Deltek

# Deltek Cobra® 8.4

## Cobra Essentials

**February 24, 2021**

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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.



This edition published February 2021.

# Contents

# Start Your Adventure

Cobra allows you to set up your project plan (your budget), enter the time spent working on tasks (your actuals), calculate how much work you actually accomplished (your earned value), and update the remaining effort required to finish your tasks or project (your forecast).

The intent of this guide is to help you become familiar with Cobra's basic capabilities. We first show you how a typical project and its key elements are seen through the eyes of someone charged with planning and maintaining project information, and then we help you to explore the flexible configuration options as you walk through Cobra's basic functionality. Throughout the guide, there are links to the Cobra online help where you can find additional information.

If you have not yet set up your database platform, created a Cobra database, or installed Cobra, see Appendix A: Before You Explore Cobra for information and steps.

## Launch Cobra

To launch Cobra, click **Start » Deltek Cobra 8.4 » Deltek Cobra 8.4**.

After starting Cobra, enter a user ID and password to log in. The default user ID is **SYSADMIN** and the default password is **password**. For security reasons, you should change this password as soon as possible.

**To change your password, complete the following steps:**

1. Click  **» Change Password** to display the Change Password dialog box.
2. Enter your current password in the **Old Password** field.
3. Enter a new password in the **New Password** field.
4. Re-enter the new password in the **Re-enter New Password** field.
5. Click **OK** to save the new password.

## Restore the Essential Cobra Sample Data

The Essential Cobra sample data includes a simple project and its data which you can use to become familiar with Cobra. It is used for all screenshots and examples in this guide. You can use the sample data as a starting point for your own project; adding additional data or modifying existing data and structures.

**To restore the Essentials sample data, complete the following steps:**

1. Log in to Cobra and click  **» Manage » Restore**.
2. Navigate to the Cobra folder. For example, C:\Program Files (x86)\Deltek\Cobra.
3. In Samples » Backups, select the **DELTEKCOBRAESSENTIALSAMPLEDATA.CMP** file.
4. In the Select Files to Restore dialog box, confirm that everything is selected.
5. Click **Restore**.
6. After the restore is complete, you can view the log or click **Close**.

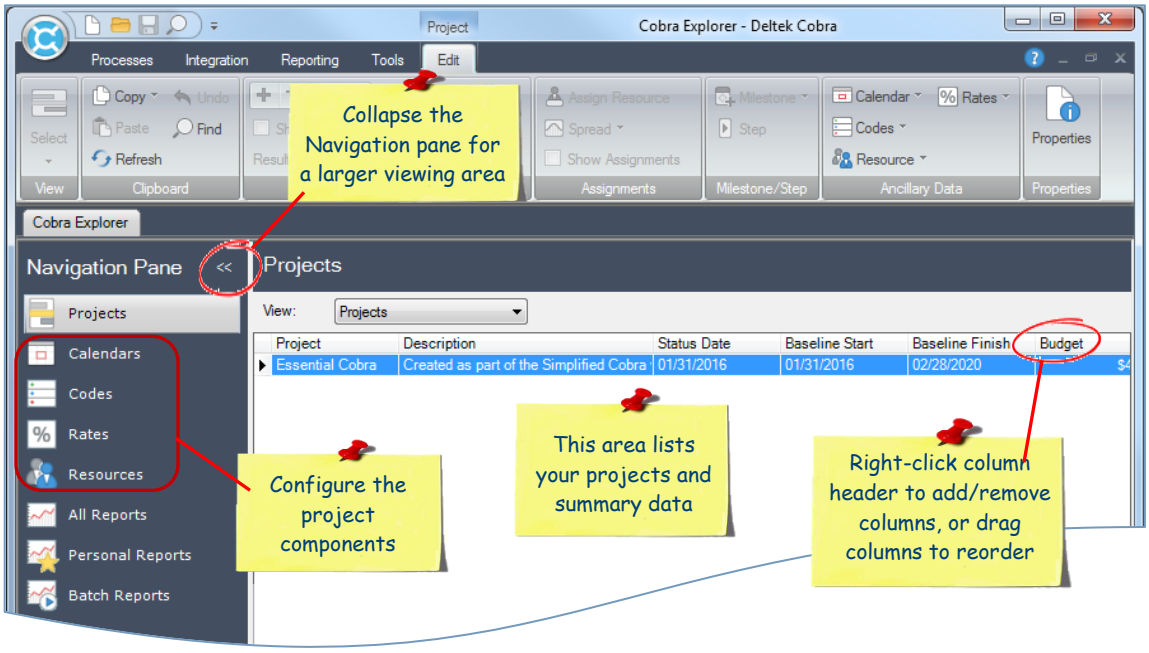
# Explore Cobra

## Cobra Explorer

The Cobra Explorer view, in conjunction with the left hand Navigation Pane, allows you to view and access all projects, related ancillary files (calendars, codes, rates, resources), and reports.

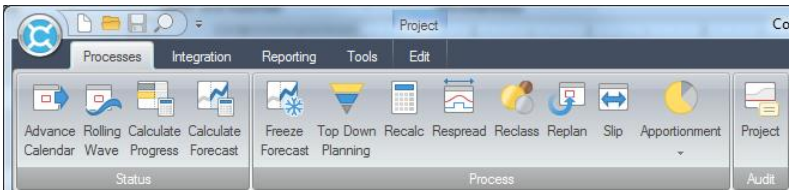
The view includes summary information for each project. You can right-click on a column heading to add or remove columns to view different data and drag and drop columns to reorder them.

You can create and maintain the project components using the links in the Navigation pane and collapse the Navigation pane to increase your viewing area.



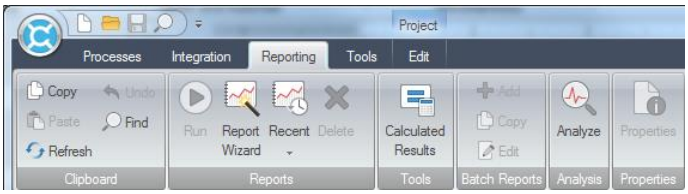

## Tabs

- Use the Processes tab to perform Cobra processes.

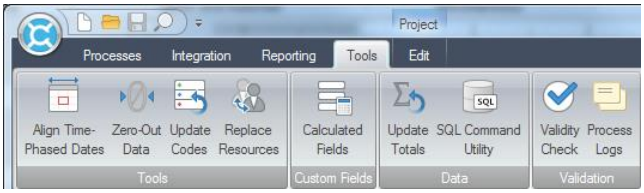



- Use the Integration tab to import and export to/from Cobra.

- Use the Reporting tab to create reports and analyze data.



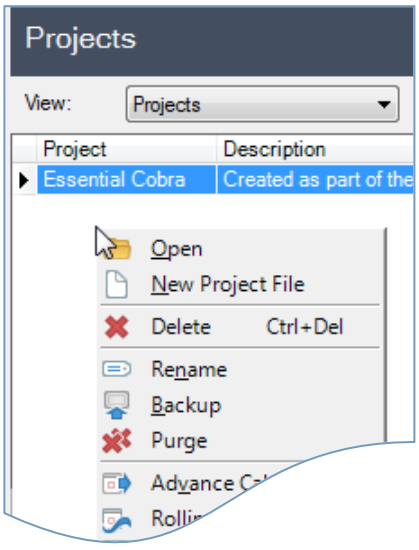

- Use the Tools tab to manage and validate data and create calculated fields.




- The Edit tab options change, depending on the view that you are in:
  - Project Edit tab
  - Calendar Edit tab
  - Codes Edit tab
  - Rates Edit tab
  - Resources Edit tab

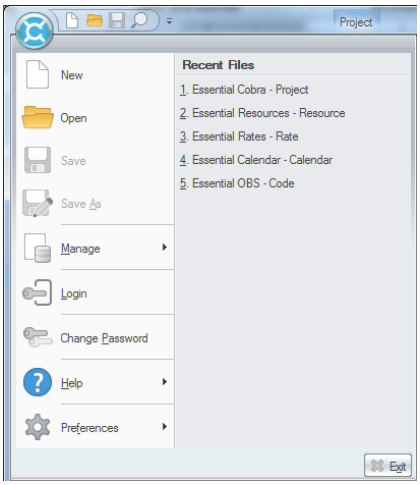
# Shortcut Menus

Many of the panes and grids have shortcut menus. For example, right-clicking on the white space in the Projects view displays a list of shortcut options.



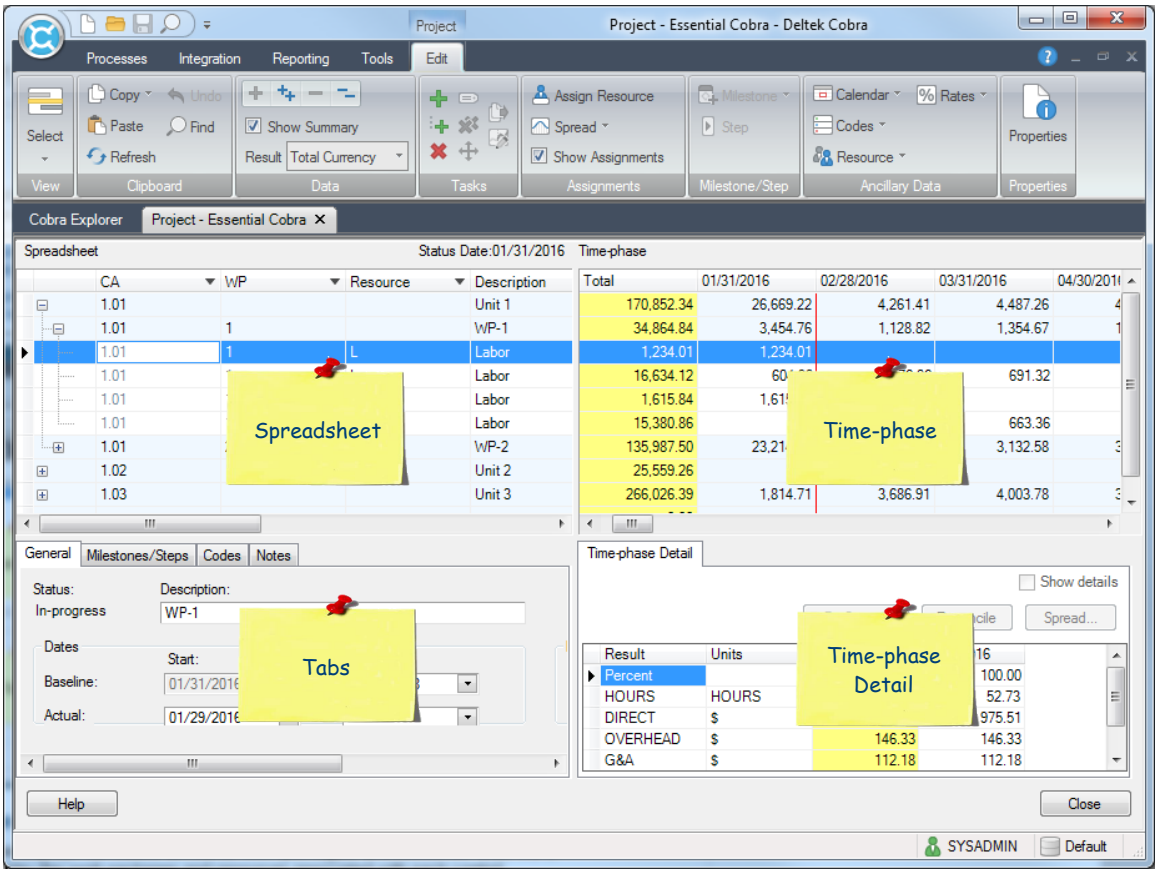
# File Manager

Click the Cobra button in the top left corner of the window to backup and restore files, change your password, and set preferences, among other things.



# Project View

Double-click the project in the Cobra Explorer view to open it and view the control account, work package, and resource information.

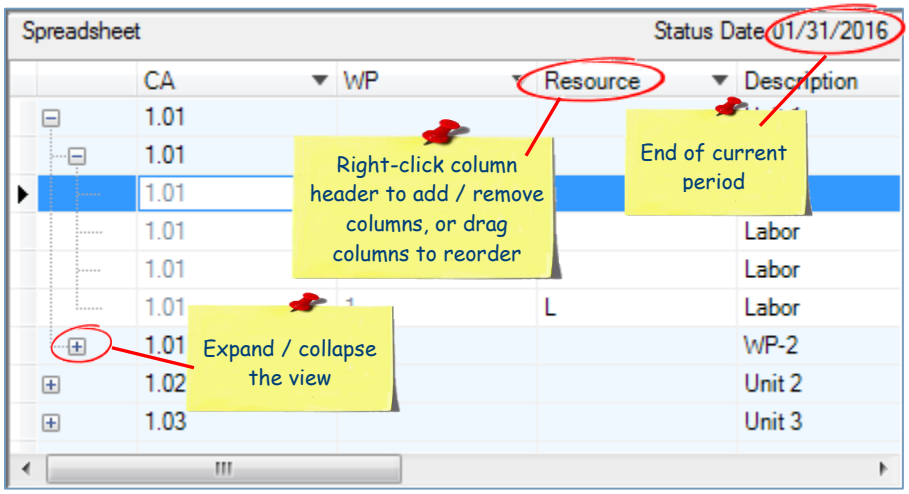



## Spreadsheet Pane

The Spreadsheet pane displays control accounts, work packages, and resources. Click the plus sign ⊞ to display the work packages and resources associated with each control account. You can see separate lines for Budget, Actual, Earned, and Forecast. The **Status Date** in the top right corner displays the end of the current period.

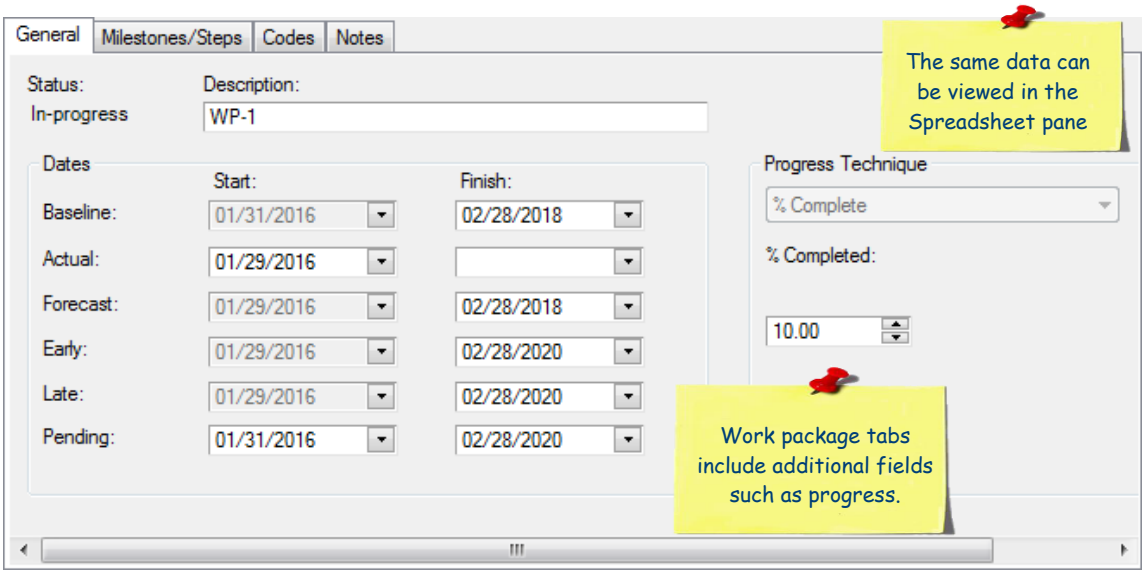
When you select a control account or work package, the information in the Tabs and Time-phase panes changes to reflect the data for the selected control account or work package. The Time-phase Detail pane is blank until you select a resource in the Spreadsheet pane.

Right-click on a column header to add or remove columns, depending on the data that you wish to view. In addition, you can drag and drop the columns to reorder them.



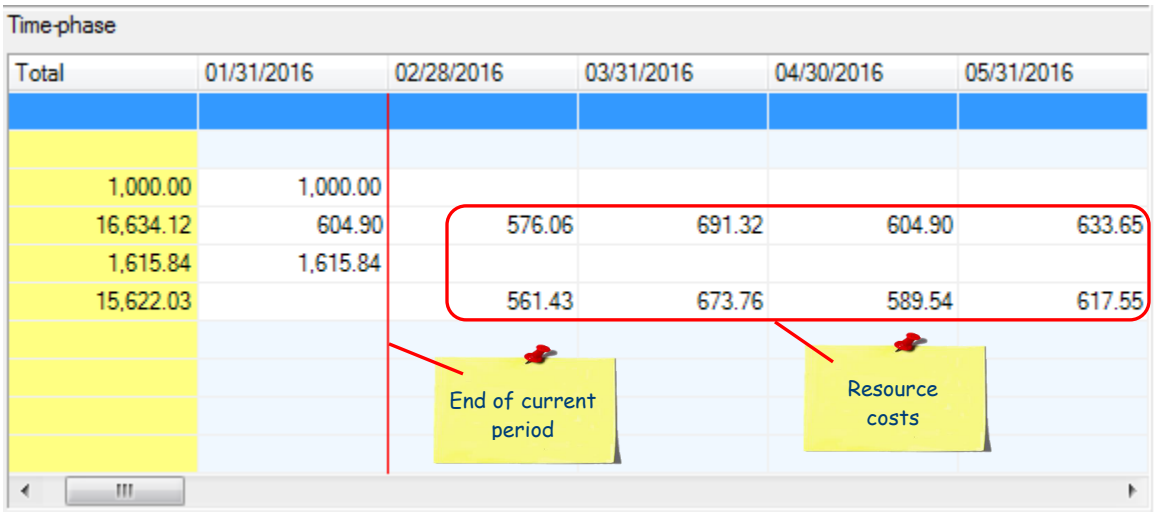

## Tabs Pane

The Tabs pane reflects the data for the control account or work package that you select in the Spreadsheet pane. Everything that you see on the General and Codes tabs can be added as a column to the Spreadsheet pane and you can edit the information in either location.



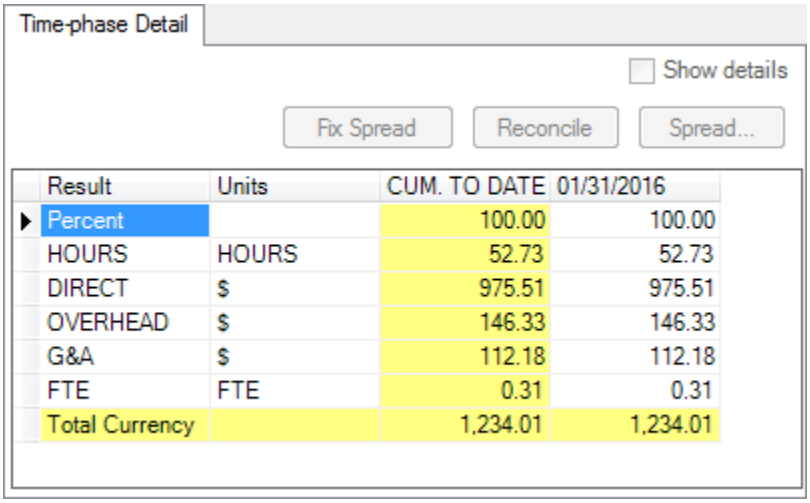
## Time-phase Pane

The Time-phase pane displays the costs associated with the resource assignments. The red line indicates the end of the current period. You specify the length of the periods when you create your calendars.




## Time-phase Detail Pane

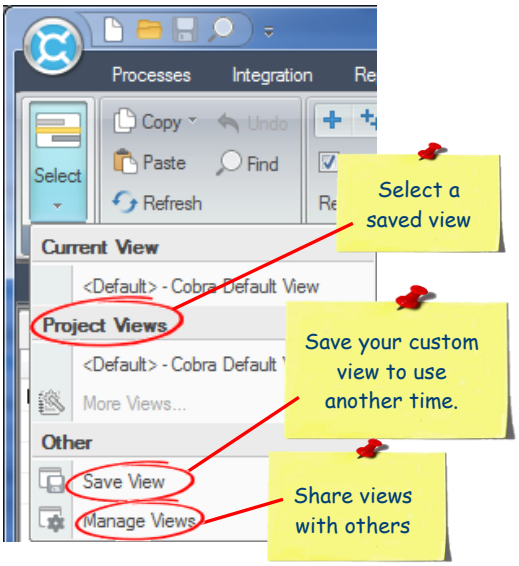
When you select a resource in the Spreadsheet pane, the costs associated with that resource display in the Time-phase Detail pane. These cost calculations are set up on the Resources Calculation tab. You can click in a cell and edit the information as needed.



# Save the View

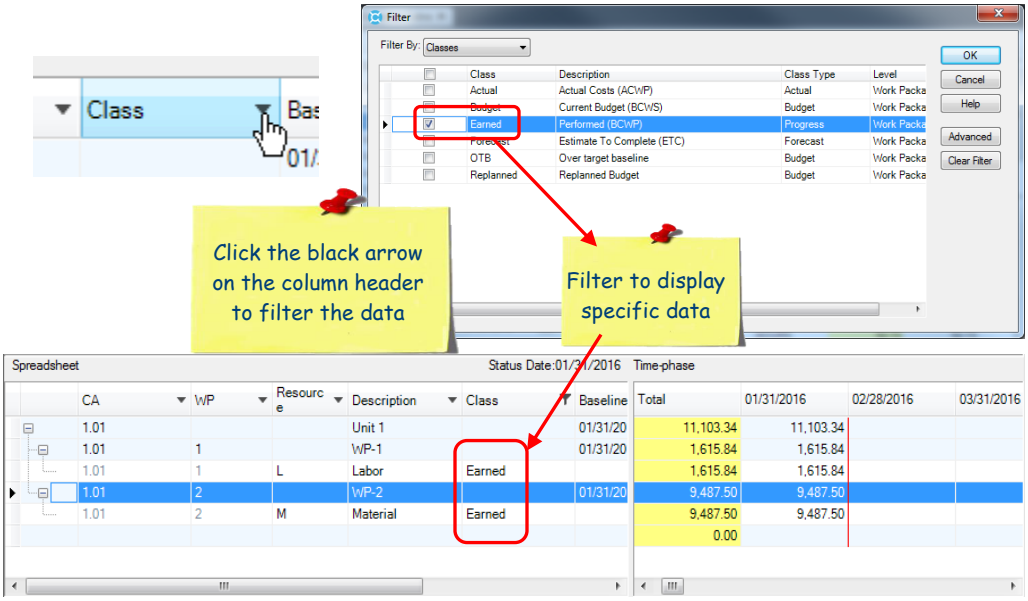
If you customize the view by, for example, adding or reordering columns, you can save the custom view so that the next time you access Cobra, you have everything set up the way you like it. You can have several different views saved. For example, you may want one that only displays the Forecast costs, and you may want another that displays Budget and Actuals.

Views are stored on your local drive. Use Manage Views to share views with others.



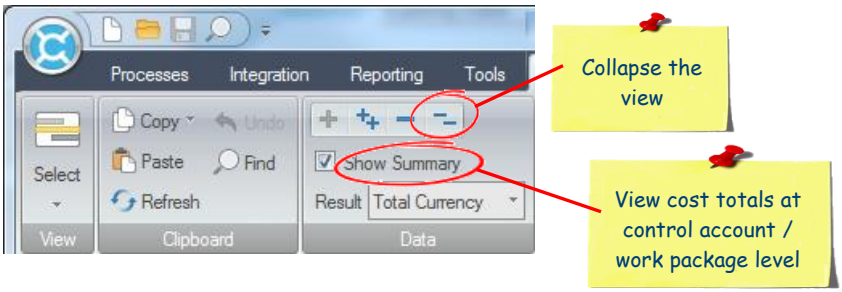

# Filter the View

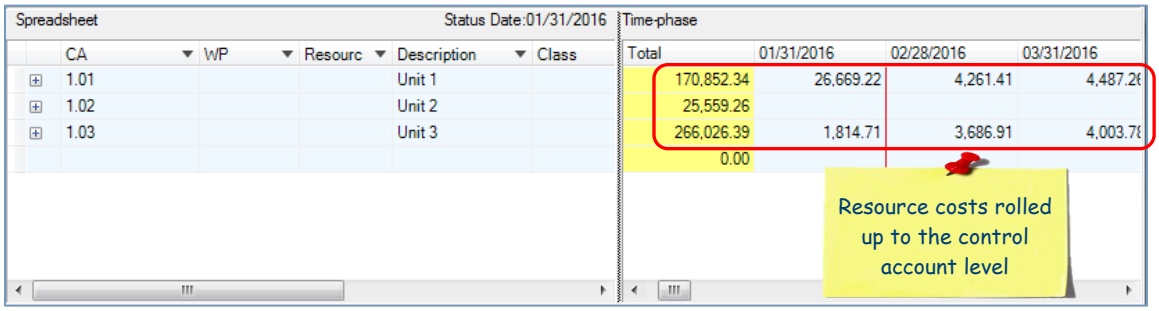
You can filter the view to only display certain types of information, for example, Earned Value. When you filter, only the control accounts/work packages that include that type of information display in the grid. To view all information again, use the filter to select all information types.



# View Summary Data

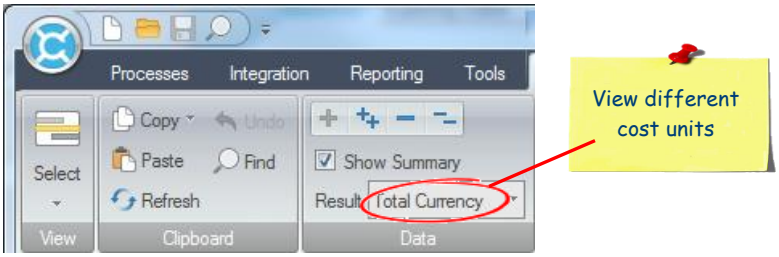
The costs display at the resource level in the Time-phase pane. To see cost totals at the control account or work package level, click **Show Summary**. Click  to collapse the view to see the cost totals rolled up to the control account level. All of the displayed data is summarized. You can use filters to aggregate data in different ways.



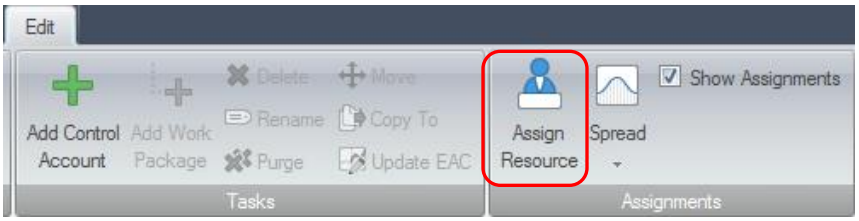

# View Direct and Indirect Resource Costs

Direct (hours, direct dollars) and indirect (burdens) costs are calculated against the resource. You can choose to view and edit different cost units (Results), for example, **Total Currency**, **Hours**, or **FTE** (Full Time Equivalent), in the Time-phase pane. These are based on calculations that you define on the Resources Calculations tab.



# Assign Resources

You can assign any of the existing resources to a control account or work package. Select **Resources** on the Cobra Explorer Navigation menu to manage resources.



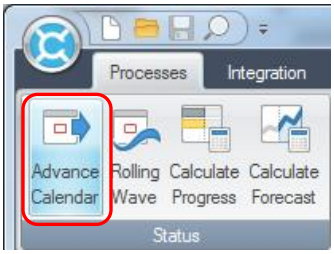

# Update Your Project

When you start your project, you enter your initial budget and forecast. At the end of each reporting period there are several steps that you perform in Cobra:

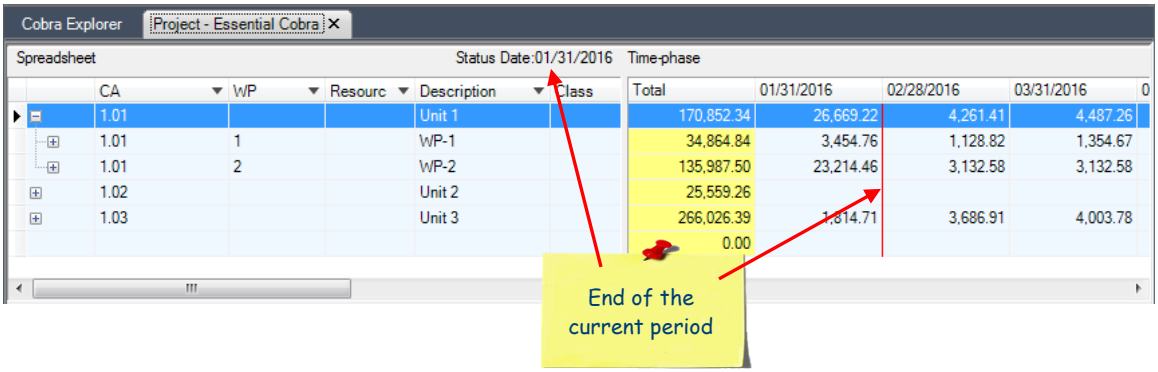
- Step 1: Start a New Reporting Period
- Step 2: Enter a Start Date
- Step 3: Enter Actuals
- Step 4: Enter Progress
- Step 5: Calculate Forecast

## Step 1: Start a New Reporting Period

Click Advance Calendar on the Processes tab to close out the current period and move the status date (period end date) to the end of the next period. The status date changes to the last day of the next period and the red line on the Time-phase pane moves to the last day of the next period.

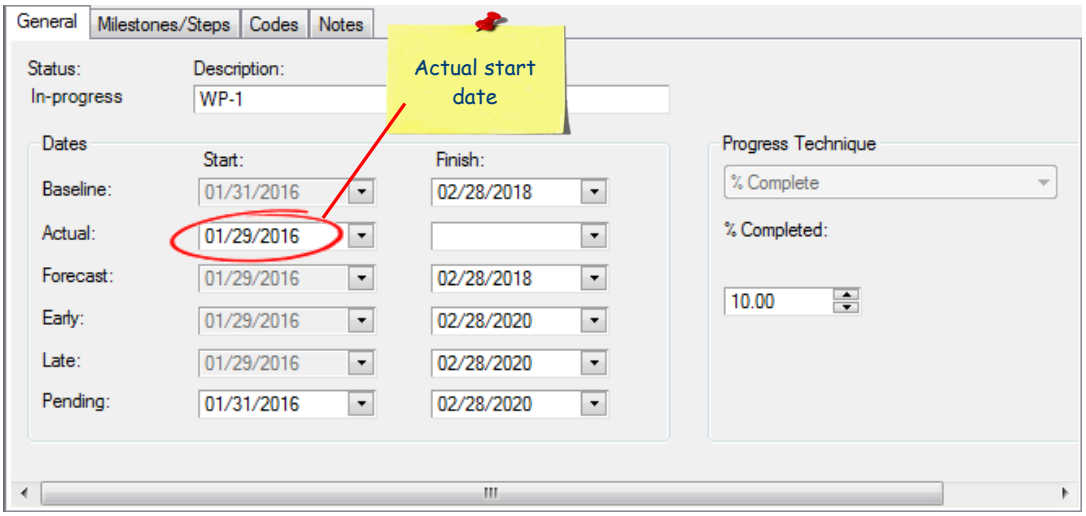



The example below shows the sample data before you advance the calendar. After you advance the calendar, the Status Date will change to 02/28/2016 and the red line will move to the end of February.



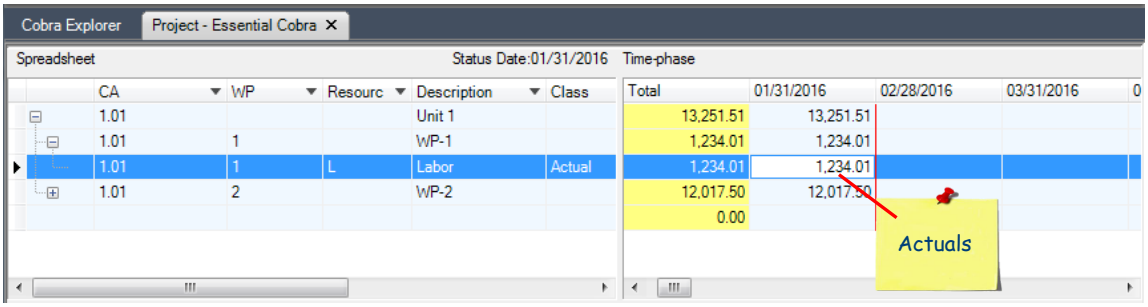
## Step 2: Enter a Start Date

After the work starts, and before you enter actuals or calculate progress, you must set the status of the work package to in-progress by entering an actual start date that represents when the work began. You do this on the work package General tab or in the Spreadsheet grid.




## Step 3: Enter Actuals

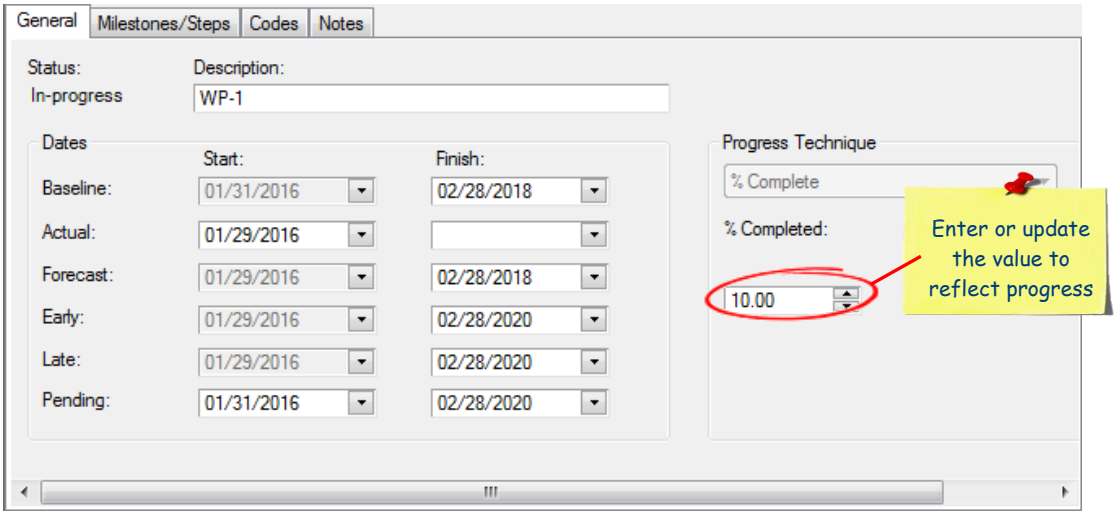
Enter actual costs in the Time-phased grid.



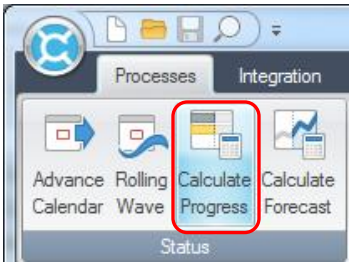
## Step 4: Enter Progress

Update progress for the current period that ends on the status date. For some progress techniques such as Level of Effort (LOE), you don't need to enter anything since Cobra calculates the progress when you run the Calculate Progress process. For progress techniques such as **% Complete**, you must enter progress for each work package. You can enter progress on the General tab.

Earned Value is calculated based on the progress technique and value.

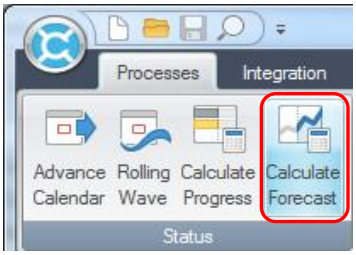



After entering progress for all work packages that have progress, run the Calculate Progress process. Cobra calculates and updates all earned value in the project.




## Step 5: Calculate Forecast

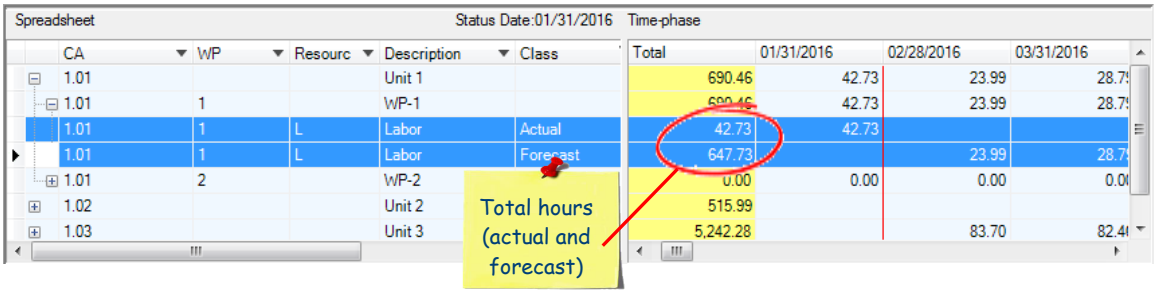
When you run the Calculate Forecast process, Cobra projects the total cost in future periods and spreads that amount across the remaining periods based on the selected forecast method. After you run the calculation, you can manually modify any forecast amounts in the grid as needed.



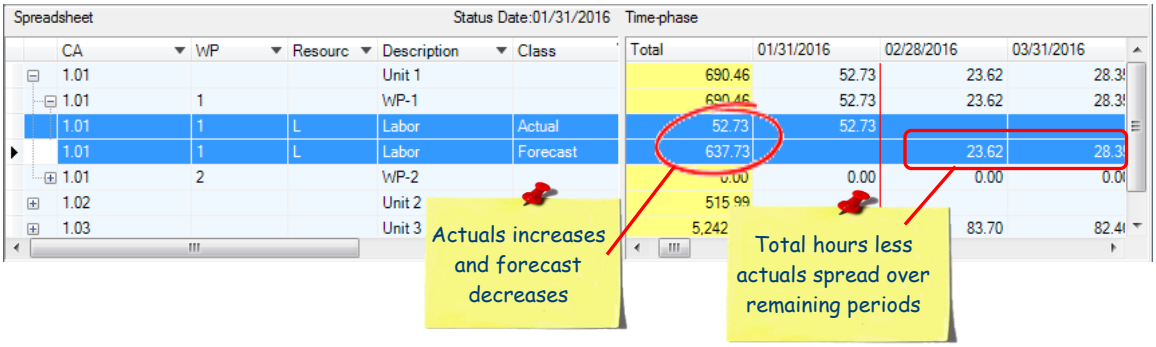
**Example**

*This example uses the forecast method of retaining the existing estimate at complete.*

There are a total of 690.46 hours with 42.73 in actuals and 647.73 in forecast.




The actual hours are increased to 52.73 and the Calculate Forecast process is run. Cobra calculates total hours less actuals and respreads the amount across the remaining periods. The total hours remain the same but actuals hours have increased and forecast hours have decreased.




After calculating forecast, you now have all of the data you need in order to determine if you are completing work as planned, staying within budget, and projecting to complete on time.

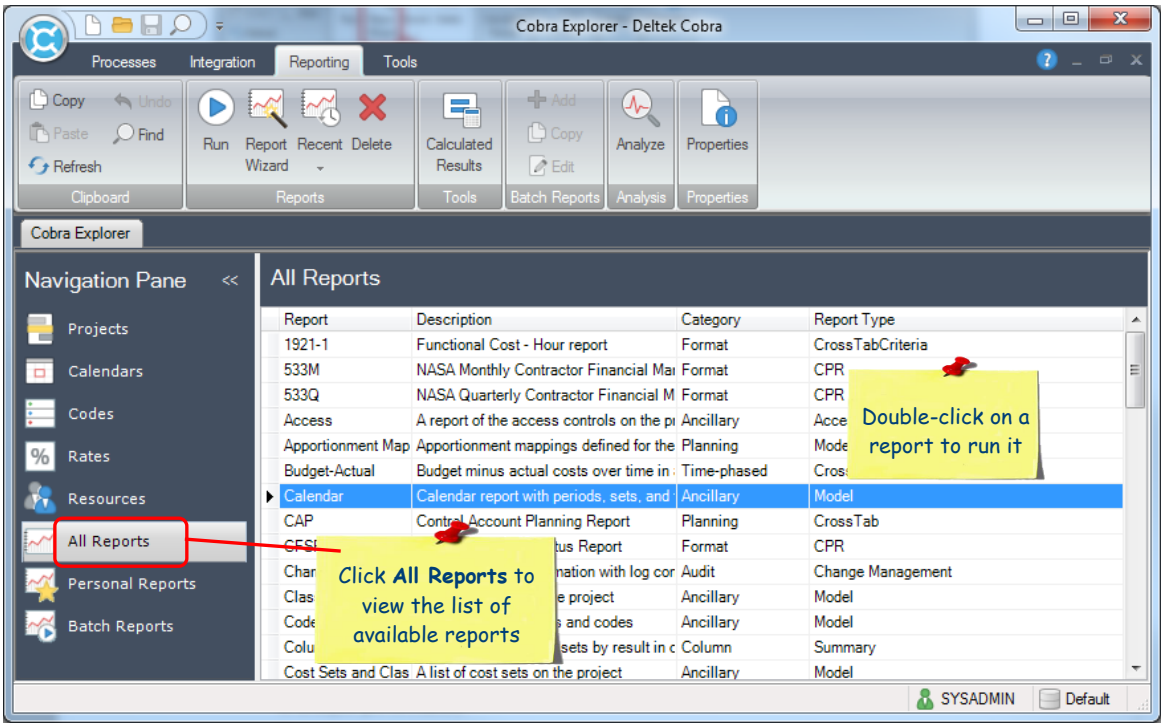
You can run various reports to analyze data and variances, and to report to internal and external stakeholders.

# Reports

Cobra features a complete set of standard cost and schedule reports. You can view reports by clicking **All Reports** in the Navigation pane. To run a report, do one of the following:

- Double-click a report in the All Reports grid.
- Click the Report Wizard menu option.
- Select a report in the All Reports grid and click the **Run** menu option.

After the report displays, you can save it as an Excel file.




- Ancillary reports display information about the ancillary data (calendar, code, rate, and resource) connected to the project and the related access control.
- Audit reports display project account information and audit transactions.
- Graphic reports display project information in a graphical format.
- Column reports display cost sets and results information in columns.
- Export reports are unformatted reports that contain the contents of the selected ancillary file. The data is displayed in a flat Excel file that can be manipulated and re-imported if desired through the Integration wizard.
- Cobra provides a format reporting utility that retrieves data from Cobra and formats data related to government standard reports.
- Planning reports display control account and work package information that you can use to analyze performance.
- Reports are categorized as time-phased when the data is organized by periods from the selected calendar set (such as monthly, quarterly, semi-annual or annual). The criteria/cost set is displayed by row and the calendar periods by column. Data is plotted at the intersection of both.

# Continue Your Adventure

You've had a chance to explore Cobra and set up some basic information; however, that just scratches the surface of what this product can do. Cobra has so much more to offer.

### Estimates

- Back-in your hours using top-down planning to meet a total monetary amount
- Move projects easily along a timeline when priorities change or projects slip
- Reprice values quickly using new rates or rate escalation
- Define your own calculations to model your company's burden buildup
- Define rules using apportionment and add new resources based on need

### Budgets and Forecasts

- Organize data using control accounts and work packages
- Improve your compliance with the EIA standard for EVMS with flexible formatting of the project hierarchy
- Summarize data for reporting purposes
- Use time-phased budgets and rate escalation to estimate future cost increases
- Use multiple foreign currencies
- Load your budget and forecast quickly from integrated products
- Maintain unlimited, time-phased forecasts
- Use forecasts to run "what-if" rate and resource scenarios

### Actual Costs

- Automatically load actual cost data from accounting systems
- Integrate charge numbers from your accounting system for cost variance analysis
- Track approved actuals and accruals

### Status/Earned Value

- Document explanation of variances, impacts, and corrective actions
- Update status automatically from a schedule
- Use earned value techniques for accurate earned value calculations
- Set thresholds to monitor work that is not progressing as planned

### Integration

- Integrate directly with Deltek PM Compass, Open Plan, wInsight Analytics, Acumen, Microsoft Project, Microsoft Project Server, Microsoft Excel, and Primavera
- Integrate with Deltek Costpoint and other accounting systems
- View Cobra data from within the Deltek Open Plan scheduling tool
- Import resource, rate, code, and calendar data from Excel or CSV files

### Change Control

- Freeze and retain historical data to see what has changed over time
- Simplify change request approvals with reports that show proposed and approved changes
- Use a different set of rates for each change in scope
- Track changes automatically with an integrated audit function that creates an audit trail

### Multi-projects

- Work with a master project and any number of subprojects as though they were a single entity

### Reports

- Create and edit reports using Cobra's Report Wizard with output directly into Microsoft Excel
- Create detailed time-phased reports or high-level multi-project reports
- Submit standard monthly reports in different formats and customize reports

### Other

- Automate your month-end process
- Track other types of data such as funding and obligations

# See What People Are Saying About Cobra

*"…a simple yet robust tool for tracking project financial performance."*

*"…one of the top options for an earned value cost engine."*

The New Look and Feel of Deltek Cobra 8.0

*"…it just keeps on getting better as Deltek have been listening to their customers and creating some other really great enhancements."*

*"This is an exciting upgrade and has delivered on the promises made…"*

*"…a really nice piece of work by Deltek has been delivered here and we anticipate the user base will be delighted…"*

What's New in Deltek Cobra 8.1

# Cobra Components

When you first set up Cobra, you need to configure the system to reflect some of your basic business related standards such as your calendar, resources, rates, reporting and so on. After they are set up, you can associate these components with each new project you create.

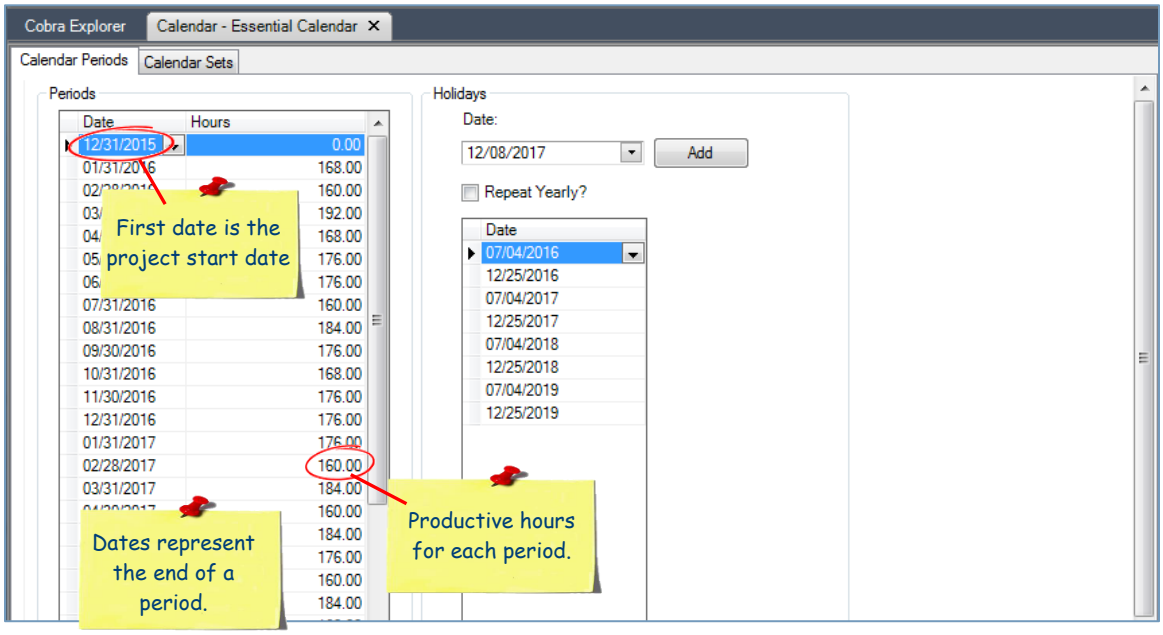
In this section we describe these components in more detail so you can get a sense of how flexible they are and how they affect your project. If you really want to understand the components in detail, access the links that are included in the various component topics.

## Calendar

The first step is to create the primary calendar with calendar periods. The date and time spans determine how budget is spread across reporting periods, how costs are summarized, and how the information is displayed in reports.

The calendar periods can be different lengths as long as they span the entire duration of the project. When you add information to a project, it is stored in the calendar period buckets defined by the calendar. It's a best practice to extend your calendar beyond the expected finish date, to account for potential slippage.

You can create a new calendar by clicking **» New** and selecting **Calendar**. Use the Calendar Edit tab options to generate calendar periods, calculate hours, and edit the calendar properties, among other things.




The next step is to create subsets of the primary calendar, called calendar sets. You use calendar sets to view project information in different ways, such as monthly, quarterly, and yearly.

When you create a calendar set, you indicate the cut-off date(s) that you want Cobra to use for combining and rolling up the information. Cobra calls this date selection a "flag." The dates that you flag determine how the information is consolidated and viewed on a report.

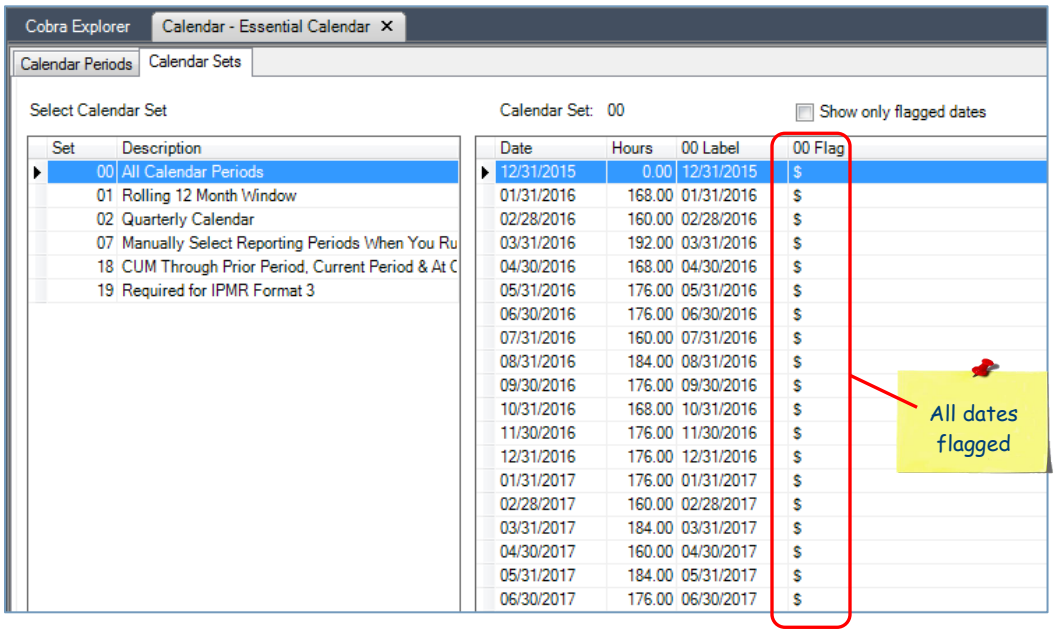
You can use Fixed flags to define fixed periods or floating flags which move with the calendar as it is advanced to allow rolling windows of time such as "the next 12 months."

When you run a report, only the flagged dates and their rolled up data display on the report.

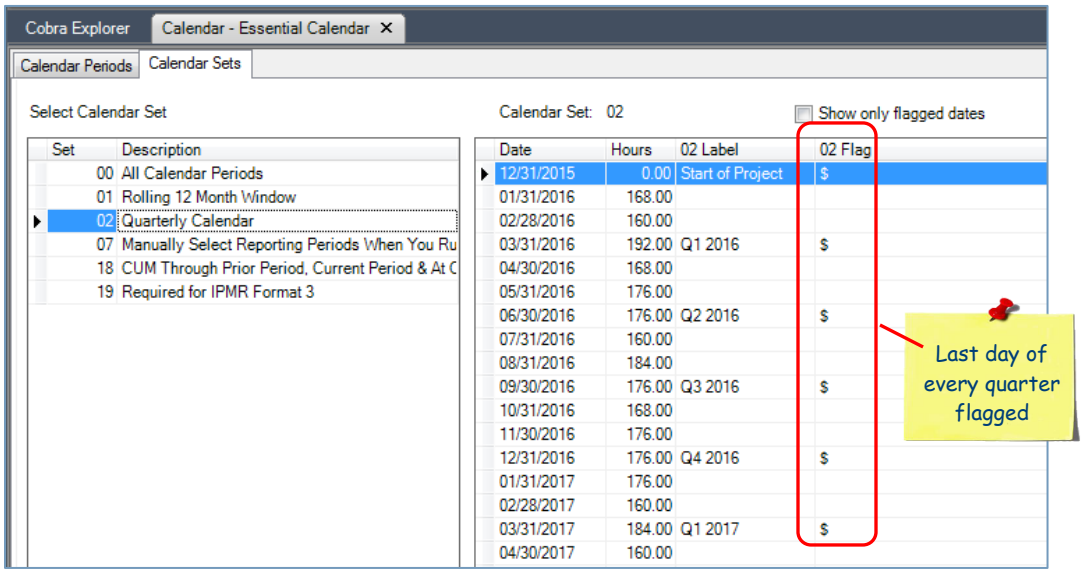
## Example Showing How Calendar Sets Impact Reporting

In this example, **00 All Calendar Periods** includes a date for the last day of every month and every date has been flagged. **02 Quarterly Calendar** includes the same dates; however, only the last day of every quarter has been flagged.

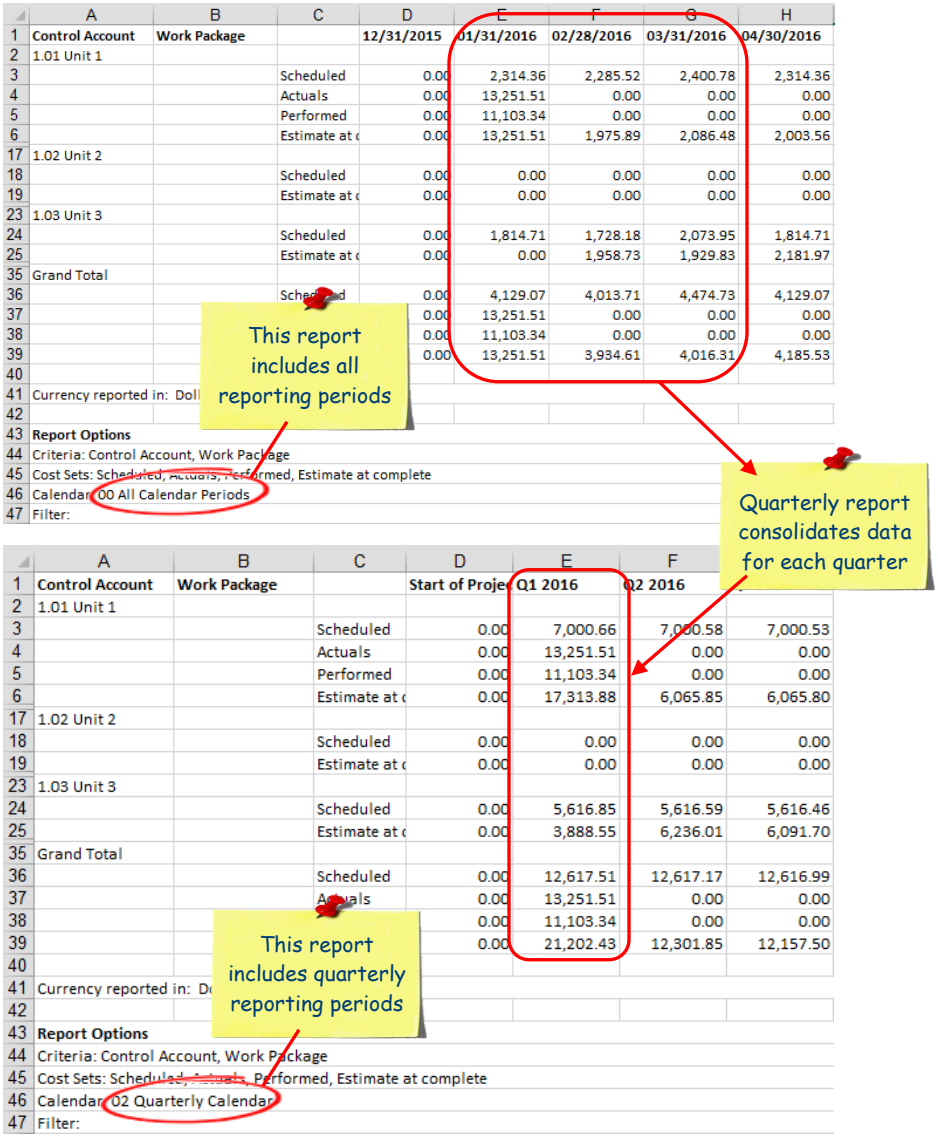
**00 All Calendar Periods**




**02 Quarterly Calendar**



When you run a report using **00 All Calendar Periods**, the report displays by months with costs for every month. When you run a report using **02 Quarterly Calendar**, the report displays by quarters with consolidated costs.



| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | **Control Account** | **Work Package** | | **12/31/2015** | **01/31/2016** | **02/28/2016** | **03/31/2016** | **04/30/2016** |
| 2 | 1.01 Unit 1 | | | | | | | |
| 3 | | | Scheduled | 0.00 | 2,314.36 | 2,285.52 | 2,400.78 | 2,314.36 |
| 4 | | | Actuals | 0.00 | 13,251.51 | 0.00 | 0.00 | 0.00 |
| 5 | | | Performed | 0.00 | 11,103.34 | 0.00 | 0.00 | 0.00 |
| 6 | | | Estimate at c | 0.00 | 13,251.51 | 1,975.89 | 2,086.48 | 2,003.56 |
| 17 | 1.02 Unit 2 | | | | | | | |
| 18 | | | Scheduled | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 19 | | | Estimate at c | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 23 | 1.03 Unit 3 | | | | | | | |
| 24 | | | Scheduled | 0.00 | 1,814.71 | 1,728.18 | 2,073.95 | 1,814.71 |
| 25 | | | Estimate at c | 0.00 | 0.00 | 1,958.73 | 1,929.83 | 2,181.97 |
| 35 | Grand Total | | | | | | | |
| 36 | | | Sched | 0.00 | 4,129.07 | 4,013.71 | 4,474.73 | 4,129.07 |
| 37 | | | | 0.00 | 13,251.51 | 0.00 | 0.00 | 0.00 |
| 38 | | | | 0.00 | 11,103.34 | 0.00 | 0.00 | 0.00 |
| 39 | | | | 0.00 | 13,251.51 | 3,934.61 | 4,016.31 | 4,185.53 |
| 40 | | | | | | | | |
| 41 | Currency reported in: Doll | | | | | | | |
| 42 | | | | | | | | |
| 43 | **Report Options** | | | | | | | |
| 44 | Criteria: Control Account, Work Package | | | | | | | |
| 45 | Cost Sets: Scheduled, Actuals, Performed, Estimate at complete | | | | | | | |
| 46 | Calendar: 00 All Calendar Periods | | | | | | | |
| 47 | Filter: | | | | | | | |



| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | **Control Account** | **Work Package** | | **Start of Proje** | **Q1 2016** | **Q2 2016** |
| 2 | 1.01 Unit 1 | | | | | |
| 3 | | | Scheduled | 0.00 | 7,000.66 | 7,000.58 |
| 4 | | | Actuals | 0.00 | 13,251.51 | 0.00 |
| 5 | | | Performed | 0.00 | 11,103.34 | 0.00 |
| 6 | | | Estimate at c | 0.00 | 17,313.88 | 6,065.85 |
| 17 | 1.02 Unit 2 | | | | | |
| 18 | | | Scheduled | 0.00 | 0.00 | 0.00 |
| 19 | | | Estimate at c | 0.00 | 0.00 | 0.00 |
| 23 | 1.03 Unit 3 | | | | | |
| 24 | | | Scheduled | 0.00 | 5,616.85 | 5,616.59 |
| 25 | | | Estimate at c | 0.00 | 3,888.55 | 6,236.01 |
| 35 | Grand Total | | | | | |
| 36 | | | Scheduled | 0.00 | 12,617.51 | 12,617.17 |
| 37 | | | Actuals | 0.00 | 13,251.51 | 0.00 |
| 38 | | | | 0.00 | 11,103.34 | 0.00 |
| 39 | | | | 0.00 | 21,202.43 | 12,301.85 |
| 40 | | | | | | |
| 41 | Currency reported in: D | | | | | |
| 42 | | | | | | |
| 43 | **Report Options** | | | | | |
| 44 | Criteria: Control Account, Work Package | | | | | |
| 45 | Cost Sets: Scheduled, Actuals, Performed, Estimate at complete | | | | | |
| 46 | Calendar: 02 Quarterly Calendar | | | | | |
| 47 | Filter: | | | | | |



## Additional Topics and Procedures

These topics and procedures in the Cobra online help provide additional information and steps.

**Related Topics**

- Calendar Edit tab
- Calendar File Properties dialog box

**Related Procedures**

- Create a new calendar
- Add holidays to a calendar

- Add calendar sets

# Codes

Codes are used to view information in different ways. You can use them to filter, group, and aggregate data for reporting purposes. For example, you might want to know how many contractors you have working in New York, or you might want to see the structural design costs in the Design department.

In the example below, there are three contractors and the company has offices in two locations. You create a **Contractor** code file and a **Location** code file and assign codes as follows:

| | | | | | | |
|---|---|---|---|---|---|---|
| **Code File** | Contractor | Location | Contractor | Location | Contractor | Location |
| **Assigned Codes** | Engineer<br>Full-time<br>Remote | Houston | Engineer<br>Off-site<br>Remote | Los Angeles | Designer<br>Part-time | Los Angeles |

You want to know how many contractor **Engineers** you have working for you. The system looks at the codes and reports that there are currently two contractor Engineers.

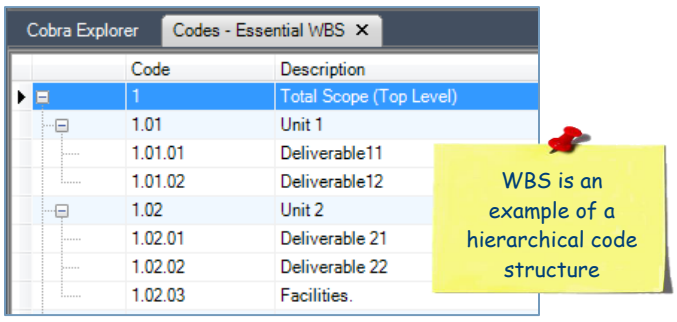
| | | | | | | |
|---|---|---|---|---|---|---|
| **Code File** | Contractor | Location | Contractor | Location | Contractor | Location |
| **Assigned Codes** | Engineer<br>Full-time<br>Remote | Houston | Engineer<br>Off-site<br>Remote | Los Angeles | Designer<br>Part-time | Los Angeles |

You now want to know how many contractor **Engineers** you have working in **Houston**. The system looks at the codes and reports that there is one contractor Engineer working in Houston.

| | | | | | | |
|---|---|---|---|---|---|---|
| **Code File** | Contractor | Location | Contractor | Location | Contractor | Location |
| **Assigned Codes** | Engineer<br>Full-time<br>Remote | Houston | Engineer<br>Off-site<br>Remote | Los Angeles | Designer<br>Part-time | Los Angeles |

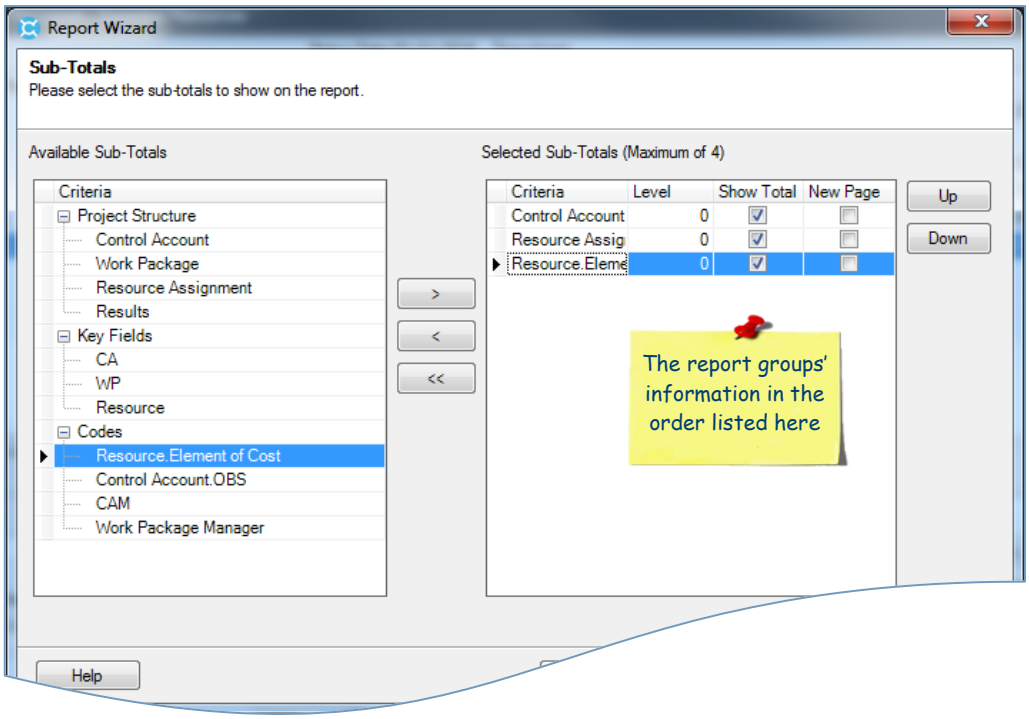
By setting up a coding system and assigning codes to your project, you can display, filter and report project data at a summary level, a detailed level, or any level within the project.

Some additional examples of code files might include, a list of managers, a list of charge numbers, or a hierarchical structure such as a work breakdown structure (WBS).

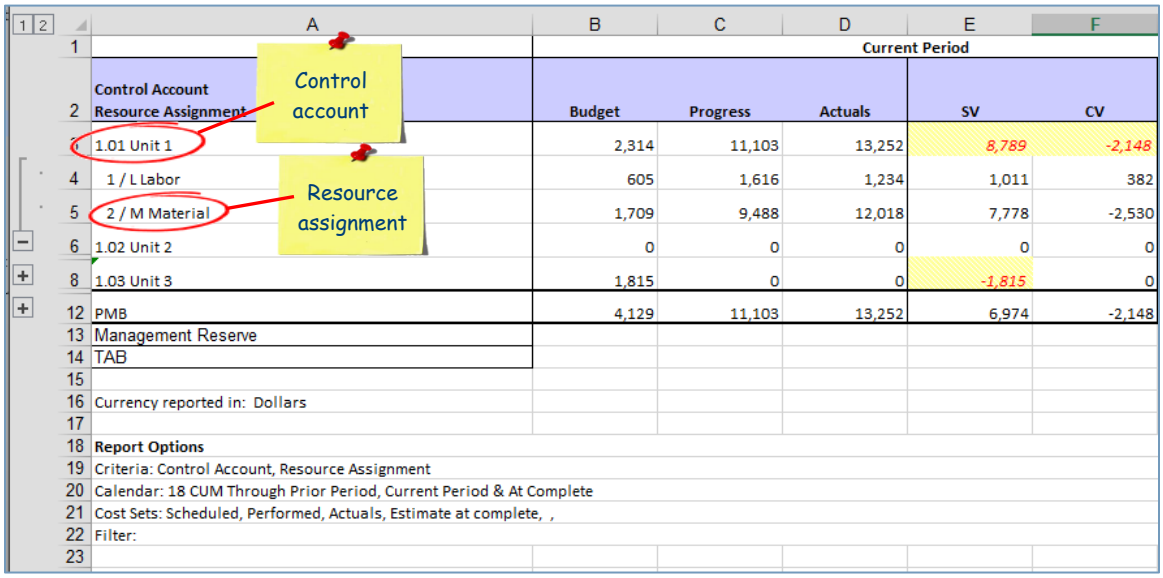


You can use codes for projects, control accounts, work packages, resource assignments, and ancillary data. After creating a code file and assigning it, the codes are included in pick lists and accessed during data entry.

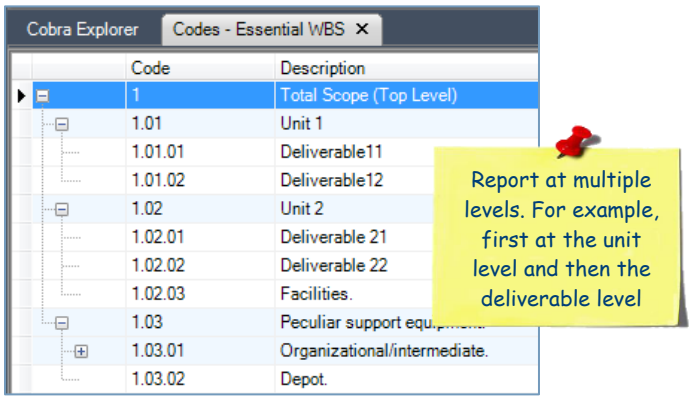
When you use the Report Wizard to run a report, you can select the codes that you want the system to use. The report groups and sub-totals the information in the order in which you list the codes.




In the example below, the report lists the information by control account and then by resource assignment:



When you run a report using a hierarchical code such as the WBS, you can report at multiple levels.




**Example of a Report with Multiple Levels**

| CA (1) | CA (2) | HOURS Scheduled |
|---|---|---|
| 1 Total Scope (Top Level) | | 6,449 |
| | 1.01 Unit 1 | 690 |
| | 1.02 Unit 2 | 516 |
| | 1.03 Peculiar support equipment. | 5,242 |
| Grand Total | | 6,449 |
| | | |
| Currency reported in: Dollars | | |

## Additional Topics and Procedures

These topics and procedures in the Cobra online help provide additional information and steps.

**Related Topics**

- Code File Property Dialog Box
- Code Assignments tab of the Project Properties dialog box
- Variance Thresholds
- Report Wizard

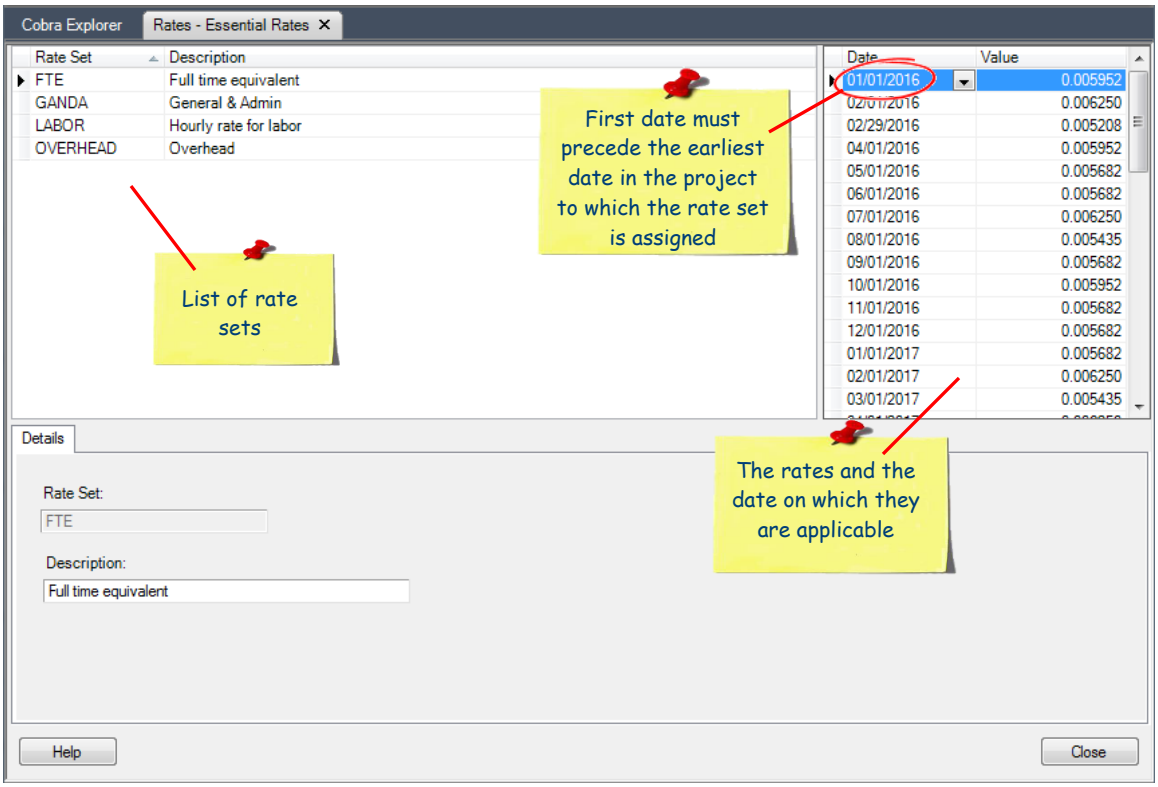
**Related Procedures**

- Create a New Code File
- Assign Codes to a Project
- Enable a User to Access a Code File

# Rates

Rates are used in resource calculations to define how costs are calculated. Since rates may change over time, you create a rate set which is a list of rates and the date each one goes into effect. The rates defined in a rate set can represent direct unburdened hourly rates, overhead rates, currency exchange rates, or any other type of multiplier whose value can be predicted over time.

Rates are always defined before resources because you need to select a rate when you create the resource.




### Rates Example

Assume that you want to define two types of rates for a project: hourly direct or unburdened rates, and overhead rates. Assuming that the project starts sometime after January 1, 2016, the following rate sets might apply:

**Rate File**

**Rate Set: TECH**

| Date | Rate |
|---|---|
| 01/01/2016 | 15.00 |
| 04/01/2016 | 15.25 |
| 07/01/2016 | 15.50 |
| 10/01/2016 | 15.75 |
| 01/01/2017 | 16.00 |
| 04/01/2017 | 16.25 |
| 07/01/2017 | 16.50 |
| 10/01/2017 | 16.75 |
| 01/01/2018 | 17.00 |

**Rate Set: OVERHEAD**

| Date | Rate |
|---|---|
| 01/01/2016 | 0.1500 |

Notice that the OVERHEAD rate set consists of a single rate that does not change over the life of the project. The TECH labor rate, however, changes on a quarterly basis, with the records in the rate set indicating each date a new rate becomes effective.

## Rate File

A collection of rate sets is called a rate file. Different rate files typically include the same rate sets but with different rates. You can use multiple rate files in a project.

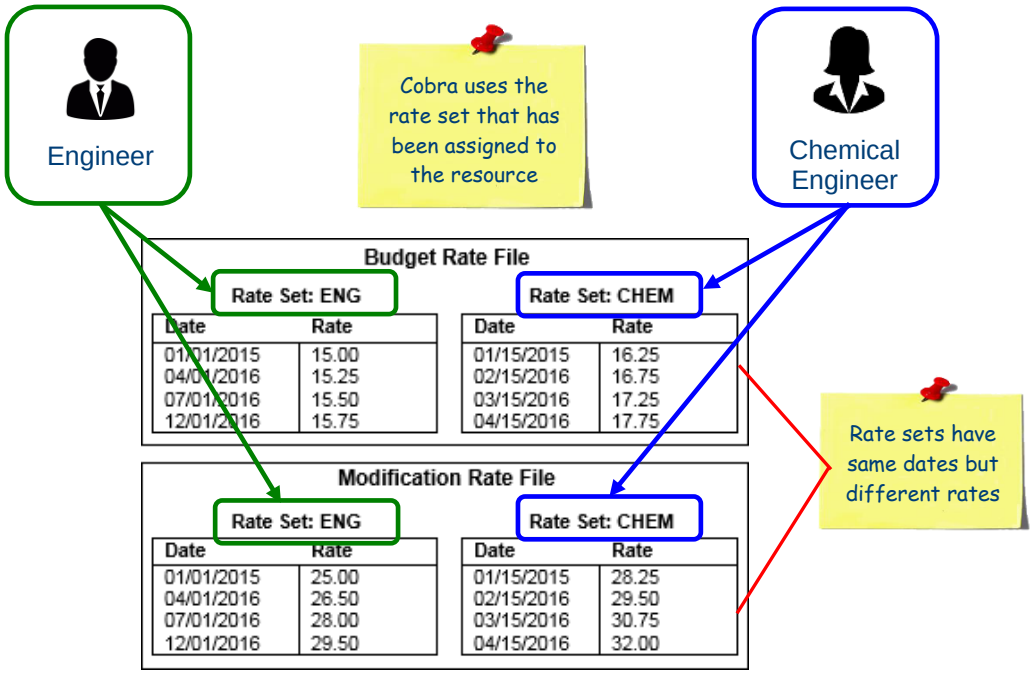
**Rate File Example**

You create two rate files in your project: a Budget rate file and a Modification rate file. The Modification rates are used to calculate costs for new scope.

Both rate files include two rate sets: **ENG** and **CHEM**. The **ENG** rate sets in both rate files have the same dates but different rates, as do the **CHEM** rate sets.

When you create the resources, you specify that the Engineering resource should use the **ENG** rate set and the Chemical Engineer should use the **CHEM** rate set.

When Cobra needs to perform budget calculations for the Engineer, the system looks for the **ENG** rate set in the Budget Rate File. When Cobra needs to perform calculations for new scope, the system looks for the ENG rate set in the Modification Rate File. The same applies for the Chemical Engineer.




## Additional Topics and Procedures

These topics and procedures in the Cobra online help provide additional information and steps.

**Related Topics**

- Rate Sets
- Rate File Properties dialog box

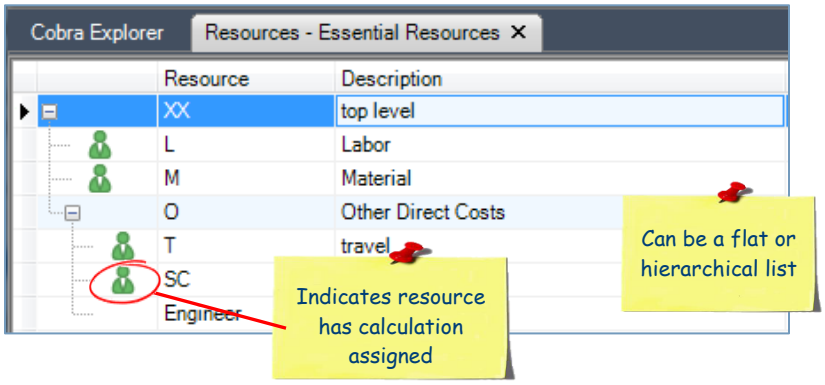
**Related Procedures**

- Add a rate to an existing rate set

# Resources

Resources are the people (labor), material, and other related costs such as travel, subcontractors, and so on, that are assigned to work and in turn produce the costs associated with the project scope.

The list of resources can be a flat list or it can be hierarchical to roll up for reporting purposes. The green person icon next to each resource indicates where resource calculations occur.

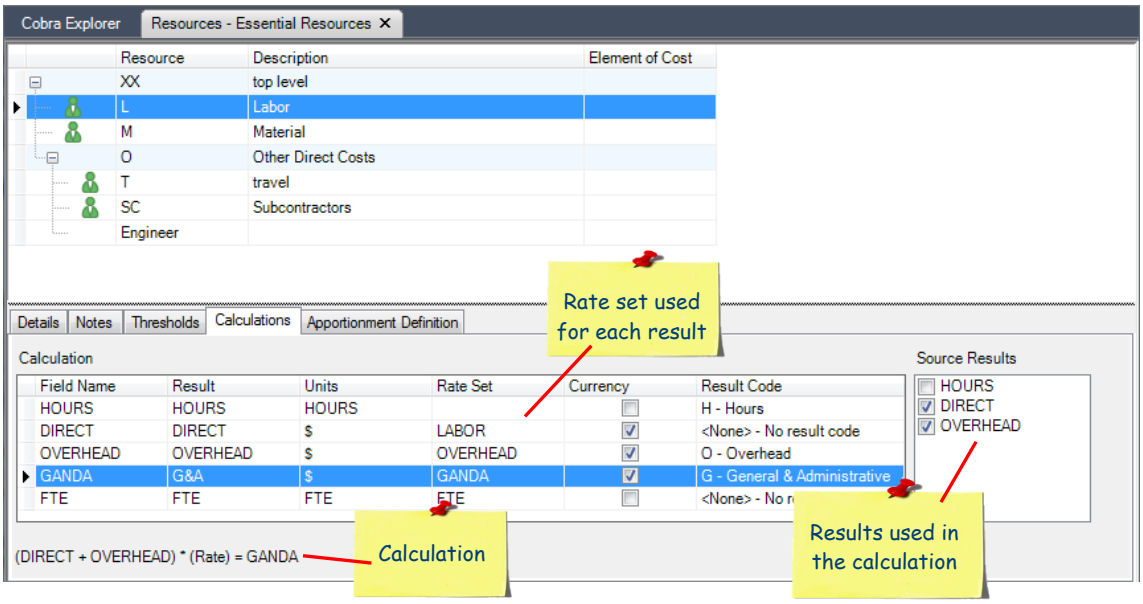



Most often, the list of resources does not include names. For example, it is more typical to create a resource titled **Engineer** than a resource titled **John** (who is an Engineer). This makes it easier to maintain the project without having to keep up with personnel changes.

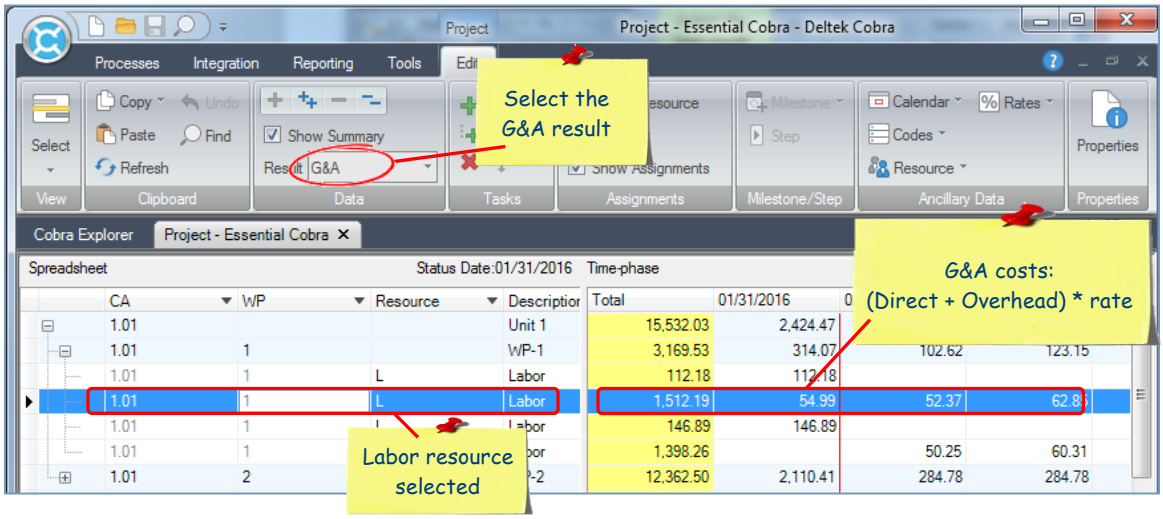
## Defining Costs for Resources

For each resource that you want to assign to your project, you define how the costs are calculated for that resource, the rate set that should be used, and the way you want the costs to be displayed. Cobra calls the different types of calculations “results” because the data that you see in the Time-phase panes is the result of a calculation.

For example, in the screenshot below, the G&A (General & Admin) cost for the selected Labor resource is calculated by summing DIRECT + OVERHEAD and multiplying the result by the rate in the GANDA (General and Admin) rate set for that resource.




In the Project view, when you select to view the G&A result on the Edit tab Data menu, the costs that you see in the Time-phase grid are the result of the calculation that you see defined on the Resource Calculation tab.




## Additional Topics and Procedures

These topics and procedures in the Cobra online help provide additional information and steps.

**Related Topics**

- Resource components

**Related Procedures**

- Create a new resource file

- Add a resource to a resource file
- Add calculations to a resource
- Copy calculations from another resource

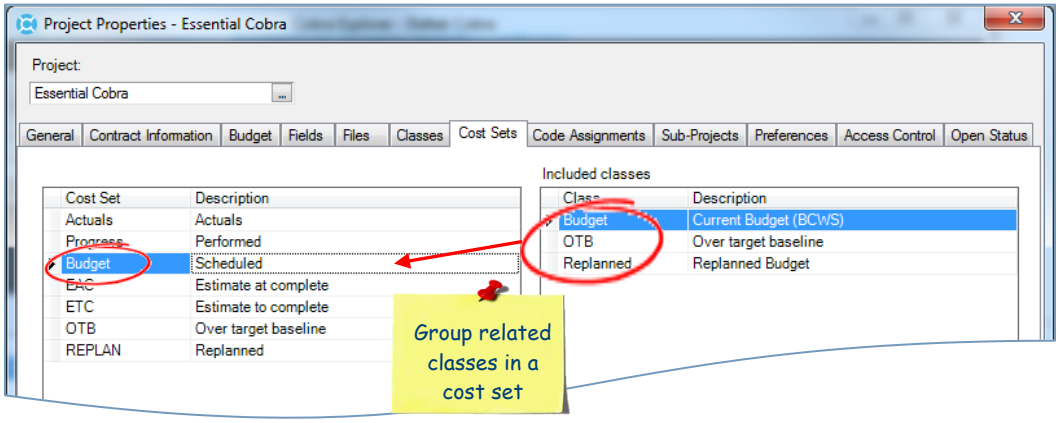
# Classes and Cost Sets

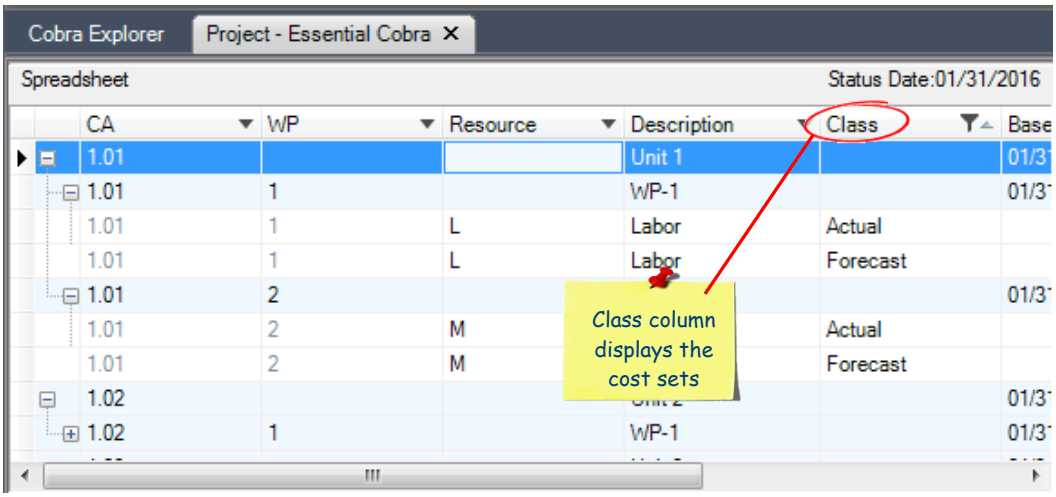
There are four types of cost sets in Cobra that you use to define different types of costs:

- Budgets
- Earned value
- Actuals
- Forecasts

For budgets, actuals, and forecasts, you can define different cost classes to group related costs together for reporting. For example, you can distinguish between different funding sources when budgeting, or distinguish between accounting, invoiced, or incurred actual costs.

Cobra also allows you to create custom budget, forecast, and actual cost classes for special-purpose cost tracking. Some examples might include items such as funding profiles, alternative forecasts, and budgets.



# Additional Topics and Procedures

These topics and procedures in the Cobra online help provide additional information and steps.

**Related Topics**

- Classes and Cost Sets
- Class Overview
- Custom Cost Classes

**Related Procedures**

- Create a New Class
- Create a New Cost Set

# Appendix A: Before You Explore Cobra

Before you start exploring Cobra, you need to install a database platform, create a Cobra database, and install Cobra.

## Step 1: Install a Database Platform

Install Microsoft SQL Server or Oracle on your machine. You may have to ask your IT department to perform the installation.

For version and other related information, see *System Requirements* in the Cobra Installation Guide.

## Step 2: Create a Cobra Database

On your SQL Server / Oracle platform, create a Cobra database called **DeltekCobra** to store the Cobra data. Keep the following information available because you will be asked for it during the Cobra installation:

- The name of the database server.
- A user ID and password (with rights to create tables) for the database.
- The database name: DeltekCobra.

## Step 3: Install .NET Framework

Install .NET Framework on your machine. You may have to ask your IT department to perform the installation.

For version and other related information, see *System Requirements* in the Cobra Installation Guide.

## Step 4: Install Cobra

Before you begin your Cobra installation, confirm that you have the following.

- Admin rights on your machine so that you can install Cobra. If you do not have these, you may need to ask your IT department to install Cobra for you.
- Deltek support center username and password for downloading the Cobra installation file.
- Cobra serial number and license number.
- SQL Server users:
  - The name of the SQL Server that is hosting the **DeltekCobra** database. If SQL Server / Express was installed as an instance, you will need both the server name and the instance name.
  - SQL Server authentication login details to connect to the server. You do not need these if you use Windows NT authentication.
- Oracle users:

- Oracle Service Name/SID.
- Oracle username and password to access the **DeltekCobra** database.

## Download the Cobra Installer File

Download the **DeltekCobra84.exe** installation file from the Deltek Support site. Double-click the file to launch the Cobra Installation Wizard.

**To access DSM from within the Deltek Support Center, complete the following steps:**

1. In your Web browser, go to https://deltek.custhelp.com.
2. Enter your Deltek Support Center **Username** and **Password**, and click **Login.**
3. When the Deltek Support Center page displays, click **Product Downloads**.
4. On the Deltek Software Manager screen, click **Launch Deltek Software Manager**.
5. Click **Settings** at the top right of the dialog box to use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.

   When you log on for the first time, DSM asks you to select a default folder where Deltek products are to be downloaded.

   You can change this folder anytime in the Settings dialog box.

6. In the left pane, expand the Deltek product that you want to download, if it is not already expanded.
7. Select the **Complete** product type.
8. In the table, select the check box next to Deltek Cobra 8.4.

   The right pane displays a message stating that Cobra has been added to the download queue.

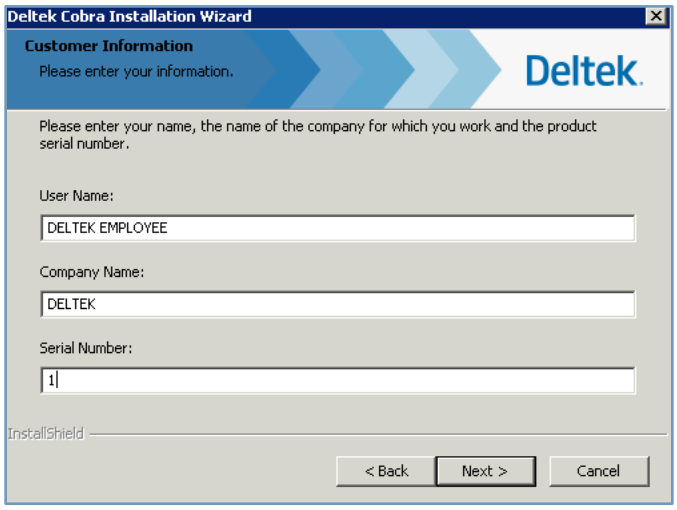
   To view the items in the download queue, click **View Download Queue** at the bottom of the left pane.

9. Click **Download** at the bottom of the left pane to download the product to the folder that you selected.

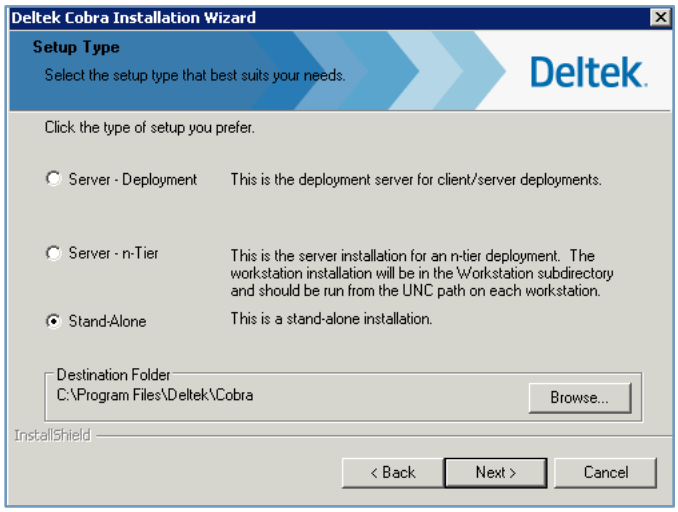
## Install Cobra

Double-click the **DeltekCobra84.exe** file that you downloaded from DSM to start the Installation Wizard and follow the steps below.

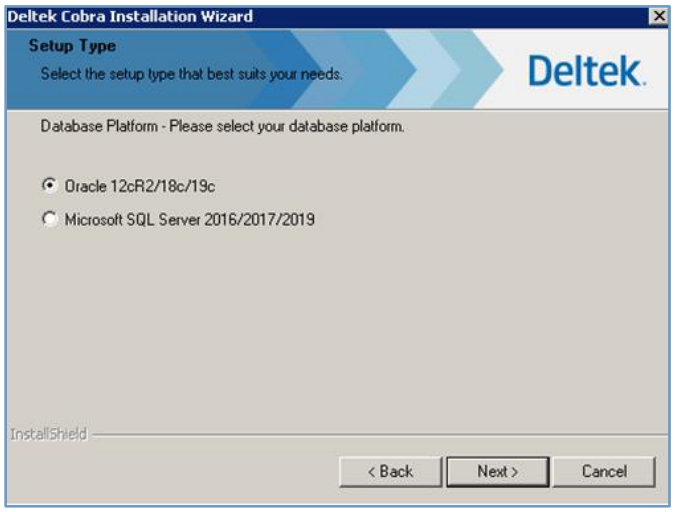
1. On the Welcome screen, click **Next**.
2. Enter your user name, your company name, and the serial number that came with the software and click **Next**.




3. Enter the licence number and click **Next**.
4. Select **Stand-Alone**. If needed, click **Browse** to specify a directory where the Cobra files will be installed. Click **Next**.




5. Select **Oracle** or **SQL Server** depending on the software that you are using.




6. **For SQL Server Users**: Select the connection type (Windows authentication or SQL Server authentication) that you want to use to connect to the database and enter the relevant information.

   In the **Name of database catalog** field, enter the name of the database that you created, for example, DeltekCobra. For more information, see Step 2: Create a Cobra Database.

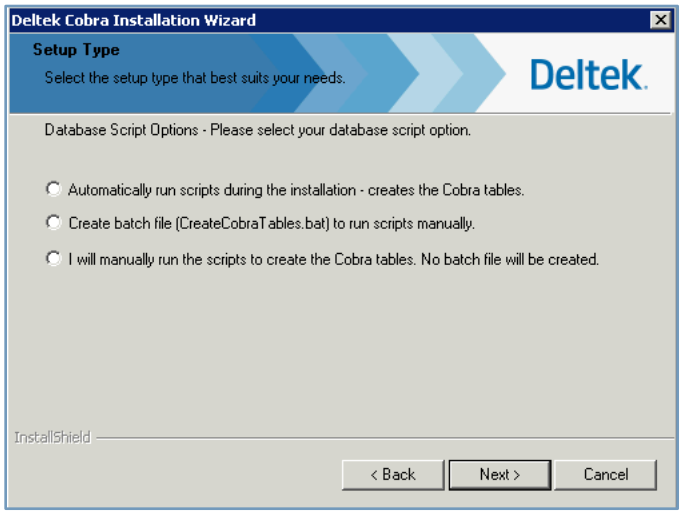
   Click **Next**.

7. **For Oracle Users**: Enter the **Service name/SID**, **Username**, and **Password** and click **Next**.

   If the installer can't find the server, ask the person who set up the database to confirm that a connection has been set up in Oracle Network Manager.

   If you see an error about an invalid username or password, ask the person who set up the database to confirm the information.

8. Select **Automatically run scripts during the installation – creates the Cobra tables** to automatically create the Cobra database tables during the installation process.




   If your scripts are up to date, this screen does not display. Instead, a message displays letting you know that your scripts are up to date.

A message displays letting you know that you can configure additional data sources after the setup is complete using Data Tool and Cobra Database Upgrade Wizard, which are located in **Start » All Programs »Deltek Cobra 8.4 » Administration**.

9. You can participate in the Customer Experience Improvement Program (CEIP) by submitting your installation and product usage information to Deltek. This information is used by Deltek to improve the functionality of the product.
10. Click **Next** to begin the installation. A progress bar displays while Cobra is being installed.
11. Click **Finish** to close the installation wizard.

# Glossary

| Term | Definition |
|---|---|
| **Actuals** | The total direct and indirect cost for the work performed for a given period. You can also refer to Actuals as Actual Cost of Work Performed, or ACWP. |
| **Baseline Dates** | The start and finish for the baseline or budget. |
| **Budget** | The total cumulative to date budget for the project. |
| **Burden** | General, unavoidable overhead costs that cannot be assigned to direct project tasks. For example, employee benefits, facility costs. |
| **Calendar Set** | Calendar sets are subsets of a primary calendar. You can use them to view project information in different ways, such as monthly, quarterly, and yearly. |
| **Class (Cost Class)** | Classes are a way to segregate types of costs. |
| **Code File** | A folder that contains codes. |
| **Codes** | Codes are used to filter, group, and aggregate data for reporting purposes. |
| **Control Account** | A summary task that is made up of many work packages. |
| **Cost Set** | A cost set is a group of classes that you use for reporting. |
| **EAC** | Estimate at completion is a forecast of the projects final cost. |
| **EOC** | Use Elements of Costs to classify costs for reporting purposes. |
| **ETC (Estimate to Complete)** | Estimate to Complete. This is the best estimate that you have of the costs that will be incurred in completing the project. |
| **Earned Value** | The sum of the budgets for completed work packages and completed portions of open work packages, plus the applicable portion of the budgets for level of effort and apportioned effort. |
| **Flag** | When you create a calendar set, you indicate the cut-off date(s) that you want Cobra to use for combining and rolling up the information. Cobra calls this date selection a “flag.” |
| **Forecast** | Estimate at Completion. Actual direct costs, plus indirect costs allocable to the contract, plus the estimate of cost (direct and indirect) for authorized work remaining. |
| **GANDA** | GANDA or G&A are General and Administrative expenses. These are costs incurred for the administration of the company. |

| Term | Definition |
| --- | --- |
| **LOE (Level of Effort)** | Level of Effort generally refers to work, such as administrative labor, not easily associated with specific cost objectives. |
| **Rate Set** | A list of dates and rates that specifies the applicable rate on any given date. |
| **Status Date** | The last day of the current period. |
| **Work Package** | A group of related cost tasks. |

# About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. www.deltek.com