Deltek

Deltek PM Compass 8.5

Standard Reports Guide

May 16, 2025

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The information contained in this publication is effective as of the publication date below and is subject to change without notice.

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Contents

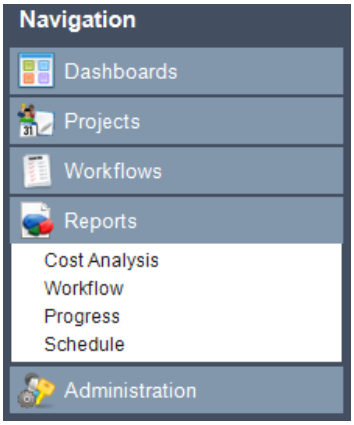
Overview

Reporting is a key component of PM Compass. The reports extend the analysis capability provided by views such as Cost Analysis. They also provide a mechanism for presenting workflow, cost, schedule, and performance information in printed reports or dashboard views with a high degree of configurability.

PM Compass reports can be emailed or saved as Word, Excel, or PDF documents. You can give users complete access to reports with the full array of options available, or you can limit user access to pre-configured reports prepared by the PCA or project administrator.

Reports are a key component of dashboard content and you can render any report in a dashpart. Built-in features enhance the performance and use of reports in dashboards.

Report Categories



PM Compass reports are divided into categories and can be accessed through the **Reports** menu. Each report can be secured separately in the EPM Security Administrator.

- The **Cost Analysis Reports** category includes both tabular and graphical reports that relate to cost information as well as combined cost and schedule information in a single report.
- The Workflow Reports category includes reports that focus on data such as change management, variance analysis, and corrective actions.
- You can use the **Progress Reports** category to determine if all progress has been submitted and/or approved.
- The Schedule Reports category includes reports focused on schedule data and is made up largely of column picker style reports that show activity data, activities with assignments, and activities with predecessors or successors. This category also includes a Baseline Execution Index report that shows actual vs. baseline task completion information. Before running schedule reports, ensure that your schedule is linked to the PM Compass project.

Attention: For information about linking schedules to PM Compass projects, see “Link Schedule Projects to PM Compass Projects” (**Projects » Projects Procedures**) in the PM Compass Help System.

Microsoft SQL Server Reporting Services

PM Compass uses Microsoft SQL Server Reporting Services (SSRS) as its reporting tool. SSRS is a server-based reporting platform that you can use to create and manage tabular, matrix, graphical, and free-form reports that contain data from relational and multidimensional data sources. The reports that you create can be viewed and managed over a World Wide Web-based connection.

SSRS includes the following core components:

- A complete set of tools that you can use to create, manage, and view reports.
- A Report Server component that hosts and processes reports in a variety of formats. Output formats include HTML, PDF, TIFF, Excel, CSV, and more.

- An API that allows developers to integrate or extend data and report processing in custom applications, or create custom tools to build and manage reports.

The reports that you build can be based on relational or multidimensional data from SQL Server, Analysis Services, Oracle, or any Microsoft .NET data provider such as ODBC or OLE DB. You can create tabular, matrix, and free-form reports. You can also create ad hoc reports that use predefined models and data sources.

Adding Reports as Dashparts

You can add saved reports as report or report link dashparts.

- A report dashpart allows you to preview a single report on your PM Compass dashboard.
- A report links dashpart contains links to selected global and personal saved reports or to all global and personal saved reports to which you have access. It provides easy access to multiple reports directly from the dashboard without requiring you to access them via the report menu.

  If you create a report links dashpart that only contains links to selected saved reports, then you will need to add a new link every time you create a new saved report whose link you want in the dashpart.

  If you create a report links dashpart that contains links to all saved reports to which you have access, then every time a new saved report is created (to which you have access), it will automatically be added to the dashpart.

Note:

- You cannot add standard reports as Report or Report Link dashparts. You first need to save the report as a new report. See Modifying Standard Reports below for more information.
- For more information on report dashparts, see Dashboards and Dashparts » Dashparts » Report and Report Links Dashparts in the PM Compass Help System.

Customizing Workflow Types and Running Reports

PM Compass reports are designed to print standard workflow types. If you add fields or columns to a workflow type, they will not display on the standard report. You will need to create a custom report and add the fields to the report.

Attention: For more information about working with custom reports, see the *Deltek PM Compass Custom Reports and MSQL Server Reporting Services Guide*.

Modifying Standard Reports

You can modify the standard reports using the Report Options and Search dialog boxes. There are several reasons that you may want to modify a standard report and save it as a new report:

- You may need to add/edit report columns or headings, edit font and orientation, or specify the date and time format for the report, among other things. Report options are only remembered for the current session. If you run a report on a regular basis and you do not want to keep setting the options and criteria every time you run it, you can save it as a new report.
- You may want to add a report or report link dashpart. You cannot add standard reports as report or report link dashparts.

- You may want to share a modified report with others.

Modifying and Saving Report Options

Click  in the Report grid Options column to display the Report Options dialog box which allows you to perform tasks such as:

- Edit the report name
- Select the columns that display on the report
- Adjust the page settings such as margins and orientation
- Set default number, currency, and date formats

When you modify standard report options, you can save them for future use. If you save them to the Personal Options folder, only you as the report owner can use them. If you save them to the Global Options folder, all users with access to that report can use them.

Note:

- The Report Options dialog box is not available for all reports and the available tabs and options vary depending on the type of report selected.
- For information and steps about modifying, saving, and sharing standard reports, see **Reports » Report Procedures » Modify Standard Reports** in the PM Compass Help System.

Filtering the Data

Click  in the Report grid Selection column to display the Search dialog box that you can use to define the filter. Report criteria define the filter that the system should use when creating the report. You can specify either specific records (values) or criteria.

Using Specific Records

When you select a result from the Search Results grid, you are specifying that you only want to report on that record or value.

For example, you want to see all of the assignment history records for a specific user. You do not remember the name but you know that they have change management assignments. You complete the following steps:

1. Using the Standard search, select the following search criteria:
   - **Project — <Blank>**
   - **Search By — Workflow Category**
   - **Search Text — Change Management**
2. Click **Search**.
3. In the Search Results grid, select the user.
4. Click **Apply**.

When you run the report, you see all assignments (not just change management) for the one selected user. If you want to see all assignments for a different user, you have to edit the search and select a different record.

Using Search Criteria

Instead of selecting specific records, you can build the criteria (**SQL Where** statement) to gather the data from the database.

For example, to see all change management assignment history records, you complete the following steps:

1. Using the Standard search, select the following search criteria:
   - Project — <Blank>
   - Search By — Workflow Category
   - Search Text — Change Management
2. Click **Search**.
3. Click **Apply**.

Not selecting specific users in the Search Results grid indicates a selection criterion instead of specific records.

You can verify your selection criteria by selecting **SQL Where Clause** in the **Display Type** field. The selection criteria displays in the **Where Clause** text box.

When you save the search criteria, every time you run the saved search, the data is acquired using your selection criteria. If you add additional records and run the report again using this same search, you will see the newly added records in the report if they meet the criteria.

Sharing New Reports

By default, a new report saves as a personal report. No other user can view this report (even as a report dashpart) unless you use Access Control to grant other users access.

> **Attention:** For steps relating to sharing reports, see "Share a Modified Report with Other Users" (**Reports » Report Procedures » Modify Standard Reports**) in the PM Compass Help System.

Creating Custom Reports

The standard reports are designed to meet most of your business needs. In addition, you can use Microsoft SQL Server® Reporting Services (SSRS) and its report writing tools to create PM Compass custom reports.

The following are the report writing tools that are supported for creating PM Compass custom reports:

- SQL Server Data Tools - Business Intelligence for Visual Studio 2013 Report Designer (known as SSDT-BI 2013 Report Designer)
- Report Builder 3.0

Warning:

- The SSDT-BI version is different from the standard SSDT version. The standard SSDT version does not include the BI templates and is not supported.
- You cannot use Report Builder to create a custom report from a PM Compass standard report. Although a previously run standard report may open in Report Builder, if you edit it and try to load it into PM Compass, the report may fail.

Attention: For more information about using and creating custom reports, see the *PM Compass Custom Reports and MSQL Server Reporting Services Guide*.

Archiving Reports

Archived Reports are a snapshot summary of the data at the time the report was archived. This is useful to allow you to quickly regenerate the report without going back to the original data. It is also very useful to allow you to take a snapshot of the month-end data and review this information at any time during the week.

The month end snapshot is useful when analyzing variances because you know that when the archive was created, all of the actual costs and earned value for the month had already been calculated. Gathering data from the live project at any time could provide false data if, for example, the earned value had been calculated but actual costs were not loaded.

Attention: For more information, see **Reports » Archived Reports** in the PM Compass Help System.

Report Administration

Use PM Compass Report Administration to:

- Load reports onto the report server.
- View the list of available printers for reports.
- View the status of each report server and report activity.
- View the report log data.
- Delete workflows that have been running too long or that have stopped processing because of an error.
- Display report log data if report logging is enabled.

To access Report Administration in PM Compass, click **Administration » Report Administration**.

Generating a Report

Use this procedure to generate a report.

To run/preview a report from the PM Compass Reports view:

1. In PM Compass, on the Navigation menu, click **Reports » <Report Category>**.

2. In the Reports grid, select the report that you want to run.
3. (Optional) Click  in the Options column to display the Report Options dialog box where you can customize your report options.

   Click the dialog box **Help** button to see descriptions of the available fields. The Report Options dialog box is not available for all reports.
4. (Optional) Click  in the Selection column to specify the record selection criteria for the report.

   Click the dialog box **Help** button to see descriptions of the available fields. The Search dialog box is not available for all reports.
5. Click **Preview** on the Reporting toolbar to generate the report.

> **Note:** If you do not define any report options prior to generating the report, PM Compass displays the Report Options dialog box where you can edit the options or click **Run** without making any changes.

Cost Analysis Reports

Use Cost Analysis reports to view control account, work package, and resource variances. You can also identify the variances that exceed the established threshold criteria.

- You can use aggregation analysis reports such as the Cost/Schedule Variance report, the Price/Usage Variance report, and the Control Account Analysis bubble chart to view project cost details.
- Use the two variance reports to view current period and cumulative to date variance information at the control account, work package, and/or resource levels where the amounts are expressed in hours, direct, total dollars, and percentages.
- You can use the Control Account Analysis bubble chart to view cumulative to date variance data.

Master Projects

If you select a master project in Project Search (<Report> Search dialog box), when the report runs, data for all subprojects related to the selected master project displays on the report.

The cost sets that are used (displayed on the Table Columns tab of the Options dialog box) are from the master project. You do not need to define the cost sets in each subproject. When you run the report, only the classes in the master project for the cost sets you have selected will be retrieved from each subproject. For example, if you select a cost set on the Table Columns tab that includes a budget class, when you run the report, it only retrieves the budget class data from each subproject.

Reports using master projects use the master calendar.

To display the data by project, group by **Project** on the Sorting/Grouping tab.

Cost Analysis Report Categories

The Cost Analysis reports category contains the following reports:

Report	Description
Control Account Analysis	Use this report to view cumulative to date variance data. You can view the account, package and resource variances and identify those that exceed established threshold criteria.
Control Account CPI vs. SPI Gauge	Use this report to view the difference in a control account's CPI and SPI in a graphical manner, with the option of rolling up the values to the project level or for CAs belonging to a CAM.
Control Account Plan (CAP)	The CAP report is a combination of the Control Account (CA) and Work Package (WP) columns, with time phased resources below each CA and WP record.
Cost and Schedule Performance Index (CPI-SPI)	Use this report to analyze how cost (CPI) and schedule (SPI) change over time.

Report	Description
Cost and Schedule Variance (CV-SV)	Use this report to analyze the selected criteria's schedule and cost variance.
Cost and Schedule Variance Percent (CV%-SV%)	Use this report to analyze the selected criteria's schedule and cost variance.
Cost vs Schedule Performance Index (CPI vs SPI)	Use this report to determine whether cost versus schedule is improving over time.
Data Mining (Detail and Summary Reports)	Data Mining is helpful to quickly find errors in large data sets. The majority of the rules are looking for poor project management processes such as negative earned value in the current period, or earned value increased with no actual costs, or TCIP greater than CPI. It helps project managers and executives analyze how they are performing and where to improve in their area of business. As a project manager, you can use Data Mining to analyze performance and suggest areas for improvement.
EAC Analysis	Use this report to determine the feasibility of your Estimate at Completion (EAC).
Curve	Use this report to view detailed analysis of how data is spread by cost set within the control accounts and work packages.
Earned Value Histogram	Use this report to analyze data by periods. You can select the criteria that indicates how to subtotal the data and generate a different graph for each subtotal.
Portfolio	Use this report to analyze the total or at complete values by cost set and/or result. You can use the Options dialog box to select the cost sets and results that display in the columns. The report is also useful when analyzing custom cost sets.
Price and Usage Analysis	Use this report to view the current period and cumulative to date variance at the control account, work package and / or resource level. Variance amounts are expressed in hours, direct and total dollars, as well as percentages of same.
Responsibility Assignment Matrix	This report displays costs at the intersection of two code fields, usually the Work Breakdown Structure (WBS) and the Organization Breakdown Structure (OBS). Other code fields may be used, depending on how the project is set up.

Report	Description
Schedule Traceability Dates	Use this report to compare dates between the cost and schedule systems with schedule dates that fall outside the cost dates.
Schedule Traceability Progress	Use this report to compare progress data between the cost and schedule systems with progress data that falls outside the cost progress data.
Schedule Traceability Resources	Use this report to compare the Budget Baseline from Open Plan with the Budgeted Cost of Work Scheduled (BCWS) in Cobra.
Time Phased	Use this report for detailed analysis of how data is spread within the control accounts and work packages and for reporting on hours and direct costs when you want to see the total hours and other selected results for each criteria selected.
Variance Analysis	Use this report to view current period and cumulative-to-date variance at the control account, work package, and/or resource level.

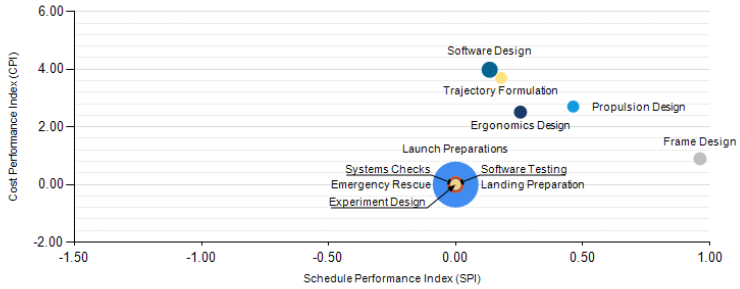
Control Account Analysis

Use this report to view cumulative to date variance data. You can view the account, package and resource variances and identify those that exceed established threshold criteria. You can customize the Control Account Analysis Bubble charts using the Graph Tab of the Control Account Analysis Options dialog box. This report supports master projects. When a master project is selected, the report uses the master calendar.

Example

Project: Inter-Planet Shuttle - Inter-Planet Space Shuttle

Status Date: 12/31/2015



Control Account	Status	Budget	Actuals	Earned	CV	SV	CPI	SPI	BAC	EAC	VAC
1.1.1.1 / 1400 Frame Design	In-Progress	78,862.06	84,686.52	75,862.06	(8,824.46)	(3,000.00)	.90	.96	78,862.06	84,686.52	(5,824.46)
1.1.1.2 / 1420 Propulsion Design	In-Progress	274,960.64	46,989.63	127,232.06	80,242.43	(147,728.58)	2.71	.46	274,960.64	55,729.11	219,231.53
1.1.2.1 / 1600 Ergonomics Design	In-Progress	57,855.19	5,869.59	14,757.20	8,887.61	(43,097.99)	2.51	.26	57,855.19	74,158.85	(16,303.66)
1.1.2.2 / 1600 Experiment Design	Planned	5,761.69				(5,761.69)			5,761.69	6,299.32	(537.63)
1.2.1.1 / 1332 Landing Preparation	Planned	187,793.90				(187,793.90)			187,793.90	222,248.63	(34,454.73)
1.2.1.2 / 1331 Trajectory Formulation	In-Progress	73,728.92	3,568.98	13,202.40	9,633.43	(60,526.52)	3.70	.18	73,728.92	63,808.36	9,920.56
1.2.3 / 1000 Emergency Rescue	Planned	223,429.85				(223,429.85)			223,429.85	223,429.85	
1.3.1 / 1220 Software Design	In-Progress	211,859.61	7,119.60	28,375.50	21,255.90	(183,484.11)	3.99	.13	211,859.61	212,883.74	(1,024.13)
1.3.2 / 1220 Software Testing	Planned	35,302.40				(35,302.40)			35,302.40	35,302.40	
1.4 / 1500 Systems Checks	Planned	45,339.90				(45,339.90)			45,339.90	45,339.90	
1.6 / 1000 Launch Preparations	Planned	1,307,734.85				(1,307,734.85)			1,307,734.85	1,307,734.85	

Report Options

Unit: Total

Type: CPI vs. SPI

Bubble Size: EAC

Control Account CPI and SPI

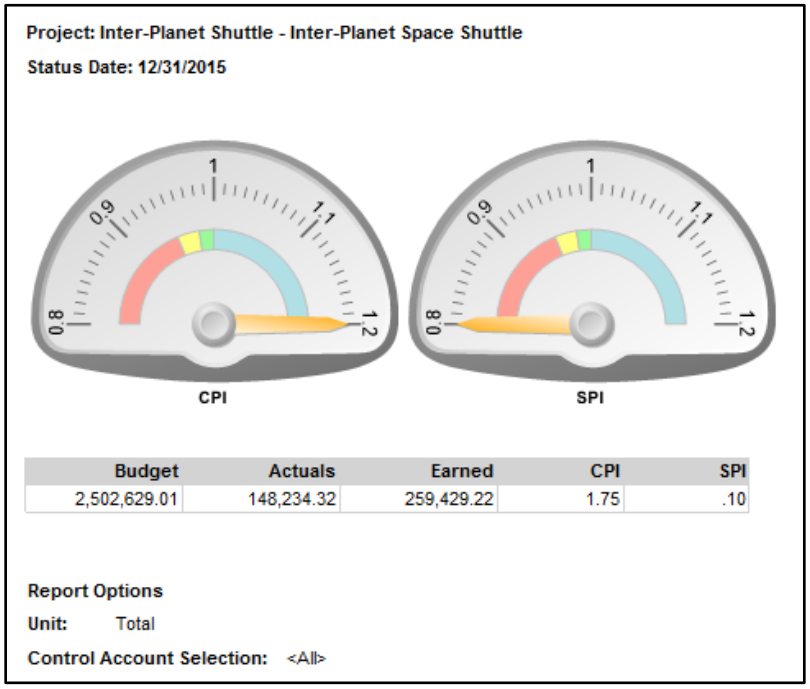
Use this report to view the difference in a control account's CPI and SPI in a graphical manner, with the option of rolling up the values to the project level or for CAs belonging to a CAM.

- **CPI** (Cost Performance Index) is the ratio of earned value to actual cost which is used to estimate the projected cost of completing the project. The formula is: Earned Value / Actual Cost.
- **SPI** (Schedule Performance Index) is the ratio of earned value to planned value which is used to estimate the projected time to complete the project. The formula is: Earned Value / Planned Value.

You can create a gauge report for individual control accounts or a list of several control accounts. You can also create a gauge report for aggregated control accounts belonging to a CAM or a project.

This report supports master projects. When a master project is selected, the report uses the master calendar.

Example



Control Account Plan (CAP)

The CAP report is a combination of the Control Account (CA) and Work Package (WP) columns, with time phased resources below each CA and WP record. The data is grouped by control account, work package, and resource. The resources are subtotaled at the Element of Cost level, therefore you need to make sure that you have element of cost correctly configured in PM Compass on the General tab of the Project Details view.

Filtering the Data

This report contains a large amount of data. If you are generating it for a large project, you should consider filtering the report by CAM or to specific control accounts to improve the performance.

Location of Elements of Cost

This report uses the Element of Cost as a subtotal when resources are selected. The **Location of Elements of Cost** setting for the project is in the Projects Detail view on the General tab. Use this setting to specify whether the Element of Cost is defined at a level of the resource file or a code on the resource.

> **Tip:** Using a code on the resource will improve the performance for generating this report.

Example

Project: Inter-Planet Shuttle - Inter-Planet Space Shuttle

Status Date: 12/31/2015

Control Account: 1.1.1.1 / 1400 Frame Design

Control Account Manager SAM

Baseline Start	6/1/2011	Actual Start	6/1/2011	Forecast Start	6/1/2011
Baseline Finish	10/13/2011	Actual Finish		Forecast Finish	10/13/2011
Location	Houston Texas				

	Period					Cumulative					At Complete			
	Budget	Earned Value	Actual Costs	SV	CV	Budget	Earned Value	Actual Costs	SV	CV	Budget at Complete	Forecast	Variance	ETC
Labor Hours						3,391	3,300	4,427	-91	-1,127	3,391	4,427	-1,036	
Labor						78,862	75,862	84,687	(3,000)	(8,824)	78,862	84,687	(5,824)	

Total Control Account	30/06/2011	31/07/2011	31/08/2011	30/09/2011	31/10/2011	Total
Hours						
Budget	1,277.77	1,332.52	290.33	254.77	235.83	3,391.21
Earned Value	151.18	1,463.92	577.85		1,107.05	3,300.00
Actual Costs	1,968.00	1,256.00	968.00		235.00	4,427.00
Est. At Complete	1,968.00	1,256.00	968.00		235.00	4,427.00
SV	-1,126.59	131.40	287.52	-254.77	871.22	-91.21
CV	-1,816.82	207.92	-390.15		872.05	-1,127.00
Total Cost						
Budget	30,047.20	29,669.40	6,727.61	6,045.61	6,372.24	78,862.06
Earned Value	2,670.04	29,535.23	12,335.70		31,321.09	75,862.06
Actual Costs	37,069.66	24,984.30	17,792.98		4,839.58	84,686.52
Est. At Complete	37,069.66	24,984.30	17,792.98		4,839.58	84,686.52
SV	(27,377.16)	(134.17)	5,608.09	(6,045.61)	24,948.85	(3,000.00)
CV	(34,399.62)	4,550.93	(5,457.28)		26,481.51	(8,824.46)

⊟ Resources

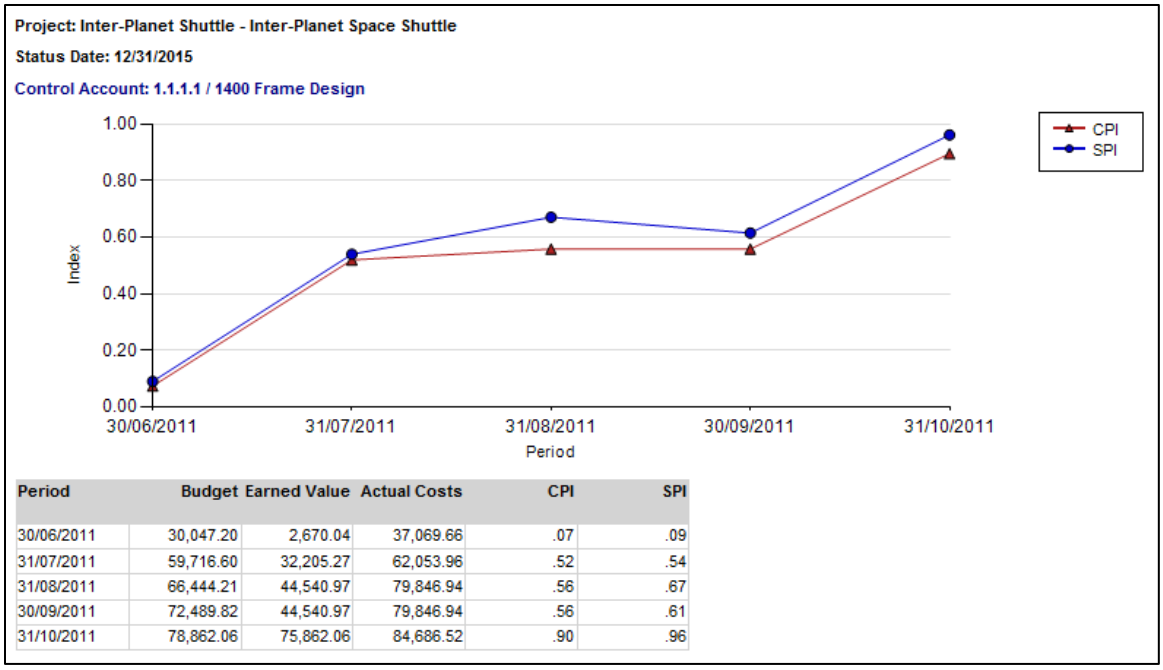
Element of Cost	30/06/2011	31/07/2011	31/08/2011	30/09/2011	31/10/2011	Total
Labor						
DRAFT Draftsmen						
Hours						
Budget	299.80	383.32	33.76	32.29	30.83	780.00
Earned Value	108.40	406.40	72.80		192.40	780.00
Actual Costs	390.00	240.00	70.00		235.00	935.00
Est. At Complete	390.00	240.00	70.00		235.00	935.00
SV	-191.40	23.08	39.04	-32.29	161.57	
CV	-281.60	166.40	2.80		-42.60	-155.00
Total Cost						
Budget	5,087.06	6,504.28	572.85	547.91	523.14	13,235.24
Earned Value	1,645.50	6,169.15	1,105.11		4,315.48	13,235.24
Actual Costs	5,288.40	3,254.40	949.20		4,839.58	14,331.58
Est. At Complete	5,288.40	3,254.40	949.20		4,839.58	14,331.58
SV	(3,441.56)	(335.13)	532.26	(547.91)	3,792.34	
CV	(3,642.90)	2,914.75	155.91		(524.10)	(1,096.34)

Cost and Schedule Performance Index

Use this report to analyze how cost (CPI) and schedule (SPI) change over time. The horizontal access displays the months, and the vertical access displays total cost. You can select the criteria that indicates how to subtotal the data and generate a different graph for each subtotal.

This report supports master projects. When a master project is selected, the report uses the master calendar.

Example

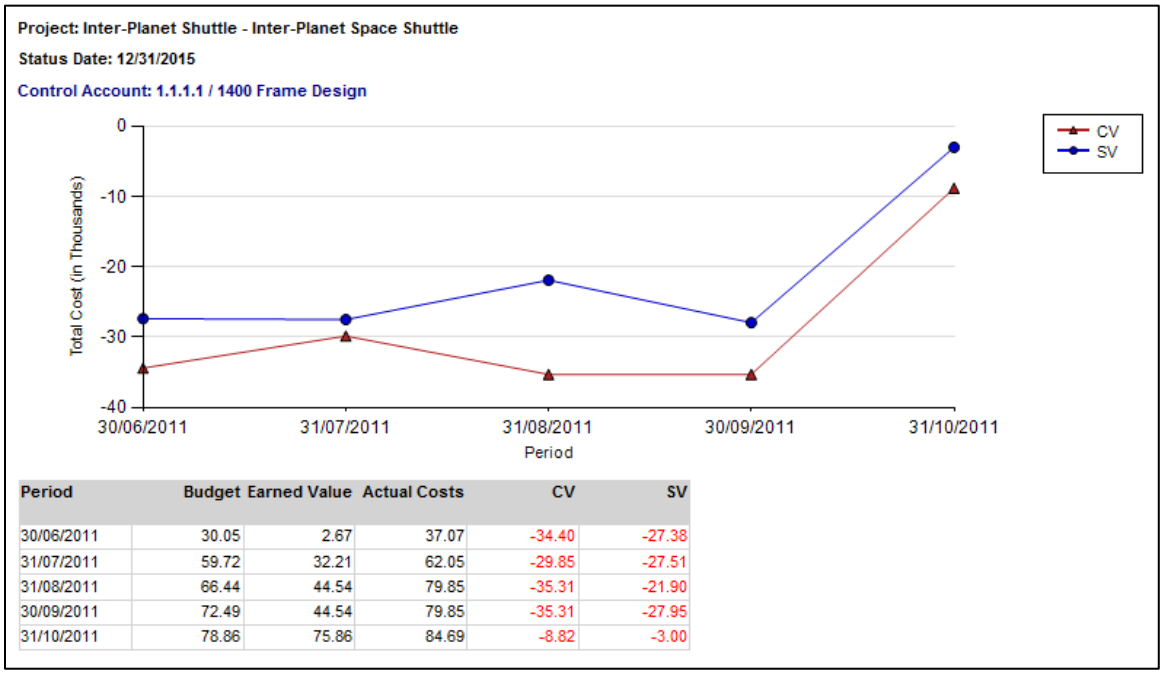


Period	Budget	Earned Value	Actual Costs	CPI	SPI
30/06/2011	30,047.20	2,670.04	37,069.66	.07	.09
31/07/2011	59,716.60	32,205.27	62,053.96	.52	.54
31/08/2011	66,444.21	44,540.97	79,846.94	.56	.67
30/09/2011	72,489.82	44,540.97	79,846.94	.56	.61
31/10/2011	78,862.06	75,862.06	84,686.52	.90	.96

Cost and Schedule Variance

Use this report to analyze the selected criteria's schedule and cost variance. You can depict the time phased schedule and cost variance graphically in a line chart. This report supports master projects. When a master project is selected, the report uses the master calendar.

Example



Period	Budget	Earned Value	Actual Costs	CV	SV
30/06/2011	30.05	2.67	37.07	-34.40	-27.38
31/07/2011	59.72	32.21	62.05	-29.85	-27.51
31/08/2011	66.44	44.54	79.85	-35.31	-21.90
30/09/2011	72.49	44.54	79.85	-35.31	-27.95
31/10/2011	78.86	75.86	84.69	-8.82	-3.00

Cost and Schedule Variance Percent

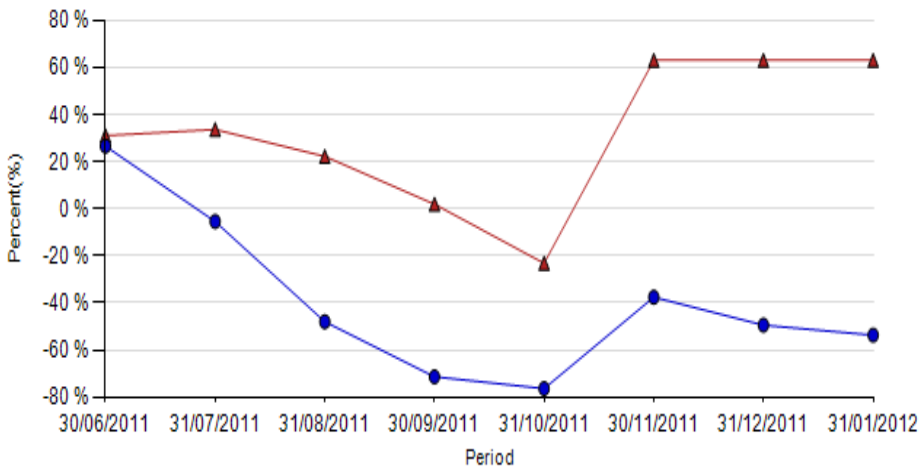
Use this report to analyze the selected criteria's schedule and cost variance. You can depict the time phased schedule and cost variance graphically in a line chart. This report supports master projects. When a master project is selected, the report uses the master calendar.

Example

Project: Inter-Planet Shuttle - Inter-Planet Space Shuttle

Status Date: 12/31/2015

Control Account: 1.1.1.2 / 1420 Propulsion Design



Period	Budget	Earned Value	Actual Costs	CV	SV	CV %	SV %
30/06/2011	17,730.09	22,444.29	15,469.70	6,974.59	4,714.20	31.08 %	26.59 %
31/07/2011	31,191.79	29,499.19	19,564.84	9,934.35	-1,692.60	33.68 %	-5.43 %
31/08/2011	60,184.08	31,273.38	24,313.10	6,960.28	-28,910.70	22.26 %	-48.04 %
30/09/2011	109,471.76	31,273.38	30,667.83	605.55	-78,198.38	1.94 %	-71.43 %
31/10/2011	155,974.78	36,746.46	45,257.46	-8,511.01	-119,228.32	-23.16 %	-76.44 %
30/11/2011	203,864.44	127,232.06	46,989.63	80,242.43	-76,632.38	63.07 %	-37.59 %
31/12/2011	251,754.11	127,232.06	46,989.63	80,242.43	-124,522.05	63.07 %	-49.46 %
31/01/2012	274,960.64	127,232.06	46,989.63	80,242.43	-147,728.58	63.07 %	-53.73 %

Cost vs. Schedule Performance Index

Use this report to determine whether cost versus schedule is improving over time. The vertical axis represents cost (CPI) and the horizontal axis represents schedule (SPI).

If all of the points are in a horizontal line along the center of the graph (in the example below, horizontally between 1 and 2), then everything is tracking well. If points are above or below the horizontal line, their trend should be that they are moving toward the centerline.

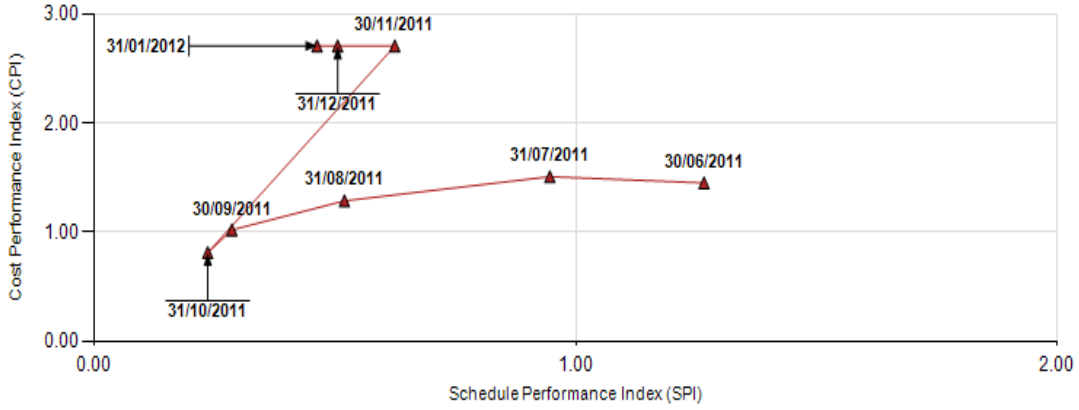
This report supports master projects. When a master project is selected, the report uses the master calendar.

Example

Project: Inter-Planet Shuttle - Inter-Planet Space Shuttle

Status Date: 12/31/2015

Control Account: 1.1.1.2 / 1420 Propulsion Design

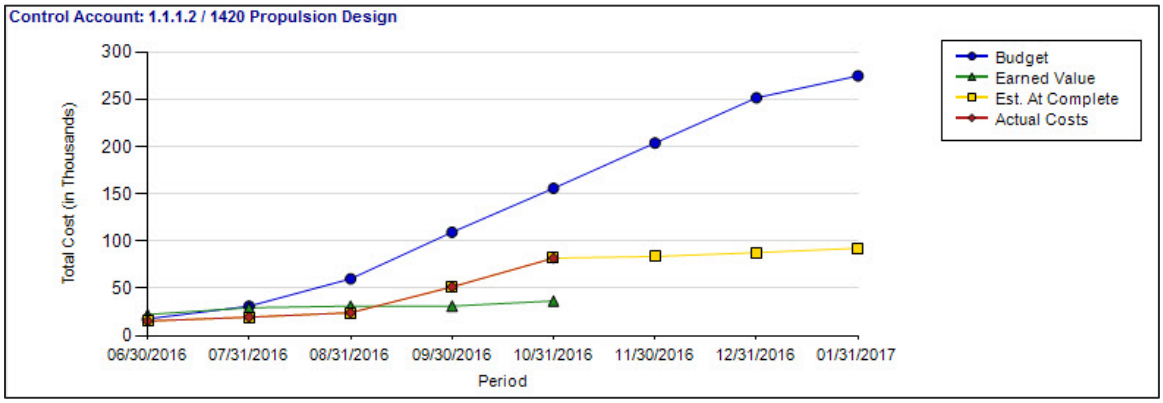


Period	Budget	Earned Value	Actual Costs	CPI	SPI
30/06/2011	17,730.09	22,444.29	15,469.70	1.45	1.27
31/07/2011	31,191.79	29,499.19	19,564.84	1.51	.95
31/08/2011	60,184.08	31,273.38	24,313.10	1.29	.52
30/09/2011	109,471.76	31,273.38	30,667.83	1.02	.29
31/10/2011	155,974.78	36,746.46	45,257.46	.81	.24
30/11/2011	203,864.44	127,232.06	46,989.63	2.71	.62
31/12/2011	251,754.11	127,232.06	46,989.63	2.71	.51
31/01/2012	274,960.64	127,232.06	46,989.63	2.71	.46

Curve

Use this report to view detailed analysis of how data is spread by cost set within the control accounts and work packages. The report also presents the time-phased data graphically in a line chart. This report supports master projects. When a master project is selected, the report uses the master calendar.

Example



Data Mining

Data Mining is helpful to quickly find errors in large data sets. The majority of the rules are looking for poor project management processes such as negative earned value in the current period, or earned value increased with no actual costs, or TCIP greater than CPI. It helps project managers and executives analyze how they are performing and where to improve in their area of business.

As a project manager, you can use Data Mining to analyze performance and suggest areas for improvement.

To produce a Data Mining report, you must first perform the following steps:

- On the PM Compass Navigation menu, click **Administration » Data Mining**. Select the rules and configure the parameters for the data conditions.
- Run Data Mining or schedule the Data Mining to occur on a regular basis. This process interrogates the database looking for any of the selected rules to be broken.

After the Data Mining process is complete, the following reports can be run to display the results:

- **Data Mining Summary**: This report displays each of the selected rules with a count of the rules that were broken. You can see the number of projects which contain the broken rules and the total occurrences. The hyperlink takes you to the Data Mining Detail report that shows the specific offending records.
- **Data Mining Detail**: This report displays each rule with the specific offending control account/work package or activity. The hyperlink in the report takes you to a Time Phased report to see the actual data.
- **Data Mining Schedule Detail**: This report displays activity information for the Data Mining rule: **An activity with no work package**. When this rule is triggered, the Data Mining Summary report automatically calls this report to display the activity information. The report can also be run on its own to display only those activities in the schedule project that triggered the rule. You can view the **Project**, **Project Description**, **Activity Id**, and **Activity Description** which allows you to determine if the activity should be linked to a work package.

  This report is located in **Reports » Schedule** and is not editable or configurable.

Data Mining Rules / Conditions

The following table includes a description of each data mining rule / condition.

Rule/Condition	Description
Task complete this period	This rule selects all tasks that have percent complete = 100% for the current reporting month but less than 100% for the last reporting month.
Cumulative actual costs exceed budget at complete (BAC)	This rule selects all control accounts or work packages where the cumulative ACWP is greater than the BAC.
Cumulative actual costs equal budget at complete (BAC)	This rule selects all control accounts or work packages where the cumulative ACWP is equal to the BAC.
Actual costs charged against completed [Control Account]	This rule is triggered for all records where BAC = cumulative BCWP and current period BCWP is zero and current period ACWP is nonzero.
Forecasted cost is zero for incomplete [Control Account]	This rule selects all control accounts that have remaining tasks to complete and zero ETC.
Cumulative actual costs exceed estimate at complete (EAC)	This rule selects all records where the cumulative ACWP exceeds the EAC value.
TCPIe is greater than CPI by more than [parameter]	This rule selects all control accounts and below where the cost performance required to complete the control account exceeds the cost performance achieved to date on the control account by an unacceptable margin.
Earned value has increased with no increase in actual costs	When selected together with a reporting month, this rule displays the control account where the cumulative BCWP from the previous month to current month has increased and the ACWP has not increased for the same period. The report displays all control accounts where work has taken place, but no corresponding cost has been recorded.
Actual costs have increased with no increase in earned value	Actual costs have been charged to this control account in the current period, but no corresponding earned value has been recorded.
Earned value present for current period with no actual cost for current period	When selected together with the reporting month, this rule selects all control accounts where the cumulative BCWP has incremented and ACWP has not. The report displays all control accounts where work has taken place, but no corresponding cost has been recorded.
SPI is less than [parameter]	When selected together with a percentage input value, this rule selects all control accounts and below with SPI is less than a certain percentage. The report displays any control accounts or below where schedule performance is unacceptably poor.

Rule/Condition	Description
Negative actual cost in current period	This rule selects all control accounts and below shows negative ACWP for the current period.
Negative earned value in current period	This rule selects all control accounts and below shows negative BCWP for the current period.
Planned value is negative for current period	This rule selects all control accounts and below shows negative BCWS for the current period.
CPI is less than [parameter]	When selected together with a percentage input value, this rule flags WBS where CPI is less than a certain percentage. The report displays any control accounts and below where the cost is unacceptably poor.
Earned value or actual costs exist for a planning package	This rule selects all work packages where BCWP is greater than 0 or ACWP is greater than 0. That is, work has started, or costs have been recorded for a planning package. Planning packages should be replanned into one or more work packages prior to the commencement of work.
Planning package inside the planning horizon of [parameter] months	Work under this planning package should now be broken out into one or more work packages.
Scheduled work package has not started	This rule selects all work packages that should have started, according to the baseline dates, but no progress has been recorded.
Percent Spent (EAC) is greater than percent complete by more than [parameter]	When selected together with percentage input, this rule selects control accounts with EAC greater than a [percentage] from Percent Complete.
Percent Spent (BAC) is greater than percent complete by more than [parameter]	When selected together with percentage input, this rule selects control accounts with BAC greater than a [percentage] from Percent Complete.
TCPIe is greater than [parameter]	This rule selects all control accounts and below where the cost performance that must be achieved on remaining work to stay within the forecast is unacceptably high. The EAC may need to be revised for this control account.
Planned value (baseline) has changed for a control account that has actual costs	This rule selects any control account and below with actual costs recorded against it where the baseline has been changed.
Planned value (baseline) has changed for a control account that has earned value	This rule selects any control account and below that has started where the baseline has been changed.

Rule/Condition	Description
Actual costs have been charged to a control account that has no earned value	This rule selects any control account below that has costs charged against it but has not yet started (no earned value recorded).
Current SV% greater than project SV% threshold	This rule selects any control account and below where the current period schedule variance is higher than acceptable.
Current CV% greater than project CV% threshold	This rule selects any control account and below where the current period cost variance is higher than acceptable.
Cumulative SV% greater than project SV% threshold	This rule selects any control account and below where the cumulative to date schedule variance is higher than acceptable.
Cumulative CV% greater than project CV% threshold	This rule selects any control account and below where the cumulative to date cost variance is higher than acceptable.
VAC% greater than project VAC% threshold	This rule selects any control account and below where the variance at complete is higher than acceptable.
Responsible department is blank or invalid	This rule identifies control accounts that do not have a valid Responsible Department assigned. The parameter is used to indicate the field where the code for the responsible department is located. Data mining checks for blank entries in the control accounts code defined in the parameter. If the entry is not blank, the validating code file is checked to ensure that the code is still in the code file. The valid parameters are: any of the three control account fields or a code on the control account.
Control account not in schedule	This rule selects any control account in Cobra that does not exist in the scheduling tool.
Discrete work packages with no activity	This rule checks for work packages without a corresponding activity. It supports the following parameters: ▪ **0**: Check for discrete work packages missing an activity. This would ignore the following EVTs: LOE, Planning Package, and both Apportioned techniques. ▪ **1**: Check for labor work packages missing an activity. This would exclude any work package budget hours equal to zero. This rule is skipped if there is no schedule linked to a project.
Work package with no activity	This rule checks for work packages without a corresponding activity in the schedule. It is skipped if there is no schedule linked to a project.

Rule/Condition	Description
An activity with no work package	This rule checks activities in the schedule that do not have a corresponding work package. It supports the following parameters: ▪ **0**: Check all activities ▪ **1**: Check only activities that have resource assignments This rule does not include: ▪ Projects when no schedule is linked to the project. ▪ Activities in the schedule that are of type subproject or external subproject.
Earned value is negative	This rule checks the cumulative to date earned value as displayed in the Earned column of the Cost Analysis View at the work package level.
Forecast not equal to actual costs for a completed work	For each project, this rule first determines the level for which costs are collected as defined in Project Information on the Files tab. The check is then performed at either the control account or work package level. Completed work is determined by the work package or control account status as displayed in the Cost Analysis view. If an actual finish date is added, the status is complete. The Forecast (calculated using the EAC cost set) is compared to the Actual costs.
Negative actual costs	This check is performed at both the work package and control account level by checking for a value less than 0 in the Cost Analysis view Actual field.
Material work package has a Schedule Variance (SV)	This rule checks work packages that do not contain Budgeted hours (BAC hours). A work package with no hours is considered a material work package. If no budget hours exist on the work package, the Schedule Variance (SV) is checked to make sure it is equal to 0. The formula used is SV <> Earned – Budget to Date.
Forecast (EAC) with no budget or actual costs	This check is performed at both levels where actual costs are collected. If the Forecast (based on the EAC cost set) is greater than zero, it then checks to confirm Budget (BAC) and Actual costs are greater than zero.
Control account with budget and no approved work authorization workflow	This rule is used to confirm that all work has been authorized by checking for a matching workflow in the work authorization category for all control accounts that have Budget (BAC) greater than zero.
Actual costs with no budget	This rule selects any control account or Work Package where BAC is zero and ACWP is greater than zero.

Note: The following rules take longer to process and you should only select them if the data mining processing is run as a server process using the **Schedule** button rather than the **Run** button:

- Control account not in schedule
- Discrete work packages with no activity
- Work package with no activity
- An activity with no work package

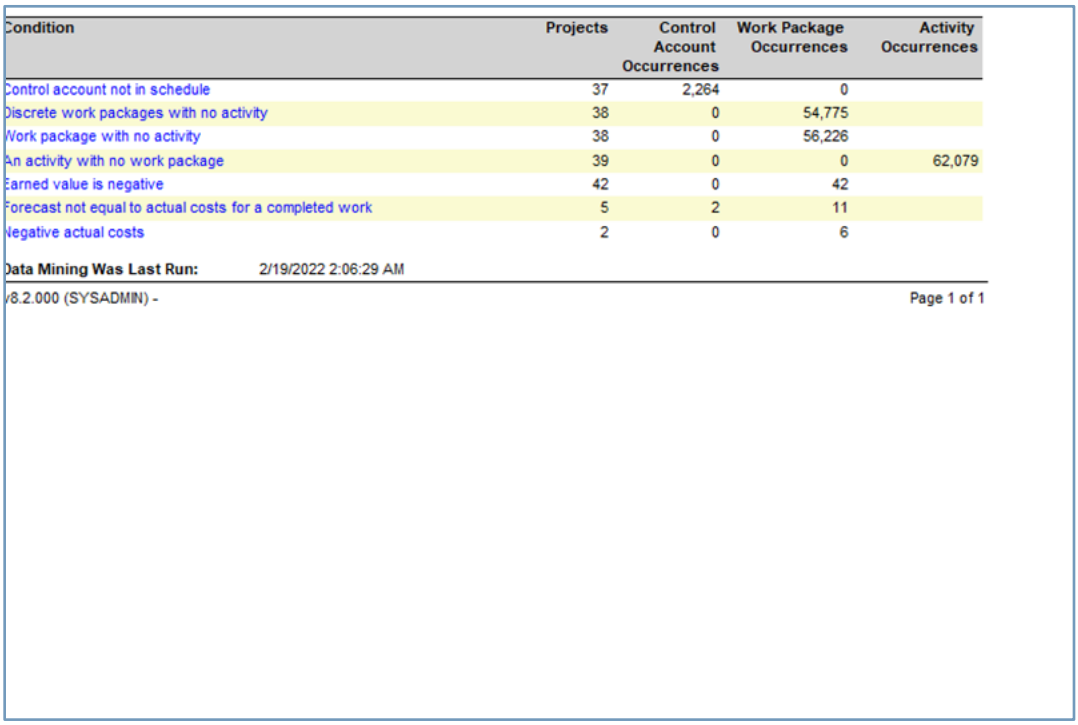
Data Mining Detail

Example

Project	Project Description	Control Account	Cumulative Actuals Hours	Cumulative Earned Hours	Cumulative Budget Hours	Current Actuals Hours	Current Earned Hours	Current Budget Hours	Estimate at Complete Hours	Budget at Complete Hours	CV Hours	SV Hours	CPI Hours	SPI Hours
Rule Description: Cumulative actual costs exceed budget at complete (BAC)														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.2 / 1420	2,080.00	1,775.67	1,775.67				2,337.75	1,775.67	-304.33		.85	1.00
Rule Description: Forecasted cost is zero for incomplete control account														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
Rule Description: TCPIe is greater than CPI by more than 1.00														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
Rule Description: SPI is less than 1.00														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.2.1 / 1600	261.00	585.80	1,216.17			481.91	2,449.90	2,072.00	324.80	-630.37	2.24	.48
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.2.2 / 1600			76.60			43.84	250.00	235.00		-76.60		
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.2.1.1 / 1332			1,219.07			1,048.86	7,498.00	6,544.00		-1,219.07		
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.2.1.2 / 1331	135.00	514.00	1,278.42			197.17	2,465.25	2,855.00	379.00	-764.42	3.81	.40
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.3.1 / 1220	305.00	1,065.12	2,097.61			722.78	7,714.15	7,796.00	760.12	-1,032.49	3.49	.51
Rule Description: Negative earned value in current period														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.2 / 1420	2,080.00	1,775.67	1,775.67				2,337.75	1,775.67	-304.33		.85	1.00
Rule Description: Planned value is negative for current period														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.2 / 1420	2,080.00	1,775.67	1,775.67				2,337.75	1,775.67	-304.33		.85	1.00
Rule Description: CPI is less than 1.00														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.2 / 1420	2,080.00	1,775.67	1,775.67				2,337.75	1,775.67	-304.33		.85	1.00
Rule Description: Percent spent EAC is greater than percent complete by more than 5														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
Rule Description: Percent spent BAC is greater than percent complete by more than 5														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.2 / 1420	2,080.00	1,775.67	1,775.67				2,337.75	1,775.67	-304.33		.85	1.00
Rule Description: TCPIe is greater than 1.05														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.2.1.2 / 1331	135.00	514.00	1,278.42			197.17	2,465.25	2,855.00	379.00	-764.42	3.81	.40
Rule Description: Planned value (baseline) has changed for a control account that has actual costs														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.2 / 1420	2,080.00	1,775.67	1,775.67				2,337.75	1,775.67	-304.33		.85	1.00
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.2.1 / 1600	261.00	585.80	1,216.17			481.91	2,449.90	2,072.00	324.80	-630.37	2.24	.48
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.2.1.2 / 1331	135.00	514.00	1,278.42			197.17	2,465.25	2,855.00	379.00	-764.42	3.81	.40
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.3.1 / 1220	305.00	1,065.12	2,097.61			722.78	7,714.15	7,796.00	760.12	-1,032.49	3.49	.51
Rule Description: Planned value (baseline) has changed for a control account that has earned value														
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.1 / 1400	4,427.00	3,300.00	2,973.48			44.81	4,427.00	3,491.21	-1,127.00	326.52	.75	1.11
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.1.2 / 1420	2,080.00	1,775.67	1,775.67				2,337.75	1,775.67	-304.33		.85	1.00
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.1.2.1 / 1600	261.00	585.80	1,216.17			481.91	2,449.90	2,072.00	324.80	-630.37	2.24	.48
IP Shuttle_FCR	Inter-Planet Space Shuttle	1.2.1.2 / 1331	135.00	514.00	1,278.42			197.17	2,465.25	2,855.00	379.00	-764.42	3.81	.40

Data Mining Summary

Example



Condition	Projects	Control Account Occurrences	Work Package Occurrences	Activity Occurrences
Control account not in schedule	37	2,264	0	
Discrete work packages with no activity	38	0	54,775	
Work package with no activity	38	0	56,226	
An activity with no work package	39	0	0	62,079
Earned value is negative	42	0	42	
Forecast not equal to actual costs for a completed work	5	2	11	
Negative actual costs	2	0	6	

Data Mining Was Last Run: 2/19/2022 2:06:29 AM

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Data Mining Schedule Detail

Example

Project	Project Description	Activity Id	Activity Description
Rule Description: An activity with no work package			
AWSUM	AWSUM	1.1.1	Project Start Milestone
AWSUM	AWSUM	1.1.2	Project Finish Milestone
AWSUM	AWSUM	1.2.1.16	Prototype Certification
AWSUM	AWSUM	1.2.1.7	Study approval milestone
AWSUM	AWSUM	1.3.1.18	Prototype Certification
AWSUM	AWSUM	1.3.1.8	Impact and Aging Study approval milestone
AWSUM	AWSUM	1.4.1.18	Prototype Certification
AWSUM	AWSUM	1.4.1.8	Impact and Aging Study approval milestone
AWSUM	AWSUM	1.5.1.18	Prototype Certification
AWSUM	AWSUM	1.5.1.8	Impact and Aging Study approval milestone
AWSUM	AWSUM	1.6.1.18	Prototype Certification
AWSUM	AWSUM	1.6.1.8	Impact and Aging Study approval milestone
AWSUM	AWSUM	1.7.1.18	Prototype Certification
AWSUM	AWSUM	1.7.1.8	Aging and Risk Study approval milestone
AWSUM	AWSUM	1.8.1.18	Prototype Certification
AWSUM	AWSUM	1.8.1.8	Aging and Risk Study approval milestone
AWSUM	AWSUM	2.1.1	Software Electronic Communication Protocol Definition Complete
AWSUM	AWSUM	2.1.18	Site Selected and Certified
AWSUM	AWSUM	2.1.24	Order Super Computer hardware
AWSUM	AWSUM	2.1.27	Super Computer Certified
AWSUM	AWSUM	2.1.28	Super Computer Site Certified
AWSUM	AWSUM	2.2.13	Development of software engines complete

EAC Analysis

This report helps you to determine the feasibility of your Estimate at Completion (EAC). You must have access rights to the Cost Analysis reports and the EAC Analysis report to see this report from the Reports section or be given access to a dashboard with this report as a dashpart. The data that the EAC Analysis report displays is based on a control account or work package that is selected from the Cost Analysis form. It also allows you to select multiple control accounts or work packages. This report uses the master calendar.

Example

Project: Inter-Planet Shuttle - Inter-Planet Space Shuttle

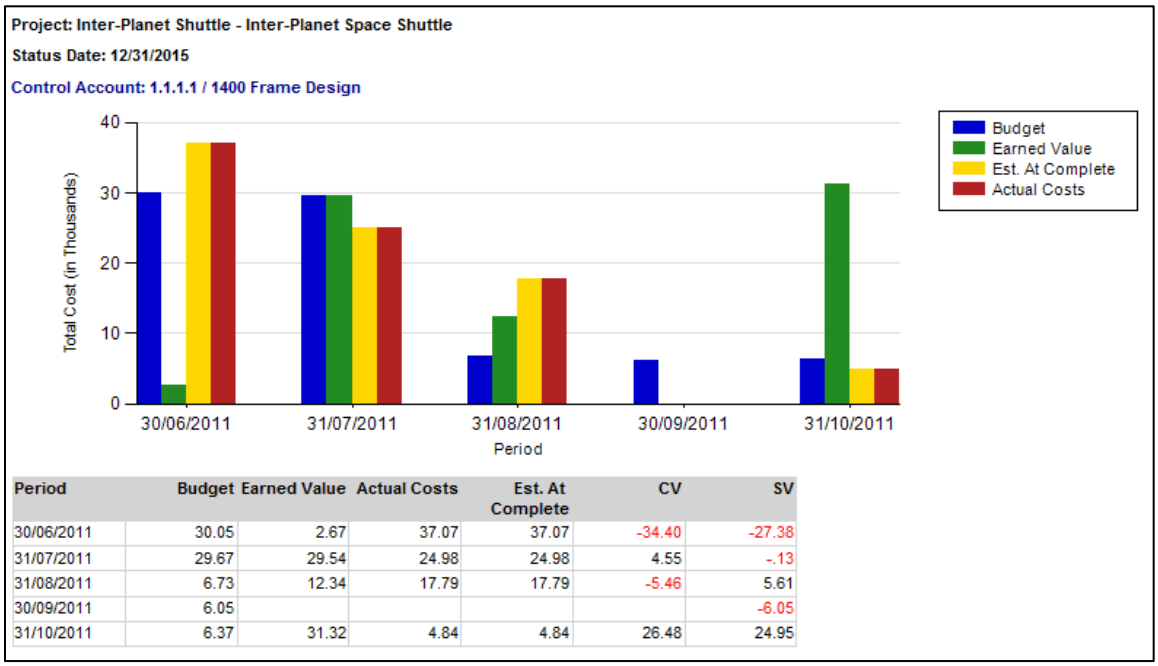
Status Date: 12/31/2015

	EAC	iEAC1 PF=1	iEAC2 1/CPI	iEAC3 1/CPI*SPI	iEAC4 1/(a*CPI+b*SPI)	BAC	VAC	SPI	CPI	TCPIe	TCPIb
Control Account: 1.1.1.1 / 1400 Frame Design											
Hours	4,427.00	4,427.00	5,938.89	6,103.04	5,596.99	3,391.21	-1,035.79	.97	.75		-.09
Currency	66,714.90	66,714.90	82,961.36	86,233.57	79,826.81	55,766.10	(10,948.80)	.96	.80		(.19)
Control Account: 1.1.1.2 / 1420 Propulsion Design											
Hours	2,337.75	2,337.75	1,111.99	2,315.25	1,314.89	9,104.50	6,766.75	.48	2.10	18.36	.67
Currency	39,794.38	39,794.38	14,869.41	32,129.95	17,816.54	194,419.32	154,624.95	.46	2.68	16.92	.65
Control Account: 1.1.2.1 / 1600 Ergonomics Design											
Hours	2,449.90	2,449.90	1,091.54	3,860.82	1,322.77	2,072.00	-377.90	.28	2.24	.68	.82
Currency	52,344.02	52,344.02	20,853.62	81,672.18	25,420.56	40,806.64	(11,537.38)	.26	2.51	.63	.83
Control Account: 1.1.2.2 / 1600 Experiment Design											
Hours	250.00	250.00				235.00	-15.00			.94	1.00
Currency	4,631.53	4,631.53				4,252.03	(379.50)			.92	1.00
Control Account: 1.2.1.1 / 1332 Landing Preparation											
Hours	7,498.00	7,498.00				6,544.00	-954.00			.87	1.00
Currency	156,950.65	156,950.65				132,632.84	(24,317.81)			.85	1.00
Control Account: 1.2.1.2 / 1331 Trajectory Formulation											
Hours	2,465.25	2,465.25	647.49	3,596.45	799.90	2,855.00	389.75	.18	3.81	1.00	.86
Currency	45,058.47	45,058.47	12,180.58	67,934.86	15,043.44	52,074.20	7,015.73	.18	3.70	1.00	.86
Control Account: 1.3.1 / 1220 Software Design											
Hours	7,714.15	7,714.15	2,208.97	16,168.24	2,734.46	7,796.00	81.85	.14	3.49	.91	.90
Currency	150,241.65	150,241.65	37,745.90	281,545.10	46,788.39	149,485.18	(756.47)	.13	3.98	.89	.90
Final Totals											
Hours	100,274.05	100,274.05	73,469.78	785,126.45	90,289.59	105,129.71	4,855.66	.09	1.36	1.02	.97
Currency	1,668,725.88	1,668,725.88	1,019,351.55	9,905,657.59	1,254,475.12	1,782,426.60	113,700.72	.10	1.64	1.03	.96

Earned Value Histogram

Use this report to analyze data by periods. You can select the criteria that indicate how to subtotal the data and generate a different graph for each subtotal. The bars represent the current period costs for the selected cost sets. This report supports master projects. When a master project is selected, the report uses the master calendar.

Example

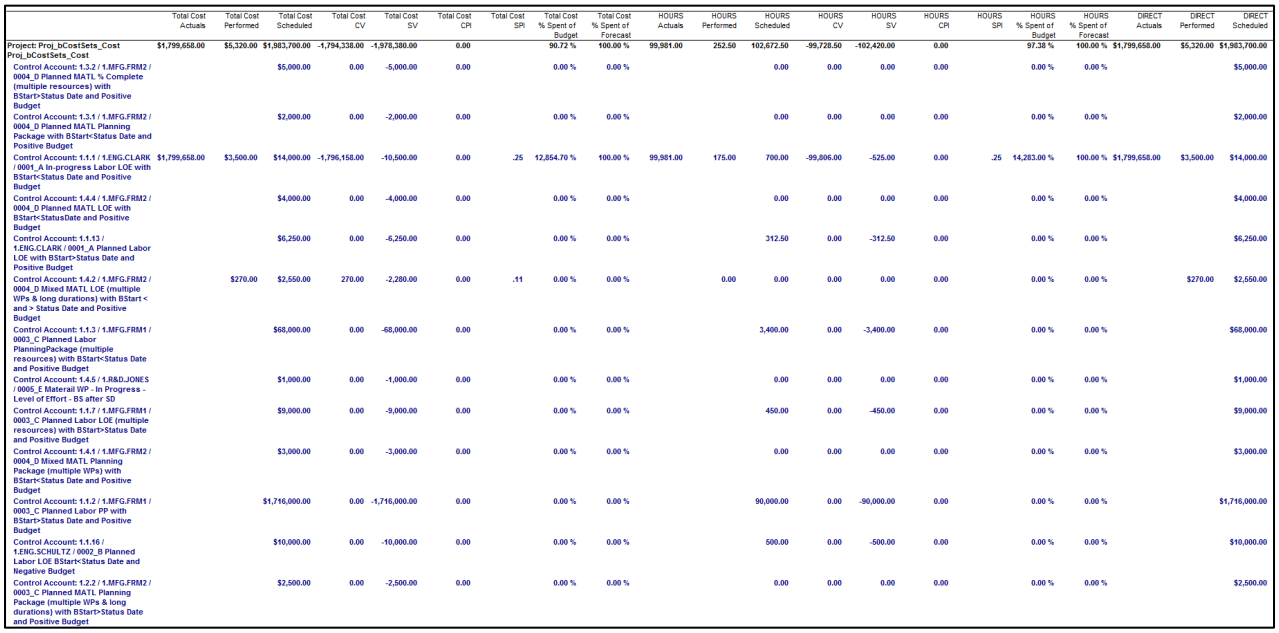


Period	Budget	Earned Value	Actual Costs	Est. At Complete	CV	SV
30/06/2011	30.05	2.67	37.07	37.07	-34.40	-27.38
31/07/2011	29.67	29.54	24.98	24.98	4.55	-.13
31/08/2011	6.73	12.34	17.79	17.79	-5.46	5.61
30/09/2011	6.05					-6.05
31/10/2011	6.37	31.32	4.84	4.84	26.48	24.95

Portfolio

Use this report to analyze the total or at complete values by cost set and/or result. You can use the Options dialog box to select the cost sets and results that display in the columns. The report is also useful when analyzing custom cost sets.

Example

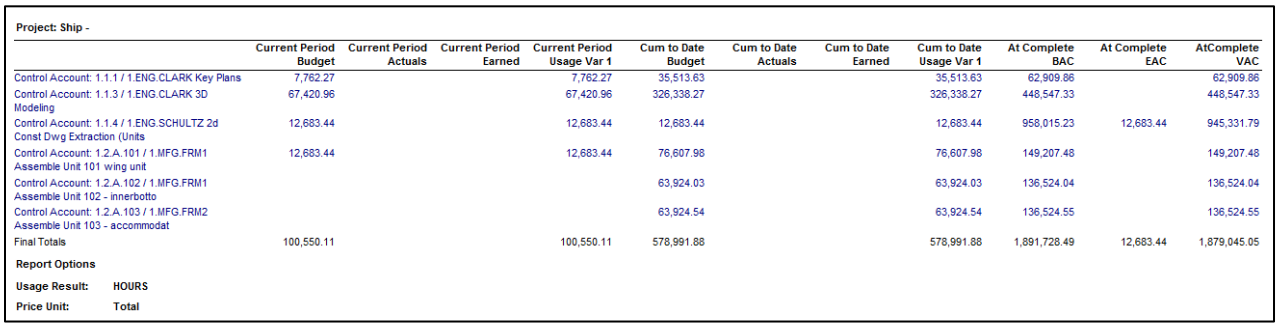


	Total Cost Actuals	Total Cost Performed	Total Cost Scheduled	Total Cost CV	Total Cost SV	Total Cost CPI	Total Cost SPI	Total Cost % Spent of Budget	Total Cost % Spent of Forecast	HOURS Actuals	HOURS Performed	HOURS Scheduled	HOURS CV	HOURS SV	HOURS CPI	HOURS SPI	HOURS % Spent of Budget	HOURS % Spent of Forecast	DIRECT Actuals	DIRECT Performed	DIRECT Scheduled
Project: Proj_bCostSets_Cost Proj_bCostSets_Cost	$1,799,658.00	$5,320.00	$1,983,700.00	-1,794,338.00	-1,978,380.00	0.00		90.72 %	100.00 %	99,981.00	252.50	102,672.50	-99,728.50	-102,420.00	0.00		97.38 %	100.00 %	$1,799,658.00	$5,320.00	$1,983,700.00
Control Account: 1.3.2 / 1.MFG.FRM2 / 0004_D Planned MATL % Complete (multiple resources) with BStart>Status Date and Positive Budget			$5,000.00	0.00	-5,000.00	0.00		0.00 %	0.00 %			0.00	0.00	0.00	0.00		0.00 %	0.00 %			$5,000.00
Control Account: 1.3.1 / 1.MFG.FRM2 / 0004_D Planned MATL Planning Package with BStart<Status Date and Positive Budget			$2,000.00	0.00	-2,000.00	0.00		0.00 %	0.00 %			0.00	0.00	0.00	0.00		0.00 %	0.00 %			$2,000.00
Control Account: 1.1.1 / 1.ENG.CLARK / 0001_A In-progress Labor LOE with BStart<Status Date and Positive Budget	$1,799,658.00	$3,500.00	$14,000.00	-1,796,158.00	-10,500.00	0.00	.25	12,854.70 %	100.00 %	99,981.00	175.00	700.00	-99,806.00	-525.00	0.00	.25	14,283.00 %	100.00 %	$1,799,658.00	$3,500.00	$14,000.00
Control Account: 1.4.4 / 1.MFG.FRM2 / 0004_D Planned MATL LOE with BStart<StatusDate and Positive Budget			$4,000.00	0.00	-4,000.00	0.00		0.00 %	0.00 %			0.00	0.00	0.00	0.00		0.00 %	0.00 %			$4,000.00
Control Account: 1.1.13 / 1.ENG.CLARK / 0001_A Planned Labor LOE with BStart>Status Date and Positive Budget			$6,250.00	0.00	-6,250.00	0.00		0.00 %	0.00 %			312.50	0.00	-312.50	0.00		0.00 %	0.00 %			$6,250.00
Control Account: 1.4.2 / 1.MFG.FRM2 / 0004_D Mixed MATL LOE (multiple WPs & long durations) with BStart < and > Status Date and Positive Budget		$270.00	$2,550.00	270.00	-2,280.00	0.00	.11	0.00 %	0.00 %		0.00	0.00	0.00	0.00	0.00		0.00 %	0.00 %		$270.00	$2,550.00
Control Account: 1.1.3 / 1.MFG.FRM1 / 0003_C Planned Labor PlanningPackage (multiple resources) with BStart<Status Date and Positive Budget			$68,000.00	0.00	-68,000.00	0.00		0.00 %	0.00 %			3,400.00	0.00	-3,400.00	0.00		0.00 %	0.00 %			$68,000.00
Control Account: 1.4.5 / 1.R&D.JONES / 0005_E Materail WP - In Progress - Level of Effort - BS after SD			$1,000.00	0.00	-1,000.00	0.00		0.00 %	0.00 %			0.00	0.00	0.00	0.00		0.00 %	0.00 %			$1,000.00
Control Account: 1.1.7 / 1.MFG.FRM1 / 0003_C Planned Labor LOE (multiple resources) with BStart>Status Date and Positive Budget			$9,000.00	0.00	-9,000.00	0.00		0.00 %	0.00 %			450.00	0.00	-450.00	0.00		0.00 %	0.00 %			$9,000.00
Control Account: 1.4.1 / 1.MFG.FRM2 / 0004_D Mixed MATL Planning Package (multiple WPs) with BStart<Status Date and Positive Budget			$3,000.00	0.00	-3,000.00	0.00		0.00 %	0.00 %			0.00	0.00	0.00	0.00		0.00 %	0.00 %			$3,000.00
Control Account: 1.1.2 / 1.MFG.FRM1 / 0003_C Planned Labor PP with BStart>Status Date and Positive Budget			$1,716,000.00	0.00	-1,716,000.00	0.00		0.00 %	0.00 %			90,000.00	0.00	-90,000.00	0.00		0.00 %	0.00 %			$1,716,000.00
Control Account: 1.1.16 / 1.ENG.SCHULTZ / 0002_B Planned Labor LOE BStart<Status Date and Negative Budget			$10,000.00	0.00	-10,000.00	0.00		0.00 %	0.00 %			500.00	0.00	-500.00	0.00		0.00 %	0.00 %			$10,000.00
Control Account: 1.2.2 / 1.MFG.FRM2 / 0003_C Planned MATL Planning Package (multiple WPs & long durations) with BStart>Status Date and Positive Budget			$2,500.00	0.00	-2,500.00	0.00		0.00 %	0.00 %			0.00	0.00	0.00	0.00		0.00 %	0.00 %			$2,500.00

Price and Usage Analysis

Use this report to view the current period and cumulative to date variance at the control account, work package and / or resource level. Variance amounts are expressed in hours, direct and total dollars, as well as percentages of same. This report supports master projects. When a master project is selected, the report uses the master calendar.

Example



Project: Ship -

	Current Period Budget	Current Period Actuals	Current Period Earned	Current Period Usage Var 1	Cum to Date Budget	Cum to Date Actuals	Cum to Date Earned	Cum to Date Usage Var 1	At Complete BAC	At Complete EAC	AtComplete VAC
Control Account: 1.1.1 / 1.ENG.CLARK Key Plans	7,762.27			7,762.27	35,513.63			35,513.63	62,909.86		62,909.86
Control Account: 1.1.3 / 1.ENG.CLARK 3D Modeling	67,420.96			67,420.96	326,338.27			326,338.27	448,547.33		448,547.33
Control Account: 1.1.4 / 1.ENG.SCHULTZ 2d Const Dwg Extraction (Units	12,683.44			12,683.44	12,683.44			12,683.44	958,015.23	12,683.44	945,331.79
Control Account: 1.2.A.101 / 1.MFG.FRM1 Assemble Unit 101 wing unit	12,683.44			12,683.44	76,607.98			76,607.98	149,207.48		149,207.48
Control Account: 1.2.A.102 / 1.MFG.FRM1 Assemble Unit 102 - innerbotto					63,924.03			63,924.03	136,524.04		136,524.04
Control Account: 1.2.A.103 / 1.MFG.FRM2 Assemble Unit 103 - accommodat					63,924.54			63,924.54	136,524.55		136,524.55
Final Totals	100,550.11			100,550.11	578,991.88			578,991.88	1,891,728.49	12,683.44	1,879,045.05

Report Options

Usage Result: HOURS

Price Unit: Total

Responsibility Assignment Matrix

This report displays costs at the intersection of two code fields, usually the Work Breakdown Structure (WBS) and the Organization Breakdown Structure (OBS). Other code fields may be used, depending on how the project is set up.

Example

Project: Inter-Planet Shuttle - Inter-Planet Space Shuttle

Status Date: 12/31/2015

WBS	OBS	1400 Structural Design Group	1600 Ergonomics Group	1331 Trajectory Engineering	Total
1.1.1.1 Structural					
Budget		55,766.10			**55,766.10**
Est. At Complete		66,714.90			**66,714.90**
Actual Costs		66,714.90			**66,714.90**
Earned Value		53,650.01			**53,650.01**
1.1.2.1 Ergonomics					
Budget			40,806.64		**40,806.64**
Est. At Complete			52,344.02		**52,344.02**
Actual Costs			4,151.00		**4,151.00**
Earned Value			10,419.29		**10,419.29**
1.2.1.2 Navigation					
Budget				52,074.20	**52,074.20**
Est. At Complete				45,058.47	**45,058.47**
Actual Costs				2,524.00	**2,524.00**
Earned Value				9,336.80	**9,336.80**
Total					
Budget		**55,766.10**	**40,806.64**	**52,074.20**	**148,646.94**
Est. At Complete		**66,714.90**	**52,344.02**	**45,058.47**	**164,117.39**
Actual Costs		**66,714.90**	**4,151.00**	**2,524.00**	**73,389.90**
Earned Value		**53,650.01**	**10,419.29**	**9,336.80**	**73,406.10**

Report Options

Row Group:	WBS
Column Group:	OBS
Unit:	Direct
Cost Sets:	Budget, Est. At Complete, Actual Costs, Earned Value

Schedule Traceability Dates

Use this report to verify cost and schedule alignment.

Conditions Under Which Dates are Highlighted

- **Baseline Start Date:** If the schedule Baseline Start date is less than the cost Baseline Start date.
- **Baseline Finish Date:** If the schedule Baseline Finish date is greater than the cost Baseline Finish date.
- **Forecast Start Date: I**f the schedule Forecast Start date is less than the cost Forecast Start date.
- **Forecast Finish Date:** If the schedule Forecast Finish date is greater than the cost Forecast Finish date.
- **Actual Start Date:** If the schedule Actual Start date is less than the cost Actual Start date.

- **Actual Finish Date:** If the schedule Actual Finish date is greater than the cost Actual Finish date.

Example

Project: Ship

Work Package	Activity ID	Baseline Start Date		Baseline Finish Date		Forecast Start Date		Forecast Finish Date		Actual Start Date		Actual Finish Date	
		Cobra	OPP	Cobra	OPP	Cobra	OPP	Cobra	OPP	Cobra	OPP	Cobra	OPP
Control Account: 1.1.1 / 1.ENG.CLARK Key Plans		**7/1/2014**	**7/1/2014**	**2/20/2015**	**2/9/2015**		**7/2/2014**	**2/9/2015**	**9/30/2014**	**8/12/2014**	**7/2/2014**		
1.1.1.1	1.1.1.1	7/1/2014	7/1/2014	11/14/2014	9/22/2014		7/2/2014	9/22/2014	8/12/2014	8/12/2014	7/2/2014		
1.1.1.3	1.1.1.3	12/29/2014	12/16/2014	2/20/2015	2/9/2015		9/3/2014	2/9/2015	9/30/2014	8/22/2014	11/7/2014		
Control Account: 1.1.3 / 1.ENG.CLARK 3D Modeling		**7/1/2014**	**7/1/2014**	**2/9/2015**	**2/9/2015**	**7/1/2014**	**7/1/2014**	**6/12/2015**	**3/6/2015**		**7/1/2014**		
1.1.1.2	1.1.1.2	9/23/2014	9/23/2014	12/25/2014	12/15/2014	1/19/2015	8/13/2014	6/12/2015	9/2/2014		8/15/2014		
1.1.3.1	1.1.3.1	7/1/2014	7/1/2014	12/15/2014	12/15/2014	7/1/2014	7/1/2014	12/15/2014	1/1/2015		7/1/2014		
1.1.3.2	1.1.3.2	7/1/2014	7/1/2014	2/9/2015	2/9/2015	8/25/2014	7/28/2014	3/12/2015	3/6/2015				
Control Account: 1.1.4 / 1.ENG.SCHULTZ 2d Const Dwg Extraction (Units		**7/28/2014**	**7/28/2014**	**3/9/2015**	**3/9/2015**	**7/28/2014**	**7/28/2014**	**4/3/2015**	**4/3/2015**		**1/2/2015**		
1.1.4.101	1.1.4.101	1/2/2015	1/2/2015	1/29/2015	1/29/2015	1/2/2015	1/2/2015	1/29/2015	1/23/2015		1/2/2015		
1.1.4.102	1.1.4.102	12/16/2014	12/16/2014	2/9/2015	2/9/2015	1/2/2015	1/2/2015	2/26/2015	2/26/2015				
1.1.4.103	1.1.4.103	2/10/2015	2/10/2015	3/9/2015	3/9/2015	3/9/2015	3/9/2015	4/3/2015	4/3/2015				
new	ACT001	7/28/2014	7/28/2014	10/25/2014	7/28/2014	7/28/2014	7/28/2014	7/28/2014	7/28/2014				

Schedule Traceability Progress

Use this report to compare progress data between the cost and schedule systems with progress data that falls outside the cost progress data. Differences in progress data are highlighted in red.

Conditions Under Which Progress is Highlighted

- If the Schedule Actual Start date is less than the Cost Actual Start date.
- If the Schedule Actual Start date is blank and the Cost Actual Start date is not blank.
- If the Schedule Actual Start date is not blank and the Cost Actual Start date is blank.

How % Complete is Highlighted

It is very difficult to compare the actual % complete due to the various EVTs and the difference in the calculation of Earned Value in the schedule. Differences in the % complete are highlighted only when one has value and the other does not.

For example:

- When one group level progress column is at 100% and the other is not, that progress pair is highlighted.
- When one group level progress column is at 0% and the other is not, that progress pair is highlighted.
- When the detail level schedule progress column is not 0% but the paired cost progress column is at 0%, that pair is highlighted.

Example

Project: Ship

		Actual Start Date		Actual Finish Date		% Complete		Earned Value Technique	
Work Package	Activity ID	Cobra	OPP	Cobra	OPP	Cobra	OPP	Cobra	OPP
Control Account: 1.1.1 / 1.ENG.CLARK Key Plans		8/12/2014	7/2/2014						
1.1.1.1	1.1.1.1	8/12/2014	7/2/2014			0.00 %	98.00 %	Level of Effort	Percent Complete
1.1.1.3	1.1.1.3	8/22/2014	11/7/2014			0.00 %	20.00 %	Level of Effort	Percent Complete
Control Account: 1.1.3 / 1.ENG.CLARK 3D Modeling			7/1/2014						
1.1.1.2	1.1.1.2		8/15/2014			0.00 %	80.00 %	Level of Effort	Percent Complete
1.1.3.1	1.1.3.1		7/1/2014			0.00 %	0.00 %	Level of Effort	Percent Complete
1.1.3.2	1.1.3.2					0.00 %	0.00 %	Level of Effort	Percent Complete
Control Account: 1.1.4 / 1.ENG.SCHULTZ 2d Const Dwg Extraction (Units			1/2/2015						
1.1.4.101	1.1.4.101		1/2/2015			0.00 %	20.00 %	User Defined	Percent Complete
1.1.4.102	1.1.4.102					0.00 %	0.00 %	Level of Effort	Percent Complete
1.1.4.103	1.1.4.103					0.00 %	0.00 %	User Defined	Percent Complete
new	ACT001					0.00 %	0.00 %	Level of Effort	Percent Complete

Schedule Traceability Resources

Use this report to compare the Budget Baseline from Open Plan with the Budgeted Cost of Work Scheduled (BCWS) in Cobra. The Open Plan budget baseline is saved using the default duration units in the Open Plan Project Properties dialog box. If you change the default duration units in Project Properties (or the conversion value that corresponds to the default units), you must resave the Open Plan budget baseline to update the resource usage values to reflect the change. The report lists all the cost and schedule resource totals and highlights in red the differences in totals.

Location of Elements of Cost

This report uses the Element of Cost as a subtotal when resources are selected. The **Location of Elements of Cost** setting for the project is in the Projects Detail view on the General tab. Use this setting to specify whether the Element of Cost is defined at a level of the resource file or a code on the resource.

Note: Using a code on the resource improves the performance for generating this report.

Example

Schedule Traceability Resources

Project: Leidos_2Key_test1

Activity ID	Baseline Resource Cobra	Baseline Resource OPP
Control Account: 1.1.1 / 1.ENG.CLARK Multiple WPs with single/multiple resources	2,897.55	2,397.55
WP: 1.1.1.4 WP w/single resource (EVT = %C) no link activity	500.00	
Resource: SHIP.MATERIAL.MATL MATL resource	500.00	
WP: 1.1.1.1 WP w/multiple resources (EVT = %C)	1,397.55	1,397.55
Resource: SHIP.LABOR.01 Painters	450.00	450.00
Leidos_2Key_Test1 / 1.1.1.1		450.00
Resource: SHIP.LABOR.83.8301 Hull Engineers	747.55	747.55
Leidos_2Key_Test1 / 1.1.1.1		747.55
Resource: SHIP.LABOR.94.9403 Hull Design Engineers	200.00	200.00
Leidos_2Key_Test1 / 1.1.1.1		200.00
WP: 1.1.1.2 WP w/multiple resources (EVT = Units Complete)	500.00	500.00
Resource: SHIP.LABOR.95.9508 Mechanical Design	400.00	400.00
Leidos_2Key_Test1 / 1.1.1.2		400.00
Resource: SHIP.LABOR.95.9512	100.00	100.00
Leidos_2Key_Test1 / 1.1.1.2		100.00
WP: 1.1.1.3 WP w/single resource (EVT = %C)	500.00	500.00
Resource: SHIP.LABOR.98	500.00	500.00
Leidos_2Key_Test1 / 1.1.1.3		500.00

Report Options

EOC: ALL

Time Phased

Use this report for detailed analysis of how data is spread within the control accounts and work packages and for reporting on hours and direct costs when you want to see the total hours and other selected results for each criteria selected. You can select criteria, results, and a number of cost sets. The totals for the results are repeated for each criterion. Each cost set appears in a row with its time phased data.

The report displays the control accounts coming from the sandbox project specific to the workflow. The sandbox includes the original cost set, which is determined by the selected cost set in the Cost Details on Form Tab of Workflow Type Configuration, as well as any change class data.

If you select **A New or Change Amount** on the Change Details on Form Tab of Workflow Type Configuration, then a new cost set is created in the sandbox project called **Total Change**. This cost set contains the classes in the original cost set plus the change class.

This report supports master projects. When a master project is selected, the report uses the master calendar.

Example

Project: Inter-Planet Shuttle - Inter-Planet Space Shuttle

Status Date: 12/31/2015

	31/08/2011	30/09/2011	31/10/2011	30/11/2011	31/12/2011	Total
Control Account: 1.1.1.1 / 1400 Frame Design						
Budget	66,444.21	6,045.61	6,372.24			78,862.06
Actual Costs	79,846.94		4,839.58			84,686.52
Earned Value	44,540.97		31,321.09			75,862.06
Control Account: 1.1.1.2 / 1420 Propulsion Design						
Budget	60,184.08	49,287.67	46,503.02	47,889.66	47,889.66	251,754.11
Actual Costs	24,313.10	6,354.73	14,589.63	1,732.17		46,989.63
Earned Value	31,273.38		5,473.08	90,485.60		127,232.06
Control Account: 1.1.2.1 / 1600 Ergonomics Design						
Budget			1,712.65	2,448.10	5,808.18	9,968.93
Actual Costs		2,014.98		3,854.61		5,869.59
Earned Value		2,851.95	7,298.61	4,606.64		14,757.20

Report Options

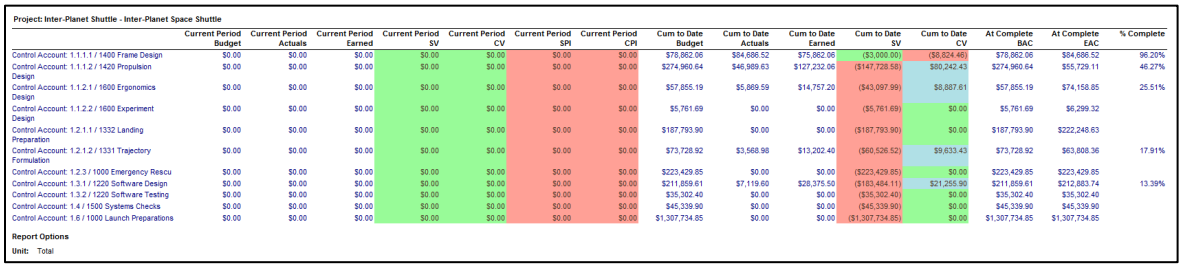
Criteria:	Control Account
Results:	Total Cost
Cost Sets:	Budget, Actual Costs, Earned Value
Calendar:	31/08/2011, 30/09/2011, 31/10/2011, 30/11/2011, 31/12/2011

Variance Analysis

Use this report to view current period and cumulative-to-date variance at the control account, work package, and/or resource level. The report uses color coding to indicate variance, and the variance amounts are expressed in hours, direct and total dollars, as well as percentages. This report uses the master calendar.

This report supports master projects. When a master project is selected, the report uses the master calendar.

Example



Project: Inter-Planet Shuttle - Inter-Planet Space Shuttle

	Current Period Budget	Current Period Actuals	Current Period Earned	Current Period SV	Current Period CV	Current Period SPI	Current Period CPI	Cum to Date Budget	Cum to Date Actuals	Cum to Date Earned	Cum to Date SV	Cum to Date CV	At Complete BAC	At Complete EAC	% Complete
Control Account: 1.1.1.1 / 1400 Frame Design	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$78,862.06	$84,686.52	$75,862.06	($3,000.00)	($8,824.46)	$78,862.06	$84,686.52	96.20%
Control Account: 1.1.1.2 / 1420 Propulsion Design	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$274,960.64	$46,969.63	$127,232.06	($147,728.58)	$80,242.43	$274,960.64	$55,729.11	46.27%
Control Account: 1.1.2.1 / 1600 Ergonomics Design	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$57,855.19	$5,869.59	$14,757.20	($43,097.99)	$8,887.61	$57,855.19	$74,158.85	25.51%
Control Account: 1.1.2.2 / 1600 Experiment Design	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$5,761.69	$0.00	$0.00	($5,761.69)	$0.00	$5,761.69	$6,299.32	
Control Account: 1.2.1.1 / 1332 Landing Preparation	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$187,793.90	$0.00	$0.00	($187,793.90)	$0.00	$187,793.90	$222,248.63	
Control Account: 1.2.1.2 / 1331 Trajectory Formulation	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$73,728.92	$3,568.98	$13,202.40	($60,526.52)	$9,633.43	$73,728.92	$63,808.36	17.91%
Control Account: 1.2.3 / 1000 Emergency Rescu	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$223,429.85	$0.00	$0.00	($223,429.85)	$0.00	$223,429.85	$223,429.85	
Control Account: 1.3.1 / 1220 Software Design	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$211,859.61	$7,119.60	$28,375.50	($183,484.11)	$21,255.90	$211,859.61	$212,883.74	13.39%
Control Account: 1.3.2 / 1220 Software Testing	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$35,302.40	$0.00	$0.00	($35,302.40)	$0.00	$35,302.40	$35,302.40	
Control Account: 1.4 / 1500 Systems Checks	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$45,339.90	$0.00	$0.00	($45,339.90)	$0.00	$45,339.90	$45,339.90	
Control Account: 1.6 / 1000 Launch Preparations	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,307,734.85	$0.00	$0.00	($1,307,734.85)	$0.00	$1,307,734.85	$1,307,734.85	

Report Options

Unit: Total

Workflow Reports

Use Workflow reports to view pertinent details that are necessary for you to evaluate all of the assigned workflows and even those that another user has created and assigned to others. The reports focus on data such as:

- The generic Workflow list report that supports column selection and can also be tailored to various workflow types.
- Highly formatted reports specific to certain workflow types (WAD, Explanation of Variance, Change Approval).
- The Workflow History report displays progress for specific workflows.

Each report is the default report for the specified workflow and is configured to print the selected workflow when you click **Print** on the Workflow menu. The default can be changed in the **Specific Report to Run** field in Workflow Type Configuration.

Note: The Workflow reports are designed to print a standard workflow type. If you add columns to the workflow type, the columns will not display on the report. If you choose a workflow of a type that contains different information than the standard report, the report will fail.

Workflow Report Categories

The Workflow reports category contains the following reports:

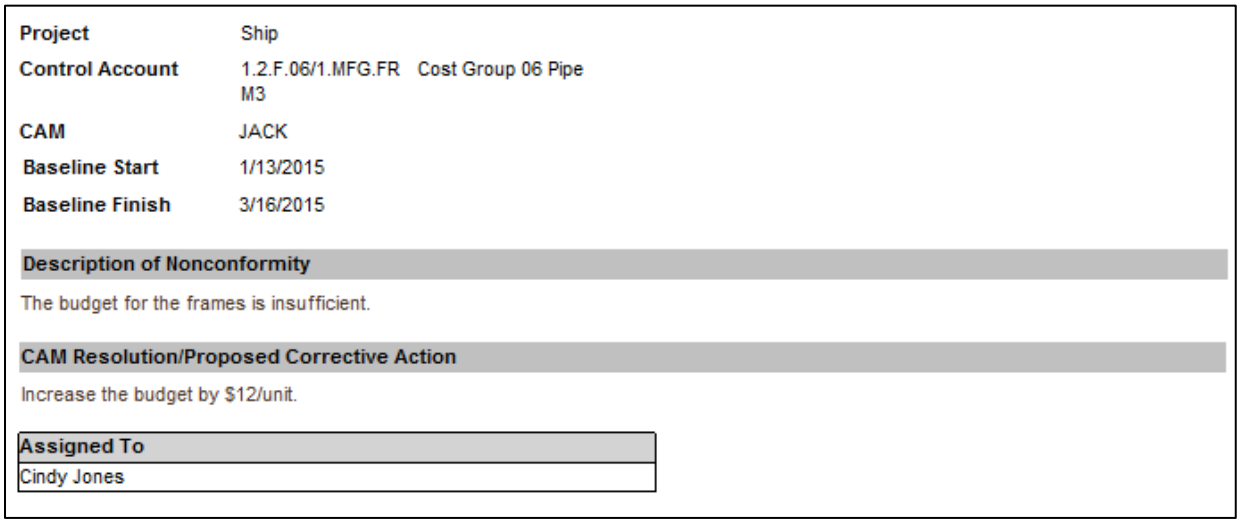
Report	Description
Actions on CAR	Use this report to view and print the tasks that have been assigned to individuals to correct the discrepancies described in the Corrective Action Request.
Approve Change	This is the default report that prints when you click the **Print** button on the menu for the Approve Change workflow type. An Approve Change form is created to plan and price a requested change in a cost management system.
Assignment History	Use this report to view and print the length of time it takes each assignee in the workflow to approve a workflow. The report looks at the assignment records for each workflow and displays the number of days the workflow stays on the assignee or approver.
Budget Change Request	This is the report for the Budget Change Request and is the default report for Change Management workflows when you click the **Print** button on the Workflows menu. A Budget Change Request (BCR) is used to document the proposed cost and/or schedule change, budget request details, justification, and other explanative details about the budget change.
Comprehensive EAC	This is the default report for the Comprehensive EAC when you click the **Print** button on the Workflows menu.

Report	Description
Contract Change Request	This is the default report for the Contract Change Request when you click the **Print** button on the Workflows menu. A Contract Change Request is used to initiate a single change request involving multiple control accounts and route them for approval.
Corrective Action Request	Use this report to view and print deficiency descriptions; the actions that should be taken; the resources required to address the deficiency; and the justification for the need to correct the deficiency.
Explanation of Spend Variance	Use this report to view budget vs. actual variance with explanation, impact, and corrective action.
Explanation of Variance	This is the default report that prints when you click the **Print** button on the Workflows menu for the Explanation of Variance. You can minimize schedule delays and cost overruns on projects by early detection using Explanation of Variance.
Initial Work Authorization	Use this report to view an initial list of authorized control accounts, expenditure of effort, scope of work and budget required to meet the projects objectives and goals.
Workflow History	Use the Workflow History report to monitor the workflow status of a workflow in its approval process. The report displays the workflow history, and you can use this to determine why a workflow has taken more time than expected to complete. The report also displays approval/rejection comments.
Workflow List	Workflows are used to assign a task to a user which is outside the schedule. This feature is used in PM Compass by the Control Account Manager and other roles to create and assign tasks to themselves or others. Users will also have the ability to associate a workflow with data in the cost and scheduling systems. The Workflow List report provides a list of workflows assigned to a user. This report provides details that can be used to evaluate all assigned workflows.
Work Authorization	This report displays the Initial Work Authorization followed by all selected workflow types. It only displays closed or approved workflows that are created after the Initial Work Authorization is created and before it is approved. In the event that there is more than one Work Authorization for a control account, all change requests will appear under each Work Authorization Document (WAD).

Actions on CAR

Use this report to view and print the tasks that have been assigned to individuals to correct the discrepancies described in the Corrective Action Request. This is the default report that prints when you click the **Print** button on the Workflows menu for Action on CAR workflows.

Example



Project	Ship
Control Account	1.2.F.06/1.MFG.FR Cost Group 06 Pipe M3
CAM	JACK
Baseline Start	1/13/2015
Baseline Finish	3/16/2015

Description of Nonconformity

The budget for the frames is insufficient.

CAM Resolution/Proposed Corrective Action

Increase the budget by $12/unit.

Assigned To
Cindy Jones

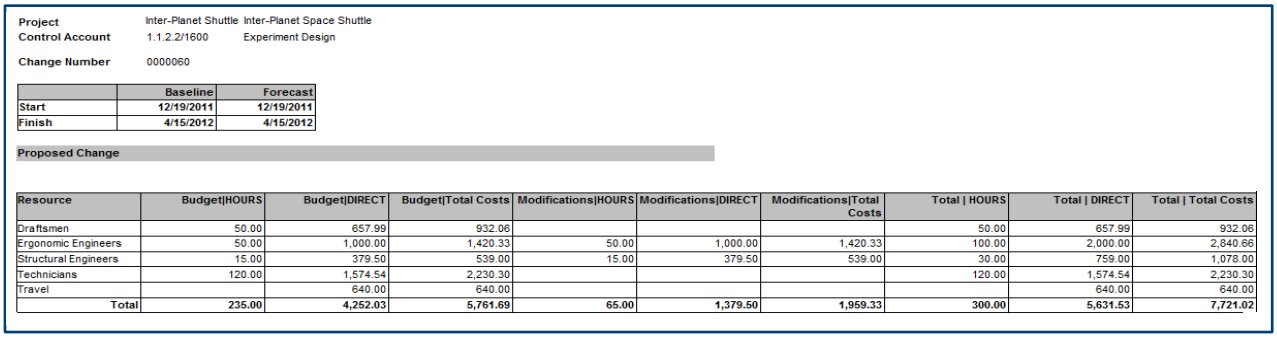
Approve Change

This is the default report that prints when you click the **Print** button on the Workflows menu for the Approve Change workflow. An Approve Change form is created to plan and price a requested change in a cost management system.

The Approve Change workflow type is not listed in the **Navigation menu » Workflows** folder by default.

The Project Controls Analyst (PCA) creates an Approve Change form after they work with a Control Account Manager (CAM) to plan and price a requested change in a cost management system.

Example



Project Inter-Planet Shuttle Inter-Planet Space Shuttle
Control Account 1.1.2.2/1600 Experiment Design

Change Number 0000060

	Baseline	Forecast
Start	12/19/2011	12/19/2011
Finish	4/15/2012	4/15/2012

Proposed Change

Resource	Budget|HOURS	Budget|DIRECT	Budget|Total Costs	Modifications|HOURS	Modifications|DIRECT	Modifications|Total Costs	Total | HOURS	Total | DIRECT	Total | Total Costs
Draftsmen	50.00	657.99	932.06				50.00	657.99	932.06
Ergonomic Engineers	50.00	1,000.00	1,420.33	50.00	1,000.00	1,420.33	100.00	2,000.00	2,840.66
Structural Engineers	15.00	379.50	539.00	15.00	379.50	539.00	30.00	759.00	1,078.00
Technicians	120.00	1,574.54	2,230.30				120.00	1,574.54	2,230.30
Travel		640.00	640.00					640.00	640.00
Total	**235.00**	**4,252.03**	**5,761.69**	**65.00**	**1,379.50**	**1,959.33**	**300.00**	**5,631.53**	**7,721.02**

Assignment History

Use this report to view and print the length of time it takes each assignee in the workflow to approve a workflow. The report looks at the assignment records for each workflow and displays the number of days the workflow stays on the assignee or approver.

If you select **Show Workflow ID as Hyperlink** on the Options dialog box General tab, you can click each workflow ID on the report to view a report for that selected workflow. If the workflow has a specific report selected in the **Specific Report to Run** field in Workflow Type Configuration, clicking the workflow ID displays the report for the selected workflow. If the workflow does not have a specific report selected in Workflow Type Configuration, clicking the workflow ID displays the Workflow List report for the selected workflow.

You can select **Minimum**, **Maximum**, and **Average** on the Options General tab to display statistics for the following columns:

- Days to Complete Workflow
- Days Assigned
- Days Step Past Due

Example

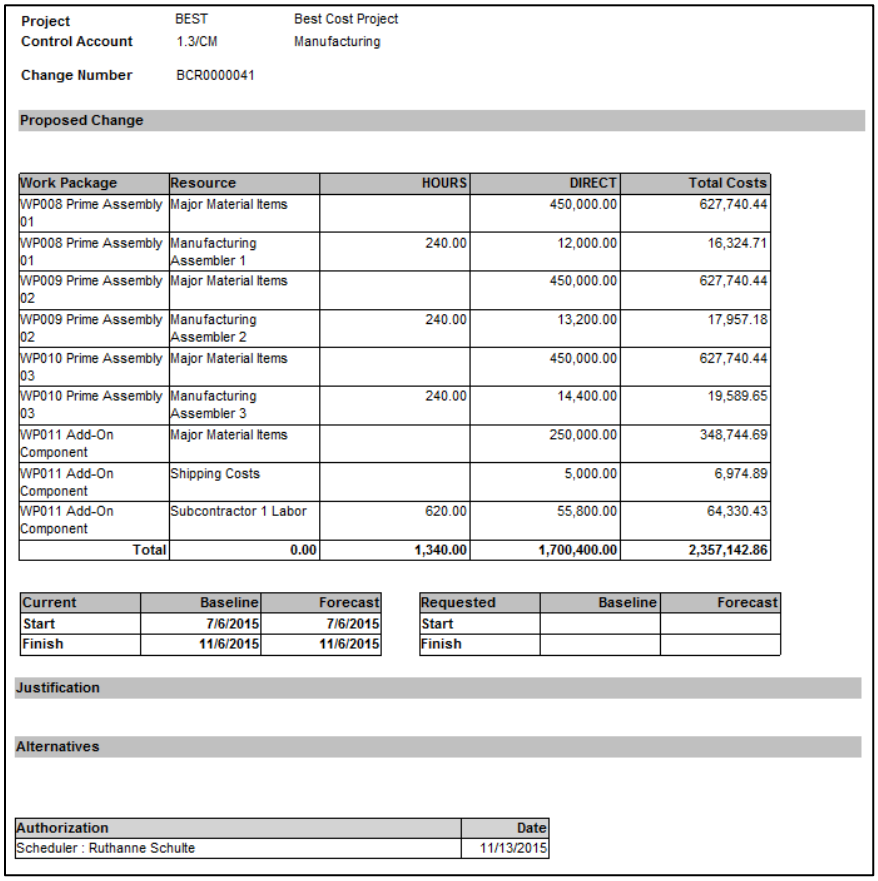
Workflow ID	Workflow Description	Step Description	Action Required	Days Assigned	Days Step Past Due	Action Taken	Action Taken Date	Days to Complete Workflow	Workflow Status	Workflow Created Date
Assigned User: Cindy Jones										
Minimum				**147**	**146**					
Maximum				**147**	**146**					
Average				**147**	**146**					
VAR0000001716	Cindy - Stop work on this	Notify Assignee	Complete	147	146				Active	10/7/2015
Assigned User: Jack Tinker										
Minimum				**0**	**29**			**0**		
Maximum				**34**	**29**			**0**		
Average				**17**	**29**			**0**		
VAR0000001717	Jack - stop work	Notify Assignee	None	0			10/7/2015 Completed	0	Completed	10/7/2015
VAR0000002004	Explanation of Variance: Inter-Planet Shuttle - 1.2.1.2/1331 /Trajectory Formulation	PCA approves	Approve	34	29				In Review	1/26/2016
Assigned User: Ruthanne Schulte										
Minimum				**0**	**3**			**0**		
Maximum				**184**	**181**			**73**		
Average				**20**	**51**			**16**		
CH00000000885	test	PCA Approves	None	0			9/11/2015 Completed	3	Completed	9/8/2015
CH00000000889	test	PCA Approves	None	0			9/11/2015 Completed	3	Completed	9/8/2015
CH00000001555	test	PCA Approves	None	0			9/11/2015 Approved	0	Approved	9/11/2015
CH00000001699	test	PCA Approves	None	6	3		10/5/2015 Completed	6	Completed	9/29/2015
CH00000001799	Add Res	PCA Approves	None	0			2/2/2016 Approved	71	Approved	11/23/2015
CH00000001801	Add Res	PCA Approves	Approve	13	8				In Approval	2/3/2016
CH00000001834	test with Shawndra	PCA Approves	Complete	29	26				In Approval	1/11/2016
CH00000001839	test with shawndra reasiggned	PCA Approves	None	0			2/2/2016 Approved	0	Approved	2/2/2016
CH00000001841	test	PCA Approves	None	0			1/11/2016 Approved		Approved	1/12/2016
CH00000002080	test	PCA Approves	None	2			2/18/2016 Approved	1	Approved	2/17/2016

Budget Change Request

This is the report for the Budget Change Request and is the default report for Change Management workflows when you click the **Print** button on the Workflows menu.

A Budget Change Request (BCR) is used to document the proposed cost and/or schedule change, budget request details, justification, and other explanative details about the budget change.

Example



Project BEST Best Cost Project
Control Account 1.3/CM Manufacturing

Change Number BCR0000041

Proposed Change

Work Package	Resource	HOURS	DIRECT	Total Costs
WP008 Prime Assembly 01	Major Material Items		450,000.00	627,740.44
WP008 Prime Assembly 01	Manufacturing Assembler 1	240.00	12,000.00	16,324.71
WP009 Prime Assembly 02	Major Material Items		450,000.00	627,740.44
WP009 Prime Assembly 02	Manufacturing Assembler 2	240.00	13,200.00	17,957.18
WP010 Prime Assembly 03	Major Material Items		450,000.00	627,740.44
WP010 Prime Assembly 03	Manufacturing Assembler 3	240.00	14,400.00	19,589.65
WP011 Add-On Component	Major Material Items		250,000.00	348,744.69
WP011 Add-On Component	Shipping Costs		5,000.00	6,974.89
WP011 Add-On Component	Subcontractor 1 Labor	620.00	55,800.00	64,330.43
Total	**0.00**	**1,340.00**	**1,700,400.00**	**2,357,142.86**

Current	Baseline	Forecast
Start	7/6/2015	7/6/2015
Finish	11/6/2015	11/6/2015

Requested	Baseline	Forecast
Start		
Finish		

Justification

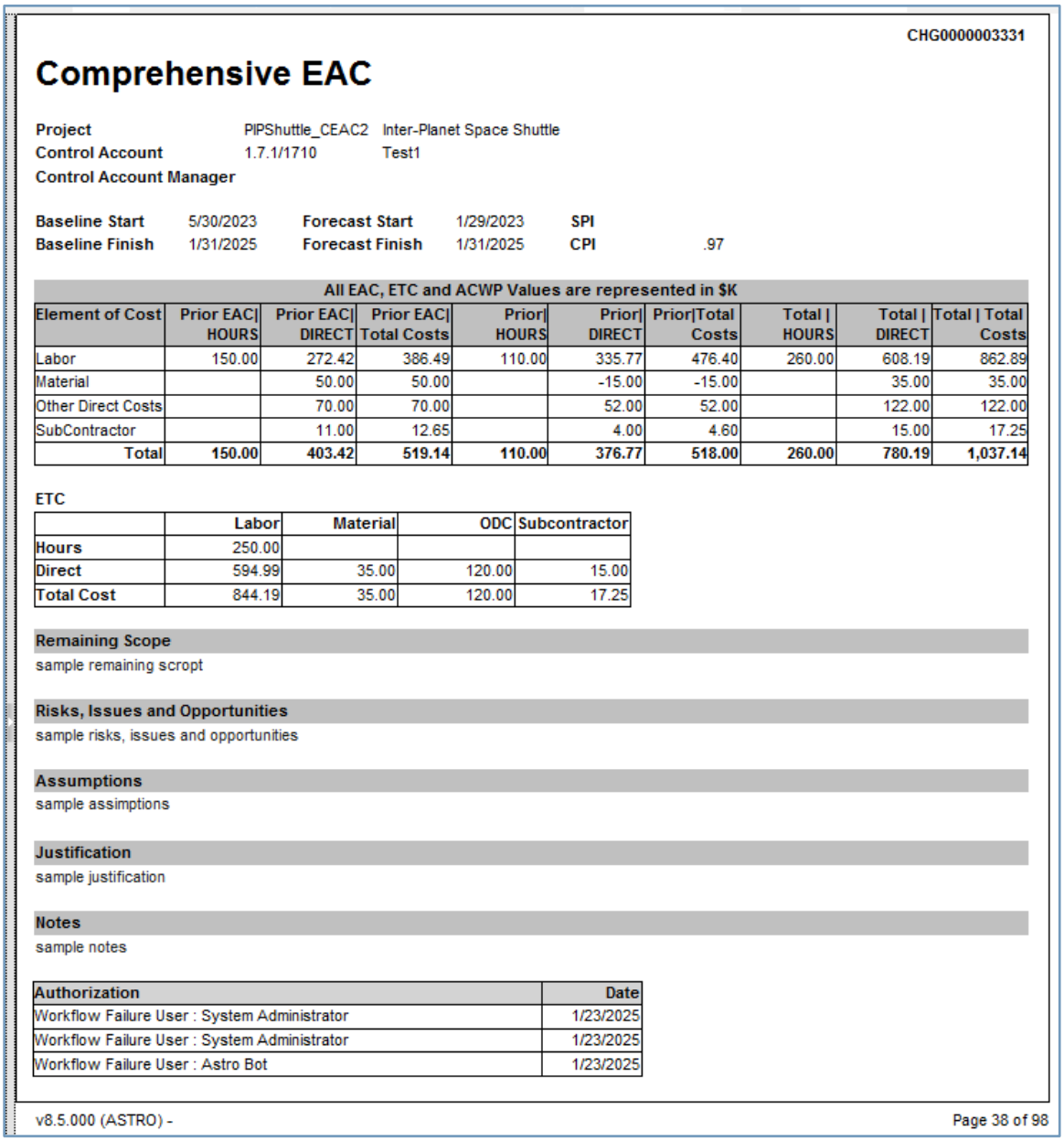
Alternatives

Authorization	Date
Scheduler : Ruthanne Schulte	11/13/2015

Comprehensive EAC

Use this report to review and compare the current EAC (Estimate at Completion) cost set with a configurable Prior EAC cost set, ensuring that any changes to the EAC are recorded.

Attention: For more information on the CEAC workflow, see the “Comprehensive EAC” topic in the PM Compass Help System under **Workflows » Change Management » Change Management Workflow Types**.



CHG0000003331

Comprehensive EAC

Project PIPShuttle_CEAC2 Inter-Planet Space Shuttle
Control Account 1.7.1/1710 Test1
Control Account Manager

Baseline Start 5/30/2023 **Forecast Start** 1/29/2023 **SPI**
Baseline Finish 1/31/2025 **Forecast Finish** 1/31/2025 **CPI** .97

All EAC, ETC and ACWP Values are represented in $K

Element of Cost	Prior EAC| HOURS	Prior EAC| DIRECT	Prior EAC| Total Costs	Prior| HOURS	Prior| DIRECT	Prior|Total Costs	Total | HOURS	Total | DIRECT	Total | Total Costs
Labor	150.00	272.42	386.49	110.00	335.77	476.40	260.00	608.19	862.89
Material		50.00	50.00		-15.00	-15.00		35.00	35.00
Other Direct Costs		70.00	70.00		52.00	52.00		122.00	122.00
SubContractor		11.00	12.65		4.00	4.60		15.00	17.25
Total	**150.00**	**403.42**	**519.14**	**110.00**	**376.77**	**518.00**	**260.00**	**780.19**	**1,037.14**

ETC

	Labor	Material	ODC	Subcontractor
Hours	250.00			
Direct	594.99	35.00	120.00	15.00
Total Cost	844.19	35.00	120.00	17.25

Remaining Scope
sample remaining scropt

Risks, Issues and Opportunities
sample risks, issues and opportunities

Assumptions
sample assimptions

Justification
sample justification

Notes
sample notes

Authorization	Date
Workflow Failure User : System Administrator	1/23/2025
Workflow Failure User : System Administrator	1/23/2025
Workflow Failure User : Astro Bot	1/23/2025

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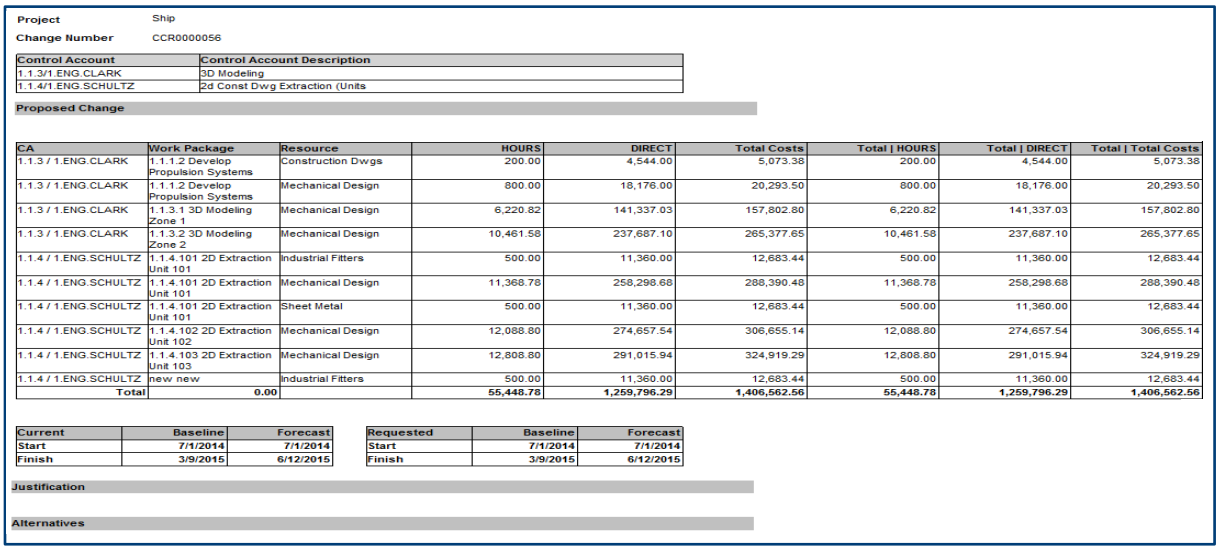
Contract Change Request

This is the default report for the Contract Change Request when you click the **Print** button on the Workflows menu. A Contract Change Request is used to initiate a single change request involving multiple control accounts and route them for approval.

The report can support multiple control accounts for better analysis. It is very useful when the Total Cost does not match Requested Cost because you can see the control account change children to determine which control accounts have the discrepancy.

Example



Project Ship

Change Number CCR0000056

Control Account	Control Account Description
1.1.3/1.ENG.CLARK	3D Modeling
1.1.4/1.ENG.SCHULTZ	2d Const Dwg Extraction (Units

Proposed Change

CA	Work Package	Resource	HOURS	DIRECT	Total Costs	Total | HOURS	Total | DIRECT	Total | Total Costs
1.1.3 / 1.ENG.CLARK	1.1.1.2 Develop Propulsion Systems	Construction Dwgs	200.00	4,544.00	5,073.38	200.00	4,544.00	5,073.38
1.1.3 / 1.ENG.CLARK	1.1.1.2 Develop Propulsion Systems	Mechanical Design	800.00	18,176.00	20,293.50	800.00	18,176.00	20,293.50
1.1.3 / 1.ENG.CLARK	1.1.3.1 3D Modeling Zone 1	Mechanical Design	6,220.82	141,337.03	157,802.80	6,220.82	141,337.03	157,802.80
1.1.3 / 1.ENG.CLARK	1.1.3.2 3D Modeling Zone 2	Mechanical Design	10,461.58	237,687.10	265,377.65	10,461.58	237,687.10	265,377.65
1.1.4 / 1.ENG.SCHULTZ	1.1.4.101 2D Extraction Unit 101	Industrial Fitters	500.00	11,360.00	12,683.44	500.00	11,360.00	12,683.44
1.1.4 / 1.ENG.SCHULTZ	1.1.4.101 2D Extraction Unit 101	Mechanical Design	11,368.78	258,298.68	288,390.48	11,368.78	258,298.68	288,390.48
1.1.4 / 1.ENG.SCHULTZ	1.1.4.101 2D Extraction Unit 101	Sheet Metal	500.00	11,360.00	12,683.44	500.00	11,360.00	12,683.44
1.1.4 / 1.ENG.SCHULTZ	1.1.4.102 2D Extraction Unit 102	Mechanical Design	12,088.80	274,657.54	306,655.14	12,088.80	274,657.54	306,655.14
1.1.4 / 1.ENG.SCHULTZ	1.1.4.103 2D Extraction Unit 103	Mechanical Design	12,808.80	291,015.94	324,919.29	12,808.80	291,015.94	324,919.29
1.1.4 / 1.ENG.SCHULTZ	new new	Industrial Fitters	500.00	11,360.00	12,683.44	500.00	11,360.00	12,683.44
Total	0.00		55,448.78	1,259,796.29	1,406,562.56	55,448.78	1,259,796.29	1,406,562.56

Current	Baseline	Forecast
Start	7/1/2014	7/1/2014
Finish	3/9/2015	6/12/2015

Requested	Baseline	Forecast
Start	7/1/2014	7/1/2014
Finish	3/9/2015	6/12/2015

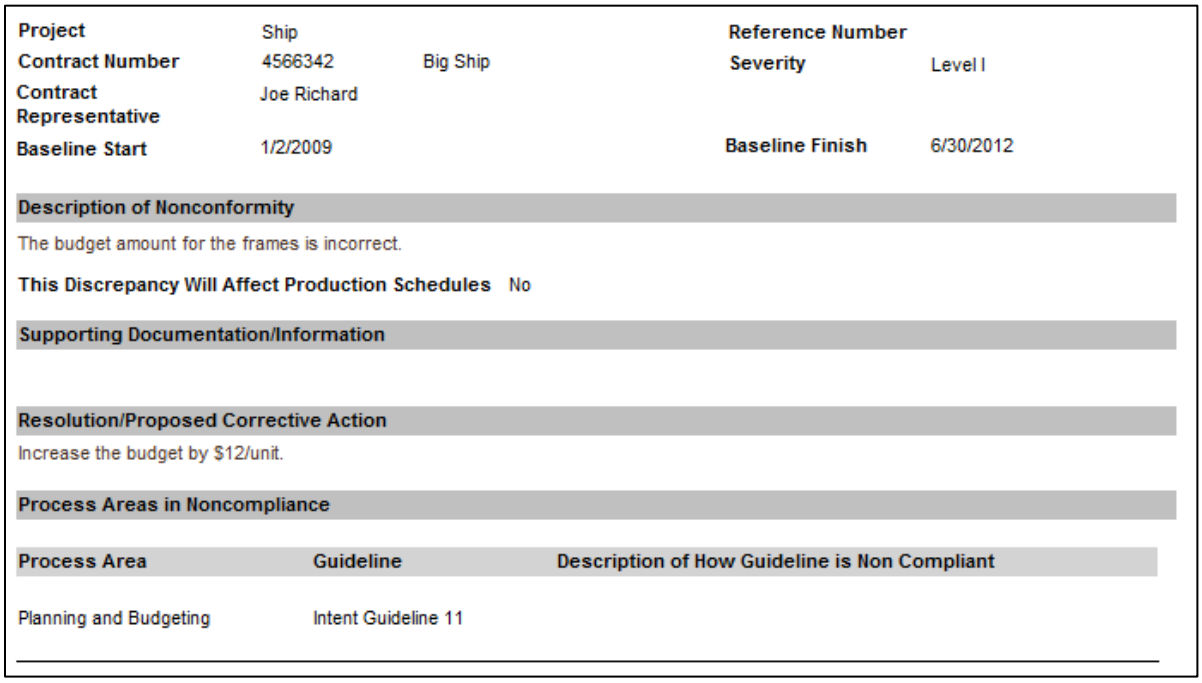
Justification

Alternatives

Corrective Action Request

Use this report to view and print deficiency descriptions; the actions that should be taken; the resources required to address the deficiency; and the justification for the need to correct the deficiency. This is the default report for Corrective Action Request when you click the **Print** button on the Workflows menu.

Example



Project	Ship		**Reference Number**	
Contract Number	4566342	Big Ship	**Severity**	Level I
Contract Representative	Joe Richard			
Baseline Start	1/2/2009		**Baseline Finish**	6/30/2012

Description of Nonconformity

The budget amount for the frames is incorrect.

This Discrepancy Will Affect Production Schedules No

Supporting Documentation/Information

Resolution/Proposed Corrective Action

Increase the budget by $12/unit.

Process Areas in Noncompliance

Process Area	Guideline	Description of How Guideline is Non Compliant
Planning and Budgeting	Intent Guideline 11	

Explanation of Spend Variance

This is the default report for the Explanation of Spend Variance when you click the **Print** button on the Workflows menu. An Explanation of Spend Variance is used to track budget vs. actual.

Example

Project Inter-Planet Shuttle Inter-Planet Space Shuttle **Status Date** 2/28/2012

Control Account 1.1.2.2/1600 Experiment Design

Variance

	Budget	Actual	Spend Variance	% Spent Budget
Current:	999		999	0.00 %
Cumulative:	1,596		1,596	0.00 %

	Budget	Forecast	Remaining Budget	% Spent Budget	Remaining Forecast	Variance at Complete	% Spent Forecast
At complete:	6,660	6,299	6,660	0.00 %	6,299	360	0.00 %

Explanation of Variance

The materials came late.

Impact

We may incur overtime expense.

Corrective Action

We will work over time next month to catch up.

Approval

Explanation of Variance

This is the default report that prints when you click the **Print** button on the Workflows menu for the Explanation of Variance. You can minimize schedule delays and cost overruns on projects by early detection using Explanation of Variance and corrective action.

After progress is entered, earned value is calculated, and actual costs are loaded into the cost system, the Explanation of Variance is used to identify thresholds defined on the WBS (or another code field) have been exceeded.

Example

Project EoV test Proj1 EoV IT1 **Status Date** 10/31/2011

Control Account 1.1.2.1/1600 Ergonomics Design

Variance

	BCWS	BCWP	ACWP	SV	SV %	CV	CV %	SPI	CPI
Current:	1,713	7,299		5,586	326.00	7,299	100.00	4.26	
Cumulative:	1,713	10,151	2,015	8,438	493.00	8,136	80.00	5.93	5.04

	BAC	EAC	VAC	VAC %	TCPI to BAC	TCPI to EAC
At complete:	57,855	74,159	-16,304	-28.00	.83	.63

Variances that exceeded thresholds:
Schedule variance: Current value and percentage. Cumulative percentage.
Cost variance: Current value and percentage. Cumulative percentage. At complete percentage.
Values calculated using: COM, DIRECT, FRINGE, G&A, OVERHEAD

Explanation of Variance

Impact

Corrective Action

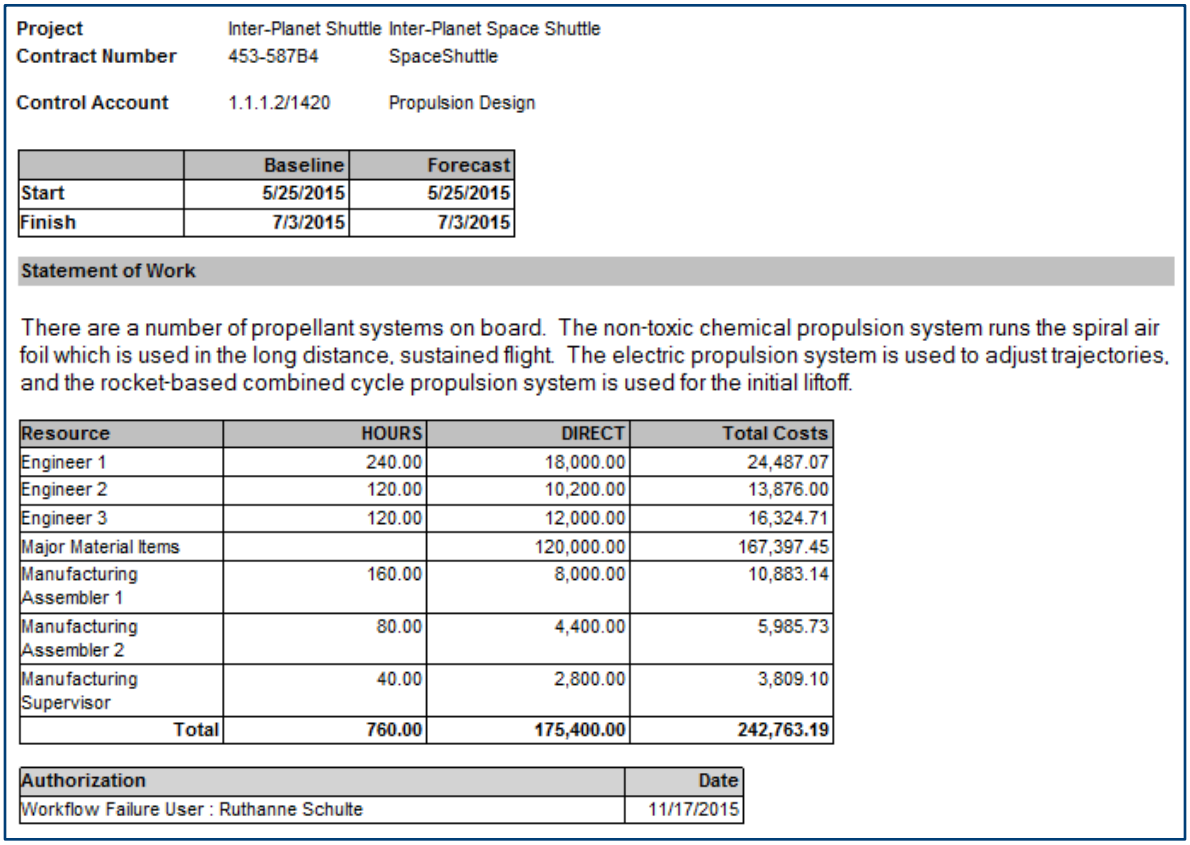
Monthly Summary

Approval

Initial Work Authorization

The Work Authorization Document (WAD) report is the report feature for the Initial Work Authorization. It is the default report for Initial Work Authorization workflows when you click **Print** on the Workflows menu. Use this report to view an initial list of authorized control accounts, expenditure of effort, scope of work and budget required to meet the projects objectives and goals.

Example



Project Inter-Planet Shuttle Inter-Planet Space Shuttle
Contract Number 453-587B4 SpaceShuttle

Control Account 1.1.1.2/1420 Propulsion Design

	Baseline	Forecast
Start	5/25/2015	5/25/2015
Finish	7/3/2015	7/3/2015

Statement of Work

There are a number of propellant systems on board. The non-toxic chemical propulsion system runs the spiral air foil which is used in the long distance, sustained flight. The electric propulsion system is used to adjust trajectories, and the rocket-based combined cycle propulsion system is used for the initial liftoff.

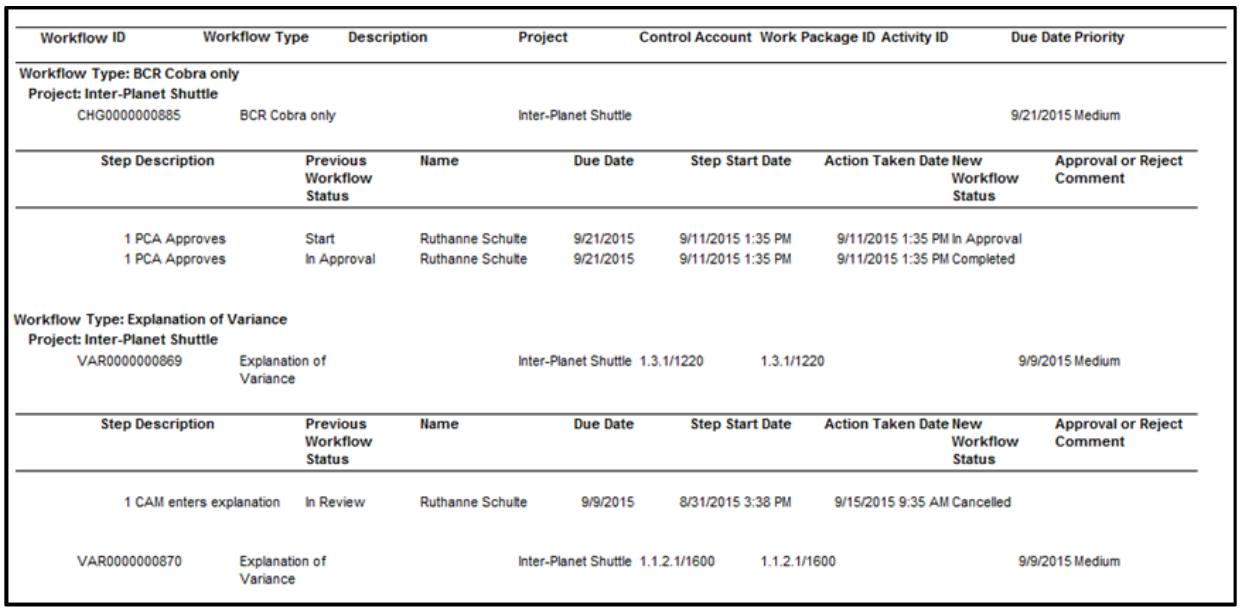
Resource	HOURS	DIRECT	Total Costs
Engineer 1	240.00	18,000.00	24,487.07
Engineer 2	120.00	10,200.00	13,876.00
Engineer 3	120.00	12,000.00	16,324.71
Major Material Items		120,000.00	167,397.45
Manufacturing Assembler 1	160.00	8,000.00	10,883.14
Manufacturing Assembler 2	80.00	4,400.00	5,985.73
Manufacturing Supervisor	40.00	2,800.00	3,809.10
Total	**760.00**	**175,400.00**	**242,763.19**

Authorization	Date
Workflow Failure User : Ruthanne Schulte	11/17/2015

Workflow History

Use the Workflow History report to monitor the workflow status of a workflow in its approval process. The report displays the workflow history and you can use this to determine why a workflow has taken more time than expected to complete. The report also displays approval/rejection comments.

Example



Workflow ID	Workflow Type	Description	Project	Control Account	Work Package ID	Activity ID	Due Date	Priority
Workflow Type: BCR Cobra only								
Project: Inter-Planet Shuttle								
CHG0000000885	BCR Cobra only		Inter-Planet Shuttle				9/21/2015	Medium

Step Description	Previous Workflow Status	Name	Due Date	Step Start Date	Action Taken Date	New Workflow Status	Approval or Reject Comment
1 PCA Approves	Start	Ruthanne Schulte	9/21/2015	9/11/2015 1:35 PM	9/11/2015 1:35 PM	In Approval	
1 PCA Approves	In Approval	Ruthanne Schulte	9/21/2015	9/11/2015 1:35 PM	9/11/2015 1:35 PM	Completed	

Workflow Type: Explanation of Variance							
Project: Inter-Planet Shuttle							
VAR0000000869	Explanation of Variance		Inter-Planet Shuttle	1.3.1/1220	1.3.1/1220		9/9/2015 Medium

Step Description	Previous Workflow Status	Name	Due Date	Step Start Date	Action Taken Date	New Workflow Status	Approval or Reject Comment
1 CAM enters explanation	In Review	Ruthanne Schulte	9/9/2015	8/31/2015 3:38 PM	9/15/2015 9:35 AM	Cancelled	

VAR0000000870	Explanation of Variance		Inter-Planet Shuttle	1.1.2.1/1600	1.1.2.1/1600		9/9/2015 Medium

Workflow List

Workflows are used to assign a task to a user which is outside the schedule. This feature is used in PM Compass by the Control Account Manager and other roles to create and assign tasks to themselves or others. Users will also have the ability to associate a workflow with data in the cost and scheduling systems. The Workflow List report provides a list of workflows assigned to a user. This report provides details that can be used to evaluate all assigned workflows.

If you select **Show Workflow ID as Hyperlink** on the Options dialog box General tab, you can click each workflow ID to view a report for that selected workflow. If the workflow has a specific report selected in the **Specific Report to Run** field in Workflow Type Configuration, clicking the workflow ID displays that report for the selected workflow. If the workflow does not have a specific report selected in Workflow Type Configuration, clicking the workflow ID displays the Workflow List report for the selected workflow.

This report supports master projects. When a master project is selected, the report uses the master calendar.

Example

Workflow ID	Workflow Title	Workflow Status	Project	Control Account	Due Date	Priority	Description
Workflow Type: BCR Cobra only							
Project: Inter-Planet Shuttle							
Workflow Status: Completed							
CHG0000000885	test	Completed	Inter-Planet Shuttle		9/21/2015	Medium	
Workflow Type: Explanation of Variance							
Project: Inter-Planet Shuttle							
Workflow Status: Cancelled							
VAR0000000869	Explanation of Variance: Inter-Planet Shuttle - 1.3.1/1220 /Software Design	Cancelled	Inter-Planet Shuttle	1.3.1/1220	9/9/2015	Medium	
VAR0000000870	Explanation of Variance: Inter-Planet Shuttle - 1.1.2.1/1600 /Ergonomics Design	Cancelled	Inter-Planet Shuttle	1.1.2.1/1600	9/9/2015	Medium	
Workflow Type: Forecast Change Request							
Project: Inter-Planet Shuttle							
Workflow Status:							
CHG0000000839	test		Inter-Planet Shuttle		8/26/2015	Medium	
CHG0000000887	test		Inter-Planet Shuttle		9/21/2015	Medium	

Work Authorization

This report displays the Initial Work Authorization followed by all selected workflow types. It only displays closed or approved workflows that are created after the Initial Work Authorization is created and before it is approved. If there is more than one Work Authorization for a control account, all change requests will display under each Work Authorization Document (WAD).

The report sorts the workflows by control account and then in the order in which the workflows were closed or typically approved. The workflows are sorted in chronological order showing what was originally authorized followed by all approved changes. The memo field displays the Statement of Work memo for the first workflow type encountered and then the Proposed Change memo for the remaining workflow types.

You can select the control accounts that are displayed on the report by clicking  in the report **Selection** column.

Location of Elements of Cost

This report uses the Element of Cost as a subtotal when resources are selected. The **Location of Elements of Cost** setting for the project is in the Projects Detail view on the General tab. Use this setting to specify whether the Element of Cost is defined at a level of the resource file or a code on the resource.

> **Tip:** Using a code on the resource will improve the performance for generating this report.

Generating a Work Authorization Report

1. Create an Initial Work Authorization workflow for the entire project.
2. After the workflow is approved, run the Work Authorization report.

This report will serve as the WAD. It shows the initial authorized work followed by all approved change requests with their signature.

When you run the report, the system asks you to select the workflow type. You must select:

1. Initial Work Authorization
2. Your change request workflow. For example, Budget Change Request.

   If you are using a Contract Change Request or another multi-control account workflow, you should also select the Control Account Change workflow because this workflow type contains the change amount for each control account.

In addition to the report, you can also configure a dashpart to show Initial Work Authorization workflows and all of your change request workflows.

Creating a Report that Includes the Control Account Manager Field

If you have already added the Control Account Manager (CAM) field to a workflow form, you can create a custom Initial Work Authorization report that includes this field. See the *PM Compass Custom Reports and MSQL Server Reporting Services Guide* for steps.

> **Note:** You will need Business Intelligence for Visual Studio 2013 Report Designer (known as **SSDT-BI 2013 Report Designer)** for this task. See Custom Reports for more information.

Example

Project	Inter-Planet Shuttle	Inter-Planet Space Shuttle
Contract Number	453-587B4	SpaceShuttle
Control Account	1.2.1.1/1332	Landing Preparation

	Baseline	Forecast
Start	**1/1/2012**	**1/1/2012**
Finish	**3/1/2013**	**3/1/2013**

Statement of Work

The structural design for the shuttle consists of swept-back wings, a conical hull, and spiral air foil to reduce fuel consumption. All materials are carbon composites which must be perfected for this particular application.

Resource	HOURS	DIRECT	Total Costs
Astronomers	775.00	18,755.01	26,569.07
Draftsmen	1,300.00	17,176.07	24,332.71
Electrical Engineers	1,572.00	39,901.26	56,529.30
Management	500.00	11,663.57	16,531.30
Structural Engineers	954.00	24,317.81	34,544.63
Systems Analysis	300.00	5,160.00	7,309.84
Technicians	1,143.00	15,159.12	21,477.05
Travel		500.00	500.00
Total	**6,544.00**	**132,632.84**	**187,793.90**

Authorization	Date
Workflow Failure User : Ruthanne Schulte	9/2/2015
PCA : Ruthanne Schulte	9/2/2015
Workflow Failure User : Ruthanne Schulte	9/2/2015

Progress Reports

Use Progress reports to view past and pending progress entries.

Progress Report Categories

The Progress reports category contains the following reports:

Report	Description
Pending Progress Report	This report displays the progress entries that have yet to be approved. It is useful for the assignee of the progress to know what activities to pay attention to. If you are an approver of progress, this report is a great tool to let you know who has not yet submitted their progress.
Progress History - Cost Report	Use this report to review how the progress of a work package has changed over time.
Progress History - Schedule Report	Use this report to review the progress of an activity over time.

Pending Progress

PM Compass provides a method to automatically generate progress entries that are either in progress or scheduled to start before the end of the next period. Use the Pending Progress report to print information about progress entry records that are yet to be approved. The report is useful for the assignee of the progress to know what activities to pay attention to. If you are an approver of progress, this report is a great tool to let you know who has not yet submitted their progress.

Use the report to:

- Confirm that the progress settings are correct.
- View all work assigned to the logged in user.
- View the in-progress status.

As an approver, it is difficult to tell if all of the progress has been submitted. For example, assume there is an activity that is in progress, but no progress has been submitted. Is that because there was no progress made this period, or has that person just not submitted the progress yet? This report will display progress entries that have not yet been submitted. Furthermore, you can view the in-progress status. If a status is **Active**, it may mean that the progress has been entered but not submitted. The assignee will need to access the Enter Cost Progress form or Enter Schedule Progress form and click **Submit**.

Progress in **Administration » Workflow Type Configuration** is a system-defined workflow. It populates the **Project » Enter Progress** dialog box so that you can update progress information for cost or schedule data that is related to a project.

Report Dashpart

You can use a Pending Progress dashpart to see a multi-project view of all activities that require focus. You can configure the Pending Progress report to display multi-project activities that are, for example, in progress or scheduled to start before the end of the next period. You can also configure the report with specific columns, sub totals and so on. After you have configured the report, you can save a copy and add it as a dashpart.

Example

Assignee/ Approver	Workflow Status	Activity ID	Activity Description	Control Account/ Work Package	Description	% Complete	Actual Start	Actual Finish	Forecast Start	Forecast Finish
Project: Inter-Planet Shuttle Inter-Planet Space Shuttle										
Ruthanne Schulte	Active			1.1.1.1/ 1400/ 02	Wing Design	100.00	6/1/2011		6/1/2011	10/13/2011
Ruthanne Schulte	Active			1.1.1.1/ 1400/ 03	Heat Shield Design	100.00	6/1/2011		6/1/2011	7/13/2011
Ruthanne Schulte	Active			1.1.1.2/ 1420/ 04	Booster Release Design	40.00	7/19/2011		7/19/2011	1/15/2012
Ruthanne Schulte	Active			1.1.2.1/ 1600/ 01	Control Room	50.00	9/15/2011		9/15/2011	4/15/2012
Ruthanne Schulte	Active			1.1.2.1/ 1600/ 02	Experiment Room	40.00	9/15/2011		9/15/2011	4/15/2012
Ruthanne Schulte	Active			1.1.2.1/ 1600/ 03	Sleeping Quarters				1/19/2012	4/15/2012

Progress History – Cost

Use this report to review how the progress of a work package has changed over time. The report displays a heading row that shows what is currently in the source system (either Cobra or the schedule). This is followed by a different row for each time progress was approved. Depending on how the activity or work package is progressed/EVT, each period will show the Resource % Complete or Milestones.

Each control account ID and description for which progress has been approved is displayed. Under the control account, the header record for the first work package for which progress has been approved displays information from the live project. Below the work package, the detailed history of each time progress is submitted and approved for the work package is displayed.

If the work package has an EVT of **Milestones** or an EVT of **Resource % Complete**, then the progress submitted for the milestone or resources is displayed under each period the work package progress is submitted.

This information can be analyzed to evaluate the progress submitted. For example, assume the first time progress is submitted represents 75% complete, and in three subsequent periods the percent complete submitted is 80%, 85%, and 90%. This may indicate that the original 75% complete was over optimistic. Use of a more objective EVT such as milestones may be better suited for the work being progressed by this individual.

Example

Project: EoV test Proj1 - EoV IT1

WP	Description	Approved Date	Status	Forecast Start	Forecast Finish	Actual Start	Actual Finish	EVT	Units Complete	Percent Complete	Submitted By
Control Account: 1.1.1.1 / 1400 - Frame Design											
02	Wing Design		Completed	6/1/2011	1/1/2015	6/1/2011	1/1/2015	Milestone			
		9/11/2015				6/1/2011	1/1/2015		0.000000	100.00 %	Ruthanne Schulte

Milestone	Description	Forecast Finish	Actual Finish	Weight	Percent Complete	Status	Complete
PHASE1	Structure Design	6/15/2011	6/15/2011	9	100.00 %	Completed	Yes
PHASE2	Material Design	7/15/2011	7/15/2011	21	100.00 %	Completed	Yes
PHASE3	Wiring Design	10/13/2011	10/13/2011	70	100.00 %	Completed	Yes

03	Heat Shield Design		Completed	6/1/2011	7/13/2015	6/1/2011	7/13/2015	User Defined			
		9/11/2015				6/1/2011	7/13/2015		0.000000	100.00 %	Ruthanne Schulte

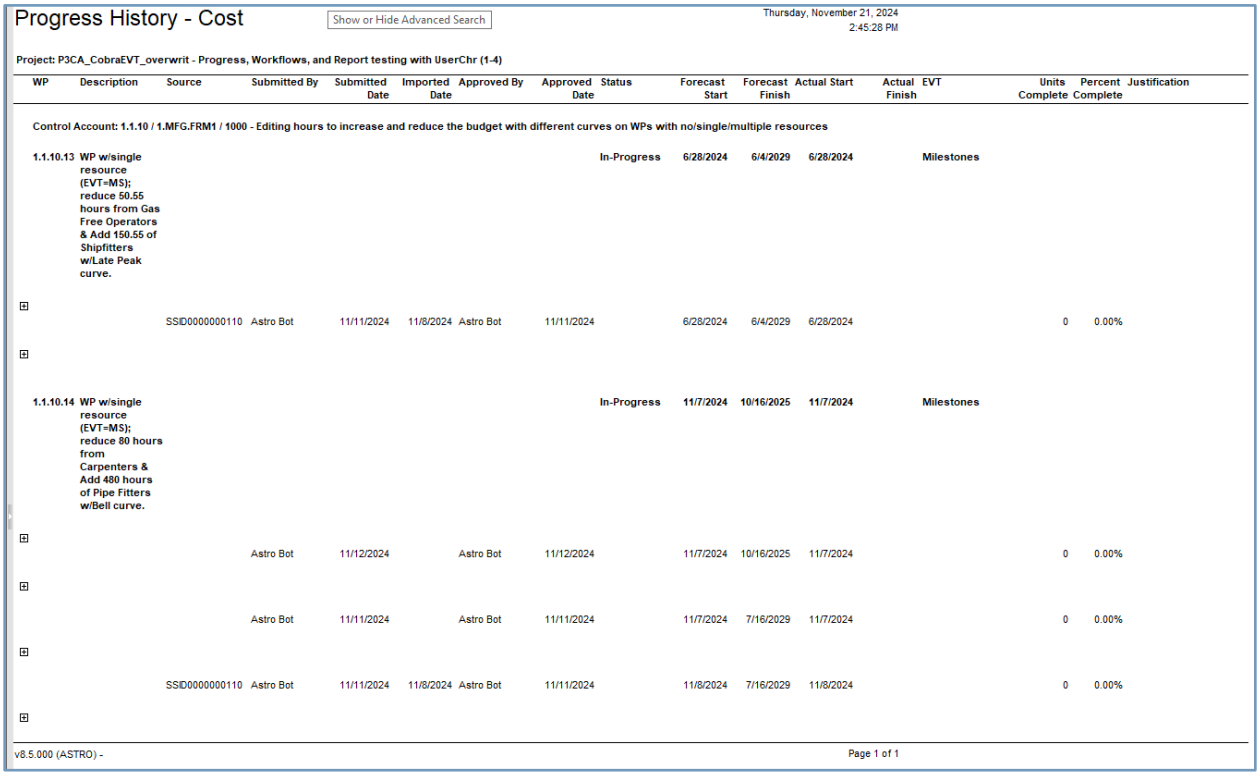
When progress is imported through the Import Progress API, additional columns are available at the beginning of the Progress History Cost report.

The additional columns include:

- **Source**
- **Submitted Date**
- **Imported Date**
- **Justification**

Attention: For more information on the Import Progress API and imported progress entries columns, see the “Import Progress API” and “Enter Cost Progress Form” topics in the PM Compass Help System.

Example



Progress History - Cost

Show or Hide Advanced Search

Thursday, November 21, 2024
2:45:28 PM

Project: P3CA_CobraEVT_overwrit - Progress, Workflows, and Report testing with UserChr (1-4)

WP	Description	Source	Submitted By	Submitted Date	Imported Date	Approved By	Approved Date	Status	Forecast Start	Forecast Finish	Actual Start	Actual Finish	EVT	Units Complete	Percent Complete	Justification
Control Account: 1.1.10 / 1.MFG.FRM1 / 1000 - Editing hours to increase and reduce the budget with different curves on WPs with no/single/multiple resources																
1.1.10.13	WP w/single resource (EVT=MS); reduce 50.55 hours from Gas Free Operators & Add 150.55 of Shipfitters w/Late Peak curve.							In-Progress	6/28/2024	6/4/2029	6/28/2024		Milestones			
		SSID0000000110	Astro Bot	11/11/2024	11/8/2024	Astro Bot	11/11/2024		6/28/2024	6/4/2029	6/28/2024			0	0.00%	
1.1.10.14	WP w/single resource (EVT=MS); reduce 80 hours from Carpenters & Add 480 hours of Pipe Fitters w/Bell curve.							In-Progress	11/7/2024	10/16/2025	11/7/2024		Milestones			
			Astro Bot	11/12/2024		Astro Bot	11/12/2024		11/7/2024	10/16/2025	11/7/2024			0	0.00%	
			Astro Bot	11/11/2024		Astro Bot	11/11/2024		11/7/2024	7/16/2029	11/7/2024			0	0.00%	
		SSID0000000110	Astro Bot	11/11/2024	11/8/2024	Astro Bot	11/11/2024		11/8/2024	7/16/2029	11/8/2024			0	0.00%	

v8.5.000 (ASTRO) -

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Progress History – Schedule

Use this report to review the progress of an activity over time.

Each activity for which progress has been approved is displayed. The header record for the activity displays information such as the forecast and actual dates in the live project. Below the activity, the detailed history of each time progress is submitted and approved is displayed.

If the physical % complete of the resource assignments on the activity has been submitted, it is displayed under the activity progress each time activity progress is submitted.

This information can be analyzed to evaluate the progress submitted. For example, assume the first time progress is submitted represents 75% complete, and in three subsequent periods the percent complete submitted is 80%, 85%, and 90%. This may indicate that the original 75% complete was over optimistic. Planning shorter activities may be better suited for the work being progressed by this individual.

Example

Project: TIM_MSP_CODES_STATUS -

Schedule Project: QE_MSP_CODES_STATUS - QE_MSP_CODES_STATUS

Activity ID	Description	Approved Status Date	Forecast Start	Forecast Finish	Not Earlier Than	Expected Finish	Actual Start	Actual Finish	Progress Type	Progress Value	Physical % Complete	Submitted By
1.1.1.1	Change LABOR res p%c for prog type (As Planned)	In-Progress	3/9/2015	8/26/2015			3/9/2015					
		9/11/2015				9/25/2015	3/9/2015		Remaining Duration	25d	25.00	System Administrator
		9/11/2015				9/25/2015	3/9/2015		Remaining Duration	45d	25.00	System Administrator

Resource ID	Description	Budget QTY	Remaining QTY	Resource % Complete
QE TECH1	QE Tech1	960.00	824.00	25.00

Activity ID	Description	Approved Status Date	Forecast Start	Forecast Finish	Not Earlier Than	Expected Finish	Actual Start	Actual Finish	Progress Type	Progress Value	Physical % Complete	Submitted By
1.1.1.2	Change MATL res p%c for prog type (%Complete) and insert a new res in MSP	In-Progress	3/9/2015	8/21/2015			3/9/2015					
		9/11/2015					3/9/2015		Percent Complete	25%	25.00	System Administrator

Resource ID	Description	Budget QTY	Remaining QTY	Resource % Complete
MATL	MATL	10,000.00	8,583.33	25.00

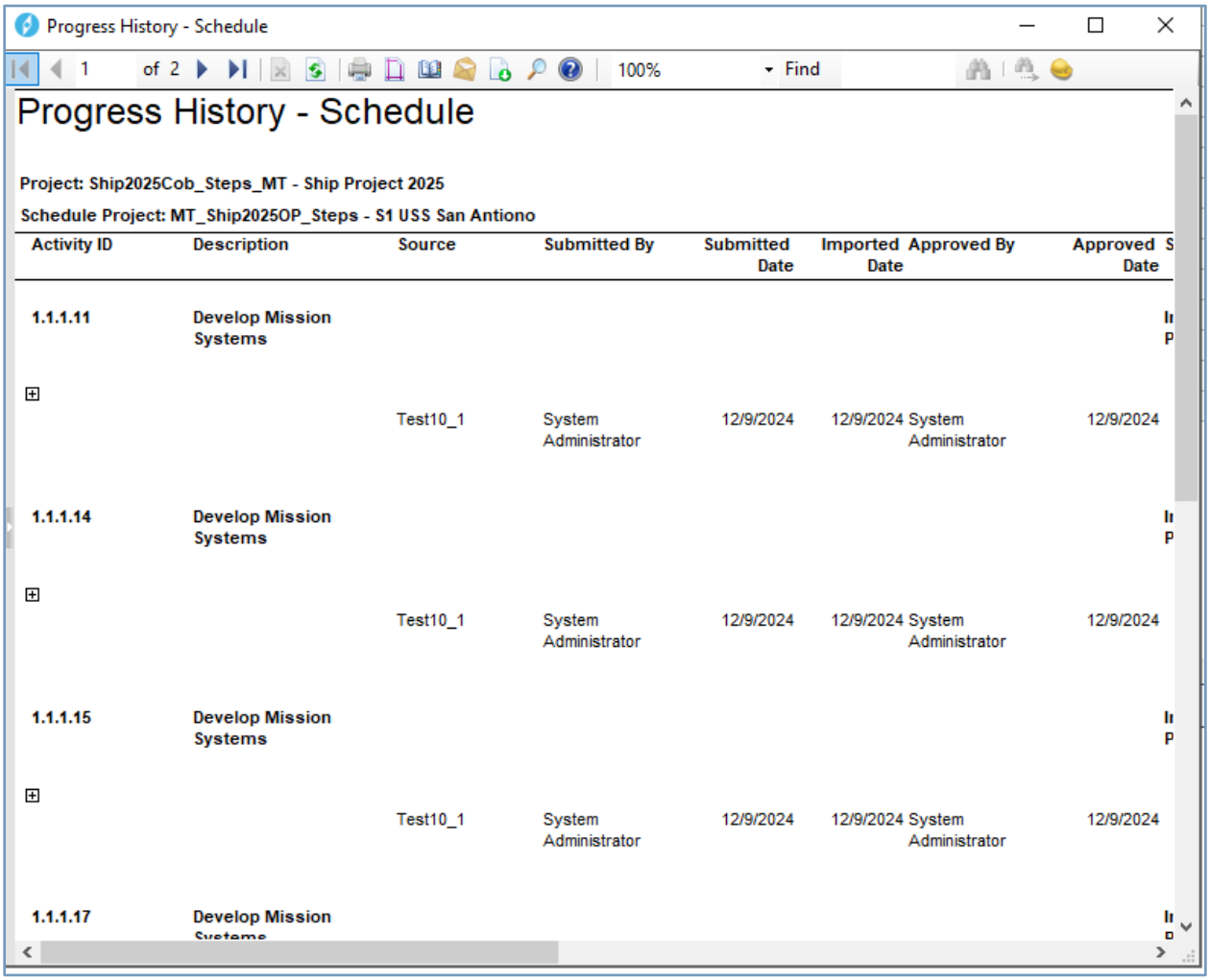
When progress is imported through the Import Progress API, additional columns are available at the beginning of the Progress History Schedule report.

The additional columns include:

- **Source**
- **Submitted Date**
- **Imported Date**
- **Justification**

Attention: For more information on the Import Progress API and imported progress entries columns, see the “Import Progress API” and “Enter Schedule Progress Form” topics in the PM Compass Help System.

Example


Progress History - Schedule
1
of 2
100%
Find
Progress History - Schedule
Project: Ship2025Cob_Steps_MT - Ship Project 2025
Schedule Project: MT_Ship2025OP_Steps - S1 USS San Antiono
Activity ID
Description
Source
Submitted By
Submitted Date
Imported Date
Approved By
Approved Date
1.1.1.11
Develop Mission Systems
Test10_1
System Administrator
12/9/2024
12/9/2024
System Administrator
12/9/2024
1.1.1.14
Develop Mission Systems
Test10_1
System Administrator
12/9/2024
12/9/2024
System Administrator
12/9/2024
1.1.1.15
Develop Mission Systems
Test10_1
System Administrator
12/9/2024
12/9/2024
System Administrator
12/9/2024
1.1.1.17
Develop Mission

Schedule Reports

The Schedule Reporting form displays activity lists, resources, relationships, and activities and includes a Baseline Execution Index report.

Schedule Report Categories

The Schedule reports category contains the following reports:

Report	Description
Activities and Predecessors	This report is an extension of the Activity List report with the addition of predecessors.
Activities and Resources	This report is an extension of the Activity List report with the addition of resource assignments.
Activities and Successors	This report is an extension of the Activity List report with the addition of successors.
Activity List	This report is a full display of all activities for all schedule projects that are connected to a PM Compass project. Use it to review activity start and end times, locations, subjects, attendees, and so on. You can print an activity list for a single activity, selected activities, or all your activities.
Baseline Execution Index	Use this report to compare the cumulative number of tasks actually completed each period to the cumulative number of baseline tasks scheduled to be completed. The Baseline Execution Index (BEI) metric is used to indicate the efficiency with which actual work has been accomplished when measured against the baseline.
Data Mining Schedule Detail	This report displays activity information for the Data Mining rule: **An activity with no work package**. When this rule is triggered, this report is called automatically from the Data Mining Summary report to display the activity information. The report can also be run on its own to display just the activities in the schedule project that triggered the rule. For additional information as well as a report example, see the Data Mining Reports in the Cost Analysis Reports section of this guide.

Link Your Schedule to the PM Compass Project

Schedule reports are different from cost reports because they run off the schedule that is attached to the PM Compass project. For a schedule report to work, you have to have the schedule properly linked to the work packages. The best way to confirm that the projects have been linked is to use the Cost Analysis Activities tab to see the activities for the selected work package.

Activities and Predecessors

This report is an extension of the Activity List report with the addition of predecessors. Use the Activities and Predecessors Options dialog box to select additional columns to display on the report.

Example

Project: Ship -

Status Date: 11/21/2014

Activity ID	Description	Predecessor	Predecessor Description	Predecessor Rel Type	Predecessor Rel Lag	Predecessor Status
Control Account: 1.1.3 / 1.ENG.CLARK						
1.1.1.2	Develop Propulsion Systems	1.1.1.1	Develop Hull Systems	FS	0	1
1.1.3.1	3D Modeling Zone 1					1
1.1.3.2	3D Modeling Zone 2					0
Total for 1.1.3 / 1.ENG.CLARK						
Control Account: 1.1.4 / 1.ENG.SCHULTZ						
1.1.4.101	2D Extraction Unit 101	1.1.3.1	3D Modeling Zone 1	FS	0	1
1.1.4.102	2D Extraction Unit 102	1.1.3.1	3D Modeling Zone 1	FS	0	0
1.1.4.103	2D Extraction Unit 103	1.1.3.2	3D Modeling Zone 2	FS	0	0
Total for 1.1.4 / 1.ENG.SCHULTZ						
Control Account: 1.2.A.101 / 1.MFG.FRM1						
1.2.A.101.06	Install Pipe	1.2.A.101.02	Doug _ this activity should have this description	FS	0	0
		1.2.F.06.101	Fab Pipe for unit 101	FS	0	0
1.2.A.101.07	Install Equipment	1.2.A.101.20	Install Fdns	FS	0	0
1.2.A.101.09	Install Vents	1.2.A.101.06	Install Pipe	FS	0	0
1.2.A.101.20	Install Fdns	1.2.A.101.09	Install Vents	FS	0	0
		1.2.F.16.101	Fab Fittings for 101	FS	0	0
Total for 1.2.A.101 / 1.MFG.FRM1						

Activities and Resources

This report is an extension of the Activity List report with the addition of resource assignments. Use the Activities and Resources Options dialog box to select additional columns to display on the report.

Example

Project: Ship -

Status Date: 11/21/2014

Activity ID	Description	Original Duration	Remaining Duration	Early Start	Early Finish	Resource ID
Control Account: 1.1.3 / 1.ENG.CLARK						
1.1.1.2	Develop Propulsion Systems	3m	15d	8/13/2014	9/2/2014	SHIP.LABOR.95.9508
						SHIP.LABOR.95.9512
1.1.3.1	3D Modeling Zone 1	6m	114d	7/1/2014	1/1/2015	SHIP.LABOR.95.9508
1.1.3.2	3D Modeling Zone 2	8m	160d	7/28/2014	3/6/2015	SHIP.LABOR.95.9508
Total for 1.1.3 / 1.ENG.CLARK						
Control Account: 1.1.4 / 1.ENG.SCHULTZ						
1.1.4.101	2D Extraction Unit 101	1m	16d	1/2/2015	1/23/2015	SHIP.LABOR.09
						SHIP.LABOR.95.9508
						SHIP.LABOR.04
1.1.4.102	2D Extraction Unit 102	2m	40d	1/2/2015	2/26/2015	SHIP.LABOR.95.9508
1.1.4.103	2D Extraction Unit 103	1m	20d	3/9/2015	4/3/2015	SHIP.LABOR.95.9508
Total for 1.1.4 / 1.ENG.SCHULTZ						
Control Account: 1.2.A.101 / 1.MFG.FRM1						
1.2.A.101.06	Install Pipe	5w	25d	2/2/2015	3/6/2015	SHIP.LABOR.41
						SHIP.LABOR.06
1.2.A.101.07	Install Equipment	2w	10d	4/6/2015	4/17/2015	SHIP.LABOR.07
1.2.A.101.09	Install Vents	2w	10d	3/9/2015	3/20/2015	SHIP.LABOR.02
						SHIP.LABOR.09
						SHIP.LABOR.41
1.2.A.101.20	Install Fdns	2w	10d	3/23/2015	4/3/2015	SHIP.LABOR.41
						SHIP.LABOR.02
Total for 1.2.A.101 / 1.MFG.FRM1						

Activities and Successors

This report is an extension of the Activity List report with the addition of successors. Use the Activities and Successors Options dialog box to select additional columns to display on the report.

Example

Project: Ship -

Status Date: 11/21/2014

Activity ID	Description	Successor	Successor Description	Successor Rel Type	Successor Rel Lag	Successor Status
Control Account: 1.1.4 / 1.ENG.SCHULTZ						
1.1.4.101	2D Extraction Unit 101	1.2.F.06.101	Fab Pipe for unit 101	FS	0	1
1.1.4.102	2D Extraction Unit 102	1.2.F.06.102	Fab Pipe 102	FS	0	0
1.1.4.103	2D Extraction Unit 103	1.2.F.06.103	Fab Pipe 103	FS	0	0
Total for 1.1.4 / 1.ENG.SCHULTZ						
Control Account: 1.2.A.101 / 1.MFG.FRM1						
1.2.A.101.06	Install Pipe	1.2.A.101.09	Install Vents	FS	0	0
1.2.A.101.07	Install Equipment					0
1.2.A.101.09	Install Vents	1.2.A.101.20	Install Fdns	FS	0	0
1.2.A.101.20	Install Fdns	1.2.A.101.07	Install Equipment	FS	0	0
Total for 1.2.A.101 / 1.MFG.FRM1						
Control Account: 1.2.A.103 / 1.MFG.FRM2						
1.2.A.103.02	Assemble Steel	1.2.A.103.06	Install Pipe	FS	0	0
1.2.A.103.06	Install Pipe	1.2.A.103.09	Install Vents	FS	0	0
1.2.A.103.07	Install Equipment					0
1.2.A.103.09	Install Vents	1.2.A.103.20	Install Fdns	FS	0	0
1.2.A.103.20	Install Fdns	1.2.A.103.07	Install Equipment	FS	0	0
Total for 1.2.A.103 / 1.MFG.FRM2						

Activity List

This report is a full display of all activities for all schedule projects that are connected to a PM Compass project. Use it to review activity start and end times, locations, subjects, attendees, and so on. You can print an activity list for a single activity, selected activities, or all your activities.

Example

Project: Ship -

Status Date: 11/21/2014

Activity ID	Description	Original Duration	Remaining Duration	Total Float	Baseline Start	Baseline Finish	Forecast Start	Forecast Finish	Actual Start	Actual Finish
Control Account: 1.1.4 / 1.ENG.SCHULTZ										
1.1.4.101	2D Extraction Unit 101	1m	16d	50d	1/2/2015	1/29/2015	1/2/2015	1/23/2015	1/2/2015	
1.1.4.102	2D Extraction Unit 102	2m	40d	26d	12/16/2014	2/9/2015	1/2/2015	2/26/2015		
1.1.4.103	2D Extraction Unit 103	1m	20d	0	2/10/2015	3/9/2015	3/9/2015	4/3/2015		
Total for 1.1.4 / 1.ENG.SCHULTZ										
Control Account: 1.2.A.101 / 1.MFG.FRM1										
1.2.A.101.06	Install Pipe	5w	25d	50d	1/20/2015	2/23/2015	2/2/2015	3/6/2015		
1.2.A.101.07	Install Equipment	2w	10d	50d	3/24/2015	4/6/2015	4/6/2015	4/17/2015		
1.2.A.101.09	Install Vents	2w	10d	50d	2/24/2015	3/9/2015	3/9/2015	3/20/2015		
1.2.A.101.20	Install Fdns	2w	10d	50d	3/10/2015	3/23/2015	3/23/2015	4/3/2015		
Total for 1.2.A.101 / 1.MFG.FRM1										
Control Account: 1.2.A.102 / 1.MFG.FRM1										
1.2.A.102.02	Assemble Steel	5w	25d	160d	7/1/2014	8/4/2014	7/28/2014	8/29/2014		
1.2.A.102.06	Install Pipe	5w	25d	26d	2/17/2015	3/23/2015	3/6/2015	4/9/2015		
1.2.A.102.07	Install Equipment	2w	10d	26d	4/21/2015	5/4/2015	5/8/2015	5/21/2015		
1.2.A.102.09	Install Vents	2w	10d	26d	3/24/2015	4/6/2015	4/10/2015	4/23/2015		
1.2.A.102.20	Install Fdns	2w	10d	26d	4/7/2015	4/20/2015	4/24/2015	5/7/2015		
Total for 1.2.A.102 / 1.MFG.FRM1										

Baseline Execution Index

Use this report to compare the cumulative number of tasks actually completed each period to the cumulative number of baseline tasks scheduled to be completed. The Baseline Execution Index (BEI) metric is used to indicate the efficiency with which actual work has been accomplished when measured against the baseline.

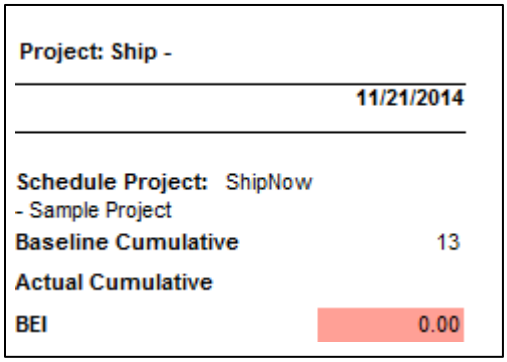
The report is driven from the activity table and compares the number of tasks that should have been completed to a certain point in time with the number of tasks that were completed.

The dates used for the BEI calculation originate from one of two places. If the schedule originated from Open Plan Professional (OPP) then the baseline dates come from the baseline identified in the grid on the schedule link page for the schedule project. If the schedule did not originate from OPP, the dates from the activity table are used.

The Baseline Cumulative section number represents those that have a baseline finish before the period end date. The Actual Cumulative number represents those tasks that contain an actual finish date before the same point in time.

You can only use the Baseline Execution Index (BEI) report if you have proper access rights.

Example



BCR Analysis Report

The purpose of the BCR Analysis report is to confirm that the change request data has been correctly added to Cobra and Open Plan as well as providing summary and detailed information about the changes processed in a particular period. The report displays before and after data for change requests processed for a period and highlights any discrepancies; that is, data that did not get processed as planned.

You can access the report from the Reports menu on the Navigation tab if the snapshot database has been configured in Cobra.

- The report displays workflow types that meet the following criteria:
  - The workflow type is in the Change Management category.
  - The change class is a budget class.

You can use the report options fields to customize the report. You can filter the data in the report by project, control account, CAM, change number, and/or stage. If you want to include the report on a dashboard, you can save the report and create a Files dashpart.

After you enter your selection criteria in the **Reports » BCR Analysis** view and click **Run Report**, PM Compass generates the report as an Excel spreadsheet, saves it to the Links folder (specified in **Administration » System Settings » File Folders),** and sends you an email with a hyperlink to the report. The report filename is **BCR Analysis_<user ID>_<change class>.** You can click the **View Status** button to make sure the job is picked up by the process server and see the status of the job running.

The report includes the following tabs:

- **Summary**: This tab contains the following sections:
  - **Information**: This section contains the project, change number, stage, control account, work package, activity ID, and so on.

    The report will contain all the information for the control accounts selected on the workflow form. The stage is used to indicate the state of the workflow. A Closed stage means the workflow has been completed. An In-Progress stage means the workflow has been started but not completed. A Failed stage means the workflow contains an action of Continue Approve or Continue Complete. If the workflow is in Continue Complete, it means some of the change actions may have been processed but it was not completed. The after section is always blank for failed workflows. You should access a failed workflow for more information about the failure and how to resolve the issue.
  - **Before**: This section contains information on the Cobra and Open Plan live projects when the change request is created. The Before Cobra information is refreshed right before completing the workflow to incorporate any changes to the live project while the change request was being approved.
  - **Requested**: This section contains information in the change request. This includes the sandbox project and the change logs. This section contains a column titled **Is There a Change/Deletion?,** which can be used to filter the report to only show what has changed in the change request.
  - **After**: This section contains information on the Cobra and Open Plan live projects after the change request is processed. When the information in the After section does not equal to the information in the Requested section, the fields are highlighted in red. You can use this information to identify if all data in the change request was correctly posted to the live project. If any data did not post correctly, PM Compass highlights the discrepancy in red.

> **Note:** When you run the report, select the **Only Include Workflows that Contain Discrepancies** option to filter the report by displaying only the workflows with information highlighted in red in the After section.

- **Cost Detail**: This tab displays the time phased costs and is very similar to the standard Cobra Time phased Repeat Sub report. It includes the Before, Requested, and After data to show the costs that were in Cobra, the change request, and what is now in the live project after completing the workflow. When you click **Change Number** on the Summary tab, the system displays this tab with the related time phased costs.

  If the time-phasing of the costs between the Requested section and the After section do not match, the values are highlighted. A common scenario that will cause highlighting of the time-phased values is when the status date on the workflow form during the time the workflow was in approval did not match the status date of the live project at the time the workflow was completed. In order not to change history in the live project, the status date on the workflow form is updated to match the status date of the live project.

  > **Attention:** For more information about the report, see “BCR Analysis Report is Highlighting Dates/Values as Discrepancies but there are No Errors” in the PM Compass Help System under Reports » BCR Analysis Report.

- **Report Template**: This tab displays the standard Cobra report template (named BCRAnalysis.xlsx).
- **Report Information**: This tab displays the filter criteria that you used to generate the report.

The report only includes workflows that have been started. You can see workflows that have not yet started in the Workflow List view and the Workflow List report.

> **Note:** Before you begin, you must set up a snapshot database. For more information and steps, see "The BCR Snapshot Database" of the *Deltek Cobra Installation Guide* for details about how to create a snapshot database and how to link the snapshot database in the Cobra Data Tool.
>
> For more information about the report, see “BCR Analysis Report” in the PM Compass Help System under **Reports » BCR Analysis Report**.

API Reports

API reports enable a quick glance at all progress entries created through the API and any errors encountered during the import. These reports provide detailed insights into each import, including their sources. In addition, users can filter the view to show data from past periods.

You can access API reports by clicking **Reports » API Reports** on the Navigation menu.

The API reports contain two tabs:

- **Import Source Report:** Use the Import Source report to view all imported records. This report displays information such as Project Name, Import Time, whether the entire import passed or failed, and other related details.

  Attention: For a complete definition of the field list, see “Import Source Report” in the PM Compass Help System under **Reports » API Reports**.

- **Import Summary Report**: Use the Import Summary report to view a summary row for each import. The Summary row displays the total number of failed and correct records. Below the Summary row, you will find a list of records that failed validation, along with an explanation of what is incorrect.

  Attention: For a complete definition of the field list, see “Import Summary Report” in the PM Compass Help System under **Reports » API Reports**.

About Deltek

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