ITEM_4B.SP_FORECAST_4

ENTER SPECIFIED PERIODS (14)

Displays the remaining EAC from column 13 to the end of the contract. This value is calculated when the EVM CPR report data generation job is run.

Database Table and Column: PERFORMANCE_ITEM_4B.SP_FORECAST_5

AT COMPLETION (15)

Displays the total staffing (EAC) for the entire contract. This value is calculated when the EVM CPR report data generation job is run.

Database Table and Column: PERFORMANCE_ITEM_4B.AT_COMPLETION

Forecast Column Headings (columns 4-15)

The PERFORMANCE_DATA_HEADER_4B table contains the column headings generated when the EVM CPR report data generation job is run.

Contract Performance Report (CPR) Format 5 - Explanations and Problem Analyses

Description

The CPR format 5 explains the cost, schedule, and other issues related to the total contract, undistributed budget (UB), management reserve (MR), PMB, and manpower.

Prerequisites

- Access rights are assigned to run jobs and reports, and to view contract data.
- CPR data for each contract is entered.
- The EVM CPR report data generation job is run.

Parameter

Report(s)

Specifies the contracts, appearing in the report, to which you have at least view access. Select contracts by report period in the Report(s) field.

Report Fields

CLASSIFICATION

Displays the security classification for this report.

Values: Competition Sensitive, Confidential, Secret, Top Secret, Unclassified, and any customer-defined classifications.

Database Table and Column: CPR_BASE.CLASSIFICATION

1. CONTRACTOR

a. Name

Displays the name of the organization submitting the report.

Table and Column: CPR_BASE.CONTRACTOR_NAME

b. Location

– Address. Displays the organization address (lines 1 and 2).

– City. Displays the city in which the organization resides.

– State. Displays the state in which the organization resides.

– Postal Code. Displays the organization zip code.

– Country. Displays the country in which the organization is located.

Database Tables and Columns: CPR_BASE.ADDRESS_1, CPR_BASE.ADDRESS_2, CPR_BASE.CITY, CPR_BASE.STATE, CPR_BASE.POSTAL_CODE, CPR_BASE.COUNTRY

2. CONTRACT

a. Name

Displays the contract name.

Database Table and Column: CPR_BASE.CONTRACT_NAME

b. Number

Displays the contract unique ID.

Database Table and Column: CPR_BASE.CONTRACT_NUMBER

c. Type

Displays the contract type value. Only one type per contract is allowed.

Table and Column: CPR_BASE.CONTRACT_TYPE

d. Share Ratio

Displays the cost share ratio as defined in the negotiated contract terms.

Database Table and Column: CPR_BASE.CONTRACT_SHARE_RATIO

3. PROGRAM

a. Name

Displays the program name.

Database Table and Column: CPR_BASE.PROGRAM_NAME

b. Phase

Displays the program phase.

Database Table and Column: CPR_BASE.PROGRAM_PHASE

c. EVMS Acceptance

Displays an X next to NO or YES indicating whether EVMS is accepted or not. If accepted, then the date of EVMS acceptance is also displayed.

Database Table and Column: CPR_BASE.EVMS_ACCEPTANCE, CPR_BASE.EVMS_ACCEPT_DATE

4. REPORT PERIOD

a. From

Displays the starting date for this reporting period.

Database Table and Column: CPR_BASE.PERIOD_FROM

b. To

Displays the end date for this reporting period.

Database Table and Column: CPR_BASE.PERIOD_TO

5. EVALUATION

Displays the detailed explanation. The textual content for each section is entered on the CPR reports page. Be sure to update the content for each section before running the EVM CPR report data generation job for each reporting period.

Each section in this report is represented by the following type:

– Summary Analysis. Type 1

– Impact. Type 2

– Corrective Actions. Type 3

Database Tables and Columns: CPR_EVALUATION.TYPE and CPR_EVALUATION.CONTENT, where:

– TYPE is the numerical representation of the section.

– CONTENT is the textual content for the section.

Contract Work Breakdown Structure Index

Description

The contract WBS index report is one of the standard contract reports used in an ANSI-748 compliant system. This report is fully described in the DID form, DI-MGMT-81334C, an U.S. federal government report standard.

Prerequisites

Access rights are assigned to run, schedule, and view reports and to view contract data.

Parameters

Contract(s)

Specifies the contracts, appearing in the report, to which you have at least view access rights. Select contracts in the Contracts field.

Report Fields

Contract No

Displays the contract number.

Database Table and Column: EVM_CONTRACTS.CODE

Contract Name

Displays the name of the contract.

Database Table and Column: EVM_CONTRACTS.NAME

Contractor

Displays the CPR contractor who represents the organization responsible for the contract.

Database Table and Column: EVM_CONTRACTS.CPR_NAME

Program

Displays the name of the program associated with this contract.

Database Table and Column: EVM_CONTRACTS.PROGRAM_NAME

CWBS ID

Each row displays the CWBS element unique identifier, excluding the CWBS root node element. Control accounts, summary level planning packages, and work packages are excluded from this report.

Database Table and Column: EVM_CWBS_NODES.EVM_CWBS_CODE

CWBS ELEMENT NAME

For each row, displays the name of the CWBS element.

Database Table and Column: EVM_CWBS_NODES.NAME

CWBS ELEMENT LEVEL

For each row, displays an X in the appropriate level column indicating the level assigned to the CWBS element. The number of levels in this report vary based on the selected contract.

Database table and Column: EVM_CWBS_NODES.LEVEL

Contract Work Breakdown Structure Dictionary

Description

The contract WBS dictionary report is one of the standard contract reports used in an ANSI-748 compliant system. This report is fully described in the DID form, DI-MGMT-81334C, an U.S. federal government report standard.

Control accounts, summary level planning packages (SLPP), and work packages are excluded from this report.

Prerequisites

Access rights are assigned to run, schedule, and view reports and to view contract data.

Parameters

Contract(s)

Specifies the contracts, appearing in the report, to which you have at least view access rights. Select contracts in the Contracts field.

Report Fields

Contract No

Displays the contract number.

Database Table and Column: EVM_CONTRACTS.CODE

Contract Name

Displays the name of the contract.

Database Table and Column: EVM_CONTRACTS.NAME

Contractor

Displays the CPR contractor who represents the organization responsible for the contract.

Database Table and Column: EVM_CONTRACTS.CPR_NAME

Program

Displays the name of the program associated with this contract.

Database Table and Column: EVM_CONTRACTS.PROGRAM_NAME

CWBS ID

Each row displays the CWBS element unique identifier, excluding the CWBS root node element. Control accounts, summary level planning packages, and work packages are excluded from this report.

Database Table and Column: EVM_CWBS_NODES.EVM_CWBS_CODE

CWBS ELEMENT NAME

For each row, displays the name of the CWBS element.

Database Table and Column: EVM_CWBS_NODES.NAME

CWBS Dictionary Description

For each row, displays the complete technical and cost description for the CWBS element.

Database Table and Column: EVM_CWBS_ELEMENTS.EVM_DICTIONARY

Responsibility Assignment Matrix (RAM)

Description

The RAM report identifies the control accounts (CA) that intersects with the CWBS and responsible OBS.

The RAM is typically developed after the CWBS is completed. The contract program manager works with various control account managers to identify the responsible OBS for each control account.

The RAM is published and distributed for approval as part of the organization EVM business processes.

No specific U.S. federal government standards exist for the RAM.

Prerequisites

Access rights are assigned to run, schedule, and view reports and to view contract data.

Parameters

Contract

Specifies the contract, appearing in the report, to which you have at least view access rights. Select a contract in the Contract field.

Report Fields

Contract No

Displays the contract number.

Database Table and Column: EVM_CONTRACTS.CODE

Contract Name

Displays the name of the contract.

Database Table and Column: EVM_CONTRACTS.NAME

Contractor

Displays the CPR contractor who represents the organization responsible for the contract.

Database Table and Column: EVM_CONTRACTS.CPR_NAME

Program

Displays the name of the program associated with this contract.

Database Table and Column: EVM_CONTRACTS.PROGRAM_NAME

CONTRACT WORK BREAKDOWN STRUCTURE

CWBS ID

Each row displays the CWBS element unique identifier, excluding the CWBS root node element. Control accounts, summary level planning packages, and work packages are excluded from this report.

Database Table and Column: EVM_CWBS_NODES.EVM_CWBS_CODE

CWBS ELEMENT NAME

For each row, displays the name of the CWBS element.

Database Table and Column: EVM_CWBS_NODES.NAME

LEVEL

For each row, displays the CWBS level assigned to this CWBS element.

Database table and Column: EVM_CWBS_NODES.LEVEL

ORGANIZATIONAL BREAKDOWN STRUCTURE (OBS)

Displays the name of the OBS unit horizontally across the report.

OBS Unit Name

Each row displays an X in the applicable column to indicate the OBS unit assigned to the control account for the CWBS element.

Database table and Column: EVM_CONTROL_ACCOUNTS.CONTROL_OBS_ID

Appendix C: Jobs

CA Clarity PPM provides jobs for earned value management.

This section contains the following topics:

Update Earned Value Totals - Contracts Job

Use the update earned value totals - contracts job to track contract progress by calculating earned value. This job calculates the current earned value data totals through the current date for a contract or set of contracts based on the parameters you select. The data is stored in a reserved row in the PRJ_EV_HISTORY (earned value history) table. The saved current earned value data totals are displayed in fields on contracts.

You can schedule this job to run in the background. You can invoke this job on demand from within the contract by updating the contract earned value.

Requirements

To calculate current earned value, the contract requires a current baseline.

Restrictions

This job cannot run concurrently with any other instance of the update earned value totals - contracts job.

Parameters

The following parameters are provided:

Note: If you do not complete any of the parameters, all contracts are processed.

Contract

Defines the name of the contract.

OBS Unit

Defines the name of the OBS Unit.

Contract Manager

Defines the name of the contract manager.

Update Earned Value History - Contracts Job

Use the update earned value history - contracts job to calculate earned value for a contract or set of contracts and to create earned value snapshots of the time sliced data. The data is based on the earned value reporting period that the contract manager assigns to the contract and the parameters you select. The earned value snapshot is used for historical earned value analysis (EVA) and reporting. The snapshots are stored in rows in the PRJ_EV_HISTORY (earned value history) table. You can use this reporting data to write reports.

This job uses the lag value to determine the day to take the snapshot. A snapshot is taken on the first day following the defined lag, provided you do not run the job on that day.

Example: Monthly with Three Day Lag

If you schedule this job to run monthly starting 2/1/11 with a lag of three days and you have associated the contract to an earned value reporting period whose period type is defined as Monthly and frequency is the first day of the month, a snapshot for January 2011 is generated only when the job runs on 2/04/11 or later.

For each contract that meets the job parameter criteria, this job:

- Finds the contract associated earned value reporting period and saves the contract earned value data based upon that period.

- Locks the contract Earned Value Reporting Period field.

Requirements

To create a historical snapshot, the contract requires:

- Assigning to an earned value reporting period.

- A current baseline.

Restrictions

This job cannot run concurrently with any other instance of the update earned value history - contracts job.

Parameters

The following parameters are provided:

Note: If you do not complete any of the parameters, all the contracts are processed.

Contract

Defines the name of the contract.

OBS Unit

Defines the name of the OBS Unit.

Contract Manager

Defines the name of the contract manager.

Lag

Determines the number of days to wait before taking the snapshot. Use this setting to defer taking a historical snapshot so that your organization can reconcile actuals from one system to another.

Rewrite Existing Snapshot

Indicates whether you want this job to regenerate the current reporting period snapshot and replace the existing current periodic snapshot with updated data. When cleared, those contracts that already have periodic snapshots are ignored.

Default: Cleared

Show Projected ACWP

Indicates the job to create data for the projected actual cost of work performed (ACWP) of all CWBS elements.

Default: Cleared

Show Projected BCWP

Indicates the job to create data for the projected budgeted cost of work performed (BCWP) of all CWBS elements.

Default: Cleared

Show Projected BCWS

Indicates the job to create data for the projected budgeted cost of work scheduled (BCWS) as of the date for projects and project tasks that are linked to the contract work packages.

Default: Cleared

EVM CPR Report Data Generation Job

The EVM CPR Report Data Generation job calculates and generates the CPR report data. This job is responsible for collecting all of the required data for one or more contracts and populates the CPR Report tables for one of more of the CPR Format reports.

Flexible job parameters let you generate report data for the following:

■ One contract at a time.

- Multiple contracts based on selected OBS Unit, and then within that OBS Unit(s), based on a selected contract program manager and/or selected control account manager.

Requirements

- Access rights are assigned to run jobs and to view contract data. You can only generate report data for contracts in which you have at least view access.

- CPR data for each contract is entered.

- When setting the parameters to run this job, do the following:

  – Select either a single contract or an OBS unit.

    Otherwise, the job fails and the following error message is written to the job log: "No data to generate. Select either a single contract or an OBS unit."

  – Specify a data range for the earned value reporting period.

  – Select the Overwrite Existing Data check box to overwrite existing report data from previously run reports for the selected contract.

    Otherwise, the base report data is not overwritten, and the following error message is written to the job log: "CPR Format *n* for Contract contract_name for Reporting Period from_date and to_dates already exists. Set the Overwrite Existing Data flag to replace and update this report data", where n is the number of the CPR Format, contract_name is the name of the contract, and from_date and to_date is the reporting period.

    For more information, see the *Administration Guide*.

Restrictions

This job cannot run concurrently with other instances of this job.

Parameters

Contract

Limits the report generation to a selected contract. If you do not select a contract, then this job generates reports based all contracts associated with selected OBSs.

Required: Yes, if an OBS unit is not specified.

OBS Unit

Limits the report generation to the selected contracts associated with the selected OBS unit. If no OBS unit is selected, all OBS units are considered based on their association with the selected contract.

Values: Unit

Required: Yes, if a contract is not specified

OBS Level

Specifies the level at which OBS unit aggregations are reported in the Performance Data sections of the CPR reports. Data is aggregated to this level. Level 1 is reserved for the top OBS node.

Used in CPR Format 2, CPR Format 4a, and CPR Format 4b reports

Limits: Positive number, greater than zero.

Default: 3

Contract Program Manager

Limits the report generation to the selected contracts assigned to the selected contract program manager.

Control Account Manager

Limits the report generation to the selected contracts assigned to the selected control account manager.

Reporting Period From Date

Limits data on the generated report starting on this date. One report for each EV reporting period. If this date does not exactly match the contract EV reporting period, this job looks further back in time for the closest EV reporting period start date.

Reporting Period To Date

Limits data on the generated report ending on this date. One report for each EV reporting period. If this date does not exactly match the contract EV reporting period, this job looks forward in time for the closest EV reporting period end date.

WBS Level

Specifies the number levels deep in which to list the CWBS elements, including control accounts, in the Performance Data sections of CPR reports. Data is aggregated from the level 2 position down to the specified level. Level 1 is reserved for the CWBS root node element and is not included in this report.

Limits: Positive number, greater than or equal to 2.

Default: 3

Overwrite Existing Report Data

Indicates if existing report data is overwritten during report generation. When selected, base report data is overwritten, and changes to shared report header fields are reflected across all CPR reports for the specified reporting period.

Default: Cleared

CPR Format 1

Indicates if the report for CPR Format 1 is generated.

Default: Selected

CPR Format 2

Indicates if the report for CPR Format 2 is generated.

Default: Selected

CPR Format 3

Indicates if the report for CPR Format 3 is generated.

Default: Selected

CPR Format 4a (BAC)

Indicates if the report for CPR Format 4a is generated.

Default: Selected

CPR Format 4b (EAC)

Indicates if the report for CPR Format 4b is generated.

Default: Selected

CPR Format 5

Indicates if the report for CPR Format 5 is generated

Default: Selected