U.S. Department of Energy

PARS II

Project Assessment and Reporting System

User Guide

PARS II Release 8.0.20120308

Department of Energy

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Title Page

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Change Control Page

The change control page records information about the changes (i.e., additions, modifications, deletions) that have been made to this document.

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5/10/2010	V1.0	Section 2.5	Added Data Values and Drop-down list section	J. Peck
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3/1/2011	V1.3	Appendix A: User Roles and Rights Appendix E: Glossary of Screen Labels	Update/adjust roles and rights Update screen label text as necessary	S.Burns
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5/15/2012	V2.0	All	Rewrite to reflect PARS II Build 8.0.20120308	M. Cree

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6/4/2012	V2.1	Title Page Section 3.5, 7 Section 3.9 Section 5.1	Update Approval Information Update Text and Screenshots – Monthly Status. Update Screenshots – Project Overview Update Report Tree	M. Cree
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6/27/2012	V2.1	Section 1.6 Appendix A	Update System Requirements Update Configuring Workstations Requirements	M. Cree

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1 INTRODUCTION

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

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

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

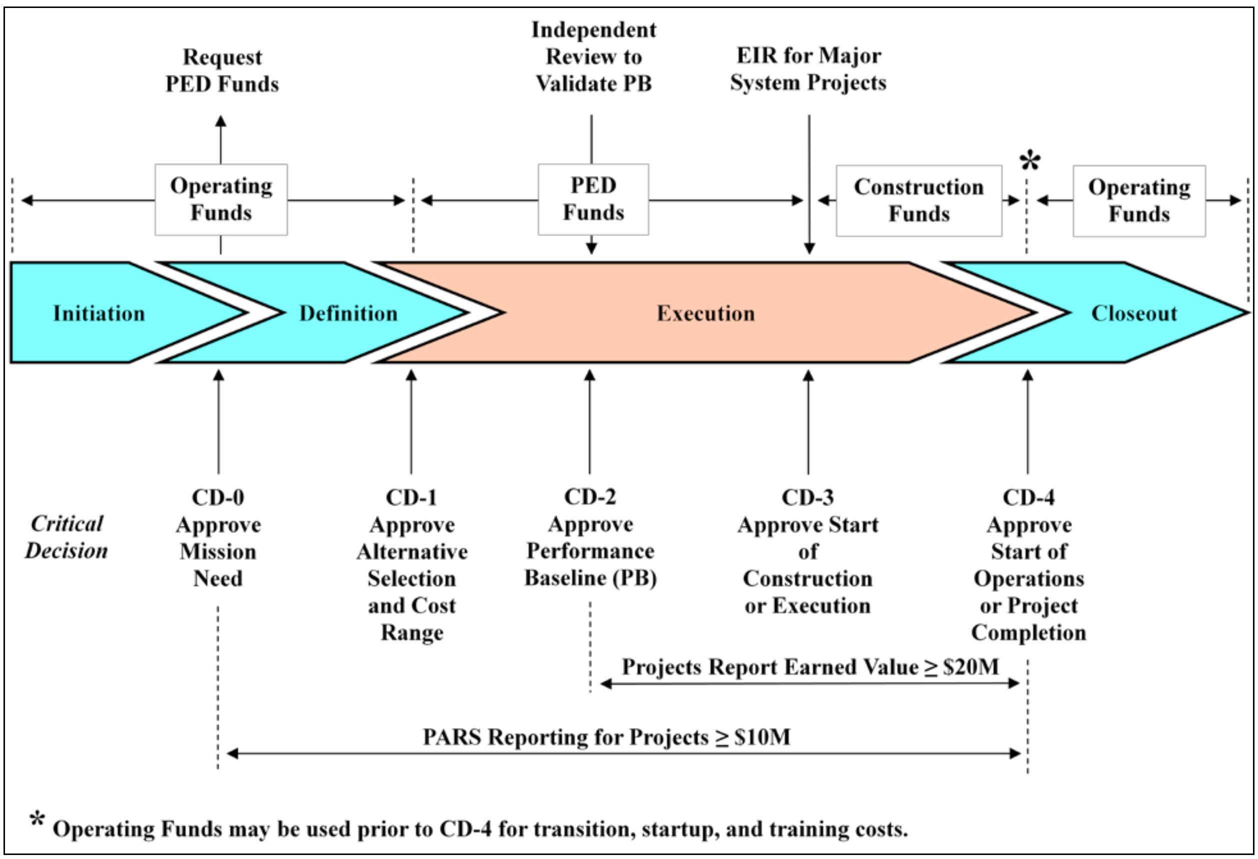


Figure 1 Typical DOE Acquisition Management System for Line-Item Projects

Source: DOE O 413.3B

Figure 2 *Process Cycle of a Project in PARS II* shows the major functions performed in PARS II. The right-hand side of the diagram represents the life-cycle of a project in PARS II with updates occurring as milestones are achieved. The left-hand side of the diagram shows the updates that are performed on a monthly basis.   Monthly updates are accepted in PARS II for all projects in the database and at any CD level. Approval of CD-0 initiates a requirement for project status reporting. As indicated in Figure 1, this reporting continues through the approval of CD-4 for all projects with a Total Project Cost (TPC) greater than or equal to $10M. At CD-2 and continuing through CD-4, projects with a TPC greater than or equal to $20M must report earned value performance in PARS II.

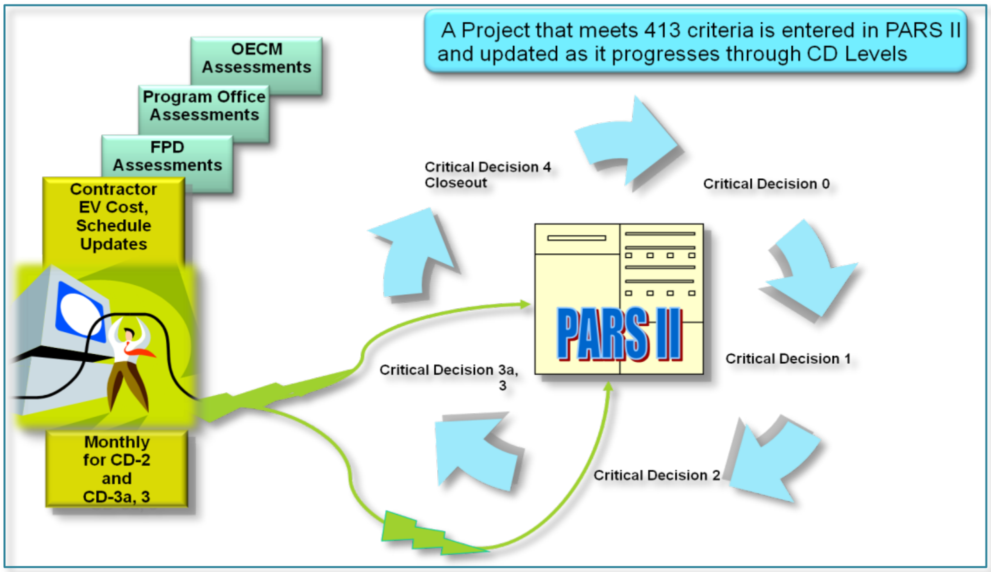


Figure 2 Process Cycle of a Project in PARS II

1.1 Purpose of this Document

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

1.2 How to Use this document

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

- All Users – Chapters 1 and 2, Introduction and Getting Started in PARS II
- Additional chapters are required for each user group:
  - APM Senior Management, Federal Program Manager(FPM), Deputy FPM, Program Secretarial Office, Contracting Officer Representative, Acquisition Executive
    - Chapters 3-6, View all data and reporting
  - Federal Project Director (FPD), Deputy FPD, and FPD staff
    - Chapters 3-8, View all data and reporting, update FPD oversight and assessment monthly

status, add attachments

- Program Office Analyst (or PMSO)
  - Chapters 3-8, View all data and reporting, update Program OA monthly status, add attachments
- APM Analyst, SC Program Manager, and SC FPD who have elected to perform complete OA data entry
  - Chapters 4 - 9, Add/edit Projects, add/edit Critical Decisions, Key Performance Parameters, Baseline Change Proposals, Budget/Funding Profiles, update OA monthly status, add attachments, view all data and reporting
- Contractors performing Monthly Upload of Project Performance data
  - Chapters 4 and 10, Submit Project Performance data upload, view dashboards

1.3 Document Conventions

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

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

This documentation uses the following conventions:

Table 1 Document Conventions

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

A list of acronyms is presented in Appendix C.

1.4 Roles and Access to the System

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

Users can view information for projects to which they have access. Project(s) access is granted when users request and receive a user account for PARS II. Typically, site users have access to view projects within their business domain, and Program users can view projects within their own Program Office. Data entry and update rights, however, are restricted.

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

1.4.1 System Administrator

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

1.4.2 Senior Management and Executives for APM and Programs

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

1.4.3 APM Analyst, SC Program Manager, and SC FPD and their Alternate

After PARS II System Administrators, these users have the highest level of system access. Within PARS II, they can:

- Initiate a Capital Project
- Initiate/update a project
- Assign and edit project contacts
- Update Critical Decision milestones – CD-1 through CD-4 and Closeout
- Add a baseline change proposal
- Update monthly status
- Edit key performance parameters
- Add attachments

1.4.4 Federal Project Director and their Deputy (Non-SC)

This class of user can view all OA project information, view contractor data, and generate reports. In addition, FPDs and their Deputies can edit and update appropriate monthly status fields, and add attachments.

1.4.5 Program Analyst and their Alternate, Program Manager and their Deputy (Non-SC)

This class of user can view all OA project information, view contractor data, and generate reports. Program Office staff can edit and update appropriate monthly status fields, and add attachments.

1.4.6 Acquisition Executives, Contracting Officer Representatives, and Stakeholders

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

1.4.7 Project Site Contractors and Managers

Site contractors have the ability to upload EV, schedule, management reserve, risk, and variance reporting data from their respective local Earned Value Management (EVM) systems. Site contractors can view this data, as with all users, in the Project Performance module of PARS II. Contractors can also view and create specified reports based on application restrictions.

1.5 Data Hierarchy

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

NOTE: Refer to "Appendix D: PARS II Data Hierarchy Nomenclature Evolution" for more information.

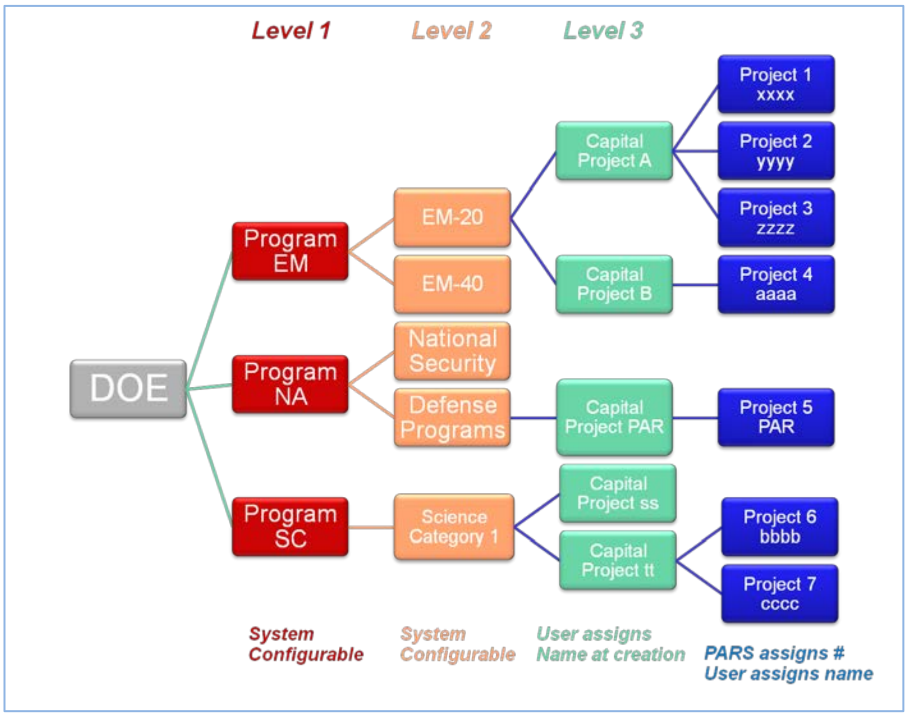


Figure 3 PARS II Data Hierarchy for Capital Projects

1.6 System Requirements

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

- Minimum 1280 X 1024 Display (Monitor and Graphics card)
- 2Gb memory
- 2 CPU cores at 2.5 GHz or 1 CPU core at 3+ GHz
- MS Windows XP or Windows7 (32- or 64-bit versions) any edition (e.g. Home, Professional, Ultimate) MS Internet Explorer 7, 8 or 9 *(Native Mode or Compatibility Mode).* Windows7 64-bit users *must* use the 32-bit version of Internet Explorer 8.
- The following browsers/modes are unsupported: Google Chrome; Firefox; Internet Explorer 7 (compatibility mode); Internet Explorer 8 (compatibility mode); and any other browser/mode not listed above.
- Microsoft Excel 32-bit for 2003, 2007 and 2010 are supported spreadsheet applications

- Network connectivity to https://pars2training.doe.gov/ and https://pars2.doe.gov/ for web and transfer of Excel spreadsheets (with embedded macros).
- Reporting Active-X Control from Dekker, Ltd and enabled Microsoft Office Macro Security allowing digitally signed content from Dekker, Ltd.

TIP: Additional information for configuring workstations is located at: http://energy.gov/sites/prod/files/maprod/documents/Configuring_Workstations_for_use_with_the_PARS_II_System.pdf

2 GETTING STARTED IN PARS II

2.1 Logging in

To log in, a user must go to https://pars2.doe.gov and click on **Continue**. When prompted, enter username and password. Passwords are case sensitive. First-time users will be prompted to change their password.

> **Note that if a user initially clicks on Cancel instead of Continue, the browser will display the PARS II home page:** http://energy.gov/node/290329
> **This resource contains user documentation, access directions, training information, etc.**

Once logged in, users will be taken to a "Projects" tab within the Oversight & Assessment (OA) module. On the left-hand side of the window is a collapsible navigation bar with modules for:

1) OA
2) Project Performance
3) All Reports
4) Administration
5) Help.

Depending on the roles and responsibilities of the user logging in, some of these modules may not be visible.

2.2 Screen Layout

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

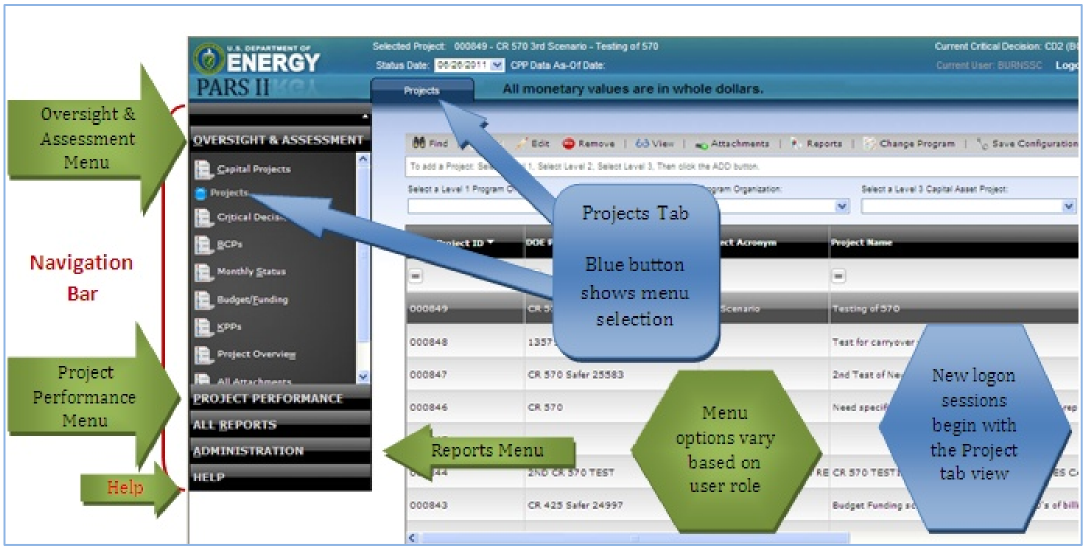


Figure 4 Typical PARS II Screen Layout

2.3 Title Bar

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

The second line of the title bar is grayed-out, and shows the User ID of the person logged into PARS II and the link to **Logout** of the system. The third line displays the message "All monetary values are in whole dollars", indicating the dollar units which are entered or displayed on PARS II screens.

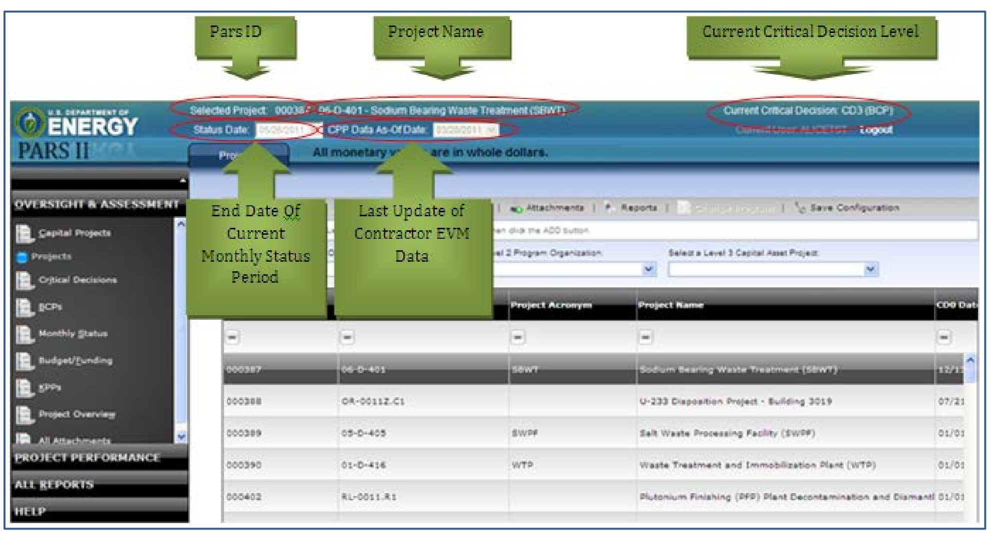


Figure 5 Title Bar - Line 1 and 2

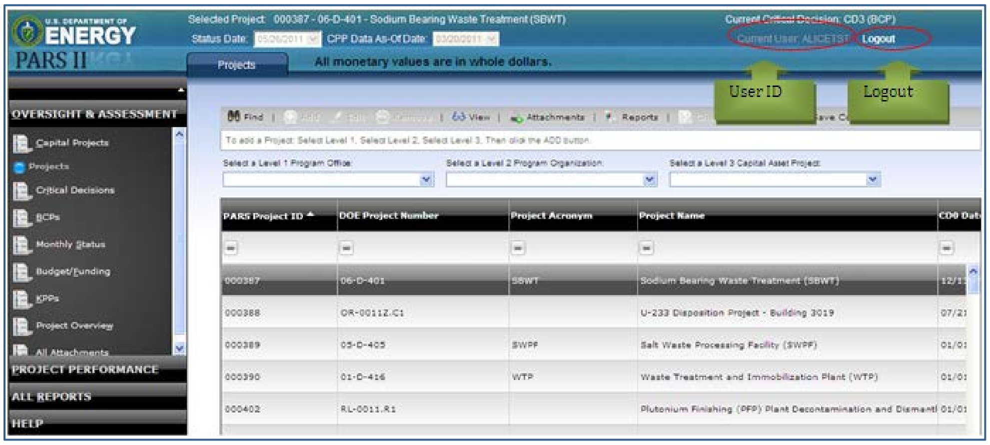


Figure 6 Title Bar - Line 2 and 3

2.4 Toolbar

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

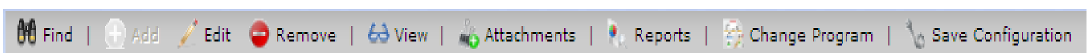


Figure 7 Example Toolbar

2.5 Data Values and Drop-down Lists

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

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

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

Dynamic lists are updated as users create entries. For example, when a Baseline Change Proposal (BCP) is entered into PARS, drop-down lists which contain BCP Titles are automatically updated to include the new BCP.

Reference the *Glossary of Screen Labels for PARS II V8.020120308* document for data definitions, format, and size details for each screen field.

2.6 Selecting a Project

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

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

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

Table 2 Project Tab Icons - Before Project Selection

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

2.6.1 Find a Project

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

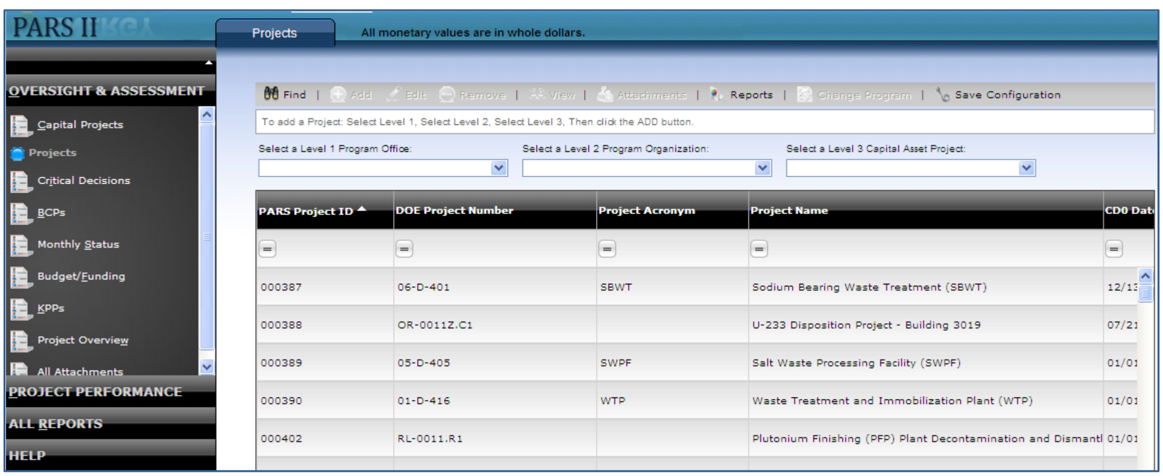


Figure 8 Projects Tab

2. Click Find.

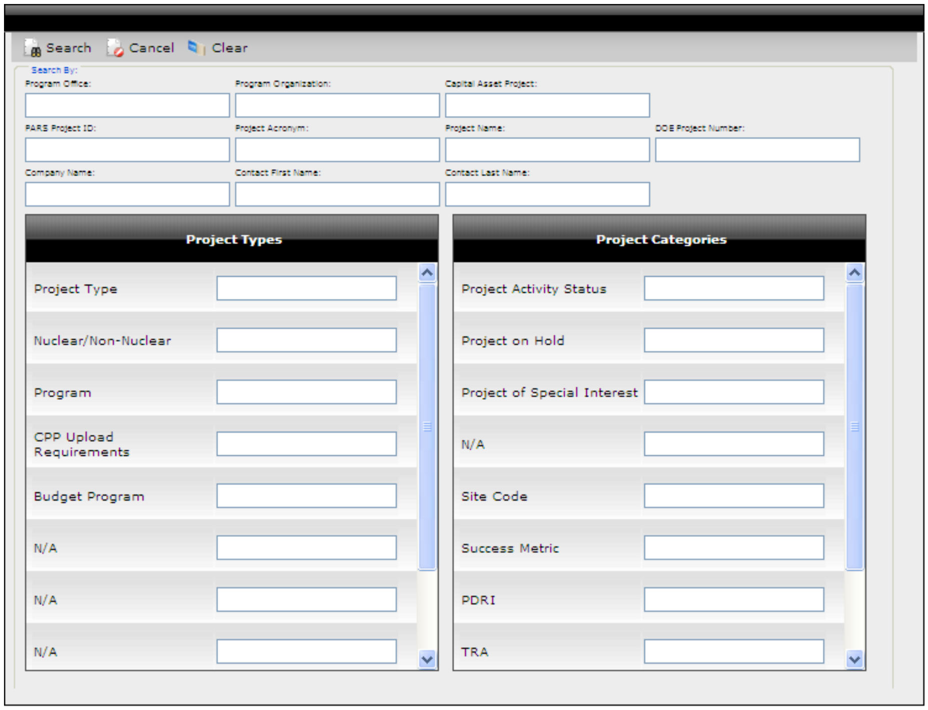
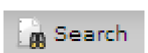


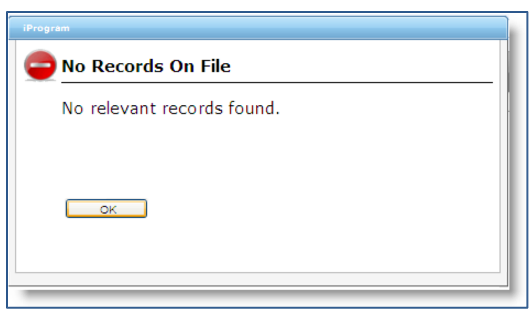
Figure 9 Find Screen

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

4. Click 

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

TIP: If no project meets the specified criteria, a message displays and the project list is empty.



Return to the Find screen to enter different criteria.

TIP: Use the Clear button to clear out any previous search criteria that does not apply to the new search.

2.6.2 Sort the Project List

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

2. Click  to save the sort arrangement. Throughout this session and for subsequent logon sessions, PARS II will use the saved sort arrangement until there is a new search.

2.6.3 Select a Project

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

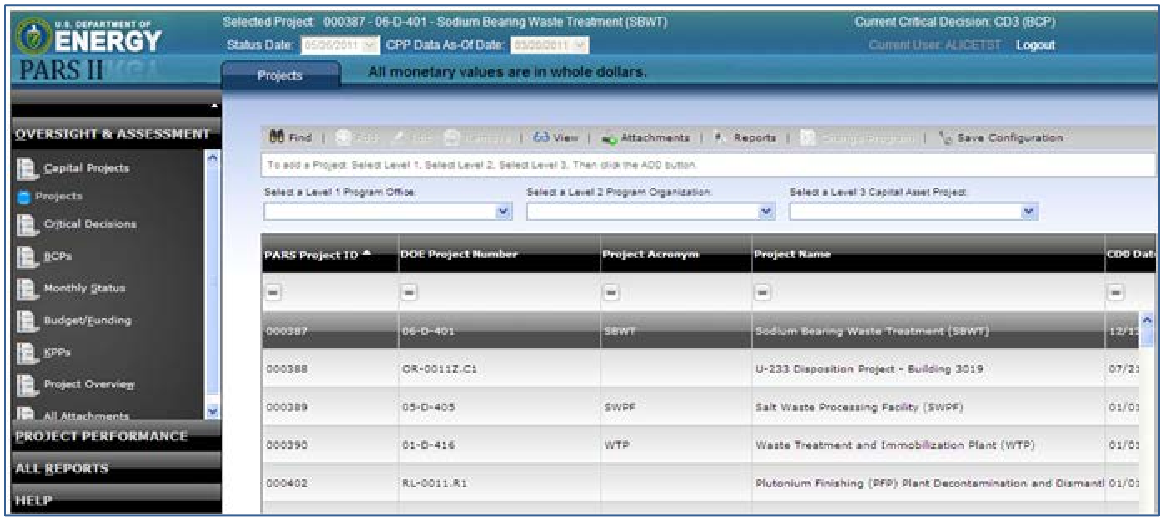


Figure 10 Highlight to Select a Project

3 OVERSIGHT AND ASSESSMENT – VIEW ONLY

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

3.1 Capital Projects

To view Capital Projects, users must click on "Capital Projects" within the OA module, and make a selection in both the "Select a Level 1 Program Office" and "Select a Level 2 Program Organization" drop-down menus. This calls up a list of Capital Projects within the selected Program Office Organization.

Selecting a Capital Project from the list and clicking the "View" icon in the toolbar opens a window that shows the Projects and their TPC and the estimated completion date (CD-4 Date) for each.

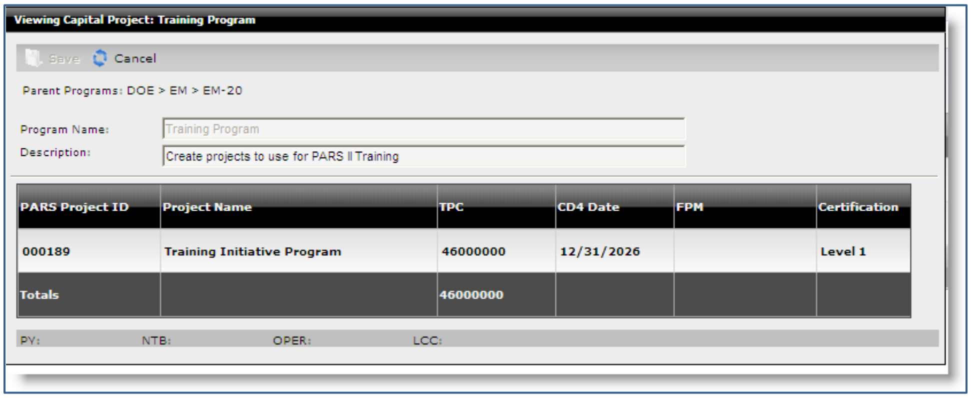


Figure 11 Viewing Capital Project

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

Table 3 Capital Projects Icons – View Mode

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

3.1.1 View a Capital Project

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

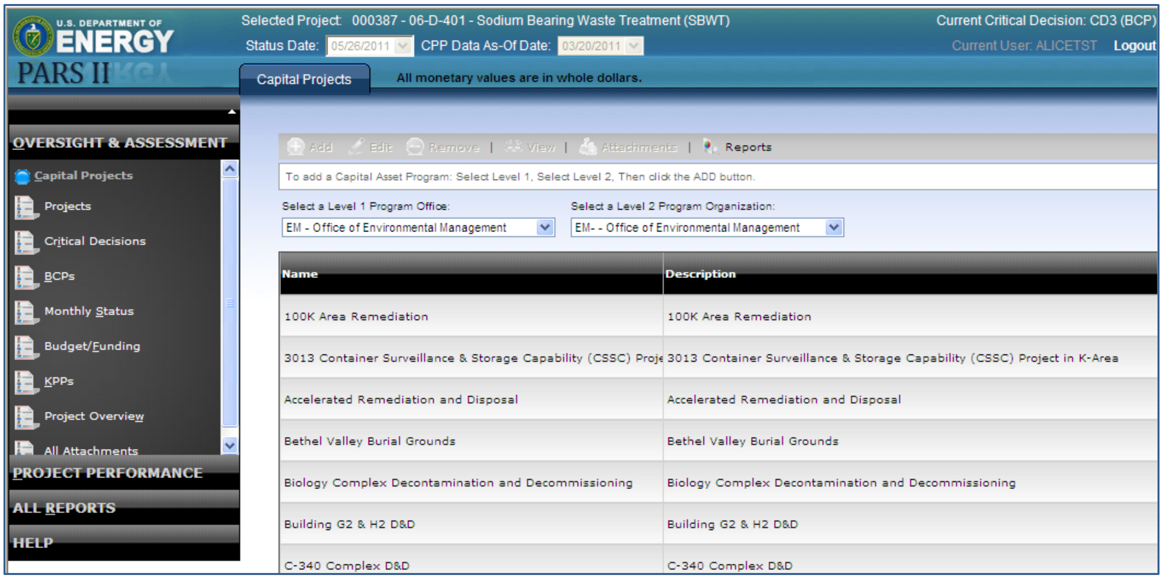


Figure 12 Capital Projects Tab

4. Click on the desired project from the list.

5. Click 

. The Capital Project description and a list of its associated projects displays.

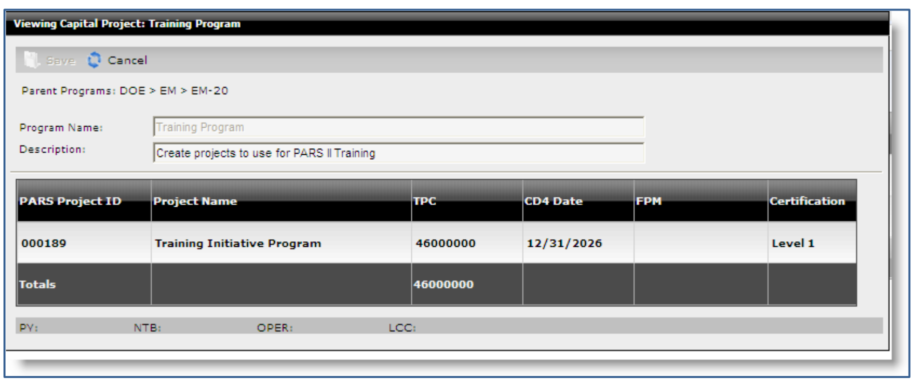


Figure 13 View Capital Project Description

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

3.2 Projects

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

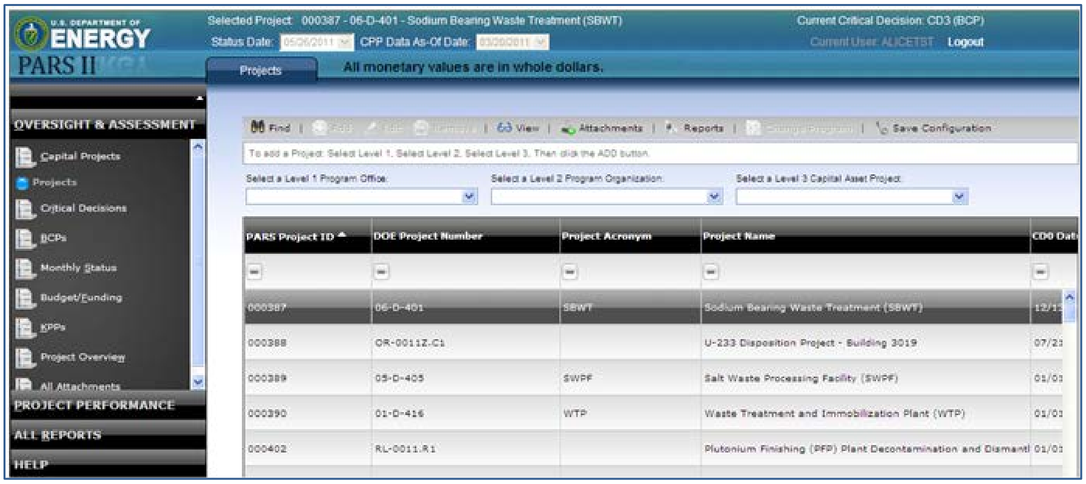


Figure 14 Projects Tab with a Project Highlighted for Selection

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

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

3.2.1 View a Project

1. Click View. The Viewing Project screen has two tabs: 1) "Project Attributes;" and 2) "Project Contacts."

3.2.1.1 View Project Attributes

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

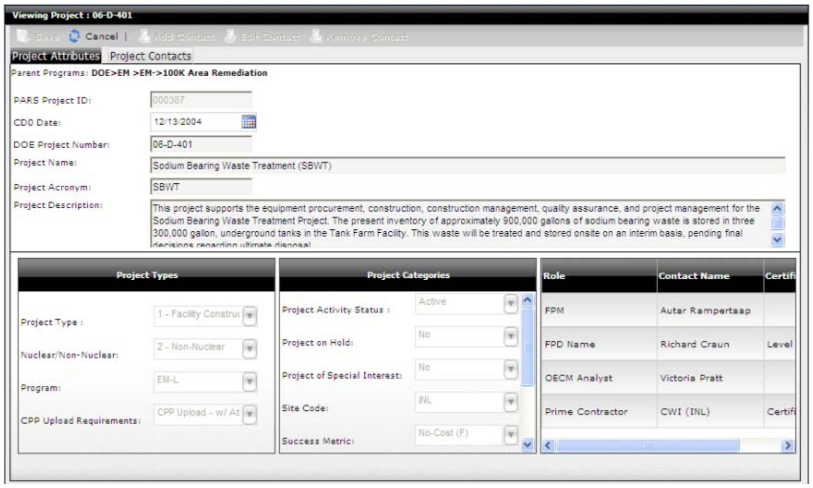


Figure 15 Project Attributes Tab

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

   a. The system assigned PARS Project ID - the unique, permanent identifier for the project.

   b. The user-entered DOE Project Number - the official DOE Project Identification Code for construction and engineering design projects as reported in the OMB A-11 Exhibit 300 or the program budget submission.

   c. The Project Types, Project Categories, and the four primary project contacts on the bottom half of the screen. Other contacts associated with the project are viewed from the “Project Contacts” tab.

3.2.1.2 View Project Contacts

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

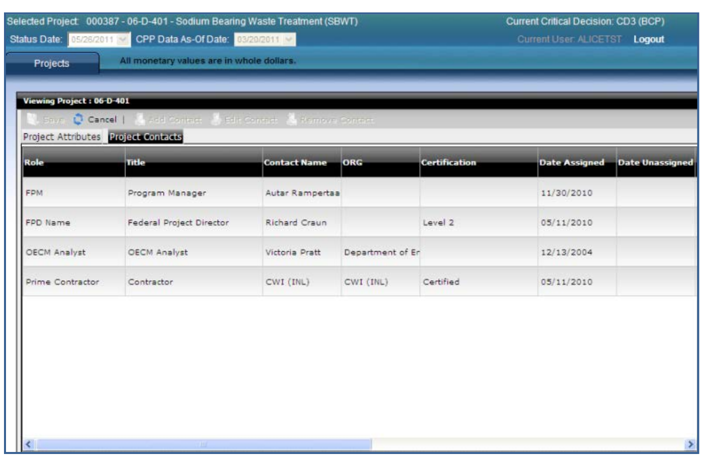


Figure 16 Project Contacts Tab

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

3. When done, click **Cancel**.

3.2.2 View Attachments

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

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

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

3.2.2.1 View Attachment Associated with Current Screen/Tab

1. Click 

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

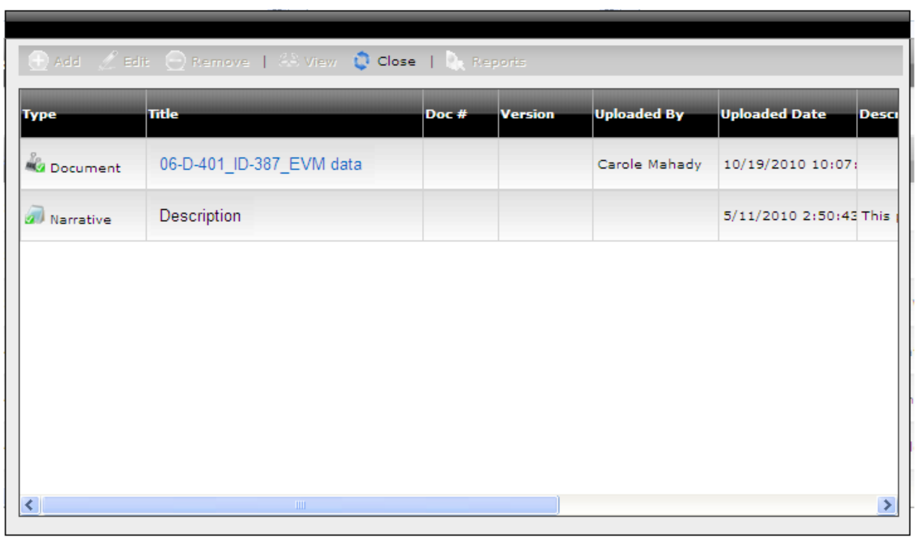


Figure 17 Attachment List Associated with Selected Screen/Tab

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

3.3 Critical Decisions (CDs)

With a project selected, clicking on the “Critical Decisions” tab in the left-hand navigation bar will access a screen allowing users to view CD-0, CD-1, CD-2, CD-3A, CD-3, CD-4, and Closeout information.

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

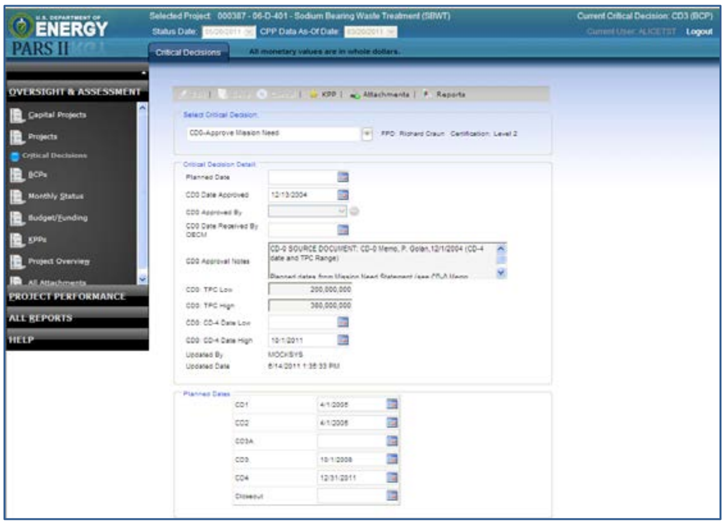


Figure 18 Critical Decisions Tab – CD-0

The “Critical Decision Detail” pane provides fields for the following:

- Planned date
- Approval date
- Name of approving authority
- Date received by APM
- Approval notes
- TPC entries
- CD-4 attainment dates

The “Planned Dates” panel provides fields for the expected dates that each Critical Decision from CD-2 through Closeout will be attained. Users can access Key Performance Parameters (KPPs) associated with the current CD screen via the KPP icon on the toolbar. The KPP icon is not activated for the CD-3, CD-3a, and Closeout screens.

Table 5 Critical Decision Icons –View Mode

ACTIVE ICON	PURPOSE
KPP	Provides a direct link to the “KPP” tab listing only those KPPs associated with the current CD screen view. The KPP icon is not activated for the CD-3, CD-3a, and Closeout screens.
Attachments	Select and view any attachments that were uploaded to the current CD screen view.
Reports	Generate reports, if any, pertaining to the current CD screen view.

3.3.1 View Critical Decisions

1. Select **Critical Decisions** from the Navigation Bar. Regardless of the CD-level that is displayed, users can change it to view information for any CD-level.

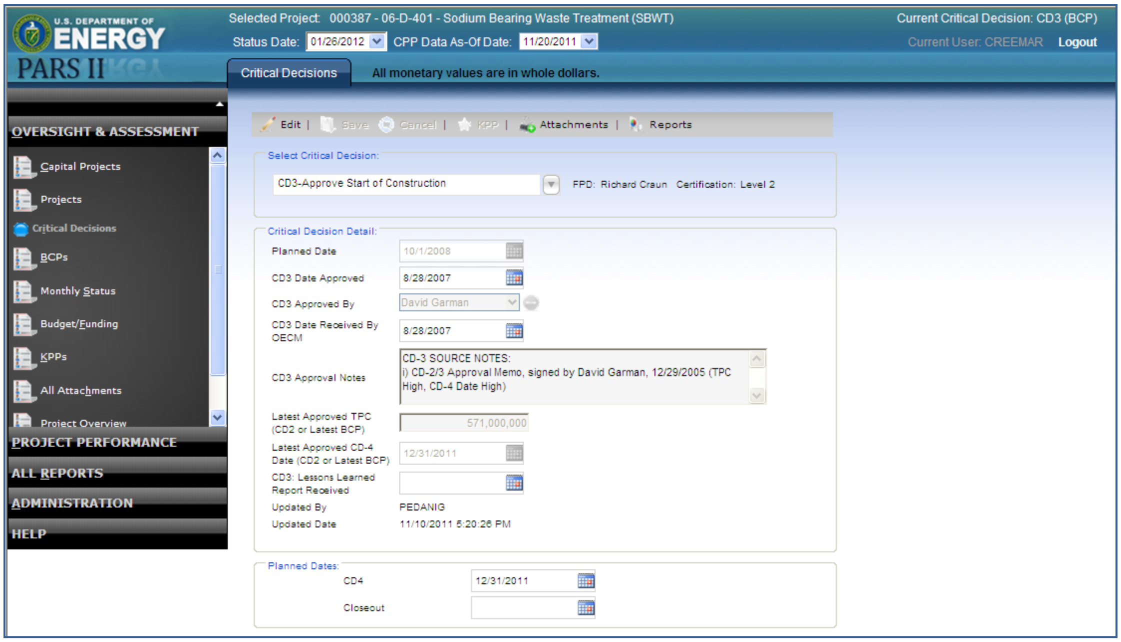


Figure 19 Critical Decisions Tab – CD-3

Select **CD** level from the Select Critical Decision drop-down list.

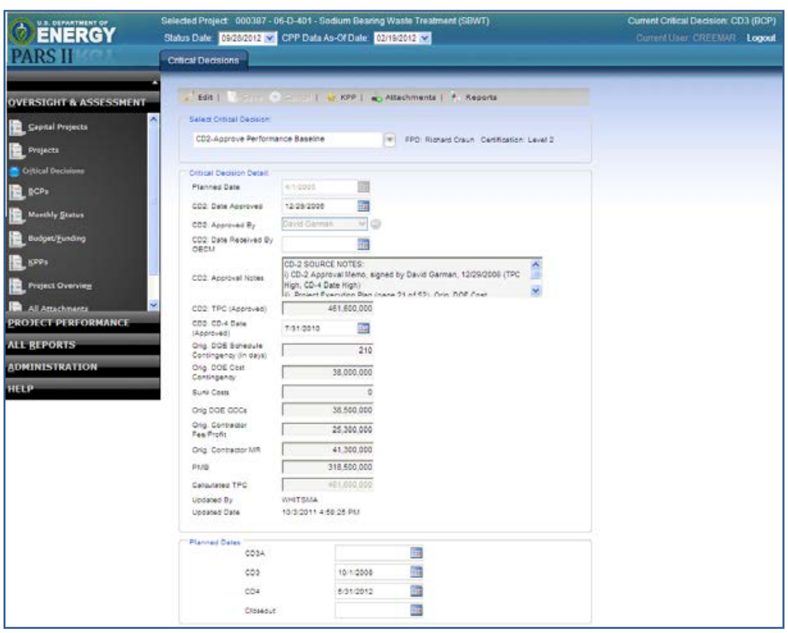


Figure 20 Critical Decisions Tab – CD-2

3.4 Baseline change proposals (BCPs) / AE Modifications

The “BCPs” tab allows users to view information for proposed performance baseline changes as well as AE modifications. An indicator as to whether or not the BCP represents a directed change is by each title. Users can view the following:

- BCP submission date
- Approval date (BCP and AE Mod)
- Name of approving authority (BCP and AE Mod)
- Approval notes (BCP and AE Mod)
- Projected TPC
- CD-4 attainment dates

Table 6 BCP/AE Mod Tab Icons – View Mode

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

3.4.1 View BCP

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

2. Select the **BCP** to view from the “Select BCP” dynamic drop-down list.

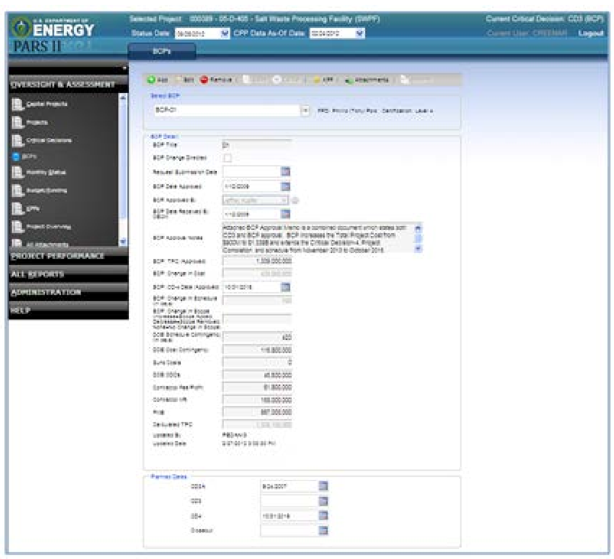


Figure 21 Baseline Change Proposal – BCP

3.4.2 View AE Modification

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

2. Select the **AE Modification** to view from the “Select BCP” dynamic drop-down list.

TIP: AE Modifications are listed in the dropdown list on the BCP screen after all approved and non-approved BCPs

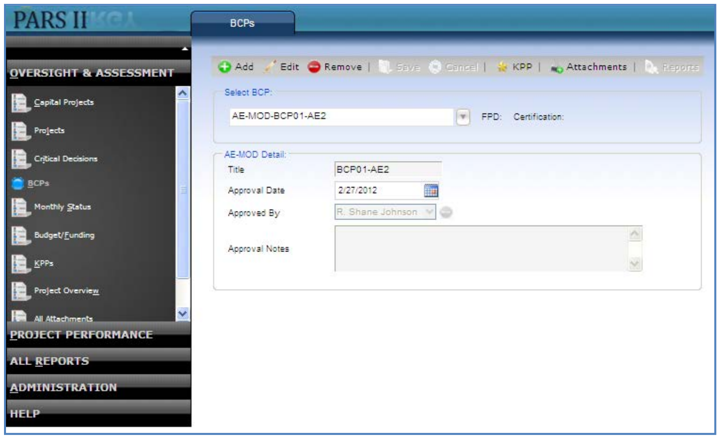


Figure 22 AE Modification

3.5 View Monthly Status

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

- FPD
- Program
- APM

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

PARS II automatically sets the “Updated By” and “Updated Date” when each organizational representative enters an update for the current reporting period shown as the Status Date on the Title Bar of the screen. If the status screen fields are blank, an update has not yet been entered for the reporting period. Viewing status data for prior months is performed via reports.

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

Table 7 Monthly Status Icons - View Mode

ACTIVE ICON	PURPOSE
	Select and view any attachments that were uploaded for the current monthly status.

3.5.1 FPD

After selecting “Monthly Status” from the Navigation bar and with “FPD” selected in the “Select Monthly Status Type” drop-down, PARS II will display the Federal Project Director’s monthly status update.

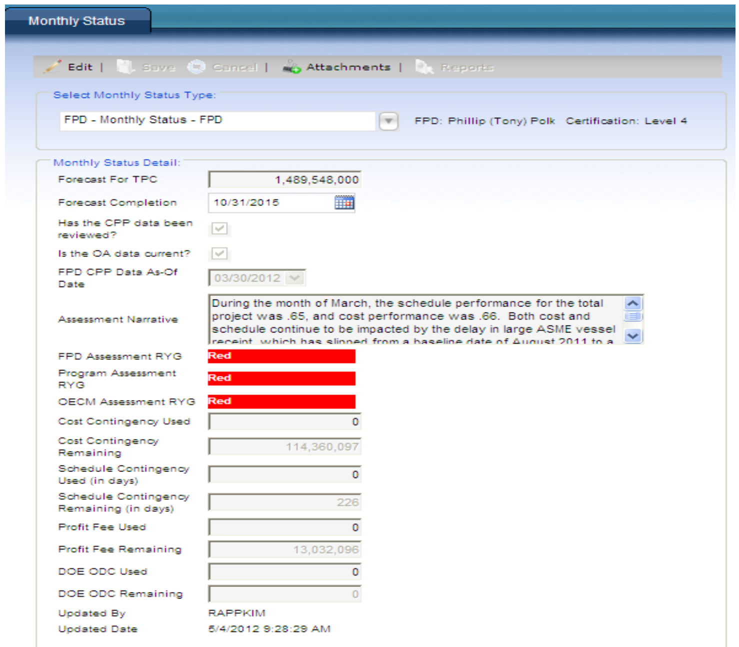


Figure 23 Monthly Status Update - FPD

Fields in the FPD Monthly Status Detail pane include “Forecast for TPC,” “Forecast Completion,” and “Assessment Narrative,” where the FPD reports an assessment on the project’s current performance.

Before entering a status update, FPDs are expected to review the Contractor Project Performance dashboards and the latest OA data. Selecting the “Has the CPP data been reviewed?” check box, the “Is the OA data current?” checkbox, and choosing the current CPP Data As-Of Date (from the date list drop down) indicates that the FPD has done so. The most recent upload CPP Data As-Of Date is shown in the date list drop down and in the title bar area below the project name.

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

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

3.5.1.1 View FPD Monthly Status Update

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

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

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

3.5.2 Program

After selecting "Monthly Status" from the Navigation bar and with the "Program" entry from the drop-down selected, a user can view the Program's (PORYG) assessment of the project's RYG status and, if not already "Green," the date the Program expects the project to attain "Green" status. Users also view the Program's TPC Forecast, forecast for CD-4 completion, and Status Assessment Narrative.

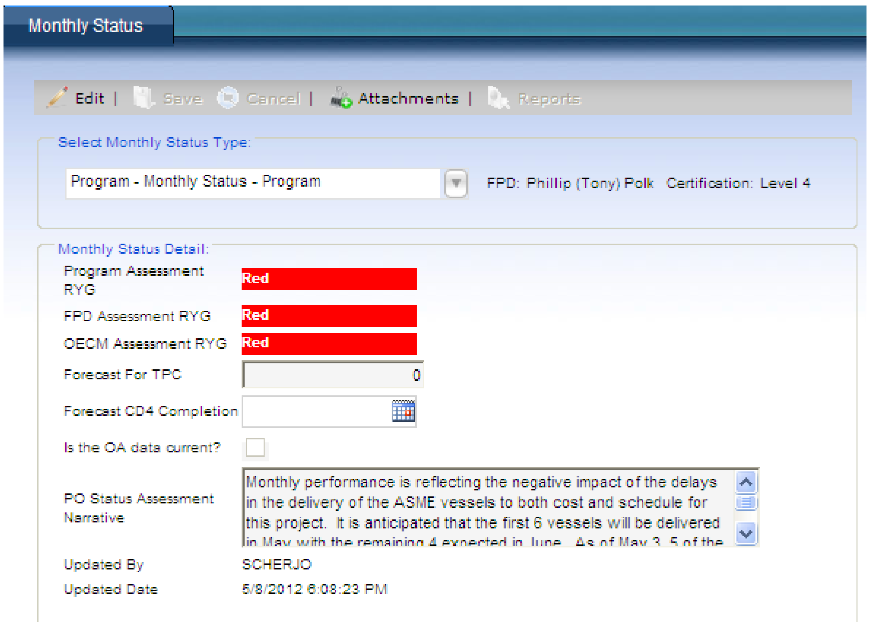


Figure 24 Monthly Status Update - Program Office

3.5.2.1 View Program Office Monthly Status Update

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

2. Select **Program** from the Monthly Status Type drop-down list.

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

3.5.3 APM

Like the FPD and Program Office, the APM Analyst or Alternate APM Analyst will have entered an RYG Assessment, the expected date of achieving "Green" status, the TPC forecast, and the forecast for CD-4 completion.

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

3.5.3.1 View APM Monthly Status Update

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

2. Select **APM** from the Monthly Status Type drop-down list.

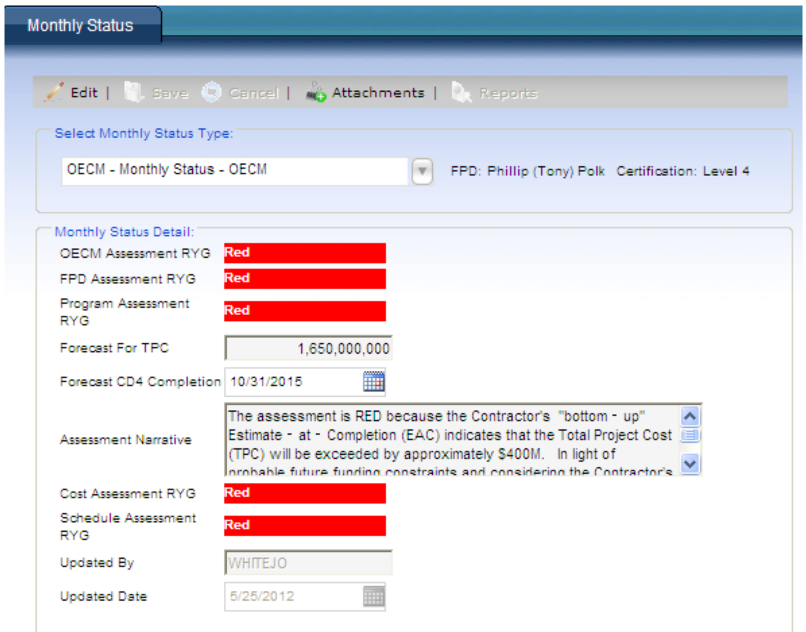


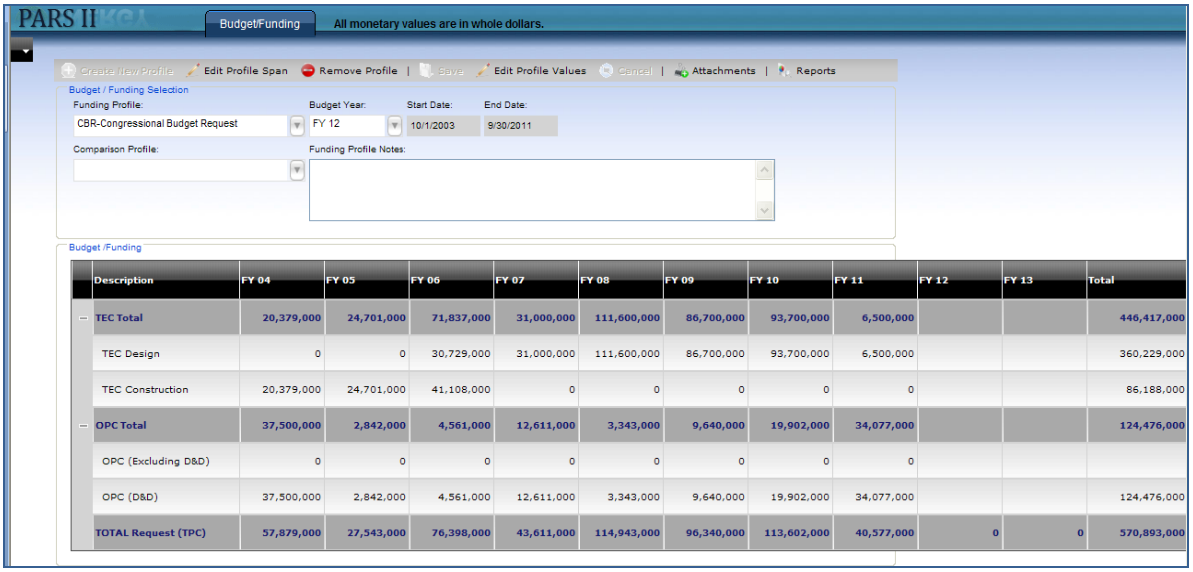
Figure 25 Monthly Status Update - APM

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

3.6 Budget/Funding

The “Budget/Funding” button in the O&A dropdown allows users to view by fiscal year, budget submissions or funding allocations that have been entered into PARS II. The “Funding Profile” drop-down list is pre-populated with the name of the budget/funding profiles: Integrated Priorities List (IPL), Office of Management and Budget (OMB), Congressional Budget Request (CBR), CD-2 Performance Baseline, and is dynamically updated when an event occurs, such as a BCP, that may require a new budget submission.

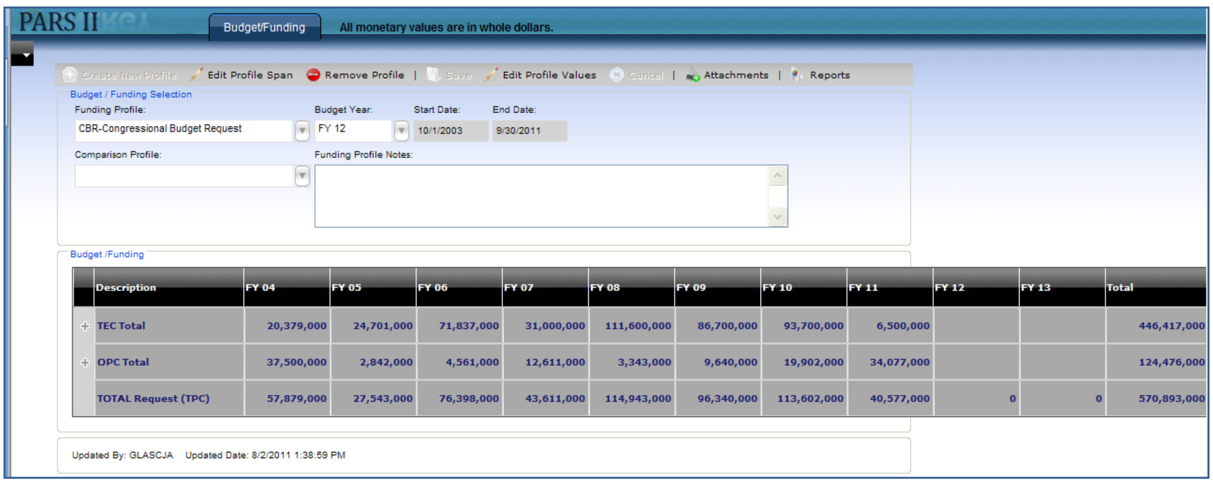
Selecting the CBR-Congressional Budget Request under the Funding Profile for this project will display as below, Figure 25. The start date of Oct 1, 2004, and end date of Sept 30, 2011 has generated columns for FY 04, FY 05, FY 06, FY 07, FY 08, FY 09, FY 10, FY 11, FY 12, and FY 13 in the table. This project has data entered for those years/columns that apply.



Description	FY 04	FY 05	FY 06	FY 07	FY 08	FY 09	FY 10	FY 11	FY 12	FY 13	Total
TEC Total	20,379,000	24,701,000	71,837,000	31,000,000	111,600,000	86,700,000	93,700,000	6,500,000			446,417,000
TEC Design	0	0	30,729,000	31,000,000	111,600,000	86,700,000	93,700,000	6,500,000			360,229,000
TEC Construction	20,379,000	24,701,000	41,108,000	0	0	0	0	0			86,188,000
OPC Total	37,500,000	2,842,000	4,561,000	12,611,000	3,343,000	9,640,000	19,902,000	34,077,000			124,476,000
OPC (Excluding D&D)	0	0	0	0	0	0	0	0			
OPC (D&D)	37,500,000	2,842,000	4,561,000	12,611,000	3,343,000	9,640,000	19,902,000	34,077,000			124,476,000
TOTAL Request (TPC)	57,879,000	27,543,000	76,398,000	43,611,000	114,943,000	96,340,000	113,602,000	40,577,000	0	0	570,893,000

Figure 26 Budget/Funding Profile

When users click the "-" icons beside Other Project Costs (OPC) and Total Estimated Cost (TEC), the detail rows will be removed from the display, leaving the total lines only, which is shown in Figure 25.1 below.



Description	FY 04	FY 05	FY 06	FY 07	FY 08	FY 09	FY 10	FY 11	FY 12	FY 13	Total
TEC Total	20,379,000	24,701,000	71,837,000	31,000,000	111,600,000	86,700,000	93,700,000	6,500,000			446,417,000
OPC Total	37,500,000	2,842,000	4,561,000	12,611,000	3,343,000	9,640,000	19,902,000	34,077,000			124,476,000
TOTAL Request (TPC)	57,879,000	27,543,000	76,398,000	43,611,000	114,943,000	96,340,000	113,602,000	40,577,000	0	0	570,893,000

Figure 27 Budget/Funding Profile total lines only

To move between Budget/Funding types, users must select a new Funding Profile from the drop-down menu with CD2-Performance Baseline (CD2) selected and shown in Figure 25.2 below..

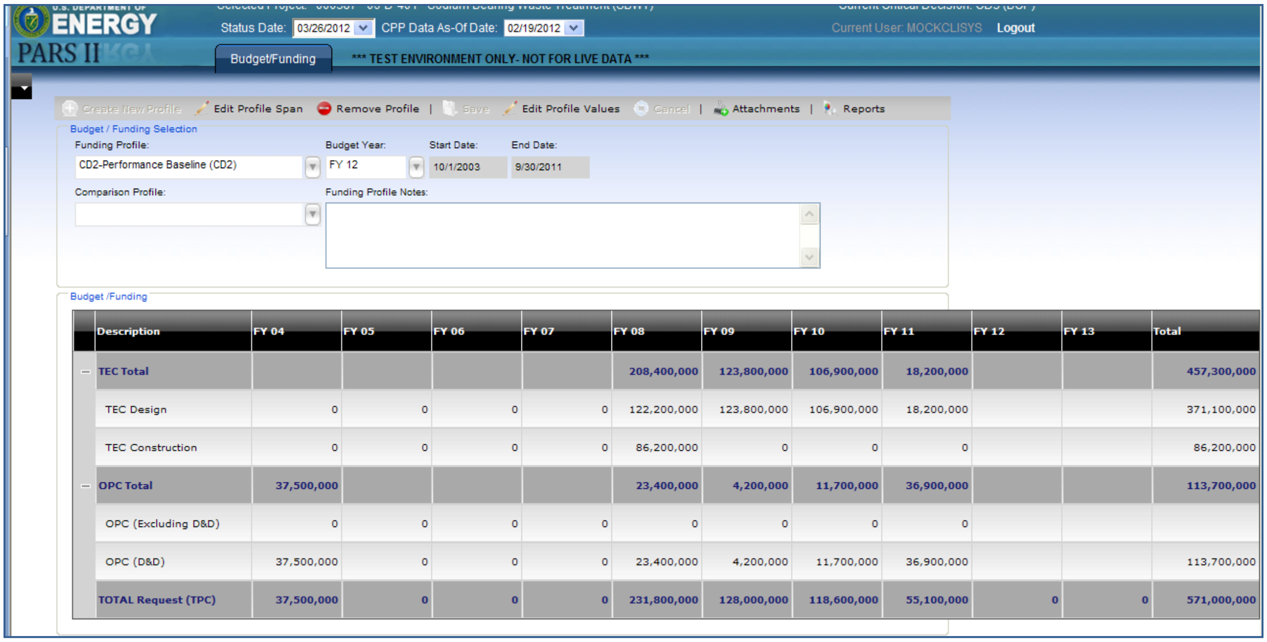


Figure 28 Budget/Funding Profile CD2 Performance Baseline Profile

Table 8 Budget/Funding Icons – View Mode

ACTIVE ICON	PURPOSE
Attachments	Select and view any attachments that were uploaded to this screen.

3.6.1 View Budget/Funding

1. Select **Budget/Funding** from the O&A Dropdown. Funding Profile criteria must be entered in order to display data. Project below has not had any data entered for the IPL-DOE Profile which is the initial profile displayed.

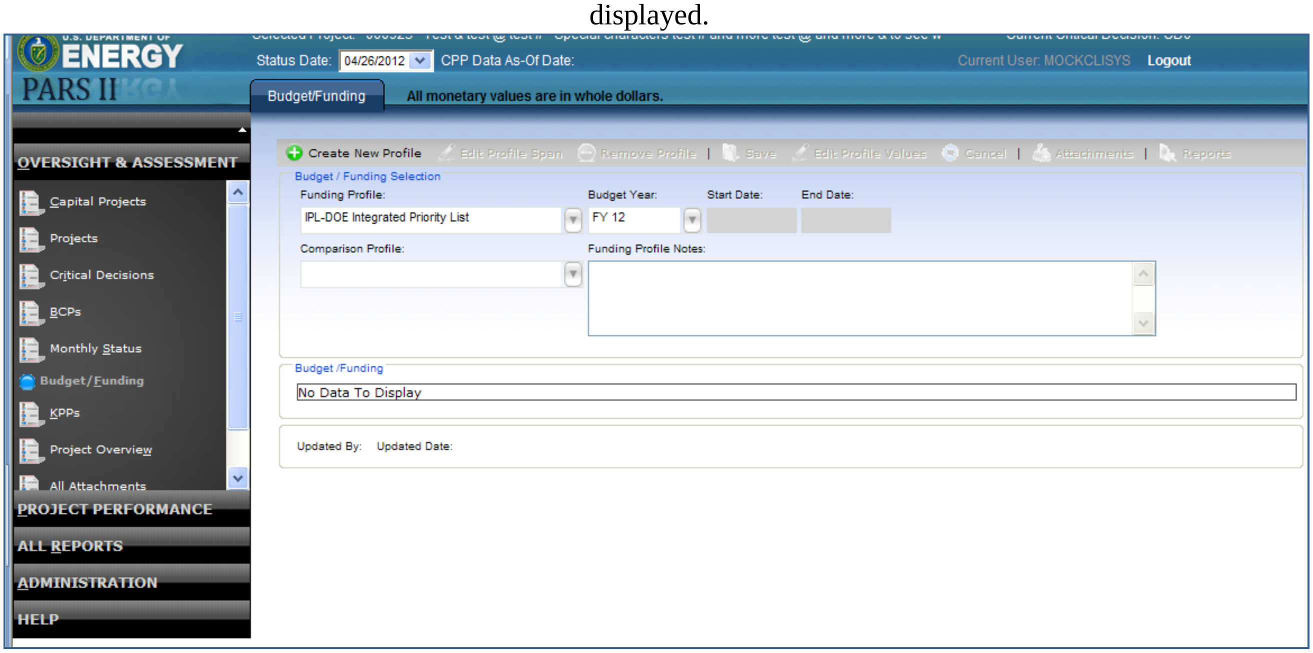


Figure 29 Budget/Funding – Empty Profile

2. Select the Funding Profile from the drop-down list for the budget/funding profile to be viewed. The

CBR-Congressional Budget Profile has been selected in Figure 27.

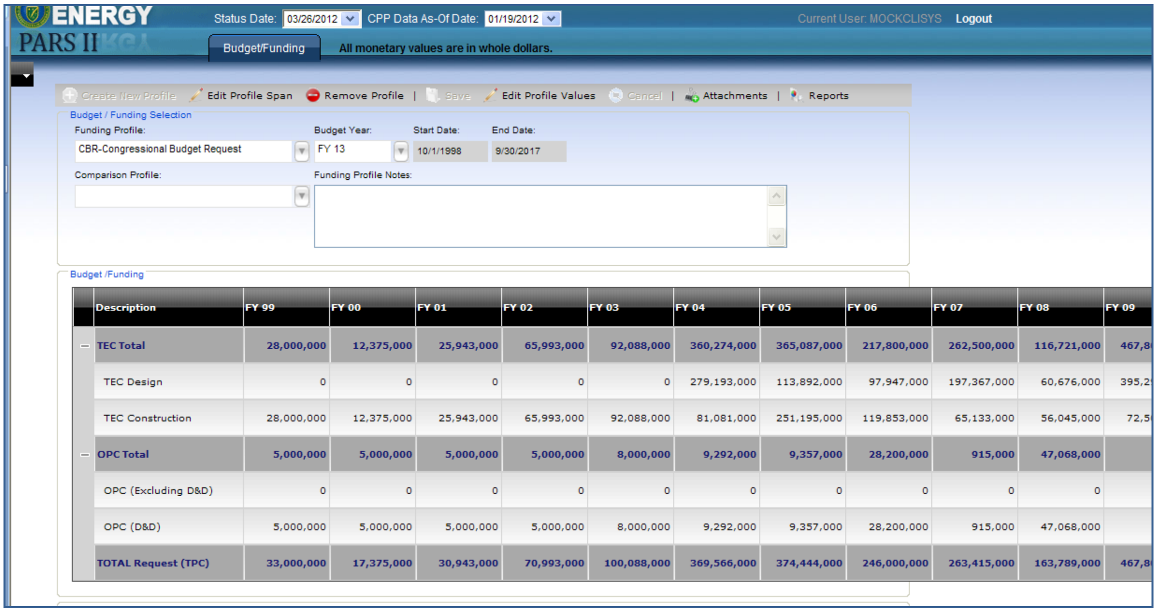


Figure 30 Budget/Funding – CBR Profile

3.6.2 Compare Funding Profiles

The "Comparison Profile" drop-down list below the Funding Profile dropdown allows users to compare the current profile with another profile, and automatically calculates the difference in the Total Request for the two profiles.

1. **Select** the desired profile from the Comparison Profile dropdown as shown below and the screen will display as shown in Figure 29 on the next page.

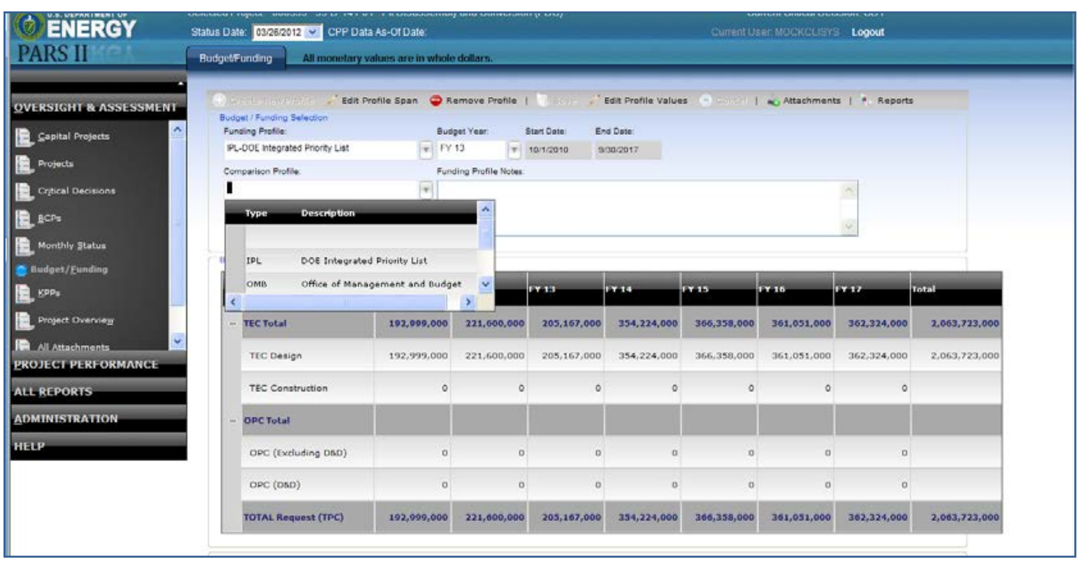
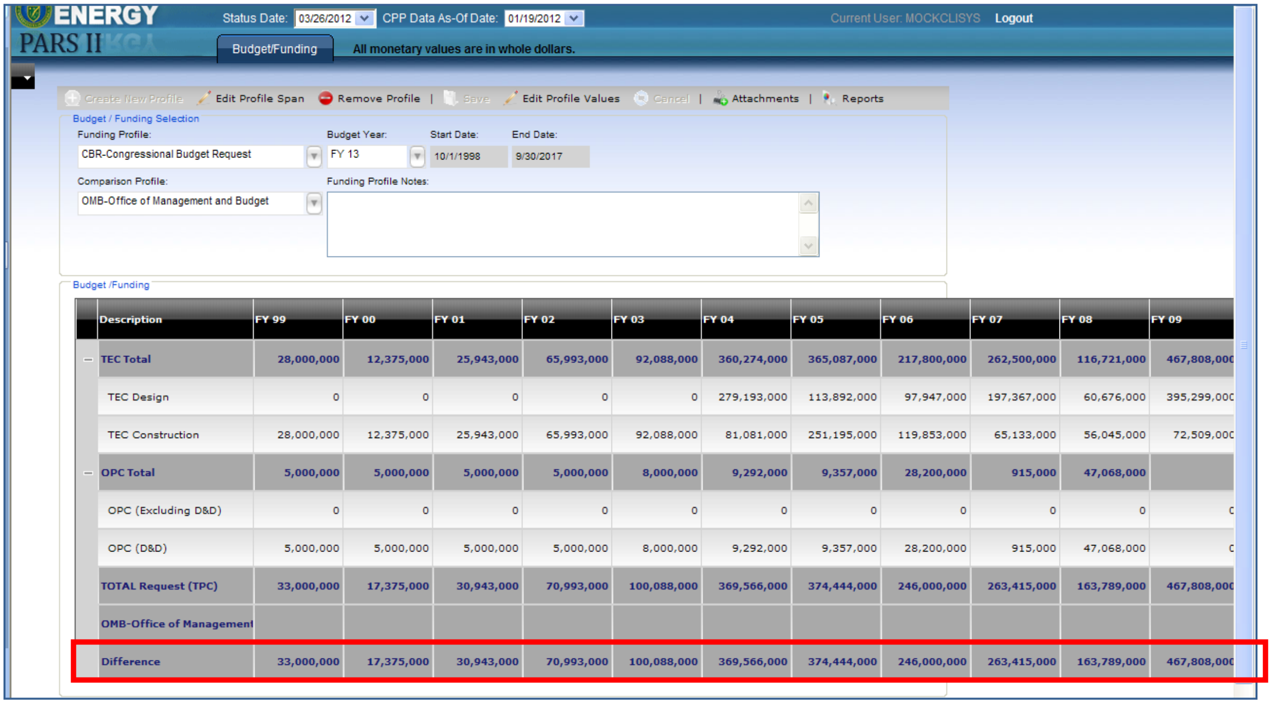


Figure 31 Compare Funding Profile Option

2. PARS II automatically calculates the difference between the Total Request of the two profiles, in this case the CBR-Congressional Budget Request and the OMB-Office of Management and Budget profile selected for comparison.



Description	FY 99	FY 00	FY 01	FY 02	FY 03	FY 04	FY 05	FY 06	FY 07	FY 08	FY 09
TEC Total	28,000,000	12,375,000	25,943,000	65,993,000	92,088,000	360,274,000	365,087,000	217,800,000	262,500,000	116,721,000	467,808,00
TEC Design	0	0	0	0	0	279,193,000	113,892,000	97,947,000	197,367,000	60,676,000	395,299,00
TEC Construction	28,000,000	12,375,000	25,943,000	65,993,000	92,088,000	81,081,000	251,195,000	119,853,000	65,133,000	56,045,000	72,509,00
OPC Total	5,000,000	5,000,000	5,000,000	5,000,000	8,000,000	9,292,000	9,357,000	28,200,000	915,000	47,068,000	
OPC (Excluding D&D)	0	0	0	0	0	0	0	0	0	0	0
OPC (D&D)	5,000,000	5,000,000	5,000,000	5,000,000	8,000,000	9,292,000	9,357,000	28,200,000	915,000	47,068,000	0
TOTAL Request (TPC)	33,000,000	17,375,000	30,943,000	70,993,000	100,088,000	369,566,000	374,444,000	246,000,000	263,415,000	163,789,000	467,808,00
OMB-Office of Management											
Difference	33,000,000	17,375,000	30,943,000	70,993,000	100,088,000	369,566,000	374,444,000	246,000,000	263,415,000	163,789,000	467,808,00

Figure 32 Compare Funding Profiles – Results

3.7 Key Performance Parameters (KPPs)

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

> ***Note: When accessing KPPs from the OA module, users will only see the latest KPPs entered and must click on the "Clear Filter button to view all KPPs.***

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

Table 9 KPP Icons – View Mode

ACTIVE ICON	PURPOSE
Clear Filter	Restore complete list of KPPs by removing any filter that may have been applied.
View	View selected (highlighted) KPP

3.7.1 View KPPs

1. Select **KPPs** from the Navigation Bar. To view the entire list, click on the "Clear Filter" button from the toolbar.

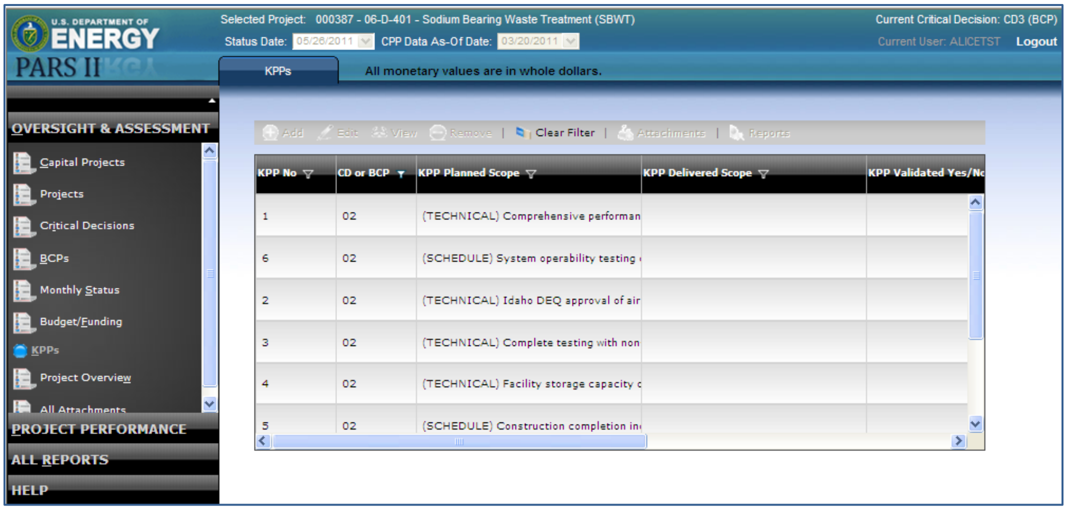


Figure 33 Key Performance Parameter List

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

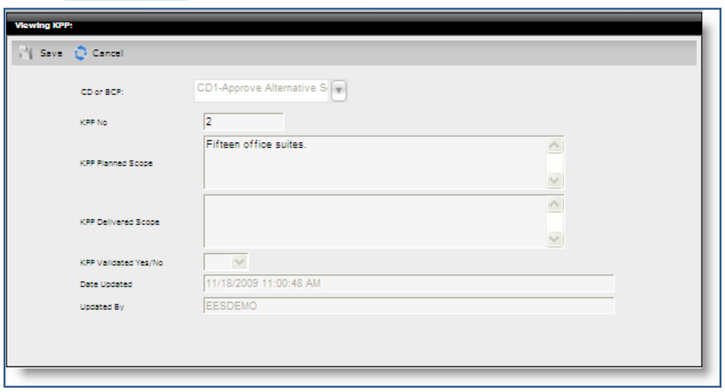
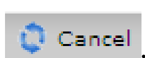


Figure 34 Key Performance Parameter Screen

3. When finished viewing, click .

3.7.2 Sort the KPP List

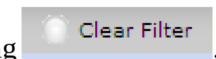
1. Click a column header label to sort the list by that column.

3.7.3 Filter the list of KPPs

1. Click the filter icon  for a column and select **filter value** from the drop-down list. The list regenerates

with the filter applied.

Figure 35 Filtered to Show CD-2 KPPs

2. Re-generate the full list by clicking 

. Resorting of the list may be necessary.

3.8 All Attachments

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

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

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

TIP: Only a System Administrator can edit or delete an attachment.

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

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

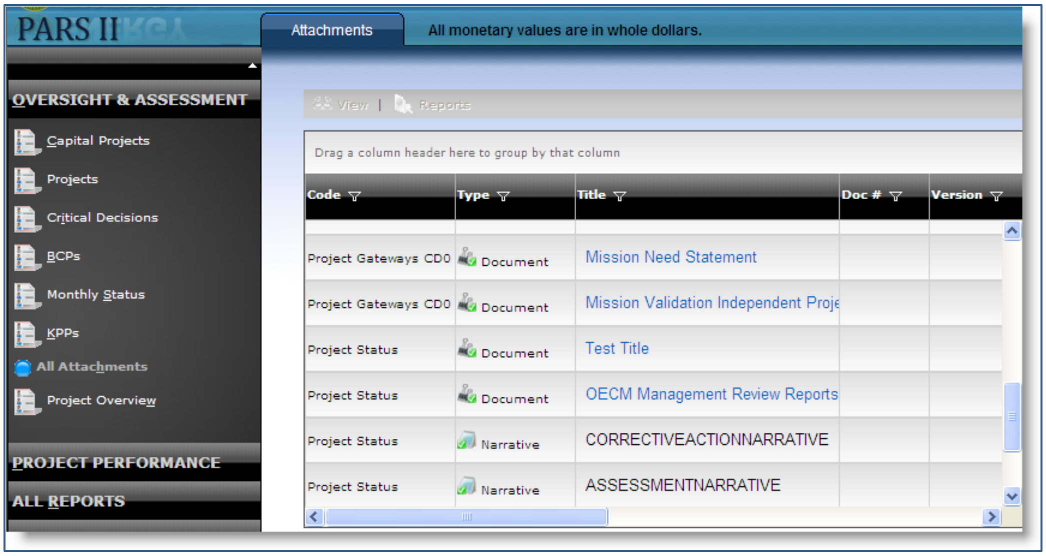


Figure 36 List of All Attachments for a Project

3.8.1 View List of All Attachments for a Project

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

3.8.2 Sort the Attachments List

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

3.8.3 Filter the list of Attachments

1. Click the filter icon  for a column. A drop-down list displays.

2. Select a filter value from the drop-down list. Attachments matching that value are listed.

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

3.8.4 View Attachment Content

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

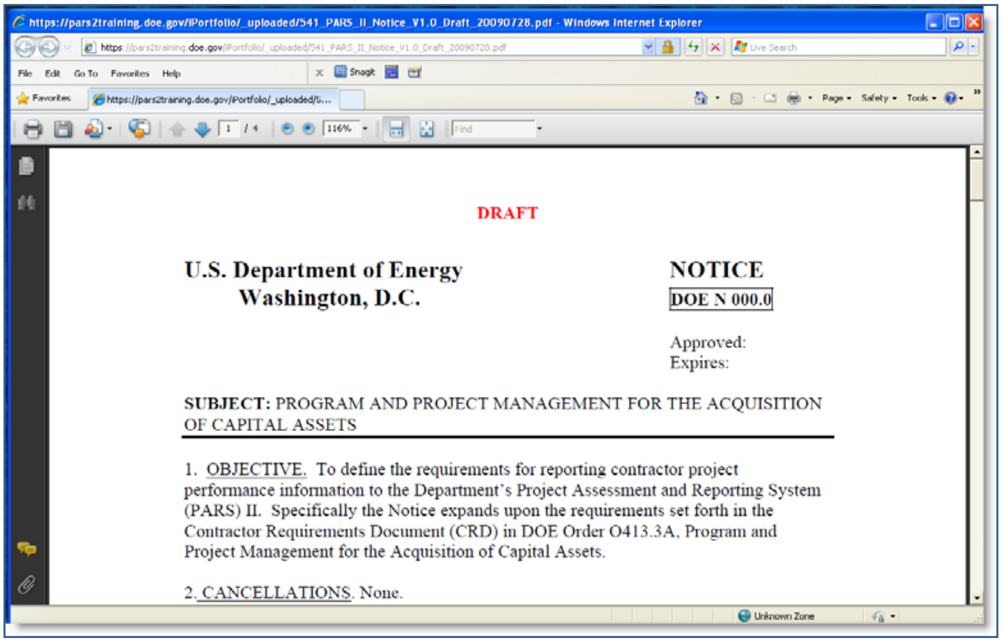


Figure 37 Document Attachment

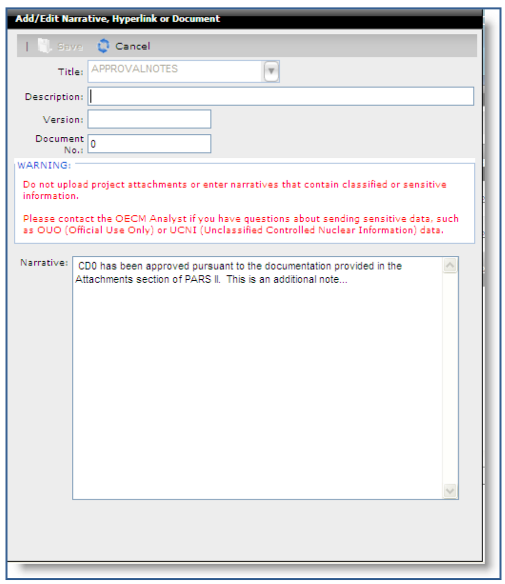


Figure 38 Narrative Attachment

3.9 Project Overview

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

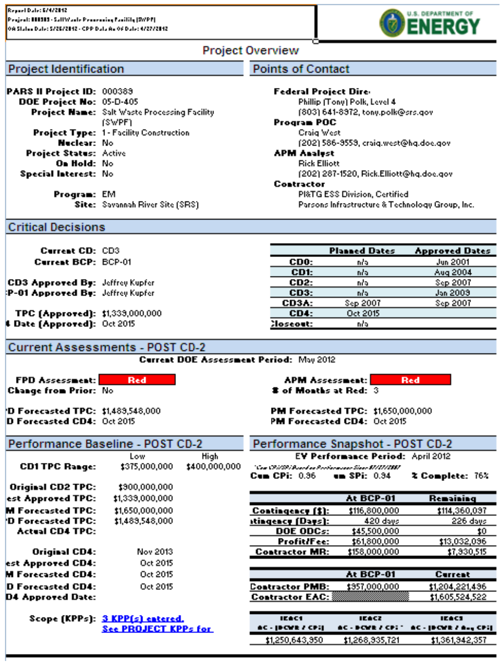


Figure 39 Project Overview Excel Report

3.9.1 Generate Project Overview Report

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

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

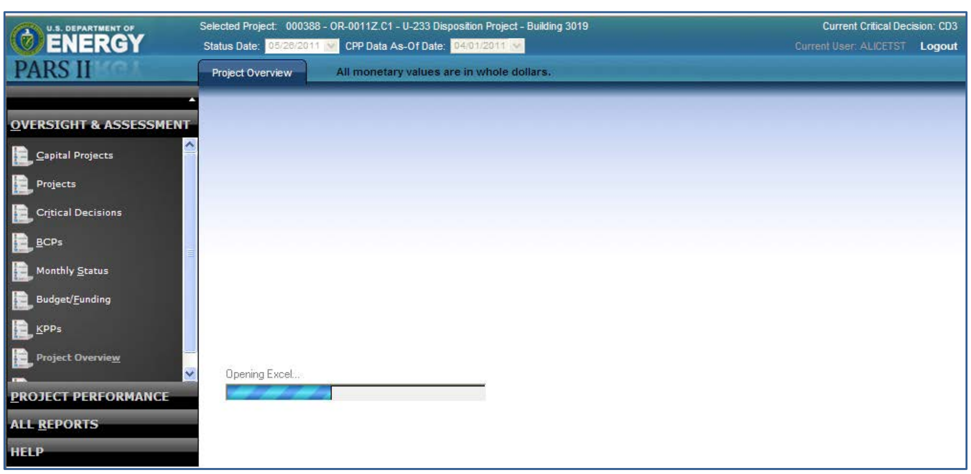


Figure 40 Generating the Project Overview

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

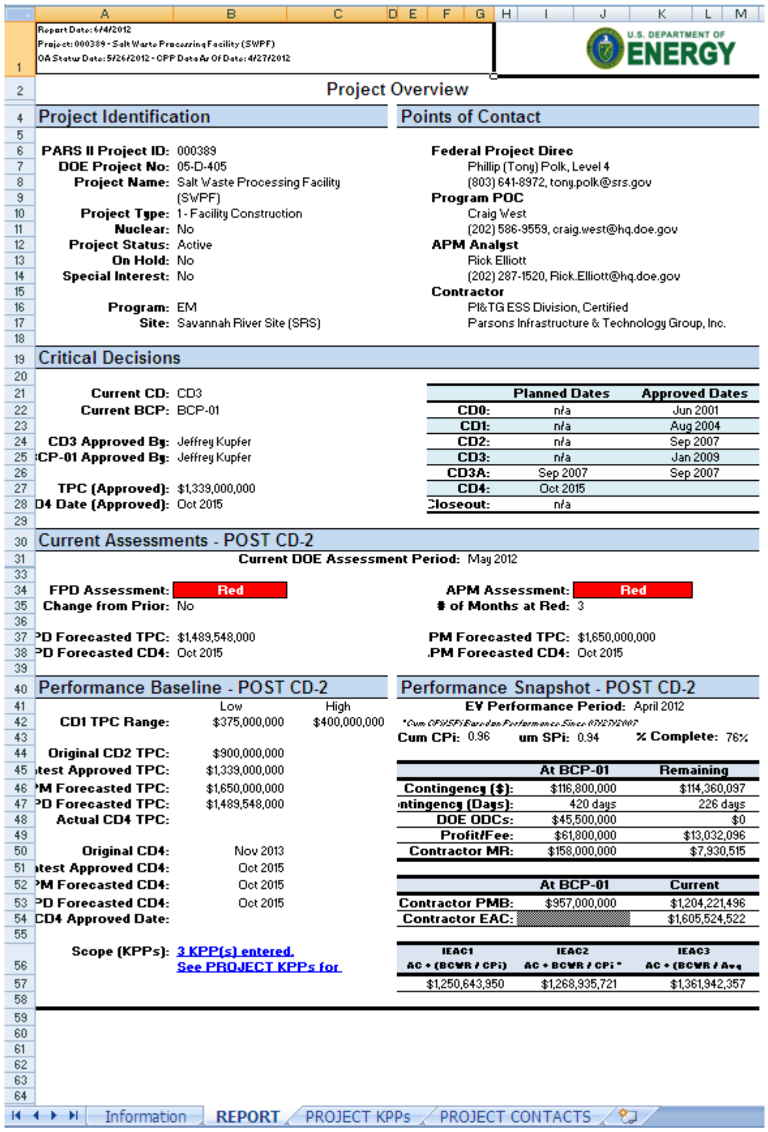


Figure 41 Excel Window with Project Overview Report

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

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

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

4 PROJECT PERFORMANCE

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

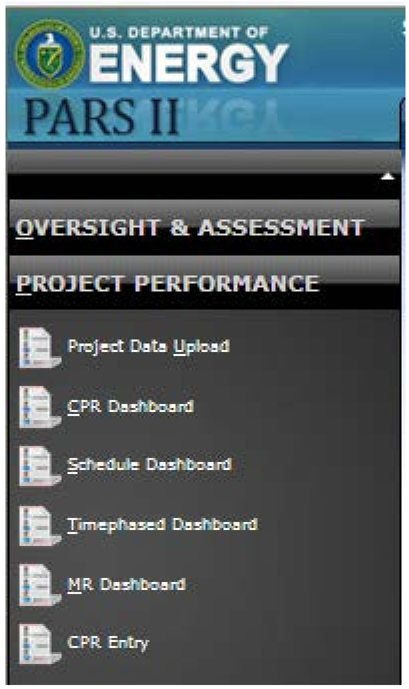


Figure 42 Project Performance Menu Options

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

The contractor's data must be uploaded no later than the last workday of every month and must be current as of the closing of the previous month's accounting period. FPDs have until the third workday of the following month to accomplish their assessment. The Program Managers have until the sixth workday and APM until the ninth workday to provide their assessment and to compile the monthly project status report. APM will coordinate the report with the Programs and on the 25th day, forward the report to the Deputy Secretary.

4.1 Work Breakdown Structure / Organizational Breakdown Structure Data

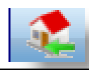
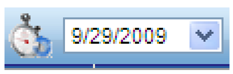
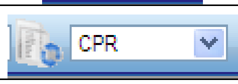
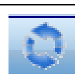
Through the Project Performance module, users can access the Cost Performance Report (CPR), Schedule, and Time-phased data through the respective dashboard tabs in the navigation bar. Top-level dashboards show project data by Work Breakdown structure (WBS) or Organizational Breakdown Structure (OBS) number. The CPR dashboard includes the Analysis and Independent Estimate at Completion (IEAC) views of the dashboard data.

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

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

Figure 43 Dashboard Toolbar

Table 10 Dashboard Icons

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

4.2 CPR Dashboard

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

4.2.1 View CPR Dashboard

1. Select **CPR Dashboard** from the Project Performance option on the Navigation Bar. The CPR dashboard displays with the following default settings:

a. Time period → latest Contractor Upload Date
b. Table →WBS
c. Dashboard View →CPR

Drop-down list selections are available to modify one or more of these default settings. The dashboard will automatically re-generate based on the modified settings.

Figure 44 Cost Performance Report (CPR) Dashboard – WBS Table

4.2.2 Check/Modify RYG Threshold Settings

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

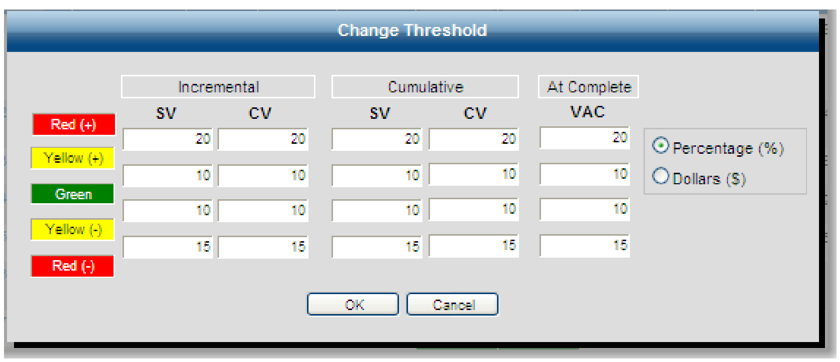


Figure 45 RYG Threshold Settings

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

NOTE: Once a setting is saved for a project, the changed values will remain. Thresholds can be returned to default settings but must be entered and saved manually. Either Percentage or Dollar values can be viewed at one time – not both.

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

4.2.3 Drilldown to Detail

1. Click the WBS or OBS number of any cell within the WBS or OBS column to drilldown to more detail.

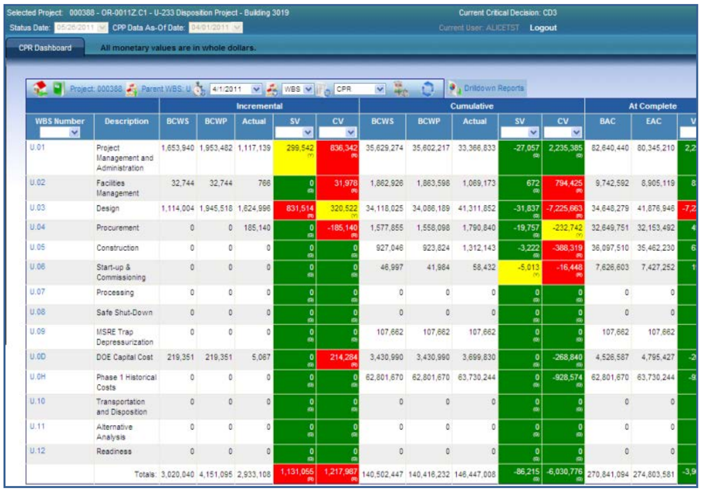


Figure 46 WBS Drilldown

2. Drilldown until an empty table displays. The previous level is the lowest level of detail available.

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

.

4. Each click of 

moves the table up one level.

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

4.3 Schedule Dashboard

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

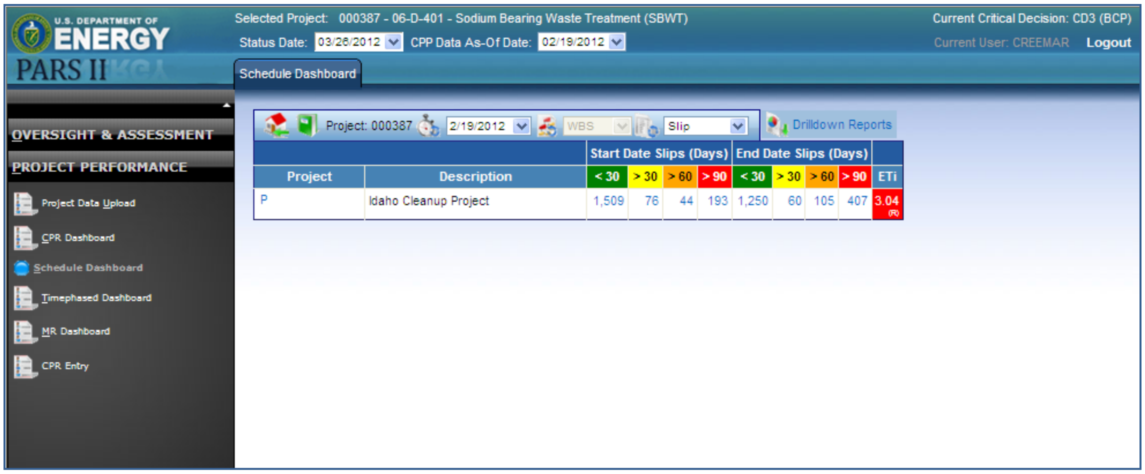
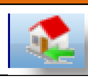
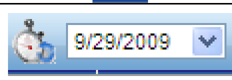
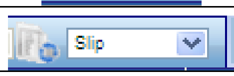


Figure 47 Schedule Dashboard

Table 11 Schedule Dashboard Icons

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

4.4 Time-phased Dashboard

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

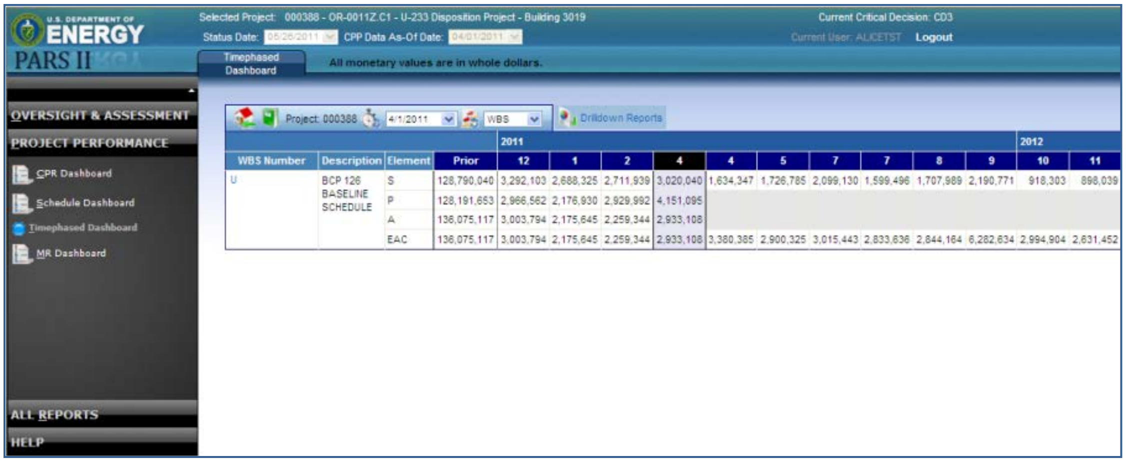


Figure 48 Time-phased Dashboard

4.5 MR Dashboard

The MR Dashboard provides a basic view of MR transactions. The Attachment button is the only "active" button and allows the user to see any narratives attached to a particular MR transaction. Not all projects will have MR data uploaded and visible in the MR Dashboard.

Figure 49 MR Dashboard

4.6 Dynamic Drilldown Reports

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

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

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

4.6.1 WBS Reports

1. Click 

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

Figure 50 Drilldown Reports Tab

NOTE: It is recommended to generate the Dynamic Drilldown Reports ONLY by using the Drilldown Reports option from the dashboard. Generating DDR reports from the ALL REPORTS menu results in only top level WBS/OBS data.

2. Click ✚ to expand the **WBS DDR** folders.

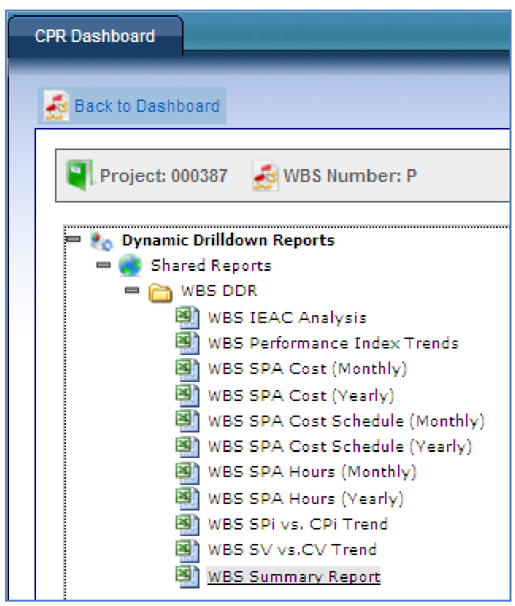


Figure 51 Project Performance WBS Report Listing

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

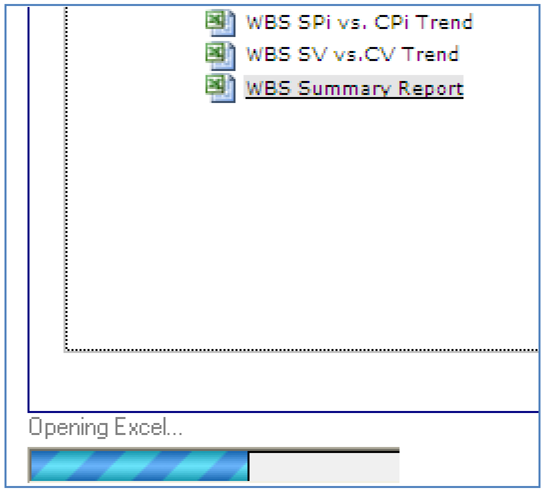


Figure 52 Downloading WBS Summary Report

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

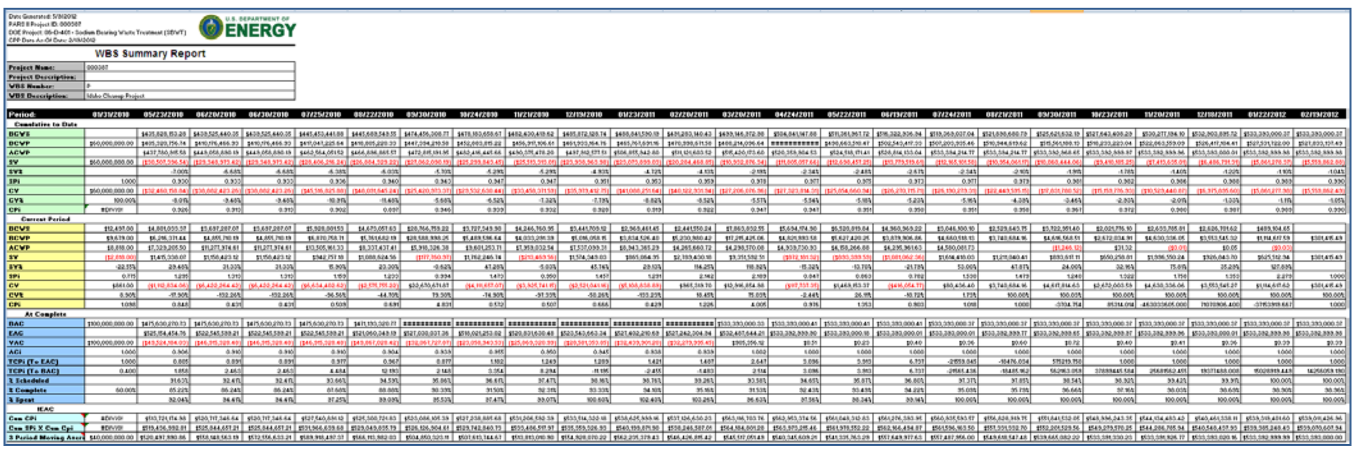
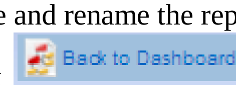


Figure 53 WBS Summary Report from Dashboard Drilldown Reports

5. At this point, users can work with the document in Excel Workbook, to include saving a copy to the user's local drive, editing, and printing a copy.

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

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

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

.

4.6.2 OBS Reports

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

2. Click 

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

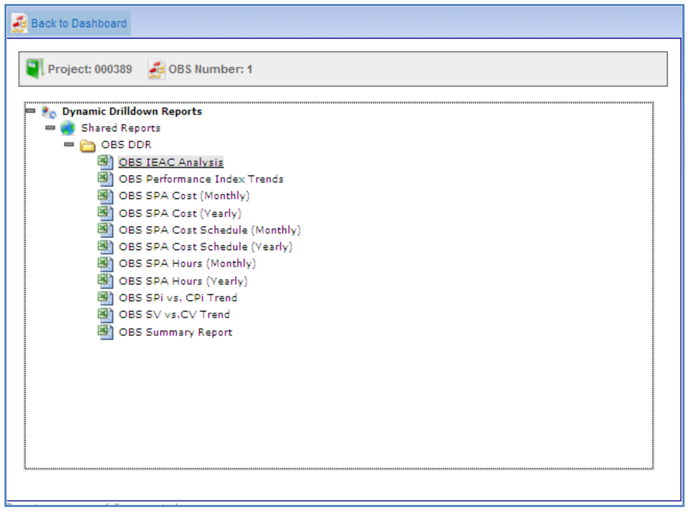


Figure 54 Project Performance OBS Report Listing

NOTE: It is recommended to generate the Dynamic Drilldown Reports ONLY by using the Drilldown Reports option from the dashboard. Generating DDR reports from the ALL REPORTS menu results in only top level WBS/OBS data.

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

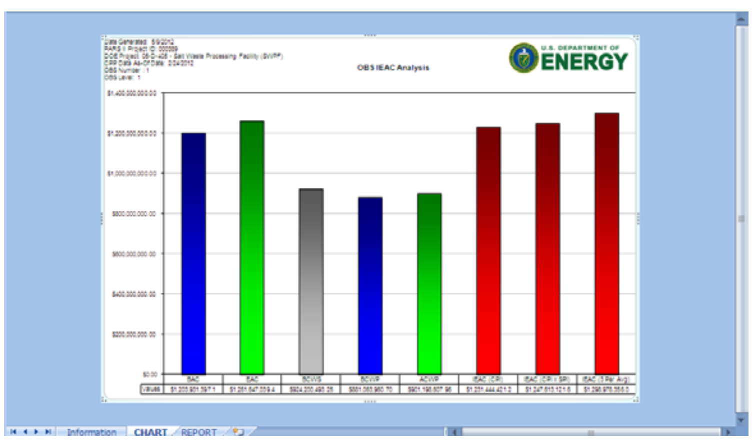


Figure 55 OBS IEAC Analysis Report from Dashboard Drilldown Reports

4. When finished viewing, **Close** the Excel window. A reminder displays to save the report (optional). If you save the report, select a folder on your local drive and rename the report.
5. Return to the PARS II task window. When finished running reports, click 

.

5 ALL REPORTS

Users have two options for generating OA reports: through the "Reports" toolbar icon in each of the OA tabs, or through the "All Reports" module.

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

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

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

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

5.1 Run a report

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

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

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

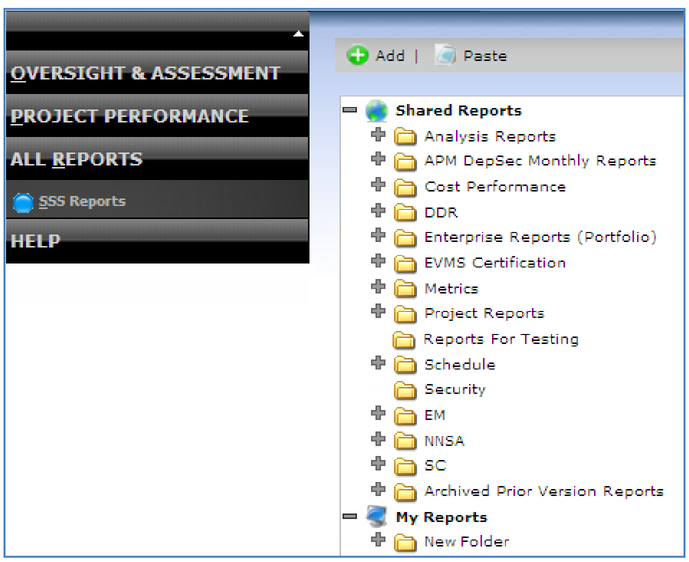


Figure 56 Reports - Sort, Select, Summarize – SSS Tab

3. Click to expand the **Cost Performance Reports** folder.

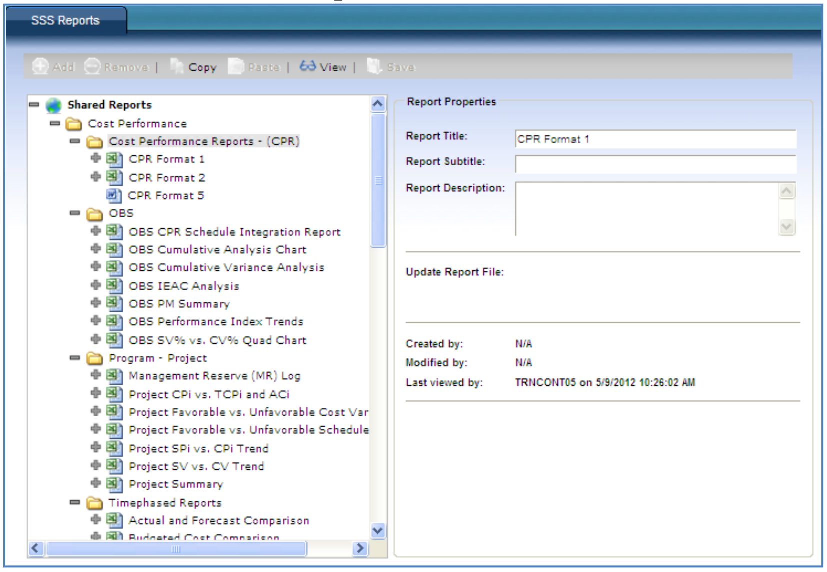


Figure 57 List of Cost Performance Reports

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

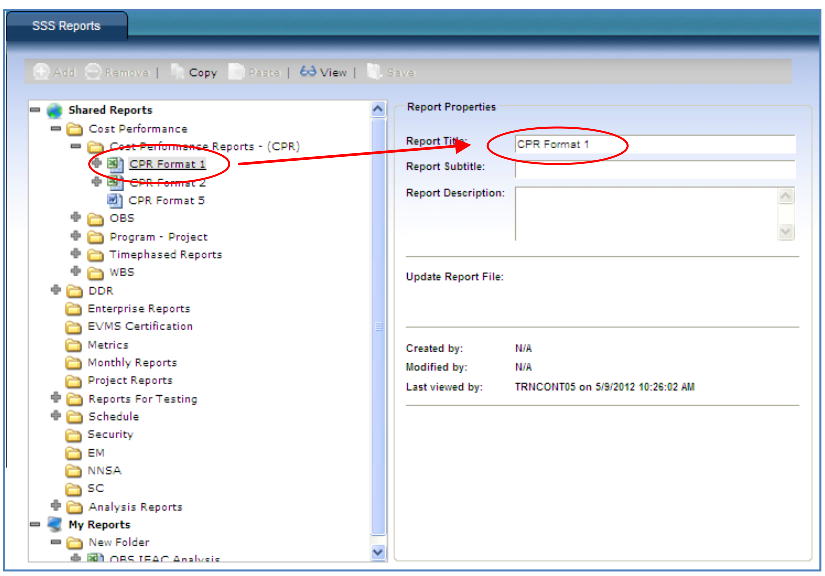


Figure 58 Report Properties

5. Click View to generate the report. (Wait as it processes.) Status messages appear above the progress bar indicating the following (some may occur too rapidly to see):

   a. Loading – PARS II is loading the report definition and data query
   b. Downloading (generating report)
   c. Opening Excel
   d. Formatting report

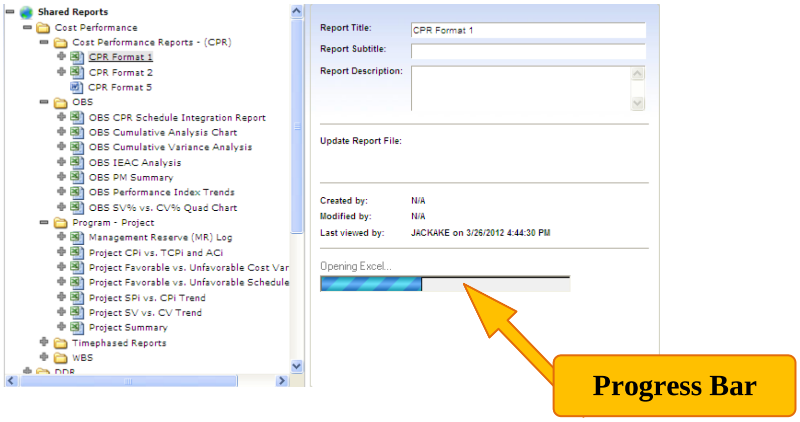


Figure 59 Downloading Report

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

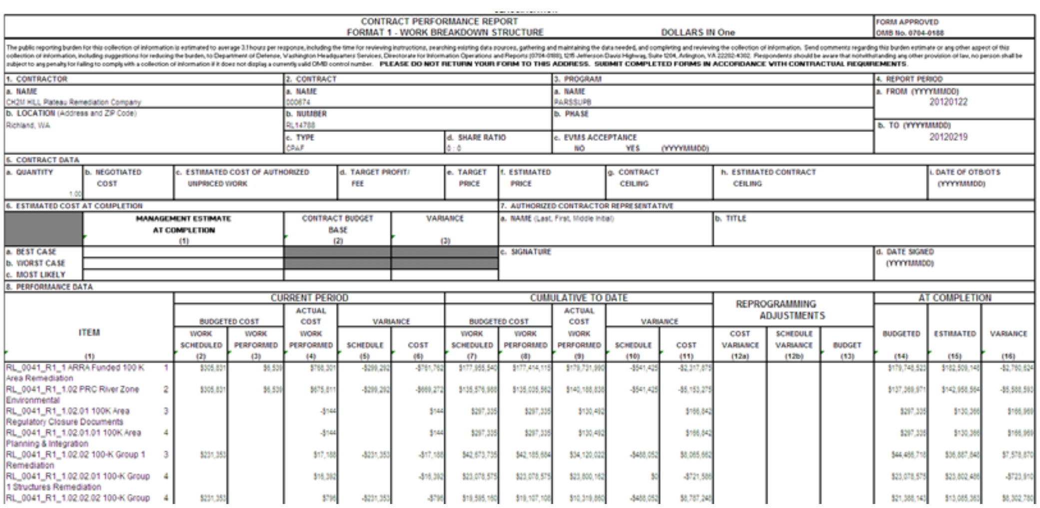
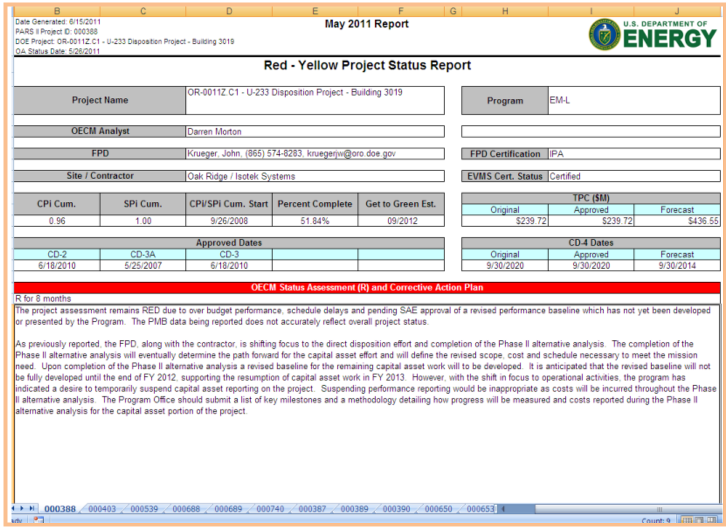


Figure 60 CPR Format 1 Report



Date Generated: 6/15/2011
PARS II Project ID: 000388
DOE Project: OR-0011Z.C1 - U-233 Disposition Project - Building 3019
OA Status Date: 5/26/2011

May 2011 Report

U.S. DEPARTMENT OF ENERGY

Red - Yellow Project Status Report

Project Name	OR-0011Z.C1 - U-233 Disposition Project - Building 3019	Program	EM-L
OECM Analyst	Darren Morton		
FPD	Krueger, John, (865) 574-8283, kruegerjw@oro.doe.gov	FPD Certification	IPA
Site / Contractor	Oak Ridge / Isotek Systems	EVMS Cert. Status	Certified

CPi Cum.	SPi Cum.	CPi/SPi Cum. Start	Percent Complete	Get to Green Est.
0.96	1.00	9/26/2008	51.84%	09/2012

TPC ($M)		
Original	Approved	Forecast
$239.72	$239.72	$436.55

Approved Dates				
CD-2	CD-3A	CD-3		
6/18/2010	5/25/2007	6/18/2010		

CD-4 Dates		
Original	Approved	Forecast
9/30/2020	9/30/2020	9/30/2014

OECM Status Assessment (R) and Corrective Action Plan

R for 8 months

The project assessment remains RED due to over budget performance, schedule delays and pending SAE approval of a revised performance baseline which has not yet been developed or presented by the Program. The PMB data being reported does not accurately reflect overall project status.

As previously reported, the FPD, along with the contractor, is shifting focus to the direct disposition effort and completion of the Phase II alternative analysis. The completion of the Phase II alternative analysis will eventually determine the path forward for the capital asset effort and will define the revised scope, cost and schedule necessary to meet the mission need. Upon completion of the Phase II alternative analysis a revised baseline for the remaining capital asset work will to be developed. It is anticipated that the revised baseline will not be fully developed until the end of FY 2012, supporting the resumption of capital asset work in FY 2013. However, with the shift in focus to operational activities, the program has indicated a desire to temporarily suspend capital asset reporting on the project. Suspending performance reporting would be inappropriate as costs will be incurred throughout the Phase II alternative analysis. The Program Office should submit a list of key milestones and a methodology detailing how progress will be measured and costs reported during the Phase II alternative analysis for the capital asset portion of the project.

000388 000403 000539 000688 000689 000740 000387 000389 000390 000650 000653

Figure 61 Report with Multiple Worksheet Tabs

7. At this point, users can work with the document in Excel Workbook, to include saving a copy, editing, and printing a copy. ***NOTE: Once the report has opened in Excel, it is best to use "Save As" so the correct directory path can be chosen if a saved copy on your computer is desired.***

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

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

NOTE: After highlighting a Report Title, click 

to generate the report.

TIP: If a user attempts to view or import a report that he/she does not have the appropriate security rights to because of report security features, the upload process will not complete and the User will get the following message: "This report cannot be imported because it requires access rights that you do not have."

6 HELP

By clicking the "User Guide" option under the Help module, Users can view the most recent version of the PARS II User Guide in a separate window during the current logon session.

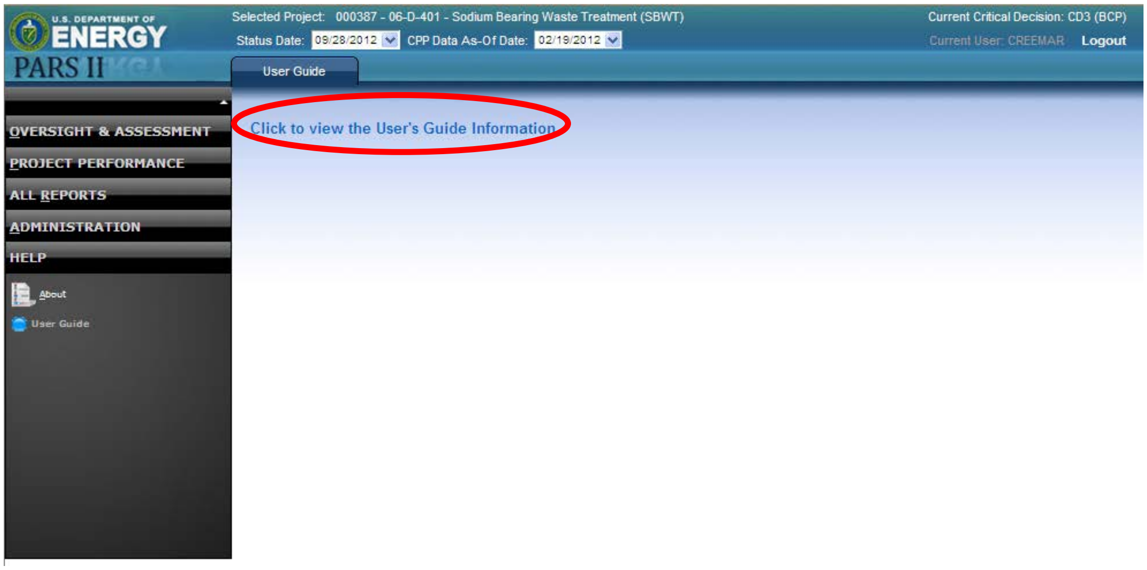


Figure 62 PARS II Version # and Date

6.1 Helpdesk & Homepage

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

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

Information is also available on the PARS II Homepage: http://energy.gov/node/290329

7 ENTER MONTHLY STATUS UPDATE

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

- FPD
- Level 1 Program
- APM

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

Users will be able to either edit or view information for each of the three areas depending on the role of the user accessing the tab. For example, FPDs can update information in the FPD section, but are only able to view

Program and APM updates. Similarly, only a Program representative can update the Program section, and only an APM analyst can update the APM section.

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

The "Monthly Status" tab displays one of three ways:

a. For a new project or one that has just passed the CD-2 Gateway, the tab may be empty.

b. For projects that have had on-going reporting in prior months, the status tab displays the most recent data entered in each field for the current reporting period. Any entries made in the EDIT mode, will overwrite/correct the current month's status information.

c. For projects that have had on-going reporting, the status tab may display with all the data fields blank. PARS II sets these fields to blank when the prior reporting period is closed. Blank fields indicate that the data has not yet been entered for the new time period.

7.1 FPD

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

Before entering a status update, FPDs are expected to review the Contractor Project Performance dashboards and the latest OA data. Selecting the "Has the CPP data been reviewed?" check box, the "Is the OA data current?" checkbox, and choosing the current CPP Data As-Of Date (from the date list drop down) indicates that the FPD has done so. The most recent upload CPP Data As-Of Date is shown in the date list drop down and in the title bar area below the project name.

7.1.1 Review Contractor EV and Schedule Upload

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

FPDs should review the contractor's data prior to upload as the information is "live" at that point. The contractor's data must be uploaded no later than the last workday of every month and must be current as of the closing of the previous month's accounting period. FPDs have until the third workday of the following month to accomplish their assessment. The Program Managers have until the sixth workday and APM until the ninth workday to provide their assessment and to compile the monthly project status report. APM will coordinate the report with the Programs and on the 25th day, forward the report to the Deputy Secretary.

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

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

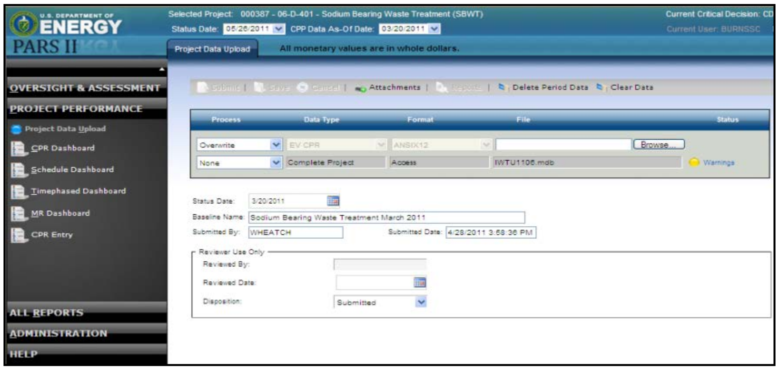


Figure 63 Project Data Upload - FPD

3. Click the 

radio button under the status column.

4. View and analyze the Import Error log.

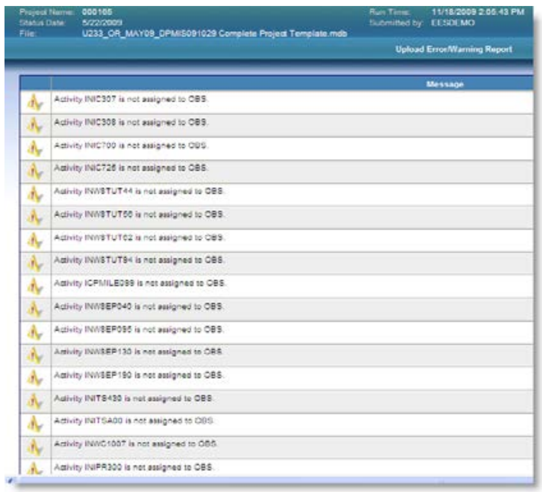


Figure 64 Import Error Log

5. View and analyze the CPR, Schedule, and Time-phased dashboards as described in Chapter 4.

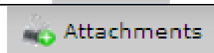
7.1.2 Update FPD Monthly Status

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

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

Fields for Cost and Schedule Contingencies and ODC's must also be completed. "Updated By" and "Updated Date" fields are automatically set by the system.

Table 12 Monthly Status Icons - FPD

ACTIVE ICON	PURPOSE
	Edit the Monthly Status.
	View, edit, or add attachments associated with Monthly Status.

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

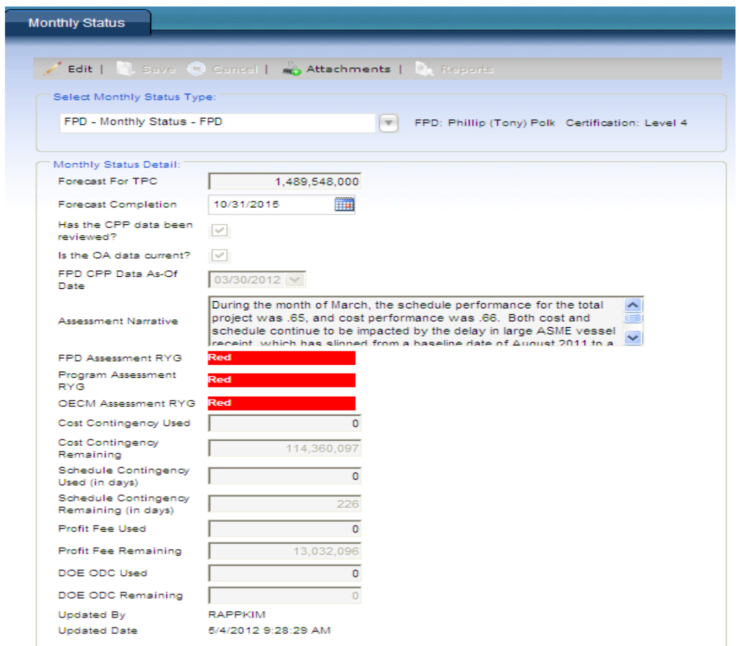


Figure 65 FPD Monthly Status Screen

2. Click  to begin entering monthly status information.

3. After reviewing the latest OA data as described in Chapter 3, click checkbox to indicate "**Is the OA Data Current?"** If it is not, leave it blank.

4. After reviewing the latest Contractor upload, click checkbox "**Has the CPP Data been Reviewed?"**
5. After reviewing the latest upload status date, select the correct date from the drop down list in the FPD CPP Data As-Of Date field. The most recent upload CPP Data As-Of Date is shown in the upload screen Status Date, the date list drop down and in the title bar area below the project name.

6. Enter/Update fields as needed. Fields in gray are calculated values. "Updated By" and "Updated Date" are populated by PARS.

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

7.2 Program

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

Like the FPD, the Program representative can enter a TPC Forecast, a forecast for CD-4 completion, and a Status Assessment Narrative. “Updated By” and “Updated Date” are automatically set by the system.

Table 13 Monthly Status Update Icons - Program

ACTIVE ICON	PURPOSE
Edit	Edit the Monthly Status.
Attachments	View, edit, or add attachments associated with Monthly Status.

7.2.1 Update Program Office Monthly Status

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

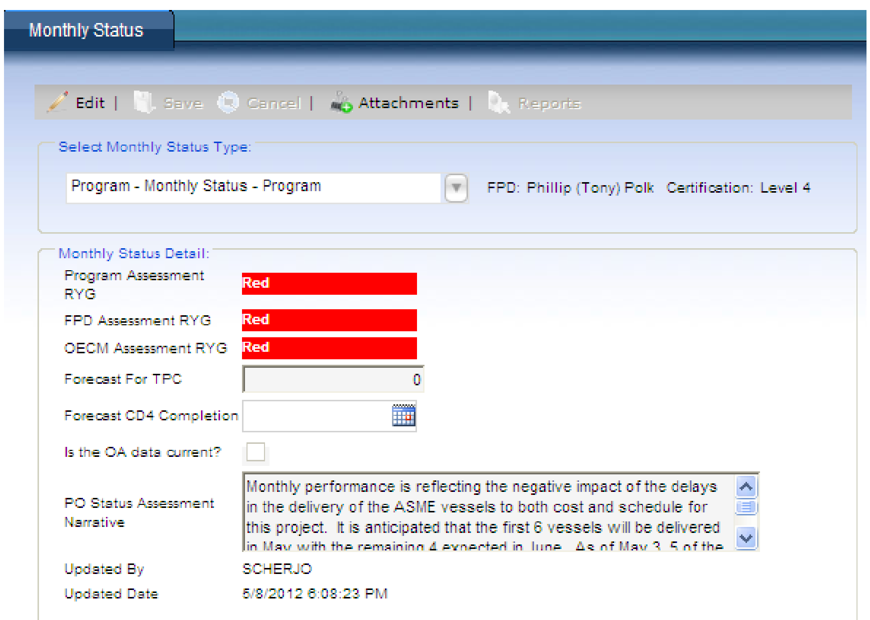
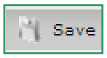


Figure 66 Program Monthly Status Screen

2. Click Edit to begin entering monthly status information.

3. Enter/Update fields as needed. Fields in gray are calculated values. Updated By and Updated Date are populated by PARS.

4. Click 

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

7.3 APM

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

Like the FPD and the Program representative, the APM analyst can enter a TPC Forecast, a forecast for CD-4 completion, and an Overall Assessment Narrative. "Updated By" and "Updated Date" fields are automatically set by the system.

7.3.1 Enter APM Monthly Status Update

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

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

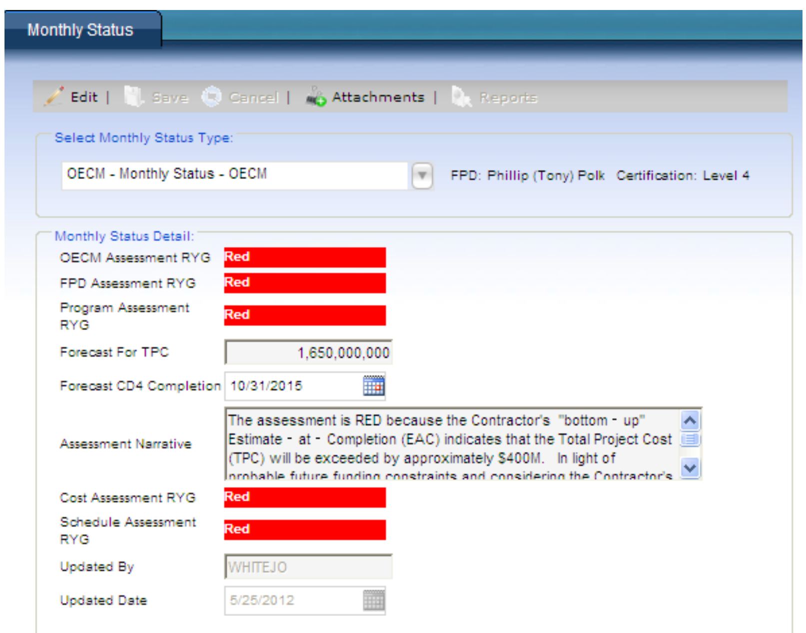
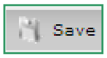


Figure 67 APM Monthly Status Screen

3. Click 

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

4. Enter/Update fields as needed. Fields in gray are calculated values. Updated By and Updated Date are populated by PARS.

5. Click 

. Users are returned to the View mode of the “Monthly Status” tab.

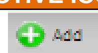
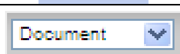
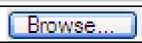
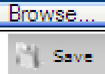
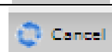
8 ADD AN ATTACHMENT

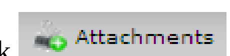
Users select the “Attachments” toolbar icon on the “Monthly Status” tab, or any tab that has an “Attachments” icon, to open an Attachments window. The Attachment window displays a list of narratives, hyperlinks, or appended documents pertaining to the active tab. In this window, users with “write” privileges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

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

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

Table 14 Add Attachment Icons

ACTIVE ICON	PURPOSE
	Opens window to select and add a new attachment.
	Permits edit of selected (highlighted) attachment. Only the user, who added the attachment, has rights to edit it.
	Drop-down list to select type of attachment – Document, Narrative, or Hyperlink. The default is Document.
	Opens window to browse through folders.
	Save the attachment.
	Exit the window.

1. From the “Monthly Status” tab, or any tab that has an “Attachments” icon, click 

. The Attachment window displays.

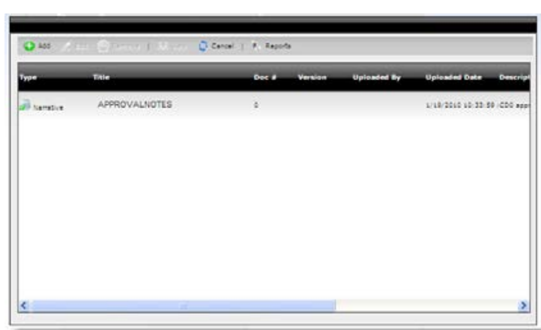


Figure 68 Attachment Window

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

3. Select **Type of attachment – Document, Narrative, or Hyperlink** (the default is Document) from the drop-down list on the toolbar and follow instructions for whichever type was selected.

8.1.1 Document

1. Enter attachment identification information. The Title can be one selected from the drop-down Title list or typed if is not on the list.
2. **Browse** for the document to be attached, then 

.

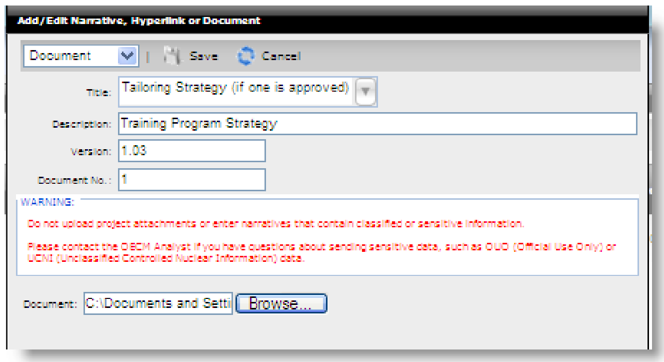
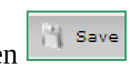


Figure 69 Add Document Attachment

8.1.2 Narrative

1. Enter attachment identification information. Type or Paste text in the Narrative box, then 

.

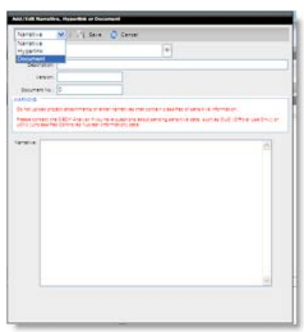


Figure 70 Narrative Attachment

8.1.3 Hyperlink

1. Enter attachment identification information. Type the **Link** in the Hyperlink field, then 

.

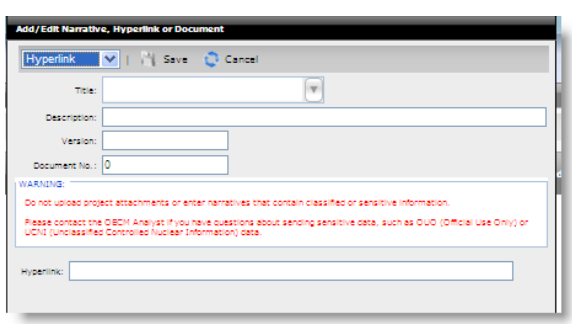


Figure 71 Hyperlink Attachment

9 OVERSIGHT AND ASSESSMENT - DATA ENTRY

To create, or edit a Capital Asset Project, and its associated Projects, CDs, BCPs, Budgeting and Funding, and KPPs, open the OA module.

9.1 Creating and Updating a Capital Project

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

NOTE: Refer to "Appendix D: PARS II Data Hierarchy Nomenclature Evolution" for more information.

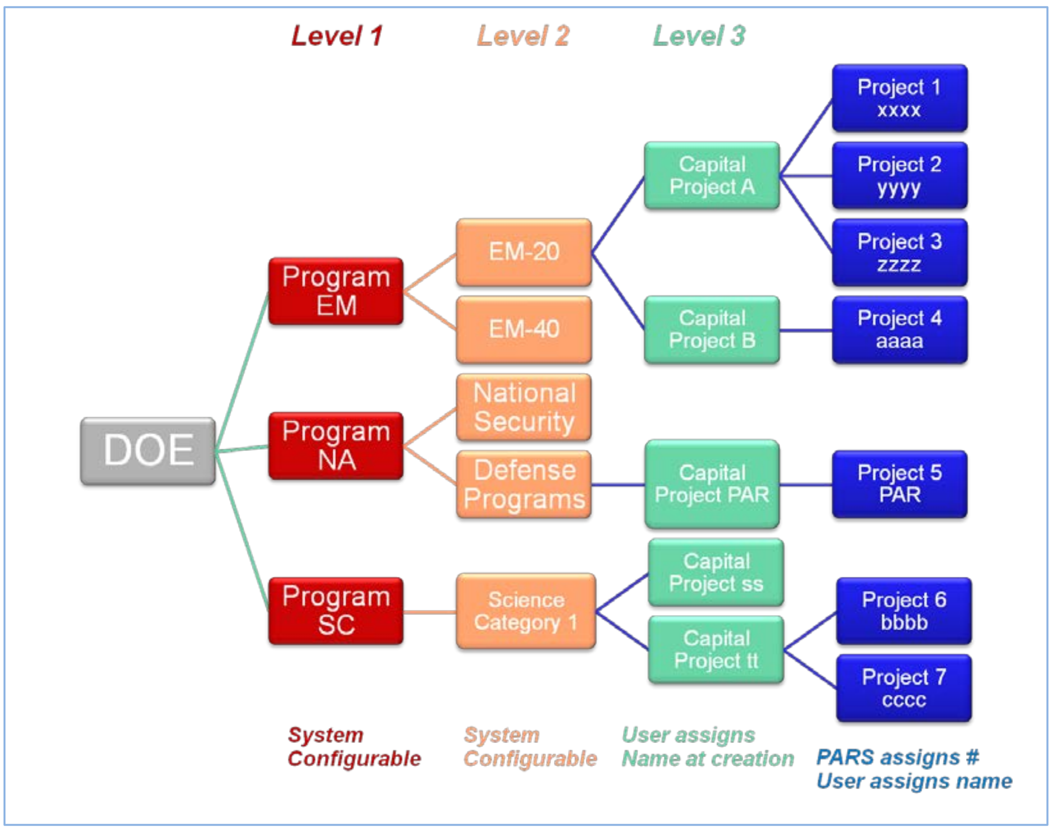


Figure 72 PARS II Data Hierarchy for Capital Projects

To edit or create a Capital Project, select the "Capital Projects" tab within the OA module.

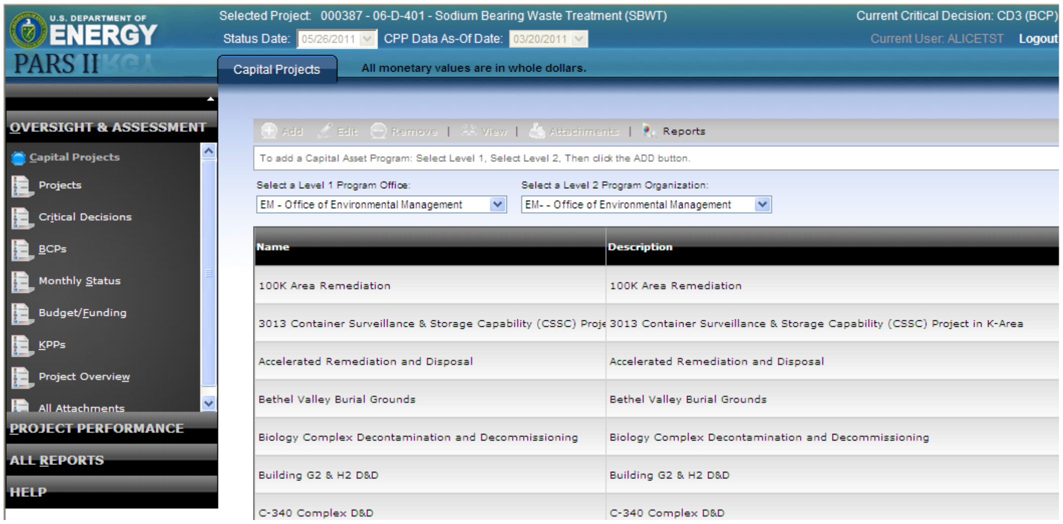


Figure 73 Capital Projects Tab

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

Table 15 Add Capital Project Icons

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

9.1.1 Add a Capital Project

1. Select **Capital Projects** from the Navigation Bar.
2. Select a Program Office from the **Level 1 Program Office** drop-down list.
3. Select the **Level 2 Program Organization** from the Level 2 drop-down list. The Level 2 list is a dependent drop-down, and as such, will contain a list that varies depending on the Program Office selected in Level 1.

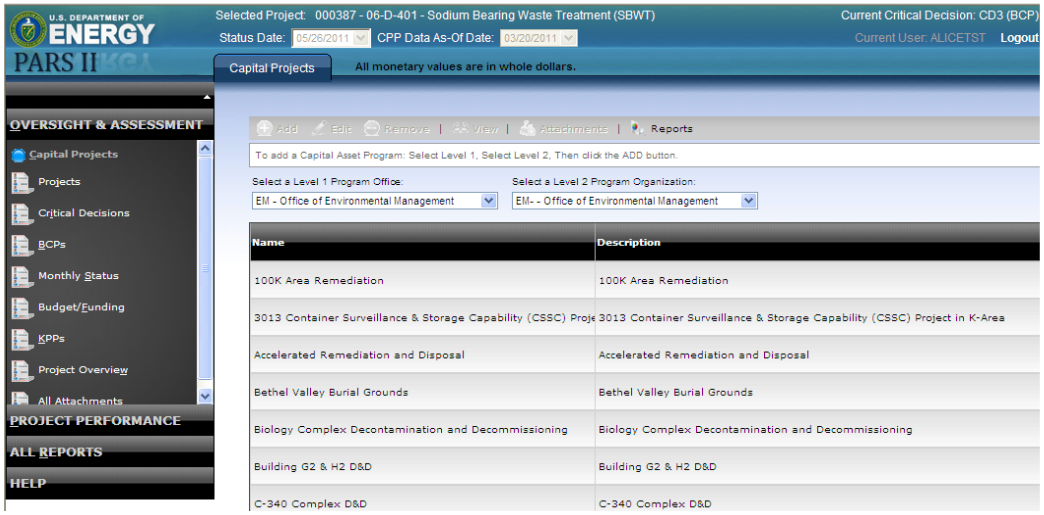


Figure 74 Capital Projects Tab

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

5. Click 

. The **Add a New Capital Project** screen displays.

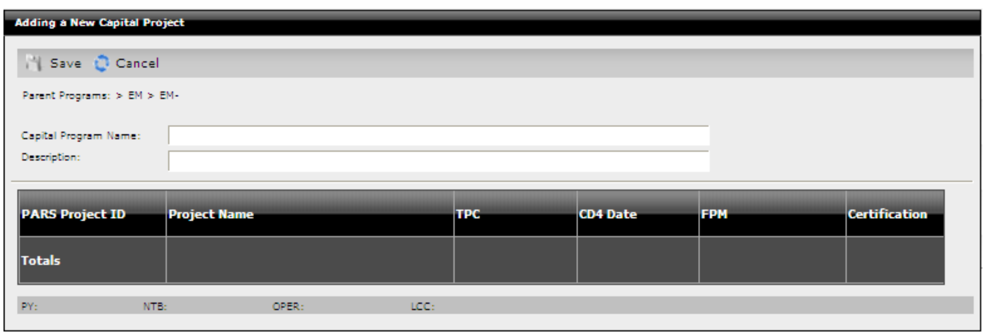


Figure 75 Add a Capital Project Screen

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

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

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

8. Click 

. Users are returned to the “Capital Projects tab and the new capital asset project is added to the list of Capital Projects for the selected Level 1 and Level 2 categories.

9.2 Creating and Updating a Project

From the “Projects” screen, users can see a list of projects by making selections from the pre-populated “Level 1 Program Office,” “Level 2 Program Organization,” and “Level 3 Capital Asset Project” drop-down lists.

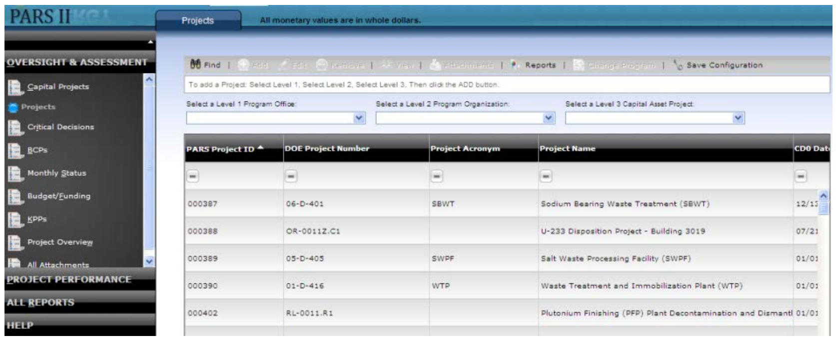


Figure 76 Projects Tab

Table 16 Projects Icons

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

.

9.2.1 Adding a New Project

To add a project users must make selections from the pre-populated “Level 1 Program Office,” “Level 2 Program Organization,” and “Level 3 Capital Asset Project” drop-down lists, as there is no project to find. This ensures that the new project is entered in the appropriate organizational hierarchy.

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

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

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

2. From each of the three drop-down lists, select the appropriate category for the new project to be added:
   a) Level 1 Program Office

b) Level 2 Program Organization
c) Level 3 Capital Asset Project.

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

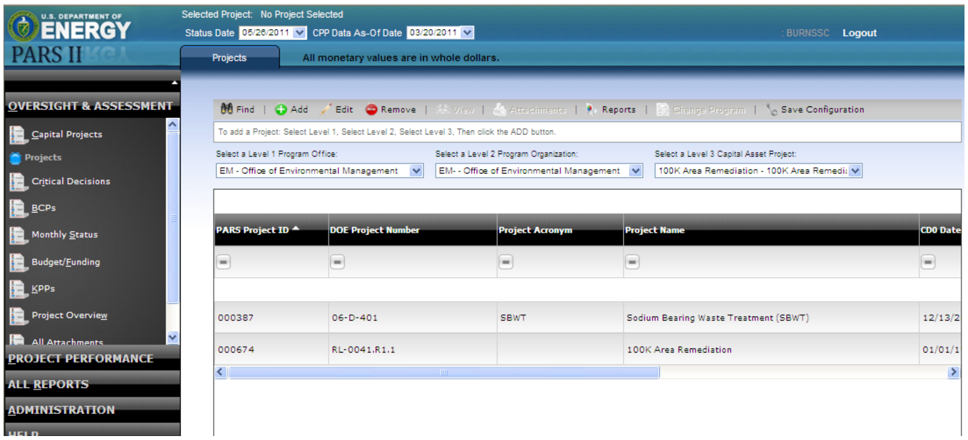
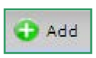


Figure 77 Three Hierarchy Selections for Add a Project

3. Click  . The Select Status Date Screen will display.

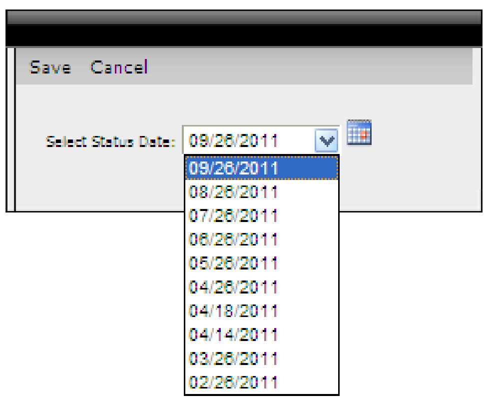


Figure 78 New Project - Select Status Date

4. Select the appropriate OA status date for the new project.

5. The **Updating a Project** screen displays with two tabs – “Project Attributes” and “Project Contacts.”

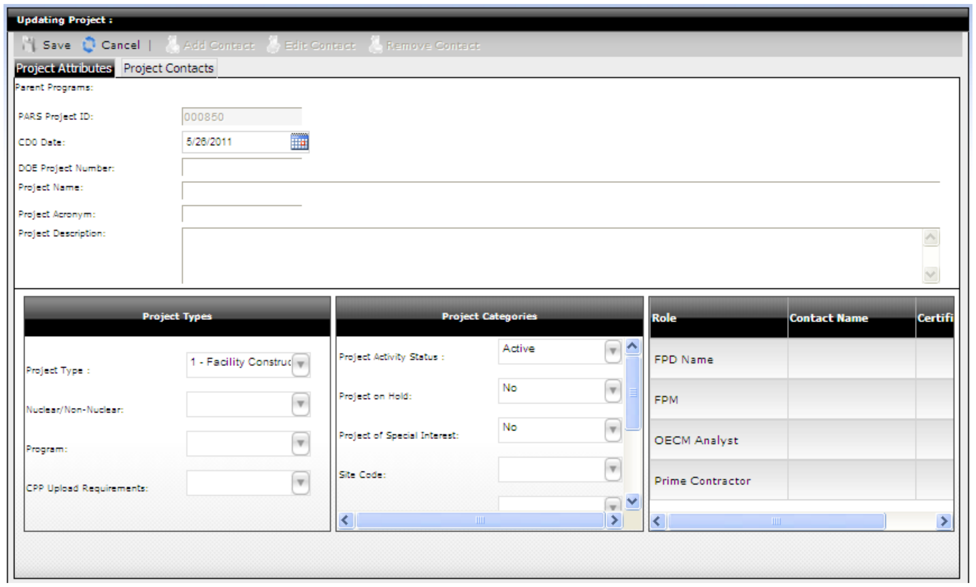


Figure 79 Add a Project Screen

9.2.1.1 Enter Project Attributes

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

    a. The CD-0 Date defaults to today's date. Change the date if it is not correct. This date will also be used to set the initial Monthly Period Status Date that appears on the title bar. The initial Status date is one month forward from the CD-0 date.

    Note: This date must be earlier (less than) any anticipated CPP upload date.

    b. Enter the DOE Project Number. The DOE Project Number is a "free-text" value and is the official DOE Project Identification Code for construction and engineering design projects as reported in the OMB A-11 Exhibit 300 or the program budget submission.
    c. Enter Project Name field.
    d. Enter Project Acronym.
    e. Enter Project Description.
    f. Select Project Type from drop-down list.
    g. Select Nuclear/Non-Nuclear from drop-down list.
    h. Select Program.
    i. Select CPP Upload Requirements
    j. Select Project Categories.
    k. Select Project Activity Status.
    l. Select Project On Hold. Select Project of Special Interest
    m. Select the site code.
    n. Select the Success Metric.
    o. Select the PDRI.
    p. Select the TRA.
    q. Select the IPT.

9.2.2 Select FPD, FPM, APM, and Primary Contractor Contacts

Table 17 Add/Edit Contacts Icons

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

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

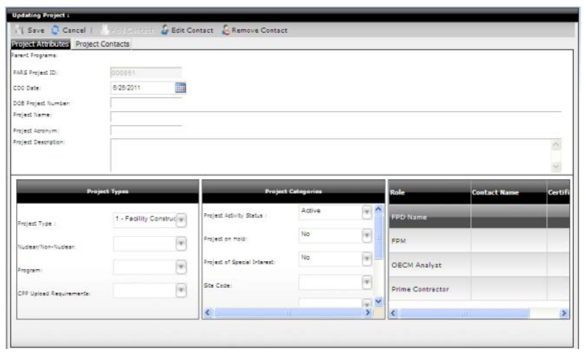


Figure 80 Highlight Contact Role

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

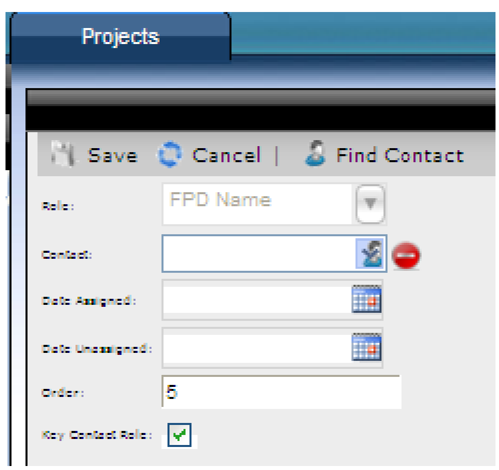
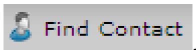


Figure 81 Edit Contact

3. Click  . The Find Contact screen displays.

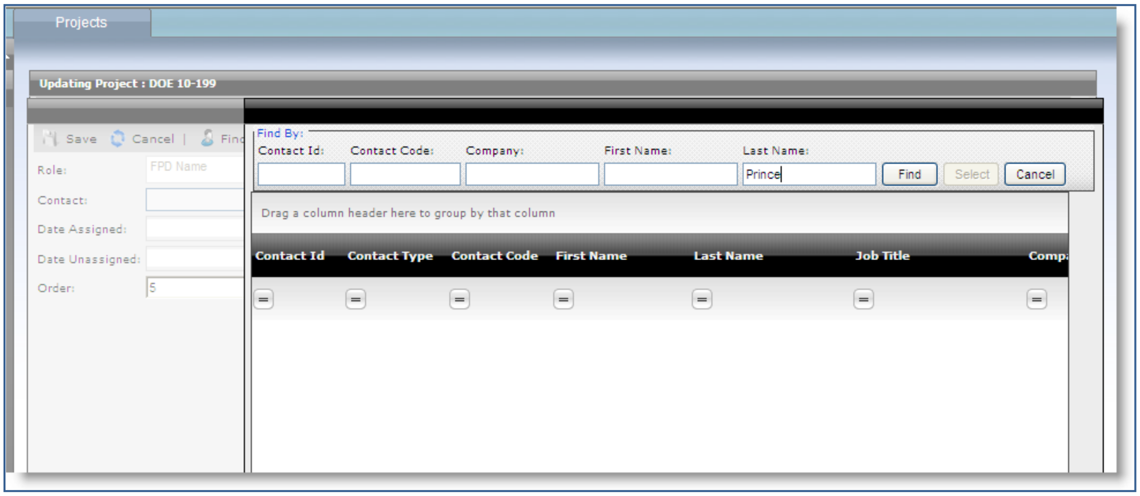


Figure 82 Find Contact Screen

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

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

c. Highlight **Contact** to select.

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

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

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

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

Note: A new Key Contact Role checkbox is added to the contacts popup screen which displays when adding or entering a contact. This checkbox can only be checked/unchecked by System Administrators

9.2.3 Select Other Contacts

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

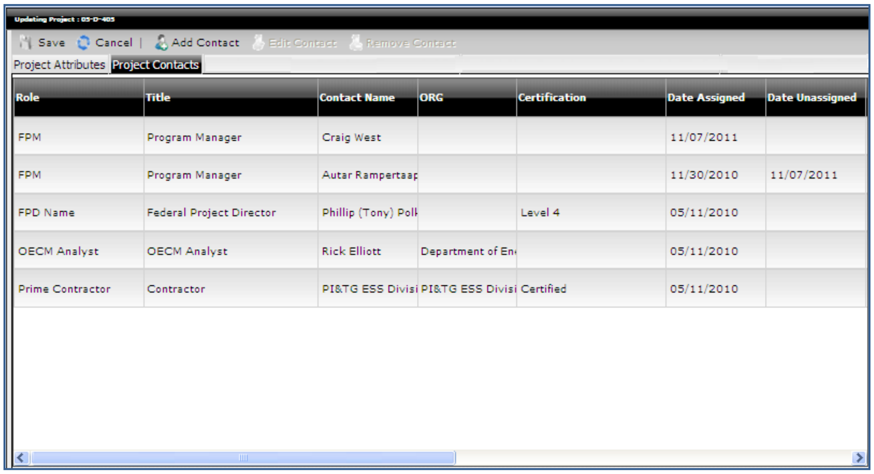
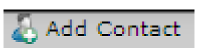


Figure 83 Project Contacts Tab

2. Click 

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

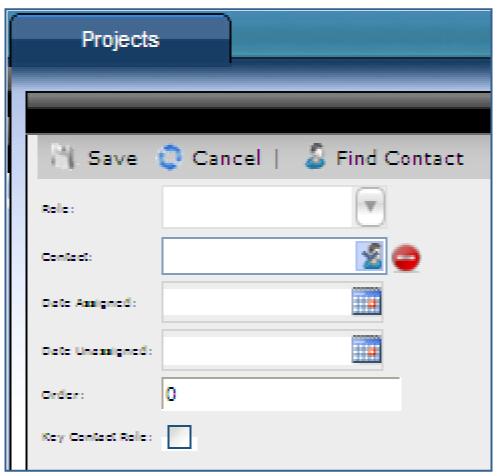


Figure 84 Add Contact Screen

3. Select the **Role** from drop-down list. Alternatively, the role can be typed in.

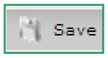
4. Click  on the "Contact" field. The "Find Contact" screen displays.

    a. Enter **search criteria**. Only contacts that are pre-registered in PARS II can be selected. The contacts register is maintained by APM and the system administrator.
    b. Click **Find.** **(**Wait until the search is complete.)
    c. Highlight **contact** entry.
    d. Click **Select**. Users are returned to the "Add Contacts" screen with the selected name filled in.
    e. Select the **Date Assigned**. Note: the "Date Unassigned" is set when this contact is no longer

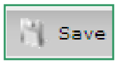
associated with the project. It is never removed (unless it is a user entry error). This permits retention of history for the project contacts.

f. Enter the **order number** (optional).

g. If the Contact being added is a Key Role (FPD, FPM, APM Analyst or Prime Contractor), click the **Key Contact Role** checkbox. If the checkbox is clicked, the Contact will also appear on the Project Attributes screen.

h. Click 

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

5. Click 

to close and exit "Add/Update Project."

9.2.4 Updating an Existing Project - Attributes or Contacts

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

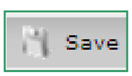
1. From the "Projects" tab, verify that the correct project is selected.

2. Click 

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

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

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

4. Click 

to close and exit "Update Project."

9.3 Critical Decisions

With a project selected, clicking on the "Critical Decisions" tab in the left-hand navigation bar will access a screen allowing users to edit or view CD-0, CD-1, CD-2, CD-3A, CD-3, CD-4, and Closeout information.

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

The "Critical Decision Detail" pane provides fields for the following:

- Planned date
- Approval date
- Name of approving authority
- Approval notes

- TPC entries
- CD-4 attainment dates

The “Planned Dates” panel provides fields for the projected dates that each Critical Decision from CD-2 through Closeout will be attained. All of these fields are editable no matter which Critical Decision is selected.

Users can access Key Performance Parameters (KPPs) associated with the current CD screen via the KPP icon on the toolbar. The KPP icon is not activated for the CD-3, CD-3a, and Closeout screens. If the KPP tab is entered from a CD or BCP screen, and a KPP is selected via the funnel-filter it will reset the currently selected KPP to the CD or BCP level. All edits will be saved including the CD or BCP level from where the KPP icon was accessed.

If you use the Clear Period icon and select a KPP the “link” to the CD or BCP level will be reset and the CD or BCP level of the selected KPP will stay the same. The CD or BCP the KPP is associated with will not change. All other edits for the KPP will be saved.   It is best NOT to use the Clear Period if you know you want to edit a KPP and save it with a new CD level.

Table 18 Critical Decision Icons

ACTIVE ICON	PURPOSE
Edit	Permits entering/updating data for the selected CD level.
KPP	Provides a direct link to the “KPP” tab listing only those KPPs associated with the current CD screen view. The KPP icon is not activated for the CD-3, CD-3a, and Closeout screens.
Attachments	Select and view any attachments that were uploaded to the current CD screen view.
Reports	Generate reports, if any, pertaining to the current CD screen view.

9.3.1 Enter a Critical Decision

1. Select **Critical Decisions** from the Navigation bar. The “Critical Decisions” tab displays with the default CD level set to the most current CD with an approval date. For example, if the project is at Gateway CD-2, the “CD” tab opens to CD-2. Users can change the CD level by selecting the appropriate one from the “Select Critical Decision” drop-down menu.

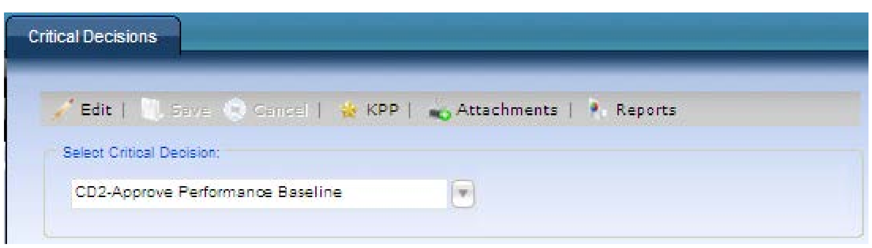


Figure 85 Critical Decisions Tab

2. Verify/Select the CD level from the first drop-down list to enter/update.

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

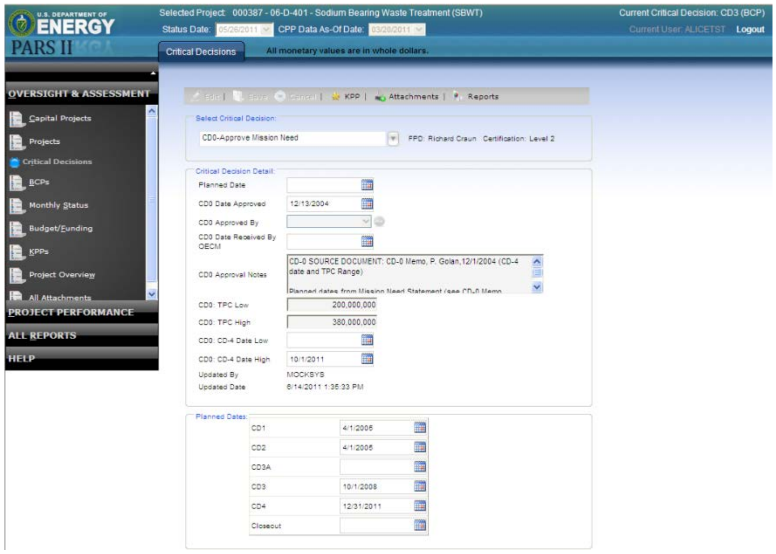


Figure 86 Edit Critical Decisions Screen

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

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

6. Click Save. Users are now in View-only mode of the "Critical Decisions" tab. Click **Edit** to make corrections.

9.4 Performance Baseline Change Proposal (BCP) / AE Modifications

The "BCPs" tab allows users to view information for proposed performance baseline change as well as AE Modifications. An indicator as to whether or not the BCP represents a directed change is by each title. Users can view the following:

- BCP submission date
- Approval date (BCP and AE Modification)
- Name of approving authority (BCP and AE Modification)
- Approval notes (BCP and AE Modification)
- Projected TPC
- CD-4 attainment dates

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

Table 19 BCP Icons

ACTIVE ICON	PURPOSE
Add	Permits entering data for a new BCP.
Edit	Permits updating data for an existing BCP, the one currently selected from the "Select BCP" drop-down menu.

KPP	Provides a direct link to the “KPP” tab listing only those KPPs associated with the current BCP screen view.
Attachments	Select and view any attachments that were uploaded to the current CD screen view.

9.4.1 Enter a BCP

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

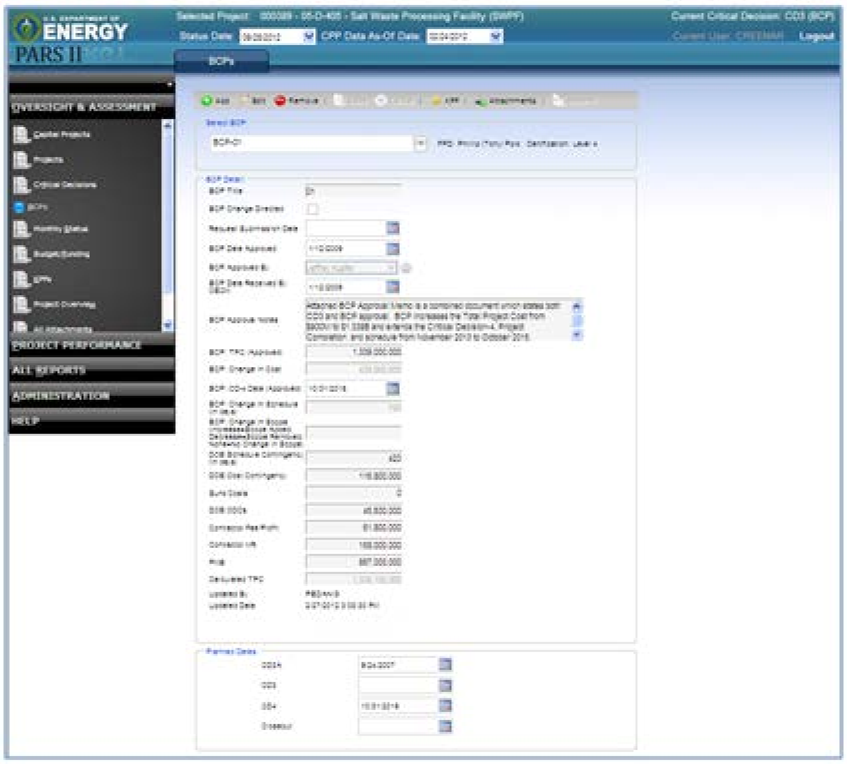


Figure 87 BCP Tab

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

3. Enter **Title** to identify the BCP. This title will be dynamically added to the “Select BCP” drop-down list.

4. Enter **Dollar Values**. (Dollars are entered as whole dollars. Grayed out boxes are calculated values.)

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

5. Click Save. “Save” returns to view-only mode and to the first BCP entered for the selected project.

9.4.2 Enter an AE Modification

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

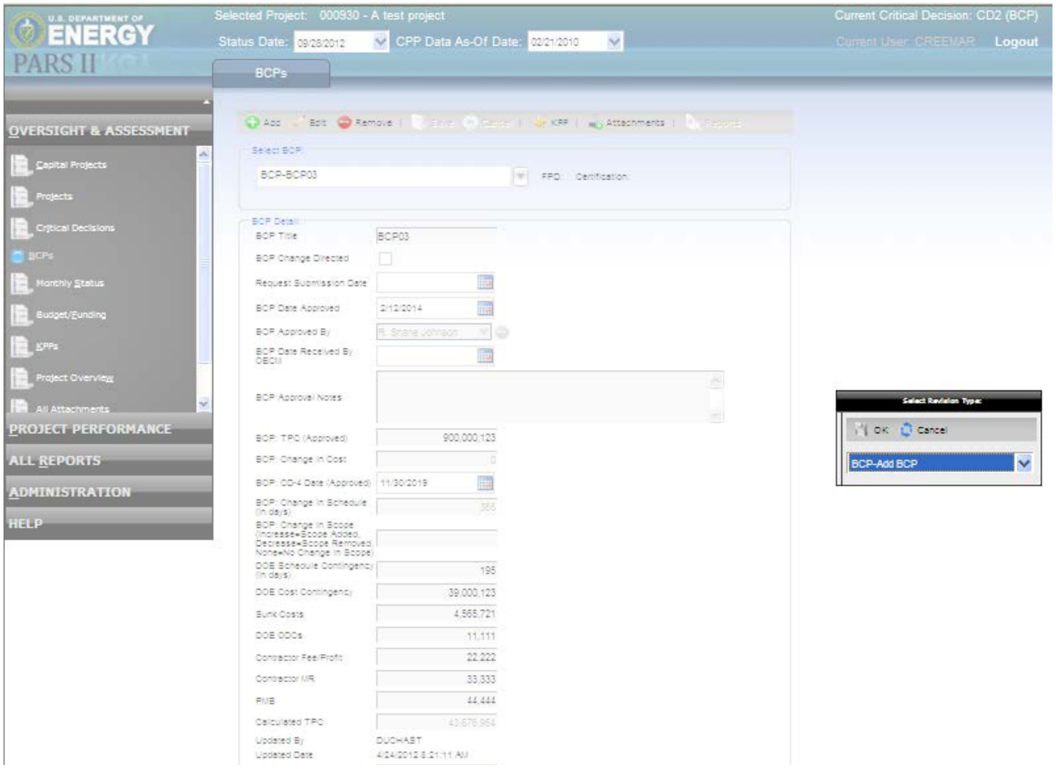


Figure 88 BCP Tab – AE Modification

2. Click . The “Select Revision Type” window displays. Select AE MOD and click OK.

3. Enter **Title** to identify the AE Modification. This title will be dynamically added to the “Select BCP” drop-down list.

4. Find and Select **Approved By**.

5. Enter **Approval Notes**.

6. Click . “Save” returns to view-only mode and to the first AE Modification entered for the selected project.

9.5 Budget/Funding Profile

The “Budget/Funding” button in the O&A dropdown pre-populates the “Funding Profile” drop-down list with different types of budget/funding profiles: IPL, OMB, CBR, CD-2 Performance Baseline, and entries for any

BCP budget submittals. Once one of the budget profiles is selected, users select the Create New Profile button and can then enter the appropriate Fiscal Year (FY) for the desired Budget Year," the FY "Start Date" and FY "End Date".

The Create New Profile window will display and 10/1/2012 and 9/30/2016 have been entered in this example.

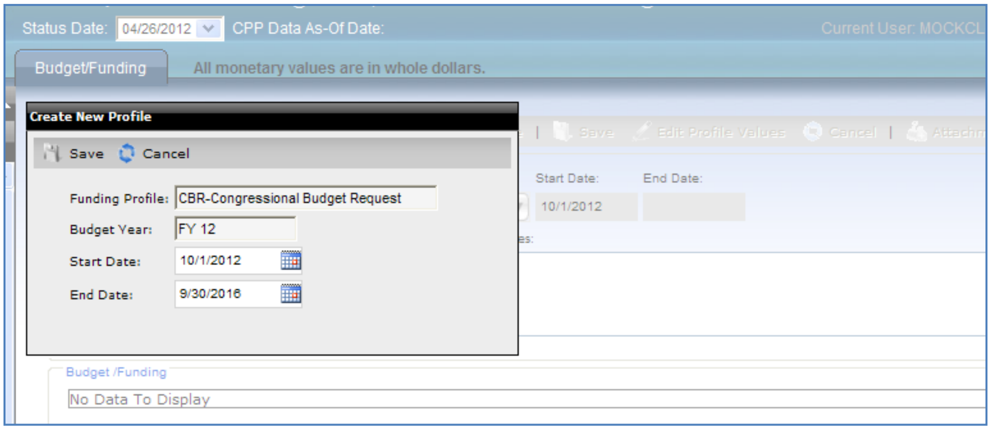


Figure 89 Budget/Funding – FY Selection – Start and End Date Entry

After these selections are made, clicking the Edit Profile Values button on the toolbar will allow users to enter the financial information that is required in the "Budget/Funding" window. Selecting an End Date beyond the end of the selected fiscal year will create multiple fiscal year columns in the Budget/Funding grid. For example, Selecting FY 12 and 10/1/2012 and 9/30/2016 has created columns FY 13, FY 14, FY 15, and FY 16 as shown in Figure 86 below. Click on the individual cells in the white rows to enter the data.

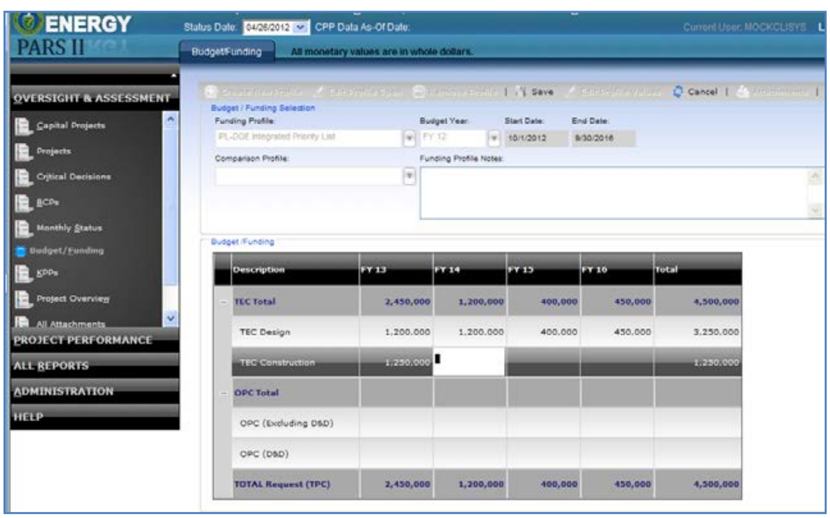


Figure 90 Budget/Funding – Data Entry

Table 20 Budget/Funding Icons

ACTIVE ICON	PURPOSE
Create New Profile	Create New Profile will allow the user to setup and enter the data for the selected profile.
Edit Profile Values	"Opens" the budget/funding table in Edit mode, and allows the user to update the table with the latest set of data.
Attachments	Select and view any attachments that were uploaded to this screen.

9.5.1 Enter Budget/Funding Profile

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

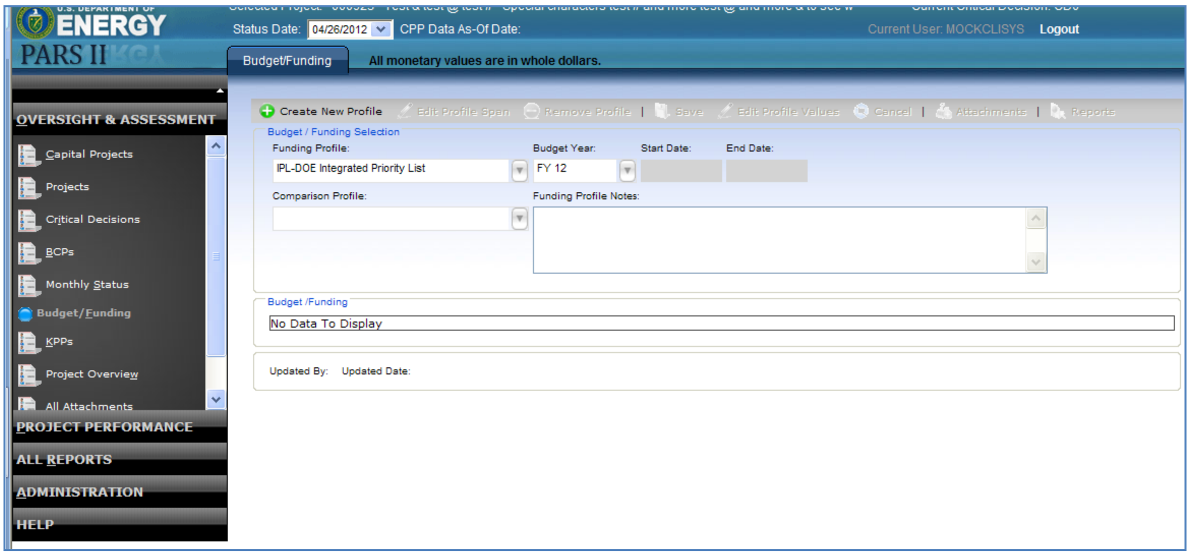


Figure 91 Initial Entry to Budget/Funding

2. Select **Funding Profile** from the first drop-down list.

3. Select the Create New Profile button from the toolbar.

4. Enter the Budget FY and the FY **Start Date** and FY **End Date** for the funding profile table. The Edit Profile Values button on the toolbar will become active at this point.

5. Select the Edit Profile Values button and the table will be open for data entry as shown in Figure 87.

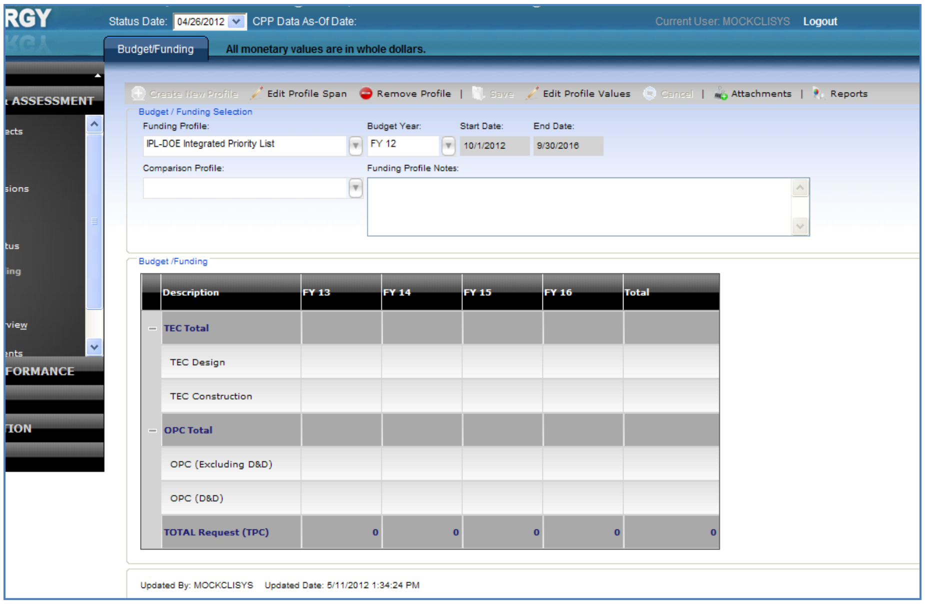


Figure 92 Budget/Funding Table - Empty

6. Click on a cell in the TEC Design row of the table to begin data entry, type **the whole dollar value** for the cell, and press **TAB**. Pressing **TAB** moves to the next cell in the current row.

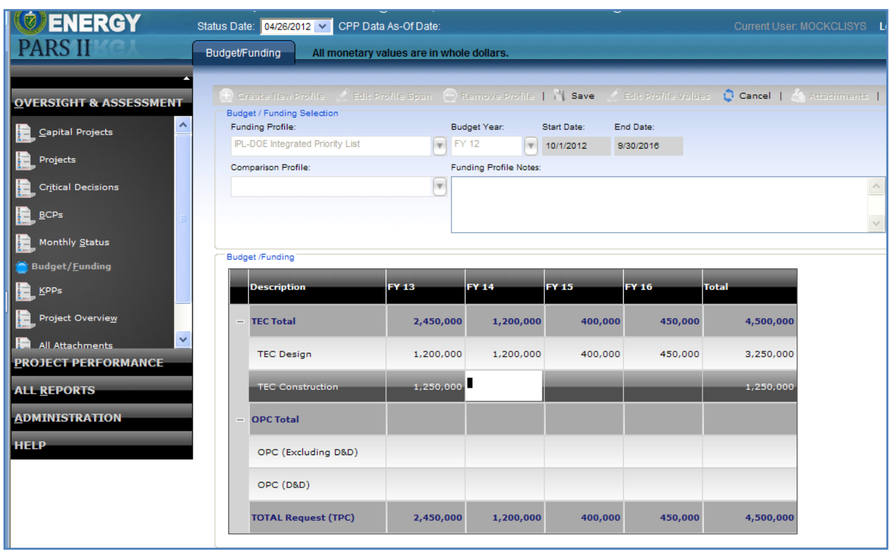


Figure 93 Budget/Funding Cell Entry

7. Click Save frequently. Click Edit Profile Values to continue entering/editing values.

8. When finished, do a final Save.

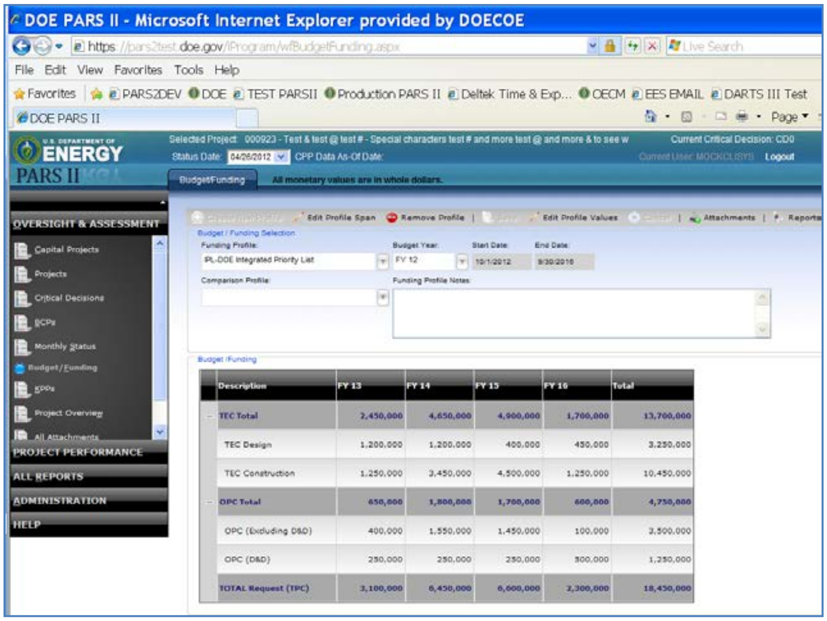


Figure 94 Completed Budget/Funding Table

9.5.2 Budget/Funding Profiles

1. From a completed budget/funding table select a profile from the Comparison Profile dropdown.

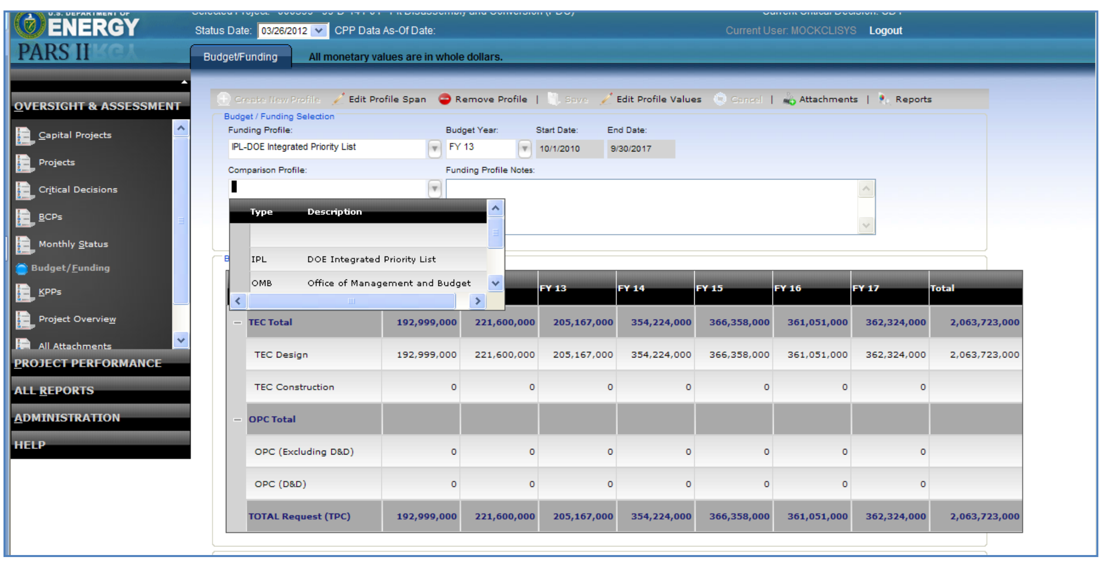


Figure 95 Compare Funding Profile Option

1. PARS II automatically calculates the difference between the Total Request of the two profiles, in this case the CBR-Congressional Budget Request and the OMB-Office of Management and Budget.

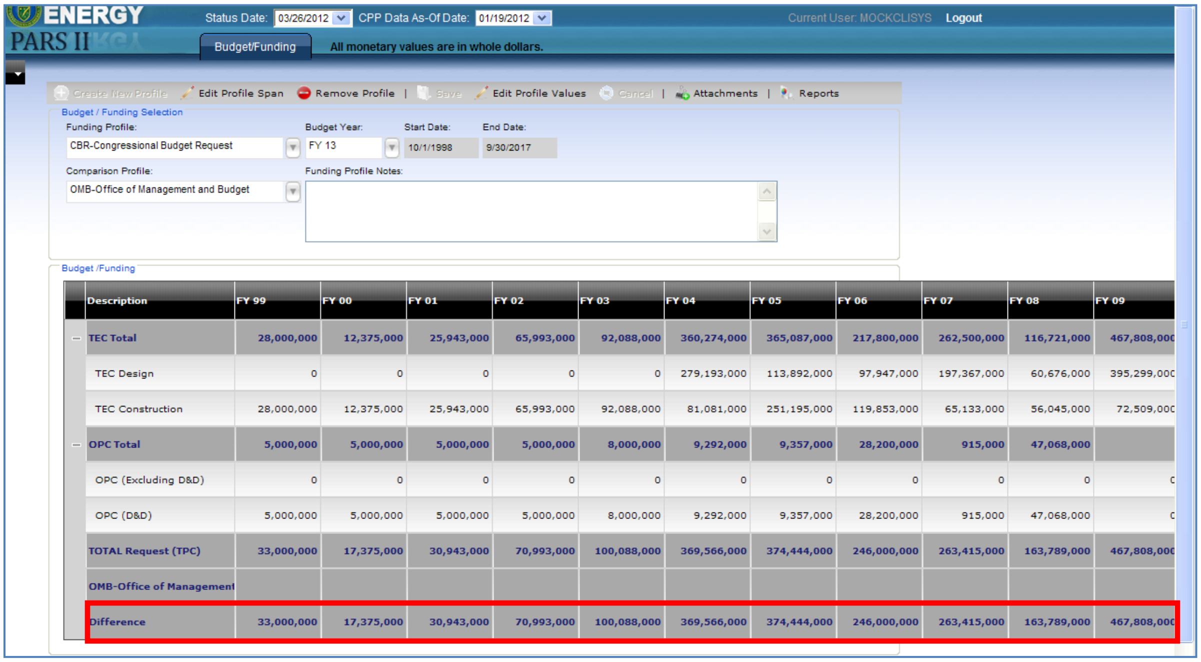


Figure 96 Profile List for Comparison Selection

9.6 Key Performance Parameters (KPPs)

By clicking on the “KPPs” tab within the OA module, the user will bring up a page that allows for viewing, editing, and tracking KPPs. When adding a new KPP, users select the appropriate “CD” or “BCP” during which the KPP is established, assign a KPP number, and complete the “Planned Scope” field.

Once the KPP has been attained, usually at CD-4, the “Delivered Scope” field must be updated. A selection for whether the KPP was validated or not must be made. The KPP list can be sorted and filtered.

Table 21 KPP Icons

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

9.6.1 Add a new KPP

1. Select **KPPs** from the navigation bar. The “KPPs” tab displays.

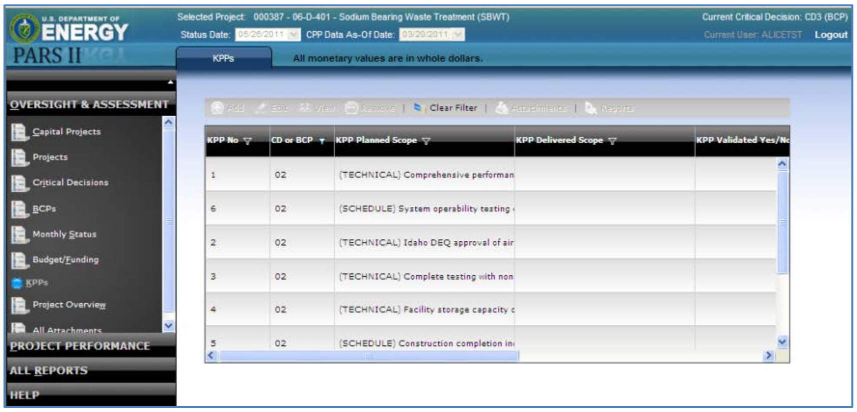


Figure 97 KPP Tab

2. Click 

. The “Adding a New KPP” screen displays.

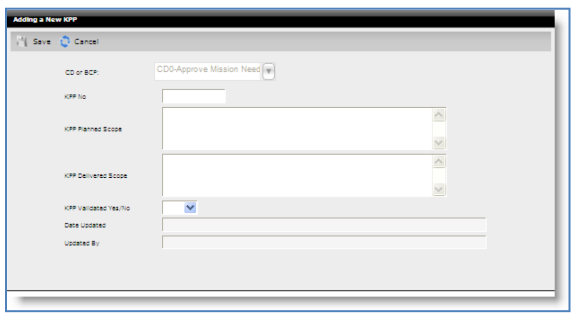


Figure 98 Adding a New KPP Screen

3. If the “KPP” tab was entered from a “CD” or “BCP” screen, then the appropriate CD level or BCP identifier is pre-set in the “CD” or “BCP” drop-down list. If the “KPP” tab was entered from the navigation bar, then select the applicable **CD Level** or **BCP Identifier** from the “CD” or “BCP” drop-down list.

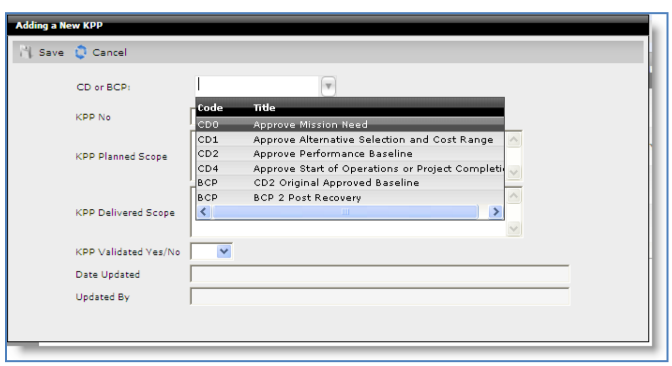
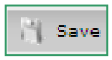


Figure 99 KPP CD or BCP Dynamic Drop-down List

4. Enter the **KPP No**.

5. Enter **KPP Planned Scope**.

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

7. When done, click 

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

9.6.2 Edit an Existing KPP

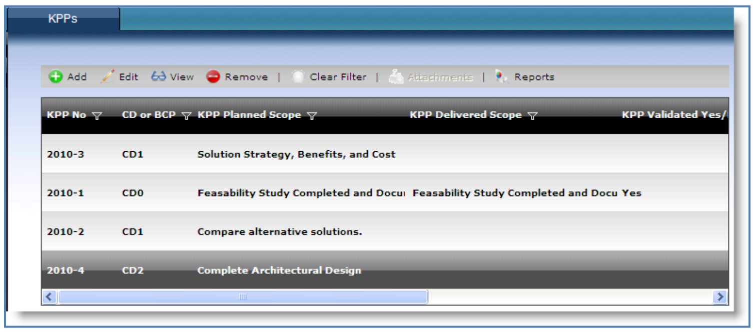


Figure 100 Select Existing KPP

1. To edit the KPP, highlight the **KPP** and click 

.

2. When finished editing, click 

to retain changes.

9.6.3 Sort the KPP List

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

9.6.4 Filter the list of KPPs

1. Click the filter icon  for a column and select **filter value** from the drop-down list. The list regenerates with the filter applied.

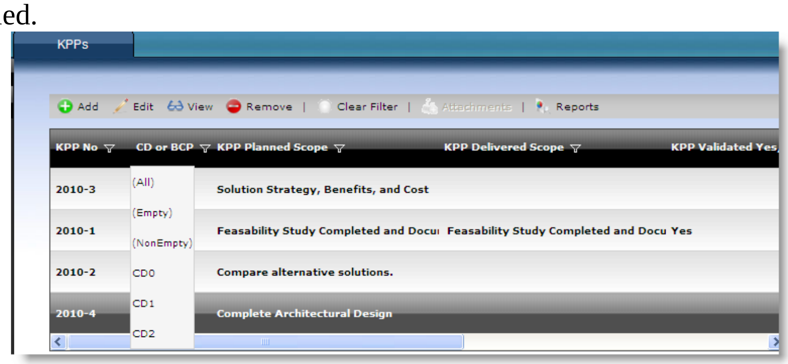


Figure 101 Filter selection for KPP List

2. Regenerate the full list by clicking Clear Filter. Resorting of the list may be needed.

10 Contractor Monthly Upload

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

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

Table 22 Projects Icons - Contractor

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

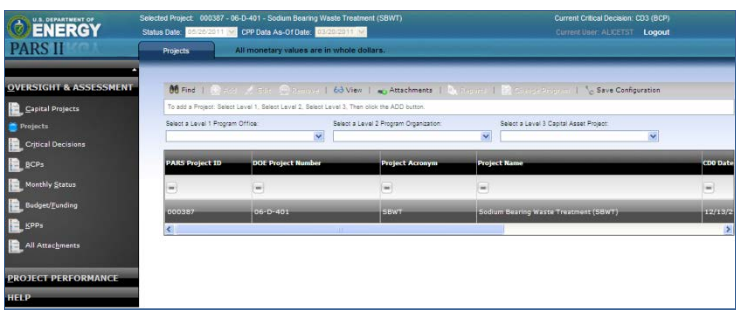


Figure 102 Select a Project

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

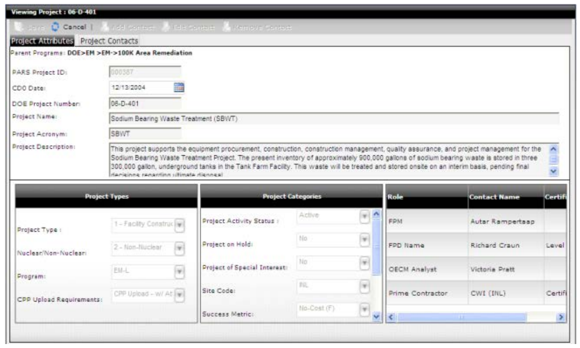


Figure 103 View a Project – Contractor

10.1 Project Performance Tab for Contractors

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

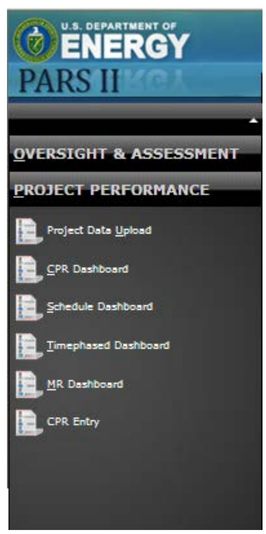


Figure 104 Navigation Bar - Project Performance Menu

PARS II accepts a complete set of project data in a Microsoft Access file.

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

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

10.2 Project Data Upload Screen

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

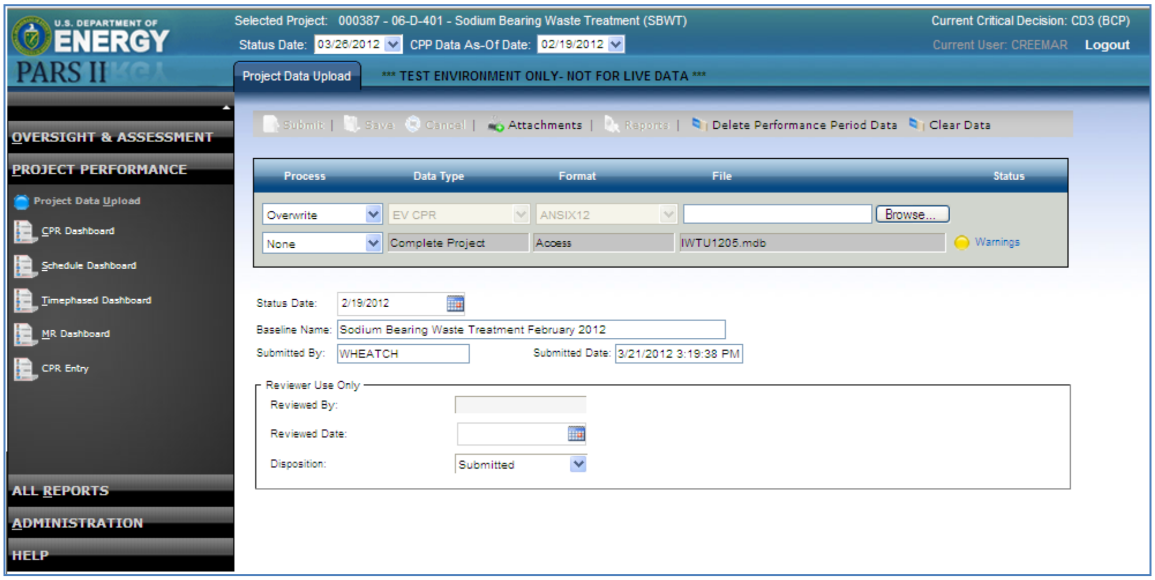
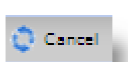


Figure 105 Project Data Upload Screen – Contractor

Table 23 Project Upload Icons - Contractor

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

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

10.2.1 Date Fields

- Status Date - Users begin by setting the Status Date. This date must match the contractor's EVM data "as of date" on the extract file, and is referred to in PARS II as the "CPP as of date." In PARS II, this date is independent of the status reporting period date, and it may vary from one project to another.

- Submitted Date – the system automatically populates this field with today's date after the upload is submitted, and populates the "Submitted By" field with the UserID of the user currently logged into PARS II.

- Reviewed Date – Grayed out for contractors as this is set during the review process for data, and, likewise for Reviewed By.

10.2.2 Process Settings

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

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

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

10.2.3 Disposition Settings

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

10.2.4 Baseline Name

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

10.2.5 Browse and Submit

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

Note: The Submit icon is not activated until the status date is populated and a file has been selected via the Browse button.

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

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

Clicking on the "Errors" or "Warnings" indicator produces a report that describes what errors or warnings were encountered during data processing. "Errors" are defined as issues that prevented data from being placed into the database. "Warnings" are items that the contractor or federal staff should be aware of, but the data was accepted into the database.

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

10.2.6 Status Settings

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

- **Waiting**: Connecting to the server and transmitting upload file to the server.

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

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

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

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

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

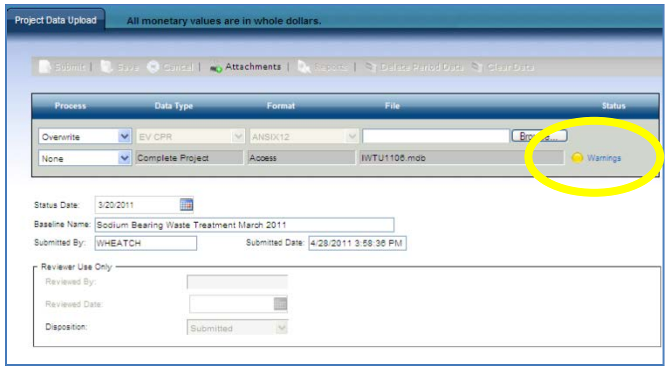


Figure 106 Upload Warning Status

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

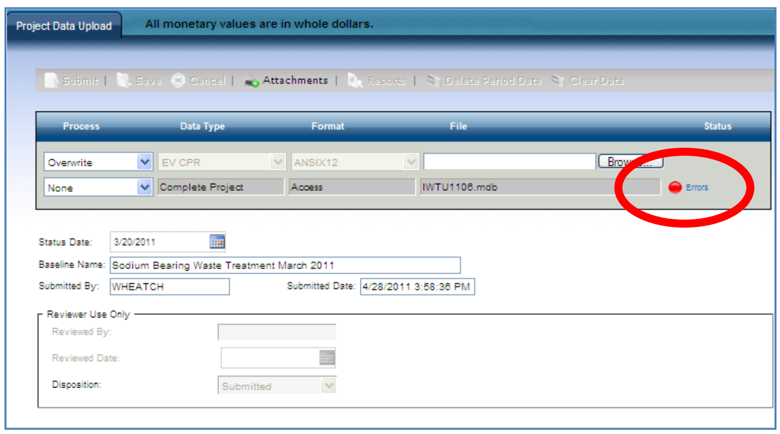


Figure 107 Upload Error Status

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

10.2.7 Monthly Data Upload Process

1. Select **Project Data Upload** under the Project Performance module.

2. Enter **Status Date**. This date must match the contractor's EVM data "as of date" on the extract file, and is referred to in PARS II as the "CPP as of date."

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

4. Click the **Browse** button and **select the file** to be uploaded.

5. Click **Submit**.

6. Do not exit this screen or logout until after the Status is set to, or has passed, the **Uploaded** stage.

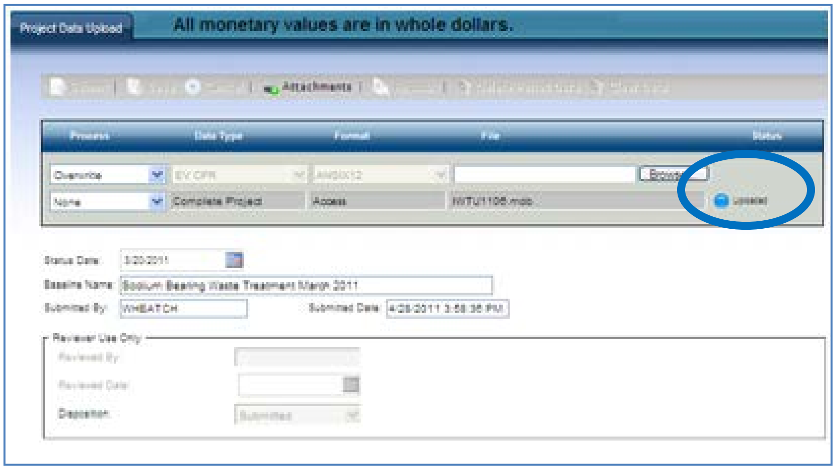


Figure 108 Uploaded Status

7. When the processing is complete, view the Import Log for messages, by clicking the “Warnings” or “Errors” radio button under the status heading.

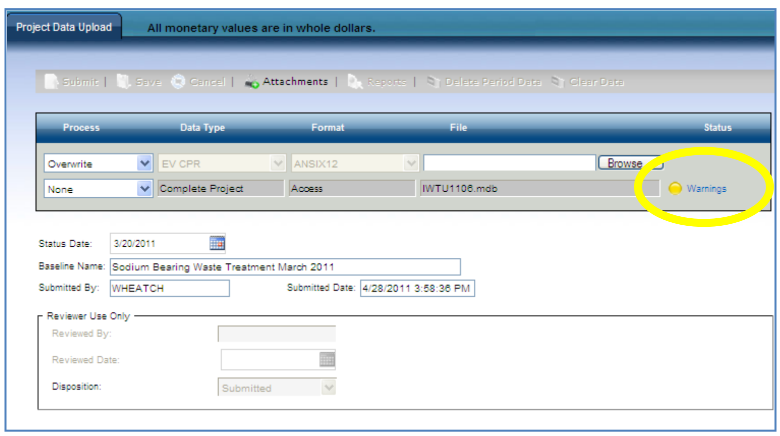


Figure 109 Warning Status

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

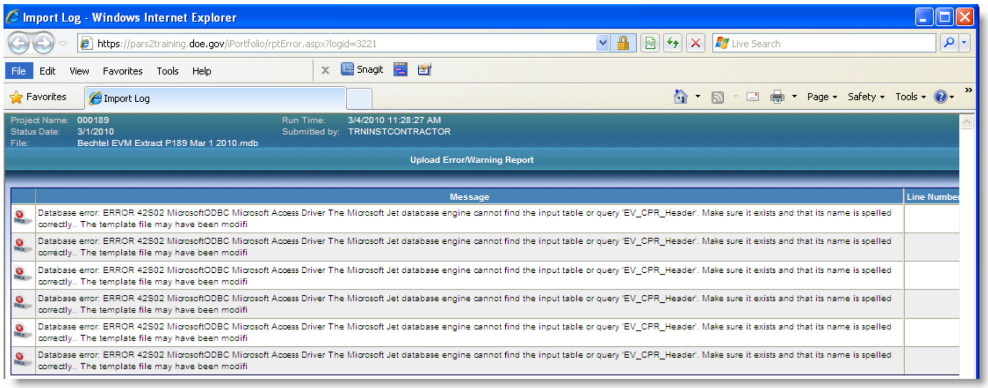


Figure 110 Import Log Window

9. Close the Import Log window when finished viewing.

NOTE: For discrepancies between the status date entered on the Project Upload screen and the status date in the upload file, the file will start to upload, but will not complete if a difference is found. The Error/Warning report will note an error alerting the User that the status date entered does not match the status date in the upload file so the issue can be corrected.

APPENDIX A: ACCESS RIGHTS

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

Table 24 User Roles and Access Rights

USER ROLE	ACCESS RIGHTS
Acquisition Executive (AE)	▪ Create and run reports ▪ View projects ▪ View attachments ▪ View BCPs ▪ View Project Contacts ▪ View gateway/critical decisions ▪ View KPPs ▪ View Budget/Funding ▪ View dashboards ▪ View oversight status ▪ View program ▪ View program status ▪ View project status ▪ View status ▪ View all monthly status
Contractor Analyst (CA) / Project Controls	▪ Upload CPP data ▪ View CPR dashboards ▪ Add attachments ▪ View projects ▪ View attachments ▪ View project contacts ▪ Create and run reports
Contracting Officer Representative (COR)	▪ Upload CPP data ▪ View CPR dashboards ▪ Add attachments ▪ View projects ▪ View attachments ▪ View project contacts ▪ Create and run reports
Other Staff Offices and Interested Parties(e.g., CF and LM)	▪ Create and run reports ▪ View projects ▪ View attachments ▪ View BCPs ▪ View Project Contacts ▪ View gateway/critical decisions ▪ View KPPs ▪ View Budget/Funding ▪ View dashboards

USER ROLE	ACCESS RIGHTS
	▪ View oversight status ▪ View program ▪ View program status ▪ View project status ▪ View status ▪ View all monthly status
Federal Project Director (FPD) and their Deputy (Non-SC)	▪ Add attachments ▪ Edit monthly FPD status ▪ Review project upload ▪ Create and run reports ▪ View projects ▪ View attachments ▪ View BCPs ▪ View Project Contacts ▪ View gateway/critical decisions ▪ View KPPs ▪ View Budget/Funding ▪ View dashboards ▪ View oversight status ▪ View program ▪ View program status ▪ View project status ▪ View all monthly status
Federal Program Manager (FPM) and their Deputy (Non-SC)	▪ Add attachments ▪ Edit monthly program status ▪ Create and run reports ▪ View projects ▪ View attachments ▪ View BCPs ▪ View Project Contacts ▪ View gateway/critical decisions ▪ View KPPs ▪ View Budget/Funding ▪ View dashboards ▪ View oversight status ▪ View program ▪ View program status ▪ View project status ▪ View all monthly status
APM Analyst and their Alternate	▪ Add attachments ▪ Add KPPs ▪ Edit monthly APM status ▪ Create and run reports ▪ Review project upload ▪ View projects ▪ View attachments

USER ROLE	ACCESS RIGHTS
	▪ View BCPs ▪ View project contacts ▪ View gateway/critical decisions ▪ View KPPs ▪ View Budget/Funding ▪ View dashboards ▪ View oversight status ▪ View program ▪ View program status ▪ View project status ▪ View all monthly status
Program Analyst/Program Manager (in PMSO) and their Alternate	▪ Add attachments ▪ Edit monthly program status ▪ Create and run reports ▪ View projects ▪ View attachments ▪ View BCPs ▪ View Project Contacts ▪ View gateway/critical decisions ▪ View KPPs ▪ View Budget/Funding ▪ View dashboards ▪ View oversight status ▪ View program ▪ View program status ▪ View project status ▪ View all monthly status
Office of Science FPM, FPD, and their Alternate	▪ Add attachments ▪ Add project contacts ▪ Edit project contacts ▪ Edit gateway/critical decisions ▪ Edit monthly status ▪ Edit projects ▪ Create and run reports ▪ Review project upload ▪ View projects ▪ View attachments ▪ View BCPs ▪ View project contacts ▪ View gateway/critical decisions ▪ View KPPs ▪ View Budget/Funding ▪ View dashboards ▪ View oversight status ▪ View program ▪ View program status ▪ View project status

USER ROLE	ACCESS RIGHTS
	▪ View all monthly status
APM Senior Management and Executives	▪ Create and run reports ▪ View projects ▪ View attachments ▪ View BCPs ▪ View Project Contacts ▪ View gateway/critical decisions ▪ View KPPs ▪ View Budget/Funding ▪ View dashboards ▪ View oversight status ▪ View program ▪ View program status ▪ View project status ▪ View status ▪ View all monthly status
System Administrator (EES/Dekker)	▪ Full system access and control ▪ Create user accounts and assign permissions ▪ Configure security settings ▪ Set access rights for users and groups

APPENDIX B: CONFIGURING WORKSTATIONS – PARS II

PROCEDURES

1 Introduction

Most users will be comfortable with contacting their IT Helpdesk for completing the instructions below. However, if you have Admin rights on your workstation, and are comfortable with making configuration changes to it, you may follow these directions yourself.

1.1 Installation of ActiveX Control

WINDOWS XP

1. Log onto the workstation to be configured using an ID/Password that can perform administrative functions on that workstation (e.g. Install software, add Active-X controls). Note that administrative access is only required for initial workstation configuration, not ongoing operation of the PARS II application.
2. Check hardware, software and network requirements as identified in section 2 below. Less than minimum requirements are unsupported and can mean unpredictable results.
3. Using Microsoft Internet Explorer 8, open this link: https://pars2.doe.gov/PARS2/SSSTemp/wfSSSXlsView.aspx?RPTID=1000000
4. There will be the thin yellow bar at the top of the application window:"This website wants to install the following add-on" 'Dekker, Ltd.' From 'Dekker, Ltd.'. If you trust the website and the add-on, and want to install it, click here". Install the Add-On, "…for all users on This Computer". Note: This website has been Certified and Accredited by DOE, and is safe to install controls deployed from this site.
5. You may receive one or more "Internet Explorer Security Warning" popup windows advising that "The software you are installing has not passed Windows Logo testing to verify its compatibility with Windows XP.". Click on "Continue Anyway" every time this popup appears.
6. The required Active-X control from Dekker will have been installed and the workstation should now display a confirmation Excel report, possibly with an Excel macro security warning.
7. Close Excel, click [no] to the question about saving the spreadsheet.
8. Close all Internet Explorer 8 windows which have opened during the install process.
9. Refer to section 1.3 below for additional instructions on Excel macro security.

WINDOWS7 (32-bit and 64-bit)

1. Log onto the workstation to be configured using an ID/Password that can perform administrative functions on that workstation (e.g. Install software, add Active-X controls). Note that administrative access is only required for initial workstation configuration, not ongoing operation of the PARS II application. Depending on local security group policies, it may be required that the OS account of the end user who will run PARS2 reports will need to have its privileges temporarily elevated to administrator for the ActiveX installation. This varies from site to site; please check with your site IT support personnel for more information.
2. Check hardware, software and network requirements as identified in section 2 below. Less than minimum requirements are unsupported and can result in unpredictable results.
3. Windows7 64-bit users *must* use the 32-bit version of Internet Explorer 8 (this is the shortcut *not* labeled 64-bit).
4. Internet explorer *must* be started by right-clicking on the Internet Explorer icon and choosing "Run as Administrator"
5. Click "Yes" when prompted by a window that starts "Do you want to allow the following Program to make changes to this computer?"
6. Using Microsoft Internet Explorer 8, open this link: https://pars2.doe.gov/PARS2/SSSTemp/wfSSSXlsView.aspx?RPTID=1000000

7. A yellow bar at the top of the browser will display this message - “To help protect your security, Internet Explorer has restricted this site from showing certain content. Click here for options”
8. A box in the browser window will display - “Click here to install the following ActiveX control: ‘Dekker, Ltd.’ From ‘Dekker, Ltd.’…”
9. Right-click on the second message and select “Install This Add-on for All Users on This Computer…”
10. A box pops up with a message that begins “Do you want to install this software?” Click on “Install”
11. You should see Microsoft Office Excel open a new spreadsheet confirming that you have successfully installed the Dekker, Ltd. ActiveX Control.

Microsoft Office Excel 2010 (32-bit)

1. Start Microsoft Office Excel 2010.
2. Click on the “File” tab on the upper left.
3. Click on the “Options” menu on the lower left.
4. On the left Navigation Bar, click on “Trust Center”.
5. On the right, click on “Trust Center Settings”.
6. On the left Navigation Bar, click on “Macro Settings”.
7. Click on the Radio Button “Disable all macros except digitally signed macros”.
8. Click on [OK].
9. Exit Excel.
10. After Installing the Dekker, Ltd. ActiveX control, log in to PARS II and run the “Project Overview”.
11. The report will appear with a yellow warning below the ribbon “Security Warning Some active content has been disabled. Click for more details”
12. DO NOT Click on the “Enable Content” button
13. Click on the “File” tab, upper left, above the ribbon
14. Locate the “Security Warning” section in the Info menu which says “Active content might contain certain viruses and other security hazards. The following content has been disabled – Macros. You should enable content only if you trust the contents of the file”
15. Click on the arrow under “Enable Content”.
16. Select “Advanced Options”.
17. “Security Alert – Macros & ActiveX” window appears
18. Click on the Radio Button “Trust All documents from this publisher”.
19. Click on [OK].
20. Verify that the report is now displaying correctly without a security warning bar.

Microsoft Office Excel 2007

1. Start Microsoft Office Excel 2007.
2. Click on the MS Office icon in the upper left-hand corner of the Excel application window.
3. Click on the [Excel Options] button at the bottom.
4. On the left Navigation Bar, click on “Trust Center”.
5. On the right, click on “Trust Center Settings”.
6. On the left Navigation Bar, click on “Macro Settings”.
7. Click on the Radio Button “Disable all macros except digitally signed macros”.
8. Click on [OK].
9. Exit Excel.
10. Logon to PARS II
11. Click on “All Reports“, then “SSS Reports”.
12. Click on the “+” sign to expand the PARS Reports folder.
13. Click on “2A Project Summary by Program”.
14. Click View and wait for Excel to open – ignore data values within sheet.
15. If there is a Security Warning bar directly under the Office tool bar, click the Options button

16. A "Security Alert - Macros & ActiveX" screen will open, requesting a decision on whether to trust content from the application vendor.
17. Select "Trust all documents from this publisher"
18. Click OK.
19. Close Excel.
20. View the report again and verify that the report is displaying correctly without a security warning bar.

Microsoft Office Excel 2003

1. Start Microsoft Office Excel 2003.
2. Click on the Tools menu item.
3. Select Macro.
4. Click on the Security tab.
5. Click on Security Level and select Medium.
6. Click OK to close the Security screen.
7. Exit Excel.
8. Logon to PARS II.
9. Click on “All Reports”, then “SSS Reports”
10. Click on the “+” to expand the PARS Reports folder.
11. Click on “2A Project Summary by Program”.
12. Click View and wait for Excel to open – ignore data values within the sheet.
13. If there is a Security Warning bar directly under the Office tool bar, click the Options button.
14. A "Security Alert - Macros & ActiveX" screen will open.
15. Select "Trust all documents from this publisher".
16. Click OK.
17. Close Excel.
18. View the report again and verify that the report is displaying correctly without a security warning bar.

2 HARDWARE, SOFTWARE AND NETWORK REQUIREMENTS

- Minimum 1280 X 1024 Display (Monitor and Graphics card)
- 2Gb memory
- 2 CPU cores at 2.5 GHz or 1 CPU core at 3+ GHz
- MS Windows XP or Windows7 (32- or 64-bit versions) any edition (e.g. Home, Professional, Ultimate)
- MS Internet Explorer 7, 8 or 9 *(Native Mode or Compatibility Mode).* Windows7 64-bit users *must* use the 32-bit version of Internet Explorer 8.
- Microsoft Excel 32-bit for 2003, 2007 and 2010 are supported spreadsheet applications
- Network connectivity to https://pars2training.doe.gov/ and https://pars2.doe.gov/ for web and transfer of Excel spreadsheets (with embedded macros).

2.1 INTERNET EXPLORER CONFIGURATION

PARS II is configured to allow users to access the application using any of the following browser versions/modes:

- Internet Explorer 7 (native mode);
- Internet Explorer 8 (native mode); or
- Internet Explorer 9 (native mode or compatibility mode).

Workstations (using Internet Explorer 7 or 8) which are properly configured and already working with PARS II require no further action. All other workstations (including those using Internet Explorer 9) need to be configured in accordance with Sections 1.2 and 1.3 of this document.

At this time, the following browsers/modes remain unsupported: Google Chrome; Firefox; Internet

Explorer 7 (compatibility mode); Internet Explorer 8 (compatibility mode); and any other browser/mode not listed above.

VERIFYING PARS II ACTIVEX CONTROL VERSION

1. Open Windows Explorer
    a. On the Windows XP Desktop: Click START > PROGRAMS > ACCESSORIES > WINDOWS EXPLORER
    b. On the Windows 7 Desktop: Click START > ALL PROGRAMS > ACCESSORIES > WINDOWS EXPLORER
2. Go to C:\WINDOWS\DOWNLOADED PROGRAM FILES
    a. Both Windows XP and 7: In Windows Explorer, double-click on "My Computer", then the "C:" drive, then the "WINDOWS" directory, then the "Downloaded Program Files" directory
3. Check the version of the ActiveX Control
    a. In Windows XP: Right-click on DkrSSSWebControl8.DkrSSSWebControl, select “Properties”, click on "Versions" Tab, verify that "Version" is “8,2,0,1”
    b. In Windows 7: Right-click on DkrSSSWebControl.ocx, select “Properties”, click on "Details" Tab, verify that "File Version" is “8.2.0.1”

APPENDIX C: ACRONYMS

AE	Acquisition Executive
AOA	Alternate APM Analyst
BCP	Baseline Change Proposal
CA	Contractor Analyst
CBR	Congressional Budget Request
CD	Critical Decision
CFO	Office of the Chief Financial Officer
COR	Contracting Officer Representative
COTS	Commercial-off-the-Shelf
CPM	Contractor Project Manager
CPP	Contractor Project Performance
CPR	Cost Performance Report
CV	Cost Variance
DDR	Dynamic Drilldown Report
DFPD	Deputy Federal Project Director
DOE	Department of Energy
ECD	Estimated Completion Date
EV	Earned Value
EVM	Earned Value Management
FPD	Federal Project Director
FPM	Federal Program Manager
GAO	Government Accountability Office
IEAC	Independent Estimate at Completion
IPL	Integrated Priorities List
KPP	Key Performance Parameter
OA	Oversight and Assessment
OBS	Organizational Breakdown Structure
APM	Office of Acquisition and Project Management
OMB	Office of Management and Budget
OPC	Other Project Costs
PA	Program Analyst
PARS	Project Assessment and Reporting System

PB	Performance Baseline
PM	Program Manager
PPC	Program Point of Contact
RYG	Red-Yellow-Green
SA	System Administrator
SSS	Sort, Select, and Summarize
SV	Schedule Variance
TEC	Total Estimated Cost
TPC	Total Project Cost
VAC	Variance at Completion
WBS	Work Breakdown Structure

APPENDIX D: PARS II Data Hierarchy Nomenclature Evolution

Nomenclature used in PARS II	Equivalent Nomenclature for future version
Capital Program	Capital Project
Level 1 Program	Level 1 Program Office
Level 2 Program Office	Level 2 Program Organization
Level 3 Capital Program	Level 3 Capital Asset Project

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APPENDIX E: Glossary of Screen Labels

PARS II V8.020120308

Goal

The primary goal of this glossary is to help PARS II end users understand the items of data that they are viewing or entering on their PARS II application screens. It does not provide technical information on the schema of the PARS II database.

Overview

This document consists of a table defining each data label displayed on PARS II screens. It is divided into sections by PARS II screen title. To find the meaning of a data item, first find the section describing the relevant screen, then find the particular screen label description. When entering dollar values into cost fields the whole dollar amount, rounded to the nearest dollar, must be used.
At the end, a second table contains useful definitions of terms.

Contents

The sections are listed in order of the major functional area of the PARS II System:

Descriptions of PARS II Screen Labels

<table>
<tr><th>SCREEN LABEL</th><th>FIELD DESCRIPTION</th><th>TYPE (LENGTH)</th><th>EXAMPLES</th></tr>
<tr><td colspan="4">OVERSIGHT & ASSESSMENT</td></tr>
<tr><td colspan="4">Add/View Program Office / Program Organization / Capital Asset Project</td></tr>
<tr><td>Select a Level 1 Program Office:</td><td>The official code (acronym) that identifies the DOE Program Offices at the Program Secretarial Officers, Administrators for the National Nuclear Security Administration or equivalent level that is responsible for providing oversight for the project.
<table>
<tr><td>ADMIN</td><td>Administrative Support</td></tr>
<tr><td>BPA</td><td>Bonneville Power Administration</td></tr>
<tr><td>CBFO</td><td>Carlsbad</td></tr>
<tr><td>EERE</td><td>Office of Energy Efficiency & Renewable Energy</td></tr>
<tr><td>EIA</td><td>Energy Information Administration</td></tr>
<tr><td>EM</td><td>Office of Environmental Management</td></tr>
<tr><td>FE</td><td>Office of Fossil Energy</td></tr>
<tr><td>FLDTST</td><td>Field Testing Program</td></tr>
<tr><td>LM</td><td>Office of Legacy Management</td></tr>
<tr><td>NA</td><td>National Nuclear Security Administration</td></tr>
<tr><td>NE</td><td>Office of Nuclear Energy</td></tr>
<tr><td>OE</td><td>Office of Electricity Delivery and Energy Reliability</td></tr>
<tr><td>RW</td><td>Office of Civilian Radioactive Waste Management</td></tr>
<tr><td>SC</td><td>Office of Science</td></tr>
<tr><td>SEPA</td><td>Southeastern Power Administration</td></tr>
<tr><td>SFTDEV</td><td>Software Development</td></tr>
<tr><td>SWPA</td><td>Southwestern Power Administration</td></tr>
<tr><td>WAPA</td><td>Western Area Power Administration</td></tr>
</table></td><td>List of Values</td><td>User selects a value from the list and does not type in a value.</td></tr>
</table>

<table>
<tr><th>SCREEN LABEL</th><th>FIELD DESCRIPTION</th><th>TYPE (LENGTH)</th><th>EXAMPLES</th></tr>
<tr><td>Level 2 Program Organization (continued)</td><td>The name of the DOE Program Organization. They are organizations within Program Offices that are positioned below the DOE Program. The actual list shown depends on the Level 1 Program Office selection.
<table>
<tr><td>EM-31</td><td>Office of Budget</td></tr>
<tr><td>EM-32</td><td>Office of Strategic Planning and Analysis</td></tr>
<tr><td>EM-40</td><td>Human Capital and Business Services</td></tr>
<tr><td>EM-41</td><td>Office of Human Capital</td></tr>
<tr><td>EM-42</td><td>Office of Corporate Information and Services</td></tr>
<tr><td>EM-50</td><td>Acquisition and Project Management</td></tr>
<tr><td>EM-51</td><td>Office of Procurement Planning</td></tr>
<tr><td>EM-52</td><td>Office of Contract and Project Execution</td></tr>
<tr><td>EM-53</td><td>Office of Project Management Oversight</td></tr>
<tr><td>EM-60</td><td>Safety Management and Operations</td></tr>
<tr><td>EM-61</td><td>Office of Safety Management</td></tr>
<tr><td>EM-62</td><td>Office of Operations Oversight</td></tr>
<tr><td>EM-63</td><td>Office of Packaging and Transportation</td></tr>
<tr><td>EM-64</td><td>Office of Standards and Quality Assurance</td></tr>
<tr><td>EM3.01</td><td>Office of Project Recovery</td></tr>
<tr><td>FE</td><td>Office of Fossil Energy</td></tr>
<tr><td>FE-20</td><td>Clean Coal</td></tr>
<tr><td>FE-22</td><td>Office of Clean Energy Systems</td></tr>
<tr><td>FE-24</td><td>Office of Sequestration, Hydrogen and Clean Coal Fuels</td></tr>
<tr><td>FE-26</td><td>Office of Planning and Environmental Analysis</td></tr>
<tr><td>FE-27</td><td>Office of Clean Energy Collaboration</td></tr>
<tr><td>FE-30</td><td>Oil and Natural Gas</td></tr>
<tr><td>FE-32</td><td>Oil and Natural Gas Resource Conservation</td></tr>
<tr><td>FE-34</td><td>Office of Oil and Gas Global Security and Supply</td></tr>
<tr><td>FE-35</td><td>Office of Planning and Environmental Analysis</td></tr>
<tr><td>FE-40</td><td>Petroleum Reserves</td></tr>
</table></td><td>List of Values</td><td>User selects a value from the list and does not type in a value.</td></tr>
</table>

<table>
<tr><th>SCREEN LABEL</th><th>FIELD DESCRIPTION</th><th>TYPE (LENGTH)</th><th>EXAMPLES</th></tr>
<tr><td>Level 2 Program Organization (continued)</td><td>The name of the DOE Program Organization. They are organizations within Program Offices that are positioned below the DOE Program. The actual list shown depends on the Level 1 Program Office selection.
<table>
<tr><td>FE-42</td><td>Planning and Engineering Office</td></tr>
<tr><td>FE-43</td><td>Operations and Readiness Office</td></tr>
<tr><td>FE-45</td><td>Office of Economic Planning, Policy and Finance</td></tr>
<tr><td>FE-46</td><td>Management and Administration Office</td></tr>
<tr><td>FE-47</td><td>Reserve Lands Management Office</td></tr>
<tr><td>FE-5</td><td>Office of Communications</td></tr>
<tr><td>FE-6</td><td>Office of Management and Field Operations</td></tr>
<tr><td>FE-7</td><td>Office of Environment, Security, Safety and Health</td></tr>
<tr><td>FE-8</td><td>Office of Alaska Natural Gas Projects</td></tr>
<tr><td>LM</td><td>Office of Legacy Management</td></tr>
<tr><td>LM-10</td><td>Office of Business Operations</td></tr>
<tr><td>LM-20</td><td>Office of Site Operations</td></tr>
<tr><td>NA</td><td>National Nuclear Security Administration</td></tr>
<tr><td>NA-10</td><td>Defense Programs</td></tr>
<tr><td>NA-20</td><td>Office of Defense Nuclear Nonproliferation</td></tr>
<tr><td>NA-40</td><td>Office of Emergency Operations</td></tr>
<tr><td>NA-50</td><td>Office of Infrastructure and Environment</td></tr>
<tr><td>NA-70</td><td>Office of Defense Nuclear Security</td></tr>
<tr><td>NE</td><td>Office of Nuclear Energy</td></tr>
<tr><td>NE-3</td><td>Nuclear Power Deployment</td></tr>
<tr><td>OE</td><td>Office of Electricity Delivery and Energy Reliability</td></tr>
<tr><td>OE-10</td><td>Research and Development</td></tr>
<tr><td>OE-20</td><td>Permitting, Siting and Analysis</td></tr>
<tr><td>OE-30</td><td>Infrastructure Security and Energy Restoration</td></tr>
<tr><td>OE-40</td><td>NETL Site Office</td></tr>
<tr><td>RW</td><td>Office of Civilian Radioactive Waste Management</td></tr>
<tr><td>RW-10</td><td>Office of Business Management</td></tr>
<tr><td>RW-5</td><td>Office of Technical Management</td></tr>
<tr><td>RW-6</td><td>Office of Operations Management</td></tr>
<tr><td>RW-7</td><td>Office of Construction and Site Management</td></tr>
<tr><td>RW-8</td><td>Office of Logistics Management</td></tr>
</table></td><td>List of Values</td><td>User selects a value from the list and does not type in a value.</td></tr>
<tr><td></td><td></td><td></td><td></td></tr>
</table>

SCREEN LABEL	FIELD DESCRIPTION	TYPE (LENGTH)	EXAMPLES
Level 2 Program Organization (continued)	The name of the **DOE Program Organization**. They are organizations within Program Offices that are positioned below the DOE Program. The actual list shown depends on the Level 1 Program Office selection. RW-9 — Office of Project Management SC — Office of Science SC-21 — Advanced Scientific Computing Research SC-22 — Basic Energy Sciences SC-23 — Biological and Environmental Research SC-24 — Fusion Energy Sciences SC-25 — High Energy Physics SC-26 — Nuclear Physics SC-31 — Safety, Security, and Infrastructure SEPA — Southeastern Power Administration CNCPT — Conceptualization CODE — Software Coding DSGN — Software Design SWPA — Southwestern Power Administration WAPA — Western Area Power Administration	List of Values	User selects a value from the list and does not type in a value.
Level 3 Capital Asset Project	The name of the **Capital Asset Project** that may represent multiple, smaller, more discrete and usable projects that collectively meet the mission need. For Program Offices who do not use this structure, the Level 3 entry will equate to the Level 4 entry. In both cases, the name of the project will be entered. If the value of the Capital Asset data element is not known at the time of project initiation, then the value of the DOE Project Number must be placed in this field.	AlphaNum (100)	Remediation of Remote Site X Remediation of Remote Site Y Remediation of Remote Site Z

SCREEN LABEL	FIELD DESCRIPTION	TYPE (LENGTH)	EXAMPLES
	Add/Edit/View Project		
PARS Project ID	**[Level 4 of Hierarchy]** The **PARS Project ID** is the official Project Identification Code for all projects contained in the PARS II database. The value of the PARS Project ID is assigned automatically by PARS II when the project is created. The PARS II Project ID will be visible on all relevant screens and reports. To maintain compatibility with the Project ID used in the budget, PARS I, and PARS II will also display the DOE Project Number data element on many screens and reports.	Non-Entry Field	N/A
CD0 Date	The actual date that the Critical Decision 0 Milestone was approved.	Date (10)	12/31/2020
DOE Project Number	**[Level 4 of Hierarchy]** The **DOE Project Number**, also known as the **DOE Project ID,** is the official DOE Project Identification Code for construction and engineering design projects as reported in the OMB A-11 Exhibit 300 or the program budget submission.	AlphaNum (50)	06-SC-01 05-D-401 U233-ORNL-3019 XX-NE-XXX-1 98-D-126 ORP-0060:01-D-16C:FY2006
Project Name	The official name of the project as approved by the Acquisition Executive. (e.g., National Ignition Facility).	AlphaNum (80)	Enterprise Secure Network Accelerator Project for Upgrade of the LHC Next Generation Nuclear Plant (NGNP) Production Bays Upgrade
Project Acronym	The acronym or abbreviated name of the project.	AlphaNum (15)	NIF
Project Description	A brief description of the project's scope.	AlphaNum (1000)	Water Treatment Research
Project Type	The Project Type Code categorizes a project by major function, such as construction, remediation, major item of equipment, information technology, etc. Only one selection can be made. If combination of project types, then the predominant type based on cost should be selected. 1 - Facility Construction 2 - Infrastructure Improvements 3 - Restoration or Remediation 4 - Information Technology 5 - Major Items of Equipment 6 - Decontamination & Decommissioning	List of Values	User selects a value from the list and does not type in a value.

SCREEN LABEL	FIELD DESCRIPTION	TYPE (LENGTH)	EXAMPLES
Nuclear/Non-Nuclear	The "Project Type 2" data element is a companion to the "Project Type 1" data element and indicates if the major function from Project Type 1 is a nuclear or nonnuclear project type. Only one selection can be made. If combination of project types, then the predominant type based on cost should be selected. 1 – Nuclear: A reactor or a non-reactor nuclear facility where an activity is conducted for or on behalf of DOE and includes any related area, structure, facility, or activity to the extent necessary to ensure proper implementation of the requirements established by 10 CFR 830. A facility in which activities or operations involve radioactive and/or fissionable materials in such form and quantity that a nuclear hazard potentially exists to the employees or the general public. (IP-425-01, Rev. 1) 2 - Non-Nuclear: A facility with potentially releasable quantities of radioactive materials that are less than 40 CFR 302 levels, but have potentially releasable quantities of hazardous chemicals meeting 40 CFR 302, Table 302.4. (IP-425-01, Rev. 1)	List of Values	User selects a value from the list and does not type in a value.
Program	The DOE Program Office data element to which the project is assigned. Only one selection can be made. EE: Office of Energy Efficiency & Renewable Energy EM: Office of Environmental Management FE: Office of Fossil Energy NA: National Nuclear Security Administration NE: Office of Nuclear Energy RW: Office of Civilian Radioactive Waste Management SC: Office of Science WAPA: Western Area Power Administration EM-L: Office of Environmental Management – Line Item Projects Only SC-IT: Office of Science – IT Projects Only EM-C: Office of Environmental Management – Cleanup Projects Only	List of Values	User selects a value from the list and does not type in a value.
CPP Upload Requirements	The level of detail contained within and/or a requirement for Contractor Project Performance Data uploads. CPP Upload - Complete: CPP Upload – Complete CPP Upload – w/Attachment: CPP Upload – Plus MR &/or Contingency Attachment CPP Upload – Waived: CPP Upload – Late CD-3 – Attachment Only CPP Upload – Exception: CPP Upload – Waived w/Exception – Attachment Only CPP Upload – Not Waived: CPP Upload – Issue to be Resolved – Attachment Only CPP Upload – Not Applicable: CPP Upload – N/A under $20M CPP Upload – Not Required: CPP Upload – Exception No Input Required	List of Values	User selects a value from the list and does not type in a value.

<table>
<tr><td>Project Activity Status Code</td><td>The current activity status of the project.
<table><tr><td>Active</td><td>The project is being tracked in PARS, has achieved CD-0 and has not achieved CD-4.</td></tr><tr><td>Complete</td><td>The project is no longer being tracked in PARS and has achieved CD-4.</td></tr><tr><td>Cancelled</td><td>The project is no longer being tracked in PARS and did not achieve CD-4.</td></tr><tr><td>Other</td><td>The project is no longer a DOE 413 project, is not completed, on-hold, and is not cancelled. An example of “Other” includes alternative financed facilities after CD-1 is approved.</td></tr></table></td><td>List of Values</td><td>User selects a value from the list and does not type in a value.</td></tr>
<tr><td>Project On Hold</td><td>The current on-hold status of a project.</td><td>Yes/No</td><td>Yes
No</td></tr>
<tr><td>Project of Special Interest</td><td>Identifies this project as one of “special interest” to the DOE Secretary or Deputy Secretary.</td><td>Yes/No</td><td>Yes
No</td></tr>
</table>

<table>
<tr><th>SCREEN LABEL</th><th>FIELD DESCRIPTION</th><th>TYPE (LENGTH)</th><th>EXAMPLES</th></tr>
<tr><td>Site Code</td><td>The abbreviation for Project Site. Note that sites have only been set up for DOE facilities where projects are located. For international projects, select the site which is managing the project. If a new site must be added, then request it be added to the pull down menu. If more than one site is involved, then select the site where the FPD is located or where the most money is spent.

<table>
<tr><td>Ames</td><td>Ames National Laboratory</td></tr>
<tr><td>ANL</td><td>Argonne National Laboratory</td></tr>
<tr><td>Ashtable</td><td>Ashtable Closure Project</td></tr>
<tr><td>Bayou Choctaw (LA)</td><td>Bayou Choctaw</td></tr>
<tr><td>BNL</td><td>Brookhaven National Laboratory</td></tr>
<tr><td>Carlsbad</td><td>Carlsbad-WIPP</td></tr>
<tr><td>ETEC</td><td>Energy Technology Engineering Center</td></tr>
<tr><td>ETTP</td><td>East Tennessee Technology Park</td></tr>
<tr><td>Fernald</td><td>Fernald</td></tr>
<tr><td>FNAL</td><td>Fermi National Accelerator Laboratory</td></tr>
<tr><td>INL</td><td>Idaho National Laboratory</td></tr>
<tr><td>KAPL</td><td>Knolls Atomic Power Laboratory</td></tr>
<tr><td>KCP</td><td>Kansas City Plant</td></tr>
<tr><td>LANL</td><td>Los Alamos National Laboratory</td></tr>
<tr><td>LBNL</td><td>Lawrence Berkeley National Laboratory</td></tr>
<tr><td>LLNL</td><td>Lawrence Livermore National Laboratory</td></tr>
<tr><td>Miamisburg</td><td>Miamisburg</td></tr>
<tr><td>Moab</td><td>Moab</td></tr>
<tr><td>MSU</td><td>Michigan State University</td></tr>
<tr><td>NETL (PA)</td><td>National Energy Technology Laboratory</td></tr>
<tr><td>NETL (WV)</td><td>National Energy Technology Laboratory</td></tr>
<tr><td>Nevada Offsite</td><td>Nevada Offsite</td></tr>
<tr><td>NREL</td><td>National Renewable Energy Laboratory</td></tr>
<tr><td>NTS</td><td>Nevada Test Site</td></tr>
</table></td><td>List of Values</td><td>User selects a value from the list and does not type in a value.</td></tr>
</table>

SCREEN LABEL	FIELD DESCRIPTION	TYPE (LENGTH)	EXAMPLES
Site Code (continued)	The abbreviation for Project Site. Note that sites have only been set up for DOE facilities where projects are located. For international projects, select the site which is managing the project. If a new site must be added, then request it be added to the pull down menu. If more than one site is involved, then select the site where the FPD is located or where the most money is spent. Oak Ridge — Oak Ridge ORNL — Oak Ridge National Laboratory ORP — Office of River Protection Paducah — Paducah Gaseous Diffusion Plant Pantex — Pantex Plant PNNL — Pacific Northwest National Laboratory Portsmouth — Portsmouth Gaseous Diffusion Plant PPPL — Princeton Plasma Physics Laboratory PPPO — Portsmouth Paducah Project Office Richland — Richland Rochester — Rochester, NY Russia — Russia SEFOR - Arkansas — Southwest Experimental Fast Oxide Reactor - Arkansas SLAC — Stanford Linear Accelerator Center SNL — Sandia National Laboratories SPR — Strategic Petroleum Reserve SRS — Savannah River Site TBD — To Be Determined TJNAF — Thomas Jefferson National Accelerator Laboratory West Valley — West Valley Demonstration Project Y-12 — Y-12 National Security Complex Yucca Mountain — Yucca Mountain	List of Values	User selects a value from the list and does not type in a value.
Success Metric	GAO Success Metric – Actual & Forecast Yes — Yes - Met Standard No-Cost — No - Did not meet Cost Standard No-Scope — No - Did not meet Scope Standard Yes(F) — Yes – Forecasted to Meet Standard No-Cost(F) — No – Forecasted to not meet Cost Standard No-Scope(F) — No – Forecasted to not meet Scope Standard N/A — Do Not Include Temporary — To allow for saving in other categories	List of Values	User selects a value from the list and does not type in a value.

<table>
<tr><td>PDRI</td><td>The PDRI for buildings is a comprehensive, weighted checklist of scope definition elements presented in a score sheet format and grouped into 15 categories and 3 main sections. It provides a tool for an individual or project team to objectively evaluate the status of a building project during pre-project planning. The project is rated on up to 1000 points and the lower the score, the better.</td><td>Yes/No/N/A</td><td>Yes
No
N/A</td></tr>
<tr><td>TRA</td><td>A technology readiness assessment (TRA) examines program concepts, technology requirements, and demonstrated technology capabilities in order to determine technological maturity.</td><td>Yes/No/N/A</td><td>Yes
No
N/A</td></tr>
<tr><td>IPT</td><td>The Integrated Project Team (IPT) is essential to the successful execution of the overall project goals and objectives. The IPT is established at the very onset of the initial project authorization and assists the PM in developing the strategies for the design and construction processes and resource requirements.
<table>
<tr><td>EIR-G</td><td>Green, properly staffed based on EIR</td></tr>
<tr><td>EIR-Y</td><td>Yellow, pursuing staff based on EIR</td></tr>
<tr><td>EIR-R</td><td>Red, insufficiently staffed & study not conducted</td></tr>
<tr><td>IPR-G</td><td>Green, properly staffed based on IPR</td></tr>
<tr><td>IPR-Y</td><td>Yellow, pursuing staff based on IPR</td></tr>
<tr><td>IPR-R</td><td>Red, insufficiently staffed & study no conducted on IPR</td></tr>
<tr><td>N/A</td><td></td></tr>
</table></td><td>List of Values</td><td>User selects a value from the list and does not type in a value.</td></tr>
<tr><td>FPM Name</td><td>The full name of the Federal project Manager (FPM) who is currently assigned to this project. This is selected from the “master” list of contacts. The program point of contact for the project.</td><td>List of Values</td><td>User searches for an existing contact record than selects a value from the search results list and does not type in a value.</td></tr>
<tr><td>FPD Name</td><td>The full name of the Federal project Director (FPD) who is currently assigned to this project. This is selected from the “master” list of contacts.</td><td>List of Values</td><td>User searches for an existing contact record than selects a value from the search results list and does not type in a value.</td></tr>
<tr><td>APM Analyst</td><td>The full name of the APM Analyst who is currently assigned to the project. This is selected from the “master” list of contacts.</td><td>List of Values</td><td>User searches for an existing contact record than selects a value from the search results list and does not type in a value.</td></tr>
<tr><td>Prime Contractor</td><td>The prime contractor responsible for overall management of the project. This is selected from the “master” list of contacts.</td><td>Non-Entry Field</td><td>N/A</td></tr>
<tr><th>SCREEN LABEL</th><th>FIELD DESCRIPTION</th><th>TYPE (LENGTH)</th><th>EXAMPLES</th></tr>
<tr><td colspan="4">Add Attachment</td></tr>
<tr><td>Narrative, Hyperlink or Document Drop-down at top of Add Attachment pop-up</td><td>This drop-down selects between the 3 types of attachments. The fields on the screen change accordingly.
<table>
<tr><td>Narrative</td><td>Text entered by the user into a “free-text memo field”.
Type = AlphaNum (4000)</td></tr>
<tr><td>Document</td><td>Allows a user’s file to be attached.
Type = any file on the user’s PC; usually a Word or Excel or PDF file.</td></tr>
<tr><td>Hyperlink</td><td>Allows a user to create a hyperlink which, when clicked on, will bring up the referenced web page.
Type = URL</td></tr>
</table></td><td>List of Values</td><td>User selects a value from the list and does not type in a value.</td></tr>
</table>

Title	The title of the electronic document to be attached to the project. Note: documents to be attached must not be categorized as "sensitive" or "classified." Acquisition Executive Delegation memos Acquisition Strategy/Plans Risk Management Plan and Risk Assessment updates Contractor Project Performance/Status Reports (monthly or as required by the contract) Quarterly Project Performance Reports/Briefing Slides Project Review Reports	List of Values	**In the case of Attachment Title – if none of the listed titles is appropriate, the user can type a different title string into the field.** Such as: Interconnection Security Agreement (ISA) document. Type = AlphaNum (100)
Description	A text description of the attachment, providing additional information such as the attachment sub-title.	AlphaNum (80)	This attachment is the full explanation for the re-baseline request.
Version	The official version number or code affixed to this document or narrative or hyperlink, if available.	AlphaNum (30)	1998-ABC-120 110
Document No. (AKA Doc #)	The official identification number or code assigned to this document, if available.	AlphaNum (30)	1 A100-a 1234-AA-N
Narrative	Narrative – text entered by user. This field is present only if this type of attachment is selected. Dekker tool places all memo field entries in the Narrative category. The "Description" field is character limited, so this is the opportunity for the submitter to provide stand alone information regarding the project.	AlphaNum (4000)	The user can enter a large amount of text into this text field.
Hyperlink	Allows a user to attach a hyperlink which when clicked on will bring up that web page. This field is present only if this type of attachment is selected.	AlphaNum (50)	https://pars2.doe.gov
Document	The computer filename of the attachment. This is selected via the standard Windows browse files feature. This field is present only if this type of attachment is selected.	AlphaNum (255)	Glossary of Screen Labels for PARS II V1.0.0.doc

SCREEN LABEL	FIELD DESCRIPTION	TYPE (LENGTH)	EXAMPLES
Add/Edit Contact			
Role	The contact's assigned role for this project. Note: this may be different from the contact's official title. [Field set only by PARS II Admin] AE – Acquisition Executive Contractor Analyst – Contractor Analyst / Project Controls Contractor PM – Contractor Project Manager Deputy FPD – Deputy Federal Project Director FPD Name – Federal Project Director FPM – Federal Program Manager Deputy FPM – Deputy Federal Program Manager APM Analyst – APM Analyst (Lead) APM Analyst (Alt) – APM Analyst (Alternate) PARS Help Desk – PARS Help Desk PARS System Admin – PARS System Admin Prime Contractor – Contractor SAE – Senior Acquisition Executive US – Under Secretary PSO – Program Secretarial Officer/Administrator	List of Values	User selects a value from the list and does not type in a value.
Contact (AKA Contact Name)	The full name of the individual assigned to the role above, as sourced from the Contacts table. [Field set only by PARS II Admin] – Once an Admin user has created the Contact record, a non-Admin user (with the right authority) may use this field to select an existing Contact to be assigned to a project, for instance. The contact name for "Contractor" will be the name of the company (e.g., Bechtel).	List of Values	User searches for an existing contact record than selects a value from the search results list and does not type in a value.
Date Assigned	The date that this contact was assigned to the project.	Date (10)	12/31/2020
Date Unassigned	The date that this contact was un-assigned from the project.	Date (10)	12/31/2020
Order	This field is used to dictate the display order of Contacts when they are listed. Contacts are displayed in Ascending Order, as determined by the value of this field.	Numeric (4)	1234
Title	The contact's official title. [Field set only by PARS II Admin]	AlphaNum (30)	Deputy Secretary Assistant Secretary Under Secretary
ORG	The contact's organization. [Field set only by PARS II Admin]	AlphaNum (30)	BJC (Oak Ridge) Department of Energy
Certification	Indicates the certification level of the contact or contractor. [Field set only by PARS II Admin]	AlphaNum (100)	Certified Level 4 Decertified
Phone	The contact's work phone number.	AlphaNum (12)	800-555-1212
Email	The contact's primary email address.	AlphaNum (50)	john.smith@some.domain.com
Cell Phone	The contact's work or personal cell phone number.	AlphaNum (12)	800-555-1212
Address	The contact's mailing address.	AlphaNum (80)	950 L'Enfant Plaza, Washington, DC
Updated By	Username of the user who last updated this contact's record.	Non-Entry Field	N/A

SCREEN LABEL	FIELD DESCRIPTION	TYPE (LENGTH)	EXAMPLES
Updated Date	Date when this contact's record was last updated.	Non-Entry Field	N/A
Critical Decisions			
CD-0			
Select Critical Decision:	Selects which Critical Decision screen to view, add, or update. Phased CDs, other than CD-3A, are not currently tracked in PARS II. If projects have other phased CDs, such as CD-4A, enter only the date of the final phase. Interim phase data should not be entered. CD-0 — Approve Mission Need CD-1 — Approve Alternative Selection and Cost Range CD-2 — Approve Performance Baseline CD-3A — Approve Procurement of Long Lead Items or Early Construction CD-3 — Approve Start of Construction CD-4 — Approve Start of Operations or Project Completion Closeout — Closing out the project	List of Values	User selects a value from the list and does not type in a value.
Planned Date (inside Critical Decision Detail box)	The planned date on which the Critical Decision 0 Milestone was expected to be met.	Non-Entry Field	N/A
CD0 Date Approved	The actual date that the Critical Decision 0 Milestone was approved.	Date (10)	12/31/2020
CD0 Approved By	The name of authority that approved the Critical Decision 0 Milestone.	Non-Entry Field	N/A
CD0 Date Received By APM	The date of any documentation for the CD that is received late.	Non-Entry Field	N/A
CD0 Approval Notes	A brief narrative that describes key activities or deliverables related to the preparation for approval of Critical Decision 0. Includes current issues or actions.	AlphaNum (255)	Approval of CD0 has been given based on the relevant documentation in the Attachments section of PARS II.
CD0: TPC Low	An estimate of Total Project Cost, at the low end of the range, as approved at CD-0.	Numeric (12)	25,000,000
CD0: TPC High	An estimate of Total Project Cost, at the high end of the range, as approved at CD-0.	Numeric (12)	45,000,000

SCREEN LABEL	FIELD DESCRIPTION	TYPE (LENGTH)	EXAMPLES
CD0: CD-4 Date Low	The estimated completion date at CD-4, at the low end of the range, as approved at CD-0.	Date (10)	12/31/2020
CD0: CD-4 Date High	The estimated completion date at CD-4, at the high end of the range, as approved at CD-0.	Date (10)	12/31/2020
Updated By	The username of the person who updated this status.	Non-Entry Field	N/A
Updated Date	The date that this status was updated.	Non-Entry Field	N/A
CD1	The planned date on which the Critical Decision 1 Milestone is expected to be met.	Date (10)	12/31/2020
CD2	The planned date on which the Critical Decision 2 Milestone is expected to be met.	Date (10)	12/31/2020

CD3A	The planned date on which the Critical Decision 3A Milestone is expected to be met.	Date (10)	12/31/2020
CD3	The planned date on which the Critical Decision 3 Milestone is expected to be met.	Date (10)	12/31/2020
CD4	The planned date on which the Critical Decision 4 Milestone is expected to be met.	Date (10)	12/31/2020
Closeout	Enter the planned date on which the Final Project Closeout Report is expected to be submitted to HQ Program Manager.	Date (10)	12/31/2020
CD-1			
Select Critical Decision:	Selects which Critical Decision screen to view, add, or update. Phased CDs, other than CD-3A, are not currently tracked in PARS II. If projects have other phased CDs, such as CD-4A, enter only the date of the final phase. Interim phase data should not be entered. CD-0: Approve Mission Need CD-1: Approve Alternative Selection and Cost Range CD-2: Approve Performance Baseline CD-3A: Approve Procurement of Long Lead Items or Early Construction CD-3: Approve Start of Construction CD-4: Approve Start of Operations or Project Completion Closeout: Closing out the project	List of Values	User selects a value from the list and does not type in a value.
Planned Date (inside Critical Decision Detail box)	The planned date on which the Critical Decision 1 Milestone was expected to be met.	Non-Entry Field	N/A
CD1 Date Approved	The actual date that the Critical Decision 1 Milestone was approved.	Date (10)	12/31/2020
CD1 Approved By	The name of authority that approved the Critical Decision 1 Milestone.	Non-Entry Field	N/A
CD1 Date Received By APM	The date of any documentation for the CD that is received late.	Non-Entry Field	N/A
CD1 Approval Notes	A brief narrative that describes key activities or deliverables related to the preparation for approval of Critical Decision 1. Includes current issues or actions.	AlphaNum (255)	Approval of CD1 has been given based on the relevant documentation in the Attachments section of PARS II.
CD1: TPC Low	An estimate of Total Project Cost, at the low end of the range, as approved at CD-1.	Numeric (12)	25,000,000
CD1: TPC High	An estimate of Total Project Cost, at the high end of the range, as approved at CD-1.	Numeric (12)	45,000,000
CD1: CD-4 Date Low	The estimated completion date at CD-4, at the low end of the range, as approved at CD-1.	Date (10)	12/31/2020

SCREEN LABEL	FIELD DESCRIPTION	TYPE (LENGTH)	EXAMPLES
CD1: CD-4 Date High	The estimated completion date at CD-4, at the high end of the range, as approved at CD-1.	Date (10)	12/31/2020
Updated By	The username of the person who updated this status.	Non-Entry Field	N/A
Updated Date	The date that this status was updated.	Non-Entry Field	N/A
CD2	The planned date on which the Critical Decision 2 Milestone is expected to be met.	Date (10)	12/31/2020
CD3A	The planned date on which the Critical Decision 3A Milestone is expected to be met.	Date (10)	12/31/2020
CD3	The planned date on which the Critical Decision 3 Milestone is expected to be met.	Date (10)	12/31/2020
CD4	The planned date on which the Critical Decision 4 Milestone is expected to be met.	Date (10)	12/31/2020

Closeout	Enter the planned date on which the Final Project Closeout Report is expected to be submitted to HQ Program Manager.	Date (10)	12/31/2020
CD-2			
Select Critical Decision:	Selects which Critical Decision screen to view, add, or update. Phased CDs, other than CD-3A, are not currently tracked in PARS II. If projects have other phased CDs, such as CD-4A, enter only the date of the final phase. Interim phase data should not be entered. CD-0 – Approve Mission Need CD-1 – Approve Alternative Selection and Cost Range CD-2 – Approve Performance Baseline CD-3A – Approve Procurement of Long Lead Items or Early Construction CD-3 – Approve Start of Construction CD-4 – Approve Start of Operations or Project Completion Closeout – Closing out the project	List of Values	User selects a value from the list and does not type in a value.
Planned Date (inside Critical Decision Detail box)	The planned date on which the Critical Decision 2 Milestone is expected to be met.	Non-Entry Field	N/A
CD2 Date Approved	The actual date that the Critical Decision 2 Milestone was approved.	Date (10)	12/31/2020
CD2 Approved By	The name of authority that approved the Critical Decision 2 Milestone.	Non-Entry Field	N/A
CD2 Date Received By APM	The date of any documentation for the CD that is received late.	Non-Entry Field	N/A
CD2 Approval Notes	A brief narrative that describes key activities or deliverables related to the preparation for approval of Critical Decision 2. Includes current issues or actions.	AlphaNum (255)	Approval of CD2 has been given based on the relevant documentation in the Attachments section of PARS II.
CD2: TPC (Approved)	An estimate of Total Project Cost as approved at CD-2.	Numeric (12)	45,000,000
CD2: CD-4 Date (Approved)	The Estimated Completion Date at CD-4 for the Performance Baseline at CD-2.	Date (10)	12/31/2020
Orig. DOE Schedule Contingency (in days)	The original amount of schedule contingency, expressed in weeks, set aside for the project by DOE at CD-2. Schedule Contingency is the total float in calendar weeks planned for this project. For EM operations funded projects schedule contingency will be for the entire PBS and will be consistent with the project baseline validated at CD-2.	Numeric (4)	730
SCREEN LABEL	**FIELD DESCRIPTION**	**TYPE (LENGTH)**	**EXAMPLES**
Orig. DOE Cost Contingency	The original amount set aside by DOE for Cost Contingency at CD-2. DOE Cost Contingency is the reserve budget held by DOE. For EM operations funded projects this contingency will be for the entire PBS and consistent with the project baseline validated at CD-2.	Numeric (12)	25,000,000
Orig DOE ODCs	Other direct costs as identified at CD-2.	Numeric (12)	25,000,000

<table>
<tr><td>Orig. Contractor Fee/Profit</td><td>The original amount of Fee or Profit set aside by DOE at CD-2.</td><td>Numeric (12)</td><td>25,000,000</td></tr>
<tr><td>Orig. Contractor MR</td><td>The original amount of Management Reserve allocated to the contractor at CD-2.</td><td>Numeric (12)</td><td>25,000,000</td></tr>
<tr><td>PMB</td><td>The calculated Budget at Completion (BAC) for the Performance Measurement Baseline (PMB) directly uploaded from contractor’s data.</td><td>Non-Entry Field</td><td>N/A</td></tr>
<tr><td>Calculated TPC</td><td>Allows a comparison of values between what is put into the TPC field and the summation of the following fields: Original DOE Cost Contingency + Non-Contract Costs + Original Contractor Fee/Profit + Original Contractor MR + PMB.</td><td>Non-Entry Field</td><td>N/A</td></tr>
<tr><td>Congressional Budget Request Date</td><td>Date of the CBR which included the original funding request for the baseline project.</td><td>Date (10)</td><td>12/31/2020</td></tr>
<tr><td>Updated By</td><td>The username of the person who updated this status.</td><td>Non-Entry Field</td><td>N/A</td></tr>
<tr><td>Updated Date</td><td>The date that this status was updated.</td><td>Non-Entry Field</td><td>N/A</td></tr>
<tr><td>CD3A</td><td>The planned date on which the Critical Decision 3A Milestone is expected to be met.</td><td>Date (10)</td><td>12/31/2020</td></tr>
<tr><td>CD3</td><td>The planned date on which the Critical Decision 3 Milestone is expected to be met.</td><td>Date (10)</td><td>12/31/2020</td></tr>
<tr><td>CD4</td><td>The planned date on which the Critical Decision 4 Milestone is expected to be met.</td><td>Date (10)</td><td>12/31/2020</td></tr>
<tr><td>Closeout</td><td>Enter the planned date on which the Final Project Closeout Report is expected to be submitted to HQ Program Manager.</td><td>Date (10)</td><td>12/31/2020</td></tr>
<tr><td colspan="4">CD-3A</td></tr>
<tr><td>Select Critical Decision:</td><td>Selects which Critical Decision screen to view, add, or update. Phased CDs, other than CD-3A, are not currently tracked in PARS II. If projects have other phased CDs, such as CD-4A, enter only the date of the final phase. Interim phase data should not be entered.

Note: only selected projects have a CD-3A milestone.

<table>
<tr><td>CD-0</td><td>Approve Mission Need</td></tr>
<tr><td>CD-1</td><td>Approve Alternative Selection and Cost Range</td></tr>
<tr><td>CD-2</td><td>Approve Performance Baseline</td></tr>
<tr><td>CD-3A</td><td>Approve Procurement of Long Lead Items or Early Construction</td></tr>
<tr><td>CD-3</td><td>Approve Start of Construction</td></tr>
<tr><td>CD-4</td><td>Approve Start of Operations or Project Completion</td></tr>
<tr><td>Closeout</td><td>Closing out the project</td></tr>
</table></td><td>List of Values</td><td>User selects a value from the list and does not type in a value.</td></tr>
<tr><td>Planned Date (inside Critical Decision Detail box)</td><td>The planned date on which the Critical Decision 3A Milestone is expected to be met.</td><td>Non-Entry Field</td><td>N/A</td></tr>
<tr><td></td><td></td><td></td><td></td></tr>
<tr><td>SCREEN LABEL</td><td>FIELD DESCRIPTION</td><td>TYPE (LENGTH)</td><td>EXAMPLES</td></tr>
<tr><td>CD3A Date Approved</td><td>The actual date that the Critical Decision 3A Milestone was approved.</td><td>Date (10)</td><td>12/31/2020</td></tr>
<tr><td>CD3A Approved By</td><td>The name of authority that approved the Critical Decision 3A Milestone.</td><td>Non-Entry Field</td><td>N/A</td></tr>
</table>

CD3A Date Received By APM	The date of any documentation for the CD that is received late.	Non-Entry Field	N/A
CD3A Approval Notes	A brief narrative that describes key activities or deliverables related to the preparation for approval of Critical Decision 3A. Includes current issues or actions.	AlphaNum (255)	Approval of CD3A has been given based on the relevant documentation in the Attachments section of PARS II.
Latest Approved CD-4 Date	The high end of the range for Estimated Completion Date at CD-4, as identified in the approval document for the Performance Baseline.	Non-Entry Field	N/A
Approved Scope	The approved scope for EM projects at CD-3A.	AlphaNum (255)	Buildings 23 & 43 have been approved.
Approved Cost	The approved cost for EM projects at CD-3A.	Numeric (12)	45,000,000
Updated By	The username of the person who updated this status.	Non-Entry Field	N/A
Updated Date	The date that this status was updated.	Non-Entry Field	N/A
CD3	The planned date on which the Critical Decision 3 Milestone is expected to be met.	Date (10)	12/31/2020
CD4	The planned date on which the Critical Decision 4 Milestone is expected to be met.	Date (10)	12/31/2020
Closeout	Enter the planned date on which the Final Project Closeout Report is expected to be submitted to HQ Program Manager.	Date (10)	12/31/2020
CD-3			
Select Critical Decision:	Selects which Critical Decision screen to view, add, or update. Phased CDs, other than CD-3A, are not currently tracked in PARS II. If projects have other phased CDs, such as CD-4A, enter only the date of the final phase. Interim phase data should not be entered. CD-0: Approve Mission Need CD-1: Approve Alternative Selection and Cost Range CD-2: Approve Performance Baseline CD-3A: Approve Procurement of Long Lead Items or Early Construction CD-3: Approve Start of Construction CD-4: Approve Start of Operations or Project Completion Closeout: Closing out the project	List of Values	User selects a value from the list and does not type in a value.
Planned Date (inside Critical Decision Detail box)	The planned date on which the Critical Decision 3 Milestone is expected to be met.	Non-Entry Field	N/A
CD3 Date Approved	The actual date that the Critical Decision 3 Milestone was approved.	Date (10)	12/31/2020
CD3 Approved By	The name of authority that approved the Critical Decision 3 Milestone.	Non-Entry Field	N/A
CD3 Date Received By APM	The date of any documentation for the CD that is received late.	Non-Entry Field	N/A
CD3 Approval Notes	A brief narrative that describes key activities or deliverables related to the preparation for approval of Critical Decision 3. Includes current issues or actions.	AlphaNum (255)	Approval of CD3 has been given based on the relevant documentation in the Attachments section of PARS II.

SCREEN LABEL	FIELD DESCRIPTION	TYPE (LENGTH)	EXAMPLES
Latest Approved TPC	An estimate of Total Project Cost, at the high end of the range, as approved at CD-3.	Non-Entry Field	N/A
Latest Approved CD-4 Date	The Estimated Completion Date at CD-4, as identified in the approval document for the Performance Baseline.	Non-Entry Field	N/A
CD3 Lessons Learned Report Received	Date Lessons Learned document received.	Date(10)	12/31/2020
Updated By	The username of the person who updated this status.	Non-Entry Field	N/A
Updated Date	The date that this status was updated.	Non-Entry Field	N/A
CD4	The planned date on which the Critical Decision 4 Milestone is expected to be met.	Date (10)	12/31/2020
Closeout	Enter the planned date on which the Final Project Closeout Report is expected to be submitted to HQ Program Manager.	Date (10)	12/31/2020
CD-4			
Select Critical Decision:	Selects which Critical Decision screen to view, add, or update. Phased CDs, other than CD-3A, are not currently tracked in PARS II. If projects have other phased CDs, such as CD-4A, enter only the date of the final phase. Interim phase data should not be entered. CD-0 — Approve Mission Need CD-1 — Approve Alternative Selection and Cost Range CD-2 — Approve Performance Baseline CD-3A — Approve Procurement of Long Lead Items or Early Construction CD-3 — Approve Start of Construction CD-4 — Approve Start of Operations or Project Completion Closeout — Closing out the project	List of Values	User selects a value from the list and does not type in a value.
Planned Date (inside Critical Decision Detail box)	The planned date on which the Critical Decision 4 Milestone is expected to be met.	Non-Entry Field	N/A
CD4 Date Approved	The actual date that the Critical Decision 4 Milestone was approved.	Date (10)	12/31/2020
CD4 Approved By	The name of authority that approved the Critical Decision 4 Milestone.	Non-Entry Field	N/A
CD4 Date Received By APM	The date of any documentation for the CD that is received late.	Non-Entry Field	N/A
CD4 Approval Notes	A brief narrative that describes key activities or deliverables related to the preparation for approval of Critical Decision 4. Includes current issues or actions.	AlphaNum (255)	Approval of CD4 has been given based on the relevant documentation in the Attachments section of PARS II.
TPC	An estimate of Total Project Cost made at CD-4 Approval.	Numeric (12)	45,000,000
TPC at CD4	The actual TPC at CD4.	Numeric (12)	45,000,000
KPP Scope Narrative At Complete	A brief narrative provided at the completion of the project that describes the completed scope so that verification of scope completion can be made to the approved scope. KPPs at CD-4 must equal KPPs at CD-2.	AlphaNum (4000)	The following outlines the method used to verify that this project's scope was delivered.

CD4 Lessons Learned Report Received	Date Lessons Learned document received.	Date (10)	12/31/2020
Updated By	The username of the person who updated this status.	Non-Entry Field	N/A
Updated Date	The date that this status was updated.	Non-Entry Field	N/A
Closeout	Enter the planned date on which the Final Project Closeout Report is expected to be submitted to HQ Program Manager.	Date (10)	12/31/2020

<table>
<tr><th>SCREEN LABEL</th><th>FIELD DESCRIPTION</th><th>TYPE (LENGTH)</th><th>EXAMPLES</th></tr>
<tr><td colspan="4">Closeout</td></tr>
<tr><td>Select Critical Decision:</td><td>Selects which Critical Decision screen to view, add, or update. Phased CDs, other than CD-3A, are not currently tracked in PARS II. If projects have other phased CDs, such as CD-4A, enter only the date of the final phase. Interim phase data should not be entered.

CD-0 — Approve Mission Need
CD-1 — Approve Alternative Selection and Cost Range
CD-2 — Approve Performance Baseline
CD-3A — Approve Procurement of Long Lead Items or Early Construction
CD-3 — Approve Start of Construction
CD-4 — Approve Start of Operations or Project Completion
Closeout — Closing out the project</td><td>List of Values</td><td>User selects a value from the list and does not type in a value.</td></tr>
<tr><td>Planned Date (inside Critical Decision Detail box)</td><td>The planned date on which the Final Project Closeout Report is expected to be submitted to HQ Program Manager.</td><td>Non-Entry Field</td><td>N/A</td></tr>
<tr><td>Closeout Date Approved</td><td>The actual date that the Final Project Closeout Report was submitted to HQ Program Manager.</td><td>Date (10)</td><td>12/31/2020</td></tr>
<tr><td>Closeout Approved By</td><td>The name of authority that approved the Final Project Closeout Report.</td><td>Non-Entry Field</td><td>N/A</td></tr>
<tr><td>Closeout Date Received By APM</td><td>The date of any documentation for the CD that is received late.</td><td>Non-Entry Field</td><td>N/A</td></tr>
<tr><td>Closeout Approval Notes</td><td>A brief narrative that describes key activities or deliverables related to the preparation for approval of Closeout. Includes current issues or actions.</td><td>AlphaNum (255)</td><td>Approval of Closeout has been given based on the relevant documentation in the Attachments section of PARS II.</td></tr>
<tr><td>Actual Cost At Financial Closeout</td><td>The final cost of the project when financial closure has been obtained.</td><td>Numeric (12)</td><td>95,000,000</td></tr>
<tr><td>Updated By</td><td>The username of the person who updated this status.</td><td>Non-Entry Field</td><td>N/A</td></tr>
<tr><td>Updated Date</td><td>The date that this status was updated.</td><td>Non-Entry Field</td><td>N/A</td></tr>
<tr><td colspan="4">Add/Edit BCPs</td></tr>
<tr><td>Select BCP</td><td>Dropdown for selecting a Baseline Change Proposal (BCP) that has been added earlier.</td><td>List of Values</td><td>BCP-CD2 Original Approved Baseline
BCP-BCP 2 Post Recovery</td></tr>
<tr><td>BCP Title</td><td>The title given to the baseline change, such as “Congressional Baseline”. This field is what populates the “Select BCP” dropdown above.</td><td>AlphaNum (50)</td><td>CD2 Original Approved Baseline
BCP 2 Post Recovery</td></tr>
<tr><td>BCP Change Directed</td><td>A flag (Yes/No) that indicates if this was a directed change to the PB.</td><td>Yes/No Checkbox (1)</td><td>Checked
Unchecked</td></tr>
</table>

SCREEN LABEL	FIELD DESCRIPTION	TYPE (LENGTH)	EXAMPLES
Request Submission Date	The date that the request for the change to the PB was submitted by the FPD.	Date (10)	12/31/2020
BCP Date Approved	The date that the BCP was approved by the approving official.	Date (10)	12/31/2020
BCP Approved By	The full name of the authority that approved this BCP, as sourced from the Contacts table.	List of Values	User searches for an existing contact record than selects a value from the search results list and does not type in a value.
BCP Approval Notes	The official text in the BCP approval document that summarizes the cost, schedule and scope elements for the project.	AlphaNum (255)	The cost of this Baseline Change is estimated to be ….
BCP Date Received By APM	The date of any documentation for the BCP that is received late.	Non-Entry Field	N/A
BCP: TPC (Approved)	The Total Project Cost as identified in the approval document for the Performance Baseline.	Numeric (12)	46.000,000
BCP: Change in Cost	If the baseline change accompanies a change in cost, the system calculates the change in the dollar value of the approved change (positive or negative) between the current TPC and the new TPC.	Non-Entry Field	N/A
BCP: CD-4 Date (Approved)	The Estimated Completion Date at CD-4, as identified in the approval document for the Performance Baseline.	Date (10)	12/31/2020
BCP: Change in Schedule (in days)	If the baseline change accompanies a change in schedule, the system calculates the change in calendar days of approved change (positive or negative) that the schedule will be extended or reduced, between the current Approved CD-4 Date and the new CD-4 Date.	Non-Entry Field	N/A
DOE Schedule Contingency (in days)	The approved total number of weeks of DOE Schedule Contingency for the Performance Baseline.	Numeric (12)	365
DOE Cost Contingency	The approved total DOE Cost Contingency for the Performance Baseline.	Numeric (12)	35,000,000
DOE ODC's	The approved total other direct costs amount for the Performance Baseline.	Numeric (12)	0
Sunk Costs	Used for a BCP when Fees and ODCs have already been spent	Numeric (12)	0
Contractor Fee/Profit	The approved total Contractor Fee/Profit dollar amount for this Performance Baseline.	Numeric (12)	1,750,000
Contractor MR	The approved total Contractor Management Reserve dollar amount for this Performance Baseline.	Numeric (12)	1,750,000
PMB	The calculated Budget at Completion (BAC) for the Performance Measurement Baseline (PMB).	Numeric (12)	4,280,010
Calculated TPC	Allows a comparison of values between what is put into the TPC field and the summation of the following fields: DOE Cost Contingency + Non-Contract Costs + Contractor Fee/Profit + Contractor MR + PMB.	Non-Entry Field	N/A
Updated By	The username of the person who updated this status.	Non-Entry Field	N/A
Updated Date	The date that this status was updated.	Non-Entry Field	N/A
CD3A	The planned date on which the Critical Decision 3A Milestone is expected to be met.	Date (10)	12/31/2020
CD3	The planned date on which the Critical Decision 3 Milestone is expected to be met.	Date (10)	12/31/2020
CD4	The planned date on which the Critical Decision 4 Milestone is expected to be met.	Date (10)	12/31/2020
Closeout	Enter the planned date on which the Final Project Closeout Report is expected to be submitted to HQ Program Manager.	Date (10)	12/31/2020

SCREEN LABEL	FIELD DESCRIPTION	TYPE (LENGTH)	EXAMPLES
Monthly Status			
Federal Project Director – Monthly Status			
Select Monthly Status Type	Dropdown to select which Monthly Status Screen to view or update. FPD — Monthly Status - FPD Program — Monthly Status - Program APM — Monthly Status - APM	List of Values	User selects a value from the list and does not type in a value.
Forecast for TPC	The FPD's estimate for Total Project Cost. The "Planned" TPC is documented in a CD approval memo, PEP, or BCP. The "Forecast[ed]" TPC is the value at which the FPD expects the project to finish, which may or may not be the same as "Planned." This is required only when the project has been assessed "Yellow" or "Red."	Numeric (12)	9,277,000
Forecast Completion	The date that the FPD expects the project to be completed. The "Planned" CD-4 Completion Date is documented in a CD approval memo, PEP, or BCP. The "Forecast[ed]" CD-4 Completion Date is the date at which the FPD expects the project to finish, which may or may not be the same as "Planned." This is required only when the project has been assessed "Yellow" or "Red."	Date (10)	12/31/2020
Has the CPP data been reviewed?	CPP is Contractor's Project Performance data. This field indicates that the FPD has reviewed the current project upload file.	Yes/No Checkbox (1) Default: Unchecked	Checked Unchecked
Is the OA data current?	OA is oversight and assessment. It's the data not uploaded by the contractor. It includes, for example, verifying the FPD's name, project contacts, and CD approval information.	Yes/No Checkbox (1) Default: Unchecked	Checked Unchecked
FPD CPP Data As-Of Date	The FPD selects the actual Status Date used for the current period CPP Upload. After an upload is complete, the date is displayed as the CPP Data As-Of Date at the top of the PARS II screen.	List of Values	User selects a value from the list and does not type in a value.
Assessment Narrative	A brief narrative on the current project status, describing recent developments, comments, clarifications, or concerns relating to the project. Describe issues that need to be addressed at the Program and/or the Department level (e.g., risks encountered that will potentially require contingency held by DOE, assumptions in the project baseline that are not valid and could result in potential delays or cost overruns).	AlphaNum (4000)	The project was baselined and should start on schedule.
FPD Assessment RYG	The FPD assigns color to the red, yellow, green performance indicator that indicates the FPD's overall condition of the assessment.	Red/Green/Yellow (1)	Red Green Yellow
Program Assessment RYG	The Program assigned color to the red, yellow, green performance indicator that indicates the overall condition of the assessment.	Non-Entry Field	N/A
APM Assessment RYG	APM assigned color to the red, yellow, green performance indicator that indicates the overall condition of the assessment.	Non-Entry Field	N/A

SCREEN LABEL	FIELD DESCRIPTION	TYPE (LENGTH)	EXAMPLES
Cost Contingency Used	The amount of DOE Cost contingency used this period.	Numeric (12)	100,000
Cost Contingency Remaining	The calculated remaining amount of DOE Cost Contingency.	Non-Entry Field	N/A
Schedule Contingency Used (in days)	The amount of DOE Schedule Contingency, expressed in calendar **weeks**, that was used by the project during the month.	Numeric (4)	43
Schedule Contingency Remaining (in days)	The number of **weeks** of DOE Schedule Contingency remaining for the project.	Non-Entry Field	N/A
Profit / Fee Used	The amount of Contractor Fee/Profit used this period.	Numeric (12)	123,000
Profit / Fee Remaining	The remaining Contractor Fee/Profit.	Non-Entry Field	N/A
DOE ODC Used	The amount of non-contract costs used this period.	Numeric (12)	100,000
DOE ODC Remaining	The calculated remaining amount of DOE ODC.	Non-Entry Field	N/A
Updated By	The username of the person who updated this status.	Non-Entry Field	N/A
Updated Date	The date that this status was updated.	Non-Entry Field	N/A
	APM Analyst – Monthly Status		
Select Monthly Status Type	Dropdown to select which Monthly Status Screen to view or update. FPD – Monthly Status - FPD Program – Monthly Status - Program APM – Monthly Status - APM	List of Values	User selects a value from the list and does not type in a value.
APM Assessment RYG	APM assigns color to the red, yellow, green performance indicator that indicates the overall condition of the assessment.	Red/Green/Yellow (1)	**Red** **Green** **Yellow**
FPD Assessment RYG	The FPD assigned color to the red, yellow, green performance indicator that indicates the overall condition of the assessment.	Non-Entry Field	N/A
Program Assessment RYG	The Program assigned color to the red, yellow, green performance indicator that indicates the overall condition of the assessment.	Non-Entry Field	N/A
Forecast for TPC	The APM Analyst's estimate for Total Project Cost. The "Planned" TPC is documented in a CD approval memo, PEP, or BCP. The "Forecast[ed]" TPC is the value at which the APM Analyst expects the project to finish, which may or may not be the same as "Planned." This is required only when the project has been assessed "Yellow" or "Red."	Numeric (12)	45,000,000
Forecast CD4 Completion	The APM Analyst's estimate for construction completion date at CD-4. The "Planned" CD-4 Completion Date is documented in a CD approval memo, PEP, or BCP. The "Forecast[ed]" CD-4 Completion Date is the date at which the APM Analyst expects the project to finish, which may or may not be the same as "Planned." This is required only when the project has been assessed "Yellow" or "Red."	Date (10)	12/31/2020

Overall Assessment Narrative	A narrative of the APM Analyst's final and overall assessment of the project for the reporting period. This narrative goes on the DepSec Report.	AlphaNum (4000)	Very close to achieving Green.
Updated By	The username of the person who updated this status.	Non-Entry Field	N/A
Updated Date	The date that this status was updated.	Non-Entry Field	N/A
SCREEN LABEL	**FIELD DESCRIPTION**	**TYPE (LENGTH)**	**EXAMPLES**
	Program Office – Monthly Status		
Select Monthly Status Type	Dropdown to select which Monthly Status Screen to view or update. FPD — Monthly Status - FPD Program — Monthly Status - Program APM — Monthly Status - APM	List of Values	User selects a value from the list and does not type in a value.
Program Assessment RYG	The Program assigns color to the red, yellow, green performance indicator that indicates the overall condition of the assessment.	Red/Green/Yellow (1)	Red Green Yellow
FPD Assessment RYG	The FPD assigned color to the red, yellow, green performance indicator that indicates the overall condition of the assessment.	Non-Entry Field	N/A
APM Assessment RYG	APM assigned color to the red, yellow, green performance indicator that indicates the overall condition of the assessment.	Non-Entry Field	N/A
Forecast for TPC	The Program's estimate for Total Project Cost. The "Planned" TPC is documented in a CD approval memo, PEP, or BCP. The "Forecast[ed]" TPC is the value at which the Program expects the project to finish, which may or may not be the same as "Planned." This is required only when the project has been assessed "Yellow" or "Red."	Numeric (12)	45,000,000
Forecast CD4 Completion	The Program's estimate for construction completion date at CD-4. The "Planned" CD-4 Completion Date is documented in a CD approval memo, PEP, or BCP. The "Forecast[ed]" CD-4 Completion Date is the date at which the Program expects the project to finish, which may or may not be the same as "Planned." This is required only when the project has been assessed "Yellow" or "Red."	Date (10)	12/31/2020
Is the OA data current?	OA is oversight and assessment. It's the data not uploaded by the contractor. It includes, for example, verifying the FPD's name, project contacts, and CD approval information.	Yes/No Checkbox (1) Default: Unchecked	Checked Unchecked
PO Status Assessment Narrative	A narrative of the Program's final and overall assessment of the project for the reporting period.	AlphaNum (4000)	This project is having problems with staff turnover. Some schedule reserve is being used.
Updated By	The username of the person who updated this status.	Non-Entry Field	N/A
Updated Date	The date that this status was updated.	Non-Entry Field	N/A

SCREEN LABEL	FIELD DESCRIPTION	TYPE (LENGTH)	EXAMPLES
	Budget / Funding		
Funding Profile	The source of data for the budget profile, such as the DOE Integrated Priority List, OMB, Congress, or the Performance Baseline. IPL — DOE Integrated Priority List OMB — Office of Management and Budget CBR — Congressional Budget Request CD2 — Performance Baseline (CD2) BCP — Baseline Change Proposal	List of Values	User selects a value from the list and does not type in a value.
BY	Enter the FY budget year for which you are requesting budget. If you were submitting budget for FY11 in FY10, then enter FY11.	Non-Entry field	N/A
Start Date	The beginning FY date where the grid should start the first column for the current Budget / Funding information being entered (determines how many columns are in the grid).	Date (10)	12/31/2020
End Date	The ending FY date where the grid should place the last column for the current Budget / Funding information being entered (determines how many columns are in the grid).	Date (10)	12/31/2020
Exception Request Needed?	An exception request is needed when a Program desires to submit a construction budget request prior to CD-2 approval.	Yes/No Checkbox (1) Default: Unchecked	Checked Unchecked
Description	Explanation of the type of funds.	AlphaNum (255)	Construction Operations
OPC	Other Project Costs = Total of OPC (D&D) + OPC (Excluding D&D)	Non-Entry Field	N/A
OPC (D&D)	Enter one-for-one replacement and/or D&D portion of Other Project Costs. Other Project Costs are engineering design, development, startup and operations which are essential for project execution and are operating expense funds. D&D = Decontamination and Decommissioning	Numeric (12)	3,000,000
OPC (Excluding D&D)	Enter Other Project Costs, excluding one-for-one replacement and/or D&D costs. Other Project Costs are engineering design, development, startup and operations which are essential for project execution and are operating expense funds. D&D = Decontamination and Decommissioning	Numeric (12)	2,000,000
TEC	Total Estimated Construction = Total of TEC Construction + TEC Design	Non-Entry Field	N/A
TEC Construction	Enter the Total Estimated Construction cost estimated for the project. If a separate Line Item budget request has not been made, then the associated Operating Expense or Major Items of Equipment funds should be shown.	Numeric (12)	2,000,000
TEC Design	The total Project Engineering and Design portion in the Budget Request.	Numeric (12)	300,000

<table>
<tr><th>SCREEN LABEL</th><th>FIELD DESCRIPTION</th><th>TYPE (LENGTH)</th><th>EXAMPLES</th></tr>
<tr><td>TOTAL Request</td><td>Grand total for this Budget Request = TEC + OPC</td><td>Non-Entry Field</td><td>N/A</td></tr>
<tr><td>Compare Funding Profile</td><td>Dropdown to allow selecting a different Funding Profile – to compare against the profile selected to view. Only the Total Requests are compared.
<table><tr><td>CBR</td><td>Congressional Budget Request</td></tr><tr><td>CD-2</td><td>Performance Baseline (CD-2)</td></tr><tr><td>IPL</td><td>DOE Integrated Priority List</td></tr><tr><td>OMB</td><td>Office of Management and Budget</td></tr><tr><td>BCP</td><td>Baseline Change Proposal</td></tr></table></td><td>List of Values</td><td>User selects a value from the list and does not type in a value.</td></tr>
<tr><td>Difference</td><td>For each Fiscal Year, this is the current TOTAL Request Minus the TOTAL Request for the Comparison Funding Profile.</td><td>Numeric (12)</td><td>-2,750,000
404,000</td></tr>
<tr><td colspan="4">Add/Edit KPPs</td></tr>
<tr><td>CD or BCP</td><td>CD level or BCP for which the KPP was created or updated. The KPP Event data element stores the name of this event.
<table><tr><td>CD-0</td><td>Approve Mission Need</td></tr><tr><td>CD-1</td><td>Approve Alternative Selection and Cost Range</td></tr><tr><td>CD-2</td><td>Approve Performance Baseline</td></tr><tr><td>CD-4</td><td>Approve Start of Operations or Project Completion</td></tr><tr><td>BCP</td><td>Baseline Change Proposal</td></tr></table></td><td>List of Values</td><td>User selects a value from the list and does not type in a value.</td></tr>
<tr><td>KPP No</td><td>The unique, sequentially numeric identifier for each Key Performance Parameter (KPP).</td><td>Numeric (3)</td><td>4
19</td></tr>
<tr><td>KPP Planned Scope</td><td>A brief narrative that describes the minimum or threshold value of the planned or intended characteristics, functions, requirements or design basis that, if changed, would have a major impact on the facility or system performance, schedule, cost and/or risk, or the ability of the interfacing project to meet its mission requirements. Update KPPs as the project progresses through planning and design stages.</td><td>AlphaNum (255)</td><td>Feasibility Study Completed and Documented
Cost/Benefit to DOE Document</td></tr>
<tr><td>KPP Delivered Scope</td><td>A brief narrative that describes the actual, delivered Key Performance Parameter (KPP) for the project.</td><td>AlphaNum (255)</td><td>Solar Energy Building is complete and occupied.</td></tr>
<tr><td>KPP Validated Yes/No</td><td>An indicator that tells if the Key Performance Parameter (KPP) was validated.</td><td>List of Values
Default:
Blank</td><td>Blank
Yes
No</td></tr>
<tr><td>Date Updated</td><td>The date that the KPP was updated.</td><td>Non-Entry Field</td><td>12/31/2020</td></tr>
<tr><td>Updated By</td><td>The username of the person who updated the KPP.</td><td>Non-Entry Field</td><td>John Smith</td></tr>
<tr><td colspan="4">Project Overview Report</td></tr>
<tr><td colspan="4">Please see the “Add/Edit/View Project” Section in this document.</td></tr>
</table>

SCREEN LABEL	FIELD DESCRIPTION	TYPE (LENGTH)	EXAMPLES
	All Attachments		
Code	The PARS II object or event to which this attachment is attached. Project Gateways / Critical Decisions Project Gateway Revisions / CD Changes (e.g., BCP after approval of CD-2) Project Definition / Project Setup Project Status / Project Information	List of Values	User selects a value from the list and does not type in a value.
Type	The type of attachment. Narrative: Text entered by the user into a "free-text memo field". Type = AlphaNum (4000) Document: A user's file that has been attached. Type = any file on the user's PC; usually a Word or Excel or PDF file. Hyperlink: A hyperlink which, when clicked on, will bring up the referenced web page. Type = URL	List of Values	User selects a value from the list and does not type in a value.
Title	The title of the electronic document to be attached to the project. Note: documents to be attached must not be categorized as "sensitive" or "classified." Acquisition Executive Delegation memos Risk Management Plan and Risk Assessment updates Contractor Project Performance/Status Reports (monthly or as required by the contract) Quarterly Project Performance Reports/Briefing Slides Follow-up status on EIR/IPR findings where a corrective action plan was left open Program Office Project Review Reports (to include peer reviews) APM Management Review Reports	List of Values	**In the case of Attachment Title – if none of the listed titles is appropriate, the user can type a different title string into the field.** Example: Interconnection Security Agreement (ISA) document. Type = AlphaNum (100)
Document No. (AKA Doc #)	The official identification number or code assigned to this document, if available.	AlphaNum (30)	1 A100-a 1234-AA-N
Version	The official version number or code affixed to this document, if available.	AlphaNum (30)	1998-ABC-120 110
Description	A text description of the attachment, providing additional information such as the attachment sub-title.	AlphaNum (80)	This document gives more details on the status of the project.
Uploaded By	The username of the person who updated the attachment.	Non-Entry Field	TRNFPD01
Uploaded Date	The date that this attachment was first uploaded.	Non-Entry Field	12/31/2020
Updated By	The username of the person who updated the attachment.	Non-Entry Field	TRNFPD01
Updated Date	The date that this attachment was last updated.	Non-Entry Field	12/31/2020

SCREEN LABEL	FIELD DESCRIPTION	TYPE (LENGTH)	EXAMPLES
PROJECT PERFORMANCE			
CPR Dashboard			
WBS Number	Work Breakdown Structure Number	Non-Entry Field	N/A
Description	Description of the WBS Number	Non-Entry Field	N/A
(Inc) BCWS	Budgeted Cost of Work Scheduled	Non-Entry Field	N/A
(Inc) BCWP	Budgeted Cost of Work Performed	Non-Entry Field	N/A
Actual	The expenditures that were recorded as occurring.	Non-Entry Field	N/A
SV	Schedule Variances	Non-Entry Field	N/A
CV	Cost Variances	Non-Entry Field	N/A
(Cum) BCWS	Budgeted Cost of Work Scheduled	Non-Entry Field	N/A
(Cum) BCWP	Budgeted Cost of Work Performed	Non-Entry Field	N/A
Actual	The expenditures that were recorded as occurring.	Non-Entry Field	N/A
SV	Schedule Variances	Non-Entry Field	N/A
CV	Cost Variances	Non-Entry Field	N/A
BAC	Budget At Completion	Non-Entry Field	N/A
EAC	Estimate At Completion	Non-Entry Field	N/A
VAC	Variance At Completion	Non-Entry Field	N/A
Schedule Dashboard			
Project	The official name of the project as approved by the Acquisition Executive.	Non-Entry Field	N/A
Description	A brief description of the project's scope, schedule and budget.	Non-Entry Field	N/A
ETi	Elapsed Time Index. The proportion of time consumed in the project versus time planned. It is calculated as Baseline Original Duration / Actual Duration.	Non-Entry Field	N/A
Activity Sub-Dashboard (if a WBS item in Schedule Dashboard has Activities, drill down to see them)			
Activity	Name of the Activity	Non-Entry Field	N/A
Description	Description of the Activity	Non-Entry Field	N/A
Org Dur	Original Duration	Non-Entry Field	N/A
Act Dur	Actual Duration	Non-Entry Field	N/A
Rem Dur	Remaining Duration	Non-Entry Field	N/A
ETi	Elapsed Time Index. The proportion of time consumed in the project versus time planned. It is calculated as Baseline Original Duration / Actual Duration.	Non-Entry Field	N/A
%	Percent Complete	Non-Entry Field	N/A
ASDATE	Actual Start Date	Non-Entry Field	N/A
AFDATE	Actual Finish Date	Non-Entry Field	N/A
ESDATE	Early Start Date	Non-Entry Field	N/A
EFDATE	Early Finish Date	Non-Entry Field	N/A
LSDATE	Late Start Date	Non-Entry Field	N/A
LFDATE	Late Finish Date	Non-Entry Field	N/A
B-Start	Baseline Start Constraint Date	Non-Entry Field	N/A
B-Finish	Baseline Finish Constraint Date	Non-Entry Field	N/A
Slip Start	How much the current Start Date has slipped from the baseline	Non-Entry Field	N/A
Slip Finish	How much the current Finish Date has slipped from the baseline	Non-Entry Field	N/A
Free Float	The amount of time the activity can be delayed without delaying the early start of any immediate successor activities.	Non-Entry Field	N/A
Total Float	The amount of time that the activity can be delayed from its early start without delaying the project finish date.	Non-Entry Field	N/A
Critical	Yes = this activity is on the Critical Path; No or blank = this activity is Not on the Critical Path	Non-Entry Field	N/A

SCREEN LABEL	FIELD DESCRIPTION	TYPE (LENGTH)	EXAMPLES
Timephased Dashboard			
WBS Number	Work Breakdown Structure Number	Non-Entry Field	N/A
Description	Description of the WBS Number	Non-Entry Field	N/A
Element	S – BCWS P – BCWP A - ACWP	Non-Entry Field	N/A
Prior	Aggregated **prior** FY financials for that item.	Non-Entry Field	N/A
Period Numbers	Period numbers	Non-Entry Field	N/A
ROP	Rest Of Periods – aggregated **subsequent** FY financials for that item.	Non-Entry Field	N/A
MR Dashboard			
Attachment	A brief narrative associated with the transaction.	Non-Entry Field	N/A
Transaction	The transaction date related to a particular posting to MR.	Non-Entry Field	N/A
Balance	The MR balance at the transaction date.	Non-Entry Field	N/A
Credit	An amount added to the MR balance.	Non-Entry Field	N/A
Debit	An amount subtracted from the MR balance.	Non-Entry Field	N/A
Remarks	The WBS/OBS number, activity or resource associated with the transaction.	Non-Entry Field	N/A
HELP			
About			
Version 8.0.20101108	Version number of Dekker iProgram COTS product, upon which PARS II is based. With Version=8.0 plus build-date=20101108 (yyyymmdd)	Non-Entry Field	V8.1.20101108

DEFINITIONS OF TERMS

TERM	DEFINITION
Baseline Change Proposal	A document that provides a complete description of a proposed change to an approved baseline, including the resulting impacts on the project scope, schedule, design, methods, and cost baselines. (DOE O 413.3B)
Capital Asset Program	A group of related capital asset projects managed in a coordinated way to obtain benefits and control not available from managing them individually. (DOE O 413.3B)
Contingency	The portion of the project budget that is available for risk uncertainty within the project scope, but outside the scope of the contract. Contingency is budget that is not placed on the contract, and is included in the Total Project Cost. Contingency is controlled by Federal personnel. (DOE O 413.3B)
Decommissioning	Takes place after deactivation and includes surveillance and maintenance, decontamination, and/or dismantlement. These actions are taken at the end of the life of a facility to retire it from service with adequate regard for the health and safety of workers and the public and protection of the environment. The ultimate goal of decommissioning is unrestricted release or restricted use of the site. (DOE O 413.3B)
Decontamination	The removal or reduction of residual radioactive and hazardous materials by mechanical, chemical or other techniques to achieve a stated objective or end condition. (DOE O 413.3B)
Directed Change	A change caused by some DOE Policy Directives (such as those that have force and affect of law and regulation), Regulatory, or Statutory action and is initiated by entities external to the Department, to include external funding reductions. (DOE O 413.3B)
Facility Construction	A project to construct buildings and functional systems, such as equipment, process systems and associated piping, landfills, and impoundments. A facility is usually associated with a unique process or operation at a given location. (DOE G 430.1-1, Appendix A)
Federal Program Manager	An individual in the headquarters organizational element responsible for managing program and, until designation of the Federal Project Director, its assigned projects. They ensure that all the projects are properly phased, funded over time, and each project manager is meeting their key milestones. They are the project manager's advocate, ensure proper resourcing, and facilitate the execution process. They predict programmatic risks and put mitigation strategies in place so that projects are not affected. (DOE O 413.3B)
Information Technology	A project to acquire any equipment, interconnected system, or subsystem of equipment used in the automatic acquisition, storage, manipulation, management, movement, control, display, switching, interchange, transmission, or reception of data or information by an executive agency. The equipment can be used by an executive agency either directly or by a contractor that requires the use of such equipment in performing a service or furnishing a product. Information technology includes computers, ancillary equipment, software, firmware, and similar procedures, services, and resources. (DOE G 413.3-14)
Infrastructure Improvements	Projects to repair, replace, or improve certain facilities, structures, roads, and utilities (collectively referred to as infrastructure) at a site to enhance or enable DOE to continue ongoing operations, scientific testing, and routine maintenance. (DOE/EA-1566)
Major Items of Equipment	A project to acquire capital equipment or automated information system components with a total estimated purchase value of $2,000,000 or more, including costs that are capitalized and not related to construction. (DOE M 135.1-1A)
Management Reserve	An amount of the total contract budget withheld for management control purposes by the contractor. Management reserve is not part of the Performance Measurement Baseline. (DOE O 413.3B)
Non-Nuclear Facility	A facility with potentially releasable quantities of radioactive materials that are less than 40 CFR 302 levels, but have potentially releasable quantities of hazardous chemicals meeting 40 CFR 302, Table 302.4. (IP-425-01, Rev. 1)
Non-Contract Costs	Those costs related to projects that are outside the prime contracts (design and construction), PMB, MR and fee, and DOE contingency. (EVMS Gold Card)
Nuclear Facility (Hazard Category 1, 2, or 3)	A reactor or a non-reactor nuclear facility where an activity is conducted for or on behalf of DOE and includes any related area, structure, facility, or activity to the extent necessary to ensure proper implementation of the requirements established by 10 CFR 830. A facility in which activities or operations involve radioactive and/or fissionable materials in such form and quantity that a nuclear hazard potentially exists to the employees or the general public. (IP-425-01, Rev. 1)

TERM	DEFINITION
Other Project Costs (OPCs)	All other costs related to projects that are not included in the Total Estimated Cost. OPCs will include, but are not limited to: research and development; pre-authorization costs prior to start of conceptual design; plant support costs during construction, activation, and startup; NEPA documentation; project data sheets; Conceptual Design Report; surveying for sitting; and evaluation of RCRA/EPA/State permit requirements. (DOE O 413.3B)
Project Assessments	Project performance assessments are determined by quantitative and qualitative reviews. Elements to be reviewed include but are not limited to EVMS data, contractor's monthly reports, acquisition management practices, risk management status, project reviews, site visits, staffing, budget submittals, and discussions with the IPT members. Ratings are assessed against the current approved performance baseline: (DOE O 413.3B) • Green – Project is expected to meet its current performance baseline. • Yellow – Project is potentially at risk of not meeting an element of the current performance baseline. • Red – Project is highly at risk of requiring a change to the Performance Baseline by the AE or is not being executed within the Acquisition Strategy and Project Execution Plan.
Project Closeout	Occurs after CD-4, Project Completion, and involves activities such as performing financial and administrative closeout, developing project closeout report, developing lessons learned reports, and other activities as appropriate for the project. (DOE O 413.3B)
Radiological Facility	A facility with quantities of radioactive materials that are less than Hazard Category 3 levels, but have potentially releasable quantities of radioactive materials meeting 40 CFR 302.4, Appendix B. (IP-425-01, Rev. 1)
Restoration or Remediation	A project to cleanup and restore sites contaminated with hazardous substances during past production or disposal activities. (DOE G 430.1-1, Appendix A)
Total Estimated Costs (TECs)	All engineering design costs (after conceptual design), facility construction costs, and other costs specifically related to those construction efforts. These are typically capitalized. TECs will include, but is not limited to: project, design, and construction management during conceptual, preliminary, and final design; contract modifications (to include equitable adjustments) resulting in changes to these costs; design and construction management reporting; contingency and economic escalation for TEC-applied elements; contractor support directly related to design and construction; equipment rental and refurbishment. (DOE O 413.3B)

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