Project Assessment and Reporting System (PARS)

User Manual
version 3.5

March, 2005

United States Department of Energy
Office of Management, Budget, and Evaluation (OMBE)
Office of Engineering and Construction Management (OECM)

Table of Contents

Table of Figures

1. Introduction

1.1. What is PARS?

PARS stands for Project Assessment and Reporting System. It is part of the DOE's project reform initiative that was launched in June 1999. A key requirement for this initiative is a directive that the Office of Management, Budget and Evaluation (OMBE) establish a project tracking and control system. PARS was specifically designed to fulfill this requirement. Since September 2000, Project Performance Corporation has worked closely with the Office of Engineering and Construction Management (OECM) to develop this system. The purpose of PARS is to deliver project status and assessment information to Department of Energy (DOE) senior managers and key program stakeholders.

1.1.1. Web Enabled Database

PARS is a web-enabled distributed database. Any person with a valid username and password can use the system with nothing more than an Internet connection and a browser. See System Requirements. Federal Project Directors, or their appointed designee, may enter monthly progress data on all projects under their management. This data is maintained in a centralized database for the purpose of progress reporting. Senior executives at headquarters or in the field can run reports to assess progress on projects. With this tool, the department has a common structure for reporting the current status of all acquisition programs that is timely, accurate, complete and reliable.

1.1.2. Reporting System

In creating PARS, the premier design consideration is its reporting capabilities. PARS has been designed so that the user can view, create, change, save, and share reports. The report generator offers the flexibility to filter, sort, group, sum, graph, and modify column properties. PARS provides a set of built-in standard reports available to all users, shared reports that are created by users and shared with members of the user community, and personal reports that can be customized and saved for easy retrieval. There are also pre-formatted customized reports, such as the Quad Report, that are specifically designed to present consolidated project data in a prescribed format.

1.1.3. Assessment System

The powerful reporting capabilities of PARS enable users to quickly assess the status of ongoing projects and programs. Data can be presented in either a conventional tabular format or graphically. These capabilities facilitate the rapid assessment of trends and developments on projects or in programs. The database also provides text fields for project managers to type in narratives explaining reported cost, schedule, or other progress variances.

The project assessment system is based on Earned Value Management System (EVMS) standards. All EVMS calculations conform to the ANSI ANS/EIA 748 standards, supplemented with additional acquisition metrics required by the department. Federal Project Directors (or their appointed designee) are responsible for entering monthly Earned Value (EV) data at the very highest summary level for their projects. The EVMS provides cost and schedule performance metrics that report progress against an integrated baseline. These metrics are effective summary level project measurements that senior executives can use to assess current project and program status.

1.2. About This User Manual

This manual is your comprehensive guide to navigating and using PARS 3.5. You will note that the manual includes special keywords set off from the rest of the text by special characters or formatting. The manual uses the following conventions to distinguish among the various menus, selections, and buttons that appear throughout the application:

- ***Menu Name*** **–** These include the menus in the Navigation Bar (***Home Menu***, ***Records Menu***, ***Reports Menu***, and ***Help Menu***), as well as the ***Record Item Menu***, ***Report Header Menu***, and ***Column Menu***.
- *Menu Selection* **–** These include all items that are contained in the above-mentioned menus.
- <Button> - These include all actions that required the clicking of a button on the screen such as <Save>.

2. Accessing PARS

2.1. System Requirements

To run PARS, you will need Internet access and Microsoft Internet Explorer (IE) versions 5.5 or higher. We recommend using IE 6.0 or greater. At this time, the application has only been tested for compatibility with IE. We cannot guarantee that PARS is compatible with Netscape or Firefox browsers. You may lose some functionality when using these other browsers. PARS has not been designed or tested with Apple computers or Macintosh operating systems.

If you are using Windows NT, Windows 2000, or Windows XP operating systems, you will need administrator privileges for your PC to load ChartFX, a self-loading graphics plug-in. If you do not have administrator privileges to load software on your PC, call your local computer support help desk and request their assistance. The system will function without the plug-in, however, you will not be able to view or print charts and graphs.

2.2. Account Setup

Setting up your PARS account involves three separate steps: submitting a registration request, account approval, and setting up your password. The following sections detail the account setup process.

2.2.1. Registering for an Account

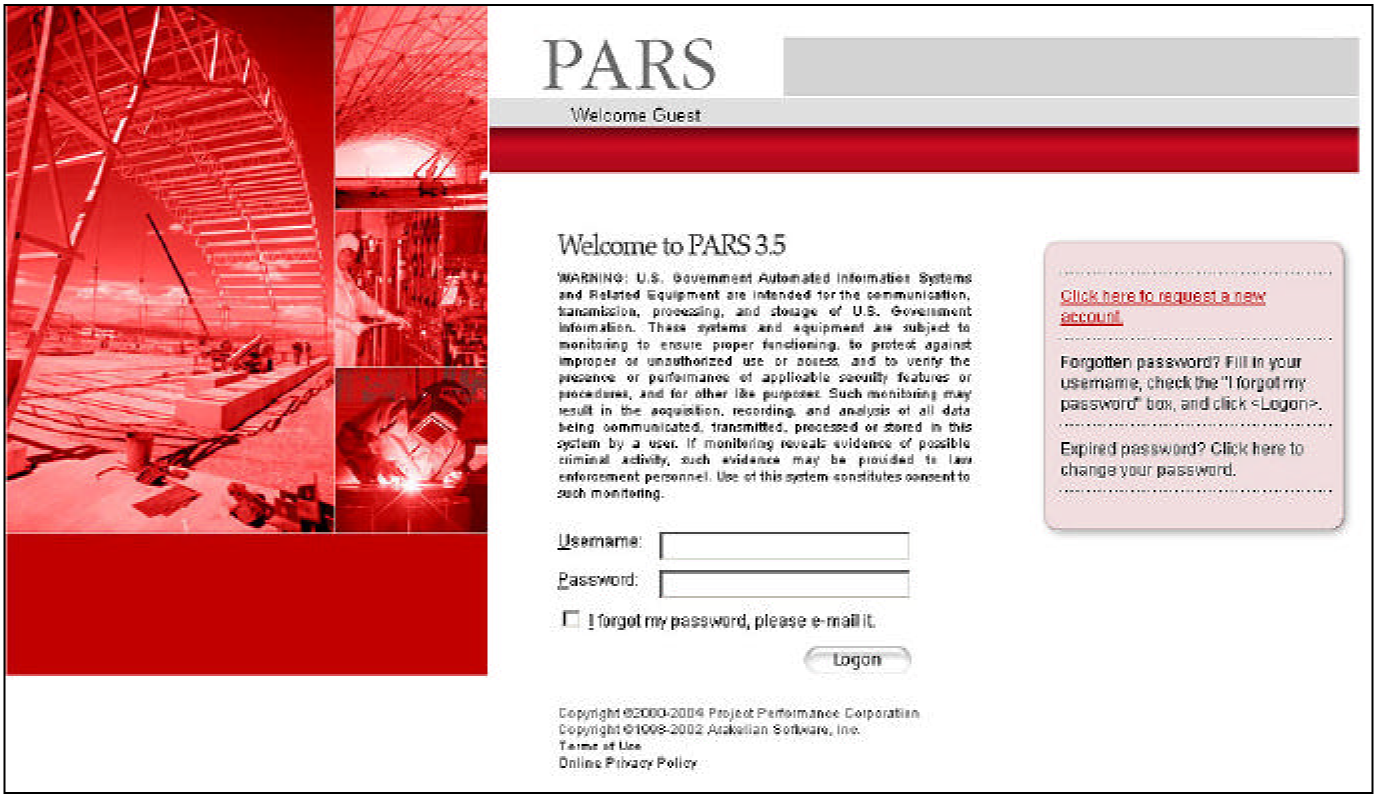

Figure 1: Logon Screen – Request a New Account

To register for a PARS account, first go to the PARS logon page: https://pars.energy.gov. On the right-hand side of the screen, click on the link "Click here to request a new account," shown circled in Figure 1. The link will bring you to the account wizard, which will step you through the process of entering all of the needed information. The first screen of the wizard is shown below in Figure 2. All of the wizard steps are listed on the left side of the screen.

Pick a username that you will be able to remember. If the username you have chosen is already taken, you will receive an error message and be asked to pick a different name. All of the required fields are marked by the white arrow in red circle icon. Please fill out your information as completely as possible.

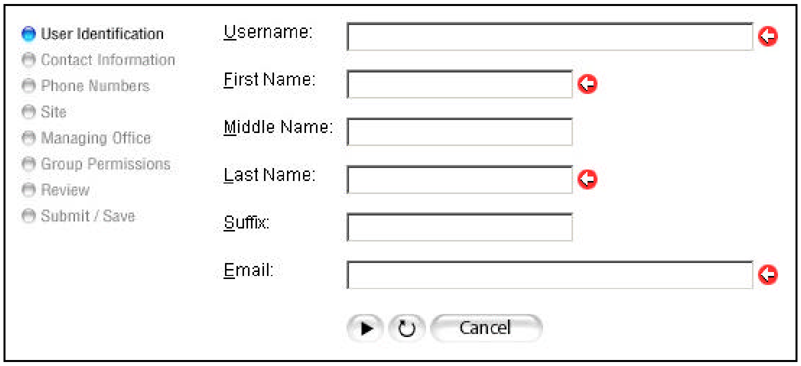

Figure 2: Account Wizard - Register a New Account

In order to submit your account request, you will have to select your Program or Site Administrator from the drop down list. The person you select will be responsible for approving your registration request. Before submitting your account request, please carefully review the information you have entered, and correct errors as needed.

Once you have submitted your account request, you will receive a confirmation email that your request has been received. The administrator that you selected will also receive notification of your pending registration. The administrator will assign you to the appropriate permissions group when approving your account. After your account has been approved, you will receive email notification with directions for obtaining a password.

If you are a Site or Program Administrator seeking a PARS account, please contact the PARS HelpDesk at 703-748-7022, or email parshelp@ppc.com.

2.2.2. Approving an Account Registration or Account Change

If you are a Program or Site Administrator you may receive account approval requests from current and potential PARS users. Approval is required for all new accounts and permission level changes. You will receive an email alerting you that your approval for an account or account change has been requested. When you log into PARS, you will find the new user record in your Inbox. Click on the record to open it. You must review the person's account information prior to approving the account request.

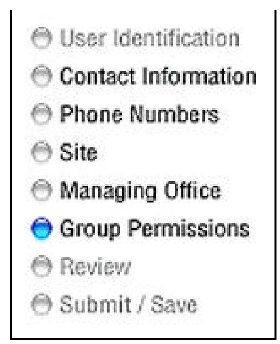

Figure 3: Account Wizard Navigation

When you open the record, you will likely be brought to the Group Permissions page since the permissions level is a required field. Please go to the contact information page to ensure that you know the person making the request and that you are the appropriate administrator for this person. You can navigate the other pages of account information using the buttons on the left-hand side of the screen, shown in Figure 3. Simply click the page to which you want to navigate.

If you do not know the person making the request, or feel that you are not the appropriate administrator to approve the user's account, please contact the PARS HelpDesk at 703-748-7022, or email parshelp@ppc.com.

When you are certain that you will approve this account request, you will need to determine the appropriate permissions level for this person. At the Group Permissions page, use the drop down field to assign the permissions group. Please see Section 2.3 Rights and Permissions for a description of each permissions group.

Once you have accepted the user account, an email notification will be sent to the new user with instructions for obtaining a password.

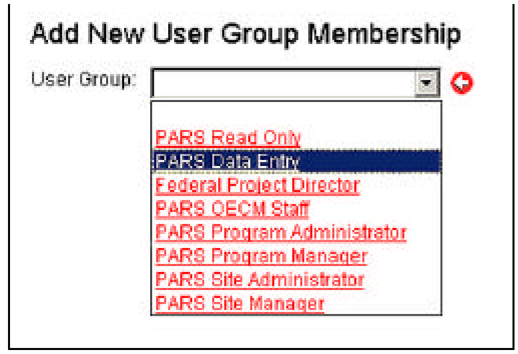

Figure 4: Assign Group Permissions

2.2.3. Creating a Password

Once your account has been approved, you will be notified via email. This email will also provide you with steps for creating a password. For security reasons, passwords are never sent through email, and are only stored in a one-way encrypted hash, so they are irretrievable. PARS adheres to the DOE Standards from the DOE Password Guide: DOE G 205.3-1. All passwords must meet these requirements. Your password is accepted by the system only when ALL of the standards are met.

2.2.4. Forgotten or Expired Password

PARS has two ways of changing your password, depending on whether you know what your old password was, or if you have forgotten it. If you remember your password, and need to change it because it has expired or someone else has obtained it, please go to the PARS logon page, https://pars.energy.gov, and click on the link “Expired Password? Click here to change your password.” Figure 5 shows the link, located in the Helpful Hint box on the Logon Screen. After clicking on the link, you will be brought to a data entry screen and prompted to enter your old password and a new password of your choosing.

If you have forgotten your password, you must also go the PARS Logon page. Please follow the following steps to reset your password:

1. Enter your PARS Username in the field labeled "Username."
2. Click to check the box, "I forgot my password, please email it."
3. Left click on the button labeled, "Logon"

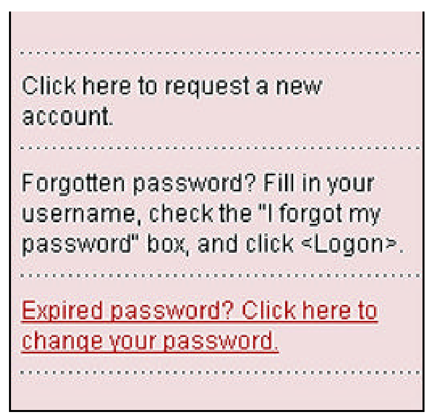

Figure 5: Password Expiration Link

4. An acknowledgement should appear indicating that an email has been sent to your email address. This email contains a link to the Reset Password page where you can change your password. Please note that you have approximately ONE HOUR from the time you receive the email to make any changes. If the link expires, then you will have to start over with Step 1.
5. Open your email program and view the email sent from ParsHelp.
6. Click on the hyperlink to open the Reset Password page on the PARS website.
7. Enter your new password in the box labeled "New password." Retype your new password in the box labeled "Confirm."
8. Left click on the button labeled, "Reset."

Figure 6: Forgotten Password Recovery

If your new password meets the criteria outlined in DOE N 205.3-1, your change will be accepted and acknowledged. If not, you will be prompted to re-enter a valid password. PARS adheres to the DOE Standards from the DOE Password Guide: DOE G 205.3-1. All passwords must meet these requirements. Your password is accepted by the system only when ALL of the standards are met.

2.3. Rights and Permissions

PARS is an open system, so anyone with a valid account can access and view the data for any project in the system. Through permissions groups, we have restricted who has the ability to enter data, and more importantly, accept data for individual projects. When your account is approved, your administrator assigns you to the appropriate permissions group. Through this association, you inherit the privileges of that group. Presently, there are nine groups (in order of graduated privileges): Read Only, Data Entry, Federal Project Director, Program Manger, Site Manger, Site Administrator, Program Administrator, OECM Staff, and OECM Administrator.

The sections that follow describe the basic rights and permissions of the selected groups.

2.3.1. Read Only

The Read Only group is restricted to viewing data, and designing and running reports. You have access to the **RowMenu** in order to *View Record*, *View Full Record*, and *View Quad Chart*; however, the *Edit*, *Delete,* and *Undo* selections will not appear. The Read Only group is designed for those users who do not have a responsibility to maintain the data, but have a need to view data or access reports. Since PARS is an open system, a Read Only user does not need to be associated with a particular project, site, or managing office in order to view data or run reports.

2.3.2. Data Entry

As a member of the Data Entry group, you can enter, edit, and mark for deletion all project data. When you use the **RowMenu**, the *Edit, Delete*, and *Undo* selections are available to you, along with *View Record*, *View Full Record*, and *View Quad Chart*. Your changes will appear in red, and will not be committed to the database until a user with *Accept* privileges, like your Project Director, accepts your changes. Since PARS is an open system, a Data Entry user does not need to be associated with a particular project, site, or managing office in order to view or enter data.

To facilitate the review and acceptance process, you should send the newly added or updated record to the appropriate user with comments by selecting *Send* from the **Row Menu**. Please see Section 3.2.6.3 Using your Inbox for more information.

2.3.3. Federal Project Director

As a member of the Federal Project Director group, you can enter, edit, and delete any data for projects that you are responsible for. You are also able to commit changes to the database that both you and other users have made. Your commit capability is restricted to only those projects for which you appear in the Contacts Table as the Federal Project Director. Your name as entered in your account registration must exactly match your name as entered in the Contact Table for your accept privileges to work. If the names are different, you will receive an error when you try to *Accept Changes*.

When you use the **Row Menu**, the *Edit* and *Delete* selections available, along with *Accept changes*. By selecting *Accept changes* you are committing all changes to the database, turning the data from red to black. Please review all changes before *Accepting*.

Alternately, you may have a record in your Inbox sent to you by a Data Entry user on your project. First click on the inbox items to view the record's contents. Use the **Row Menu** to *Edit*, *Undo*, or *Accept Changes* to it. Please see Section 3.2.6.3 Using your Inbox for more information about using your Inbox.

2.3.4. Program Manager

As a member of the Program Manager group, you can enter, edit, and delete any project data that you are associated with. In addition to the rights associated with the Data Entry group, you can accept changes to those projects for which you are listed as Program Manager in the Contacts Table. Your name as entered in your account registration must exactly match your name as entered in the Contact Table for your accept privileges to work. If the names are different, you will receive an error when you try to *Accept Changes*.

When you use the **Row Menu**, the *Edit* and *Delete* selections available, along with *Accept changes*. By selecting *Accept changes* you are committing all changes to the database, turning the data from red to black. Please review all changes before *Accepting*.

2.3.5. Site Manager

As a member of the Site Manager group, you can enter, edit, delete and accept all project data that you are affiliated with according to the specific sites and managing program office identified in your user profile. Your user profile is created for you when your PARS account is established. Your privileges extend beyond the rights associated with the Data Entry group and the Federal Project Director and Program Manager groups. You can enter, edit, delete, and accept data for all projects that match both your site AND your managing program office affiliation(s). For example, as a member of the Oakland Operations Office and the Science Program Office, you may be affiliated with Lawrence Livermore National Laboratory, Stanford Linear Accelerator Center, and Lawrence Berkeley National Laboratory. In this case, as a Site Manager, you will have rights and permissions over all Science projects executed at these three sites. However, you would not have privileges to accept changes to any NNSA projects located at Lawrence Livermore National Laboratory.

You will also have a responsibility to maintain project's Contact Table information, keeping it up to date. As described in the preceding sections, Federal Project Directors and Program Managers cannot accept data on their projects unless they are listed as the current contact (respectively) for each project they are associated with. If Project Directors and Program Managers are reassigned, then the project's Contact Table information must be updated to reflect these changes. Users with Administration privileges can freely accept changes to Project Directors and Program Managers on the project's Contacts list. Until you update the list, any Project Directors or Program Managers newly assigned to projects will not be able to accept data on their projects. Therefore, it is important that you keep the PARS database up to date with all Project Director and Program Manager personnel changes.

2.3.6. Site Administrator

As a member of the Site Administrator group, you can enter, edit, delete and accept all project data that you are affiliated with according to the specific sites identified in your user profile. Your user profile is created for you when your PARS account is established. Your privileges extend beyond the rights associated with the Data Entry group, the Federal Project Director and Program Manager groups, and the Site Manager group. You can enter, edit, delete, and accept data for all projects that match your site affiliation(s). For example, as a member of the Oakland Operations Office, you may be affiliated with Lawrence Livermore National Laboratory, Stanford Linear Accelerator Center, and Lawrence Berkeley National Laboratory. In this case, as a Site Administrator, you will have rights and permissions over all projects executed at these three sites.

You will also have a responsibility to maintain project's Contact Table information, keeping it up to date. As described in the preceding sections, Federal Project Directors and Program Managers cannot accept data on their projects unless they are listed as the current contact (respectively) for each project they are associated with. If Project Directors and Program Managers are reassigned, then the project's Contact Table information must be updated to reflect these changes. Users with Administration privileges can freely accept changes to Project Directors and Program Managers on the project's Contacts list. Until you update the list, any Project Directors or Program Managers newly assigned to projects will not be able to accept data on their projects. Therefore, it is important that you keep the PARS database up to date with all Project Director and Program Manager personnel changes.

2.3.7. Program Administrator

As a member of the Program Administrator group, you can enter, edit, delete and accept all project data that you are affiliated with according to the managing programs identified in your user profile. Your user profile is created when your PARS account is established. Your privileges extend beyond the rights associated with the Data Entry group, the Federal Project Director and Program Manager groups, and the Site Manager group. You can enter, edit, delete, and accept data for all projects that match your program affiliation(s). For example, if you are affiliated with the Science Program, you will have rights and permissions over all projects whose managing program is Science.

You will also have a responsibility to maintain project's Contact Table information, keeping it up to date. As described in the preceding sections, Federal Project Directors and Program Managers cannot accept data on their projects unless they are listed as the current contact (respectively) for each project they are associated with. If Project Directors and Program Managers are reassigned, then the project's Contact Table information must be updated to reflect these changes. Users with Administration privileges can freely accept changes to Project Directors and Program Managers on the project's Contacts list. Until you update the list, any Project Directors or Program Managers newly assigned to projects will not be able to accept data on their projects. Therefore, it is important that you keep the PARS database up to date with all Project Director and Program Manager personnel changes.

2.3.8. OECM Staff

The OECM Staff group has additional privileges to enter, edit, delete, and accept data in all the baseline fields. Under normal circumstances, all fields marked "baseline" (such as TPC Baseline and Project Completion Baseline) are initially populated whenever a critical decision (CD) 2 date is actualized. This occurs when an actual date is entered for CD-2 in the Critical Decision table. Once a baseline field is populated with data, it can only be edited by a member of the OECM Staff group. If you notice an error in a baseline field or have recently received a baseline change approval, contact the OECM Staff Representative to coordinate the changes.

2.3.9. OECM Administrator

The OECM Administrator has additional privileges to: (1) create and edit news announcements that appear on the Start Page, and (2) grant access by creating new users and assigning them to administrator groups. During the normal course of operation, however, user names, passwords, and their applicable rights will be assigned and distributed by the various administrators (Site Manager, Site Administrators, and Program Administrators). Please refer to Section 2.2 Account Setup to learn how to activate your account. Do not forward your request for a new account to the OECM Representative.

3. Using PARS

3.1. Navigation

3.1.1. Start Page

The Start Page is the first screen that appears upon logging into PARS. Your personalized Start Page displays the most common PARS functions. From this one page you can access many of the project entry and reporting features of PARS.

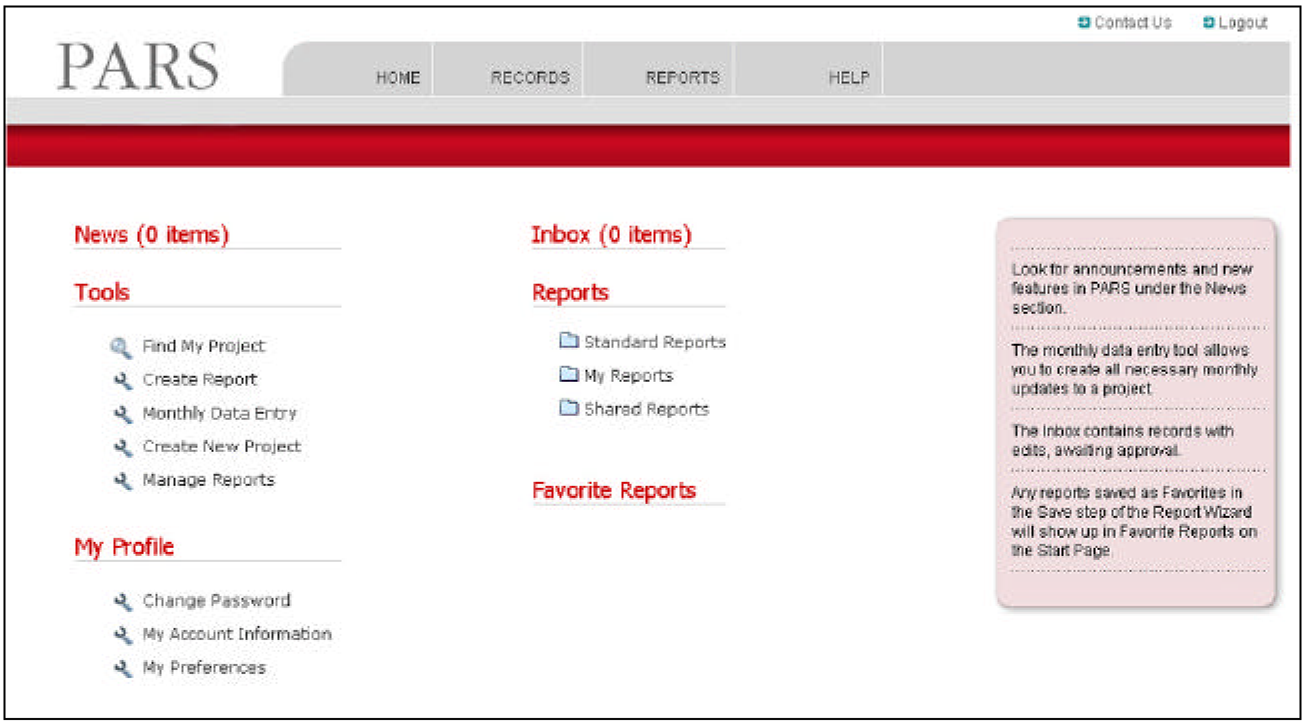

Figure 7: Start Page

3.1.1.1. News

The Start Page contains a News section, with links to reminders about PARS updates and announcements. Click on any item under the news section to read about that particular update, reminder, or announcement. Be sure to check here first if you have a question, as this section is particularly helpful as an initial reference for information about new features in PARS.

3.1.1.2. Inbox

On the start page, beside the News section is the Inbox section, which provides a direct link to your Inbox. Your inbox of new or modified data can be accessed by clicking directly on the items within this section. The number of items in your inbox will be displayed next to the section heading, in addition to being bulleted below. By clicking on the individual item, you can open that particular record.

3.1.1.3. Tools

One of the most valuable sections on your Start Page is the Tools section, located just below your News section. This section contains a set of tools that can be used to perform the major tasks within PARS.

Use the Find My Project tool to quickly bring up your desired project or projects. Clicking on this tool will bring you to a page called PARS Project Lookup, where you can type criteria to specifically call upon your project or list of projects. You can call up a project or list of projects based on its DOE Project ID, DOE Project Name, Site Name, Managing Office, and/or Status. Choose your project based on its project ID by selecting "=" in the Operator field, and by typing in your project's exact DOE project ID in the appropriate Value field. Click <Run> to bring up that project. To search for a project based on its DOE Project Name, again select "=" in the Operator field, type the project name in that field, and click <Run>. If you wish to search for your project based on its Site Name, or if you are trying to return a list of projects from a particular site, select the appropriate operator, type in the Site Name in the Value field, and click <Run>. To return a list of projects from a particular Managing Office, choose an operator, then select a Managing Office from the dropdown list in the Value field, and finally click <Run>. To see a list of projects with a particular Status, select an appropriate operator, choose a project status from the dropdown list in the Value field, and then click <Run>. You can select for projects fitting multiple criteria by choosing Operators and entering Values for more than one type of criteria. If you leave all Operator and Value fields blank and click <Run>, you will see a list of all projects in PARS.

To create a completely new report from scratch, use the Create Report tool. Clicking on the Create Report tool will bring you to the Report Wizard page, where you can build your own custom report from all of the data within PARS. For additional information about the Report Wizard, refer to the <u>Create Customized Report</u> section of this user manual.

The Create New Project tool allows you to enter information to create a new project within the PARS system. Click on this tool to be brought to a data entry screen for a new Project ID. In order to create a new project within PARS, you must fill in all required fields, indicated by the arrow to the right of the field. The most important field in creating a new project within PARS is the DOE Project ID field, because it is the DOE Project ID that ties every record within PARS to its respective project.

Another useful tool is the Manage Reports tool. Click on this tool and you will be brought to a list of all your reports including your Standard Reports, My Reports and Shared Reports. From this page you can organize your reports and delete reports from your My Reports list. For more information see the Manage Reports section of this manual.

3.1.1.4. Reports

The Reports section of the Start Page enables you to access a list of Standard, Shared and personally created My Reports. Click on the folder to view an expanded list of reports. You can run any of these reports from the page that opens next. Report types and additional information about reporting in PARS are described in the Reports section of this user manual.

3.1.1.5. My Profile

Also on the Start Page is a My Profile section, where you can view and modify your preferences and settings. Click on the Change Password link to change your user account password. This will bring you to a screen where you must type your PARS username, old password, new password (that you determine) and a confirmation of your new password. Be sure to look at the helpful hints on the right side of this screen for requirements and rules pertaining to the creation of a new password. These rules can also be found in the Account Setup: Password Creation section of this user manual.

To change the format of your charts and graphs, use the My Preferences link. Clicking on this will take you to a page where you can choose between three formats from the dropdown list. The preferences you set here will be stored with your user profile. They will be retained each time you logon.

3.1.1.6. Favorites

Favorite Reports gives you quick access to reports that you have marked as favorites (see Section 3.3 Reporting for more information). This section of the Start Page lists your favorite reports so that you can easily click on them without having to sort though all of your other reports. By clicking on the specific report in this section of the Start Page, you can directly run the report.

3.1.2. Navigation Bar

The PARS Navigation Bar, located at the top of each screen, can be used from any page within the PARS system. The **Home, Records, Reports** and **Help Menus** are found along the Navigation Bar. These tabs make navigation simple and allow you to easily and quickly distinguish between the different functions within PARS.

The items within the menus of these navigation tabs can be primarily accessed two ways. Selections from the menu can be made by scrolling through the numerous menu options using the scrollbar along the right side of the menu. In addition, all four of these navigation tabs can be clicked on individually to open up a separate page displaying their respective menus.

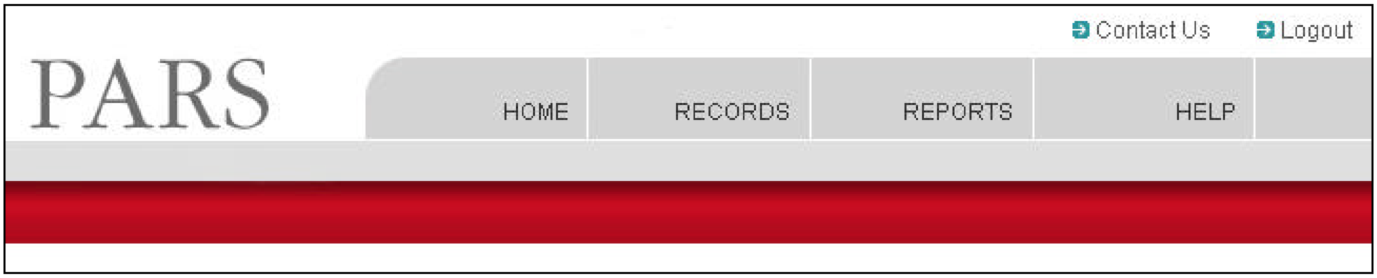

Figure 8: Navigation Bar

3.1.2.1. Home

The **Home Menu** provides you with the ability to navigate back to the Start Page or to your Inbox from any point in the system. You can also change your password and logout of the system from here.

To get back to the Start Page, click on *Start Page*. This will immediately link you directly back to your start page.

Clicking on any individual item under *Inbox* will allow you to open that particular record of new or modified data. The number of items in your inbox will be displayed next to the section heading, in addition to being bulleted below.

The *Change Password* option in the **Home Menu** enables you to change your account password. Click on this option to be brought to a screen where you enter your current user information and then choose a new password. If you use this option, your new password will be activated immediately, such that you can logon to PARS with this password.

The *My Preferences* menu option allows you to personalize your PARS account by selecting which format you would like your chart settings displayed. You can select one of three charting formats: static .jpeg, static .png, or interactive ChartFX. The interactive ChartFX format lets you modify or create different charting functions and layouts. The preferences that you set in *My Preferences* will be stored with your user profile. They will be retained each time you logon, but you can change them at any point in your PARS session by clicking on this option in the **Home Menu**.

To log out of your PARS session and to return to the logon page, click *Logout* in the **Home Menu**. This will automatically quit your session and log you out of your PARS session so that you can switch users or exit PARS.

3.1.2.2. Records

The **Records Tab** contains links to pages that will help you to create new records, enter your data and add new projects.

Use the *Create New Project* tool to enter a completely new project into PARS. Be sure to correctly enter the established DOE Project ID, as it is this ID that links all associated records to this project.

To enter new data and create a new record within PARS, select the appropriate table from the **Records Menu**. Refer to the data model in the **Help Menu** to determine which table to use for a specific entry. For example, if you wanted to add a new record for your monthly data entry you would go to the folder entitled *Earned Value* within the **Records Menu**. This contains links to create new EVM records and new EVM Narrative records. This is where you will be able to add new values and comments for your project's BCWS, BCWP, ACWP, LRE, MRR, and PCE for a particular month and fiscal year.

To add a new contact to a project, select *Contact* from the **Records Menu**. This menu option is very important when establishing rights for users within certain projects. This Contact information connects particular users to certain projects, so updating these records may be necessary. The contact type selected from within this menu option affects the data saving and accepting rights of the user.

You may at some point want to add a comment to your project. To do this, select *Comment* from the **Records Menu**. This will allow you to include a detailed comment about your overall project.

Another useful option available in the **Records Menu** is the option to add an attachment to your project. Click on *Attachment* and select your desired attachment to be added to the project within PARS. After entering the specific project ID of your project, you can attach files in a variety of formats including: .doc, .ppt, .pdf, .xls, .txt, .gif, etc.

3.1.2.3. Reports

The **Reports Menu** enables you to retrieve project data by running or creating reports. A report, previously known as a query, is a customized view of the data within PARS. In order to view any PARS data, you must run a report.

Under the **Reports Menu** there is another link besides the one on your Start Page to create a completely new report from scratch using the Create Report tool. Clicking on the Create Report tool will bring you to the Report Wizard page, where you can build your own custom report from all of the data within PARS. For additional information about the Report Wizard, refer to the Create Customized Report section of this user manual.

Another way of accessing the useful Manage Reports tool is via the **Reports Menu**. Click on this tool and you will be brought to a list of all your reports including your Standard Reports, My

Reports and Shared Reports. From this page you can organize your reports and delete reports from your My Reports list. For more information see the Manage Reports section of this manual.

The **Reports Menu** folder entitled *Standard Reports* lists several built-in reports, available to all users, which show the most commonly reported data within PARS. Standard Reports are formal reports that have been pre-created within PARS. These reports contain different sets of frequently accessed project data. The OECM Representative and PARS Administrator work together to create these reports. There are several overall reports and there are also reports specific to certain tables, separated into folders in the **Reports Menu**. These reports can also serve as templates for your own custom modifications. For more information about these reports, please refer to the Standard Reports section of this manual.

The *My Reports* folder contains all of your personally created reports. Using *My Reports* is a good way to easily retrieve a set of project data that is not already presented in a standard report. You can save any standard report under a new name such that the report will appear under *My Reports*. The report can then be adapted and modified. In this way, you can create a custom report (or modify a standard report) that meets your specific needs (see the Modifying Existing Report or the Create Customized Report sections of this manual). After creating (and saving) a custom report, it will be placed in the *My Reports* folder in the **Reports Menu** and a "My Reports" folder will also appear on your Start Page. All future custom reports that you create will also appear in this *My Reports* folder.

The **Reports Menu** folder entitled *Shared Reports* contains all the reports that have been shared with you by other users in the PARS community. All shared reports created by other users on the system will be located in your *Shared Reports* folder (remember, your own custom reports appear in your *My Reports* folder). If you select a report from this folder, you can run the report as normal. However, if an individual does not have the rights and permission to view the data, then he or she cannot view the report even though it is shared with him or her (see the Rights and Permissions section for further information). After creating a custom report, you have the ability to share the report with other users in the PARS community as well. When you save a report, select individual users and groups with whom you would like to share the report. For more information about how to share a report, please refer to the Share Report With Other Users section.

3.1.2.4. Help

The **Help Tab** gives you access to a menu containing resources and information about the PARS system. These resources will assist you in using the system and in answering your questions. The Help menu also provides access to numerous external links to sites of interest as well as contact information for the PARS Helpdesk. For additional help information, refer to the Help section of this user manual.

Information about the PARS system can be accessed by placing your mouse over the **Help** menu and selecting *About PARS*. This section provides brief purpose and background statements, the current release version, and links to the software development team.

A Getting Started Guide can be viewed by placing your mouse over the **Help** menu and selecting *Getting Started*. This document provides instructions in the form of a quick reference guide about how to start using PARS. Reading the *Getting Started* file is a great way to jump start your knowledge of PARS. It provides a quick overview of how to use the essential features of the system and will introduce you to the system without going into great detail.

Frequently Asked Questions (*FAQ*s) can be accessed by selecting *FAQ* from the **Help Menu**. FAQs are a set of commonly asked questions about the functionality of PARS. The objective of these questions is to explain some of the complexities of PARS in a simple and concise manner. The FAQs are condensed into a *FAQ Top Ten*, which is found within the **Help Menu** as well. The FAQ Top Ten lists nine of the most frequently asked questions. This is a good initial reference and can also be useful as a quick desk reference for PARS.

Click on the **Help Menu** option *Contact Us* if, after reviewing the online and downloadable help materials, you still have any questions or problems with PARS. This menu option offers further assistance with PARS by providing contact information for PARS support and a PARS DOE Technical Representative.

The *References* folder contains links to the PARS *User Manual* (available in a downloadable and printable .pdf format), a PARS data *Dictionary* (also available in .pdf), a PARS *Data Model* showing tables and fields that define the data structure of PARS, the *OMBE Memo*, and *Supported Functions* that can be used for the reporting feature within PARS.
The *External Links* folder contains links to DOE, OECM, programs, and program management websites that may provide useful for your project assessment and reporting needs.

3.1.2.5. Logout Button

The Logout quick button is located at the top, far right of the PARS screen. One click on this button, and your PARS session will be exited, bringing you to the logon page. From here, now that your PARS session is closed, you can log back on as the same user or as a different user, or you can completely navigate away from the PARS system.

3.1.2.6. Contact Us Button

The Contact Us quick button is located in the top right of the PARS screen, just to the left of the Logout quick button. If, after reviewing the online and downloadable help materials, you still have any questions or problems with PARS, use this button for further assistance with PARS. Click this button to see contact information for PARS support and a PARS DOE Technical Representative.

3.2. Data Entry

3.2.1. Database Basics

Individual database values are stored in fields. An example would be the Total Project Cost (TPC) for your project. Collectively, several fields are organized in a table. The collection is based on specific design considerations such as: commonality, reporting frequency, whether single or multiple values will be reported, etc. For example, TPC is organized in the same table as TEC and OPC. Each unique set of values is referred to as a record. In PARS, a record is usually associated with an individual project. As a further extension of this example, each set of values for TPC, TEC, and OPC relate to a specific project. Each record in the funding table must relate back to the Project ID table. This link is established by associating each record with the specific DOE Project ID. Therefore, it is not sufficient to simply enter TPC, TEC and OPC. You must also enter your DOE Project ID to associate the record with your project. It is often helpful to visualize a table in a tabular format with columns corresponding to the various fields and each row corresponding to a record.

3.2.2. PARS Data Model

The PARS database consists of 22 tables. Figure 9 presents the data model layout. For simplicity, no fields are included in the tables; only the table names appear on the top of each box. Table 1, following the figure, contains a brief description of each table's content and function. For a more detailed description of all the tables and fields, you can download the Data Dictionary (.pdf file) from the **Help Menu** in the navigation bar.

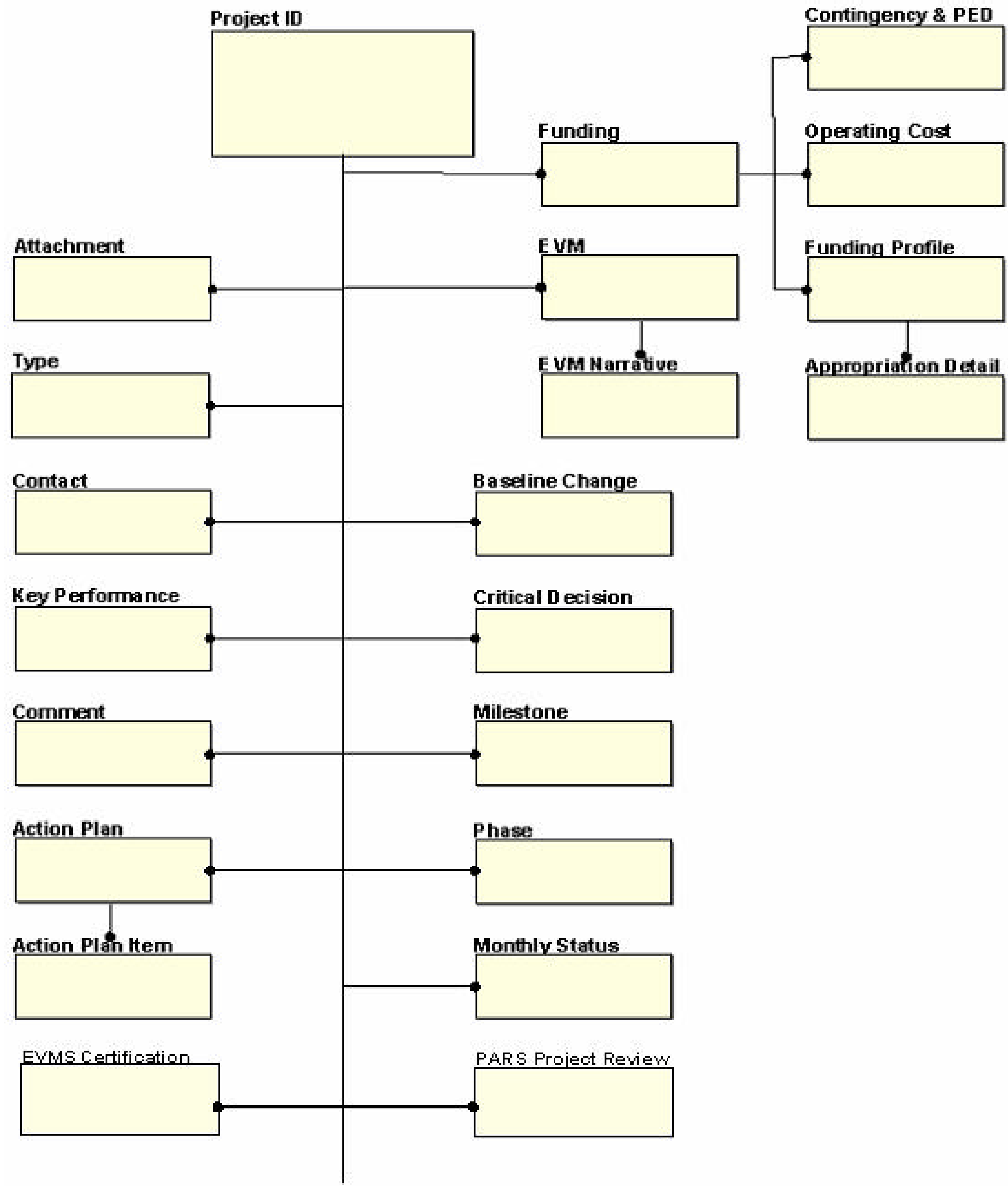

Figure 9: PARS Data Model

Table	Description
Project ID	Project identification table containing information about the project. This is usually the first table of information configured with project data when creating a new project.
PARS Project Review	Table containing information about project reviews performed by either internal or external organizations.
Action Plan	Table containing the name and current status of action plans for a project. This is the parent table to the Action Plan Items, which contains the individual tasks associated with the Action Plan.
Action Plan Item	Table containing the individual tasks that are part of an action plan. This is the child table to the Action Plan table.
Attachment	Table of all project attachments. Attachments can be MS Office documents, Adobe pdfs, or images (jpeg or gif).
Performance Measurement Baseline Change	Table containing baseline change information.
Type	Table containing project type descriptors.
Comment	Table containing comments on any aspect of the project.
Contact	Table containing key project team contact information.
EVM	Table containing monthly Earned Value Management data on a project.
EVM Narrative	Table containing monthly cost and earned value narratives for the project.
EVMS Certification	Table containing information about contractor review for EVMS certification.
Critical Decision	Table containing Critical Decision (CD) dates and approval status.
Key Performance	Table containing Key Performance Parameters (KPPs) for project.
Milestone	Table containing important project milestones.
Phase	Table containing the start and end dates for each phase of the project.
Watch List	Table containing Watch List identifiers for projects.
Monthly Status	Table containing monthly progress narratives for the project.
Performance Baseline	Table containing aggregate cost, funding, and appropriation data. This is the parent for the following tables: (1) Funding Profile, (2) Contingency, and (3) Operating Cost.
Appropriation Detail	Table containing appropriation details at the Congressional control level. This is a child to the Funding Profile table. Annual funding and appropriation amounts at the Congressional control level are rolled up in the Funding table.
Contingency & PED	Table containing annual contingency estimates. This is a child table to the Funding table. Values from this table are aggregated in the Funding table.
Funding Profile	Table containing annual funding and appropriation data as reported on the Project Data Sheet. This is both a parent table to the Appropriation Detail table and a child to the Funding table.
Operating Cost	Table containing annual operating estimates for the project. This is a child table to the Funding table. Values in the Operating Cost table are aggregated in the Funding table.

Table 1: Description of Data Tables

3.2.3. Frequency of Data Entry

The PARS requires that data elements be reported at different times during the project life cycle. Certain types of data are only entered once for the project, others are required to be updated periodically, or monthly. Figure 10 shows the frequency with which data should be entered or updated.

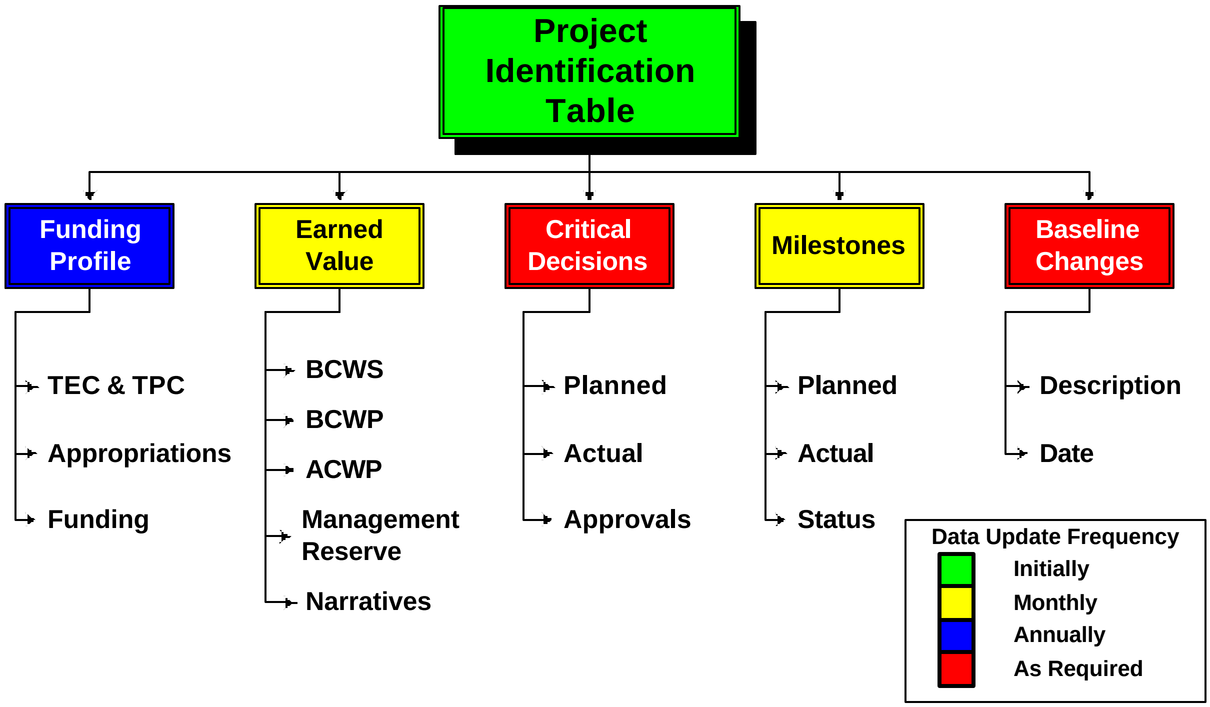

Figure 10: Data Entry Frequency Chart

3.2.4. Data Requirements

There are two types of required data that must be entered when performing data entry in PARS. The first is System Required. When a field is System Required, the field must be filled in prior to saving the record. If the field is not completed, you will receive an error message when you try to save. For instance, in most records, the *Project ID* field is required; without the appropriate Project ID, the record would not be linked to the correct project. System Required fields are marked with the icon shown in Figure 11.

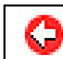

Figure 11: Required Field Icon

The other type of required data is OECM Required. These requirements are specified depending on the size of your project, as well as which managing office it falls under (SC, NNSA, etc.) and where in the project lifecycle the project currently is. The full OECM data requirements guidance is currently under development; however, the following list contains the guidelines currently in place:

- Critical Decision-0, Approve Mission Need, formally establishes a project and initiates a requirement for project status reporting through PARS. This requirement is applicable to all projects with a Total Project Cost (TPC) greater than $5 million.

- Starting at Critical Decision-2, project performance shall be reported monthly in PARS. This requirement applies to all projects with a TPC greater than $20 million.

Additional documentation for PARS data entry requirements is still being compiled by OECM.

3.2.5. Entering Data

Data can be entered into a field that is blank (an unpopulated record), or into a field that already contains an entry (a populated field). Unpopulated records can be "filled" simply by typing in the necessary data and then clicking on the <Save> button. Fields do not become populated until they are saved and accepted. Certain fields require data to be entered in specific formats. In all instances, data must be entered without formatting or units. Such formatting is displayed automatically by the system after data entry. For example, it is not necessary to type a dollar sign ($) prior to a number when entering a dollar amount. When entering numeric data, type the data exactly as you intend it to be displayed. The numeric data should display exactly as typed, but the system may truncate decimals in some instances. When entering words or letters, the entries will appear exactly as typed, so be aware that when abbreviations are used, they will be shown in the field. For date data types, the typical format to use is the standard mo/day/year, with either a 1- or 2-digit month and day (both are accepted by the system) and a 4-digit year entry.

Example: The date September 10, 2004 can be entered as 9/10/2004 or as 09/10/2004.

Some fields are populated based on the selection of an option from a drop-down or pick list. In this case, select the appropriate entry by clicking on the item, as shown in Figure 12. The item will then become highlighted and will fill the field.

Some fields in PARS are populated by the user, while others are calculated and system generated, based on the user's entries. If a field does not appear on a data entry screen, but does appear when viewing your project record, that field is system generated. Refer to the PARS Data Dictionary, available under the Help Menu within PARS, for additional information.

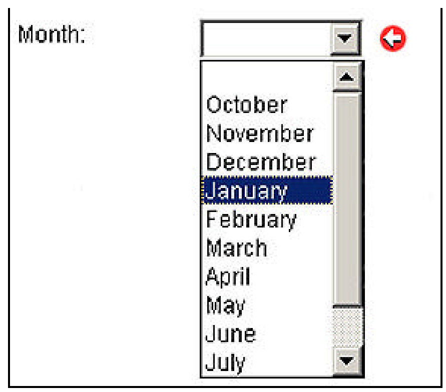

Figure 12: Example Picklist

3.2.5.1. Using the Records Menu

One way to add a record within the PARS system is to use the **Records Menu** on the navigation bar. The **Records Menu** is the tool that you can use to create any type of record for any project. To create a new record using this menu, please take the following steps:

1. Place your mouse over the **Records Menu** and select the table whose record you would like to add, shown in Figure 13.
2. An unpopulated record will appear for you to fill out. The DOE Project ID is the unique key that will associate this record with the rest of your project. If you incorrectly type this DOE Project ID, then you will see an error message requesting that you change your DOE Project ID, or you may erroneously attach the new record

to a different project. For more information on this topic, please see the Data Validation section.

3. Once the record has been populated, you must save the data by clicking either the <Save> or <Save/Done> buttons.
4. When all changes have been saved, follow the two-step data entry and review process described in Section 3.2.6 Saving and Accepting.

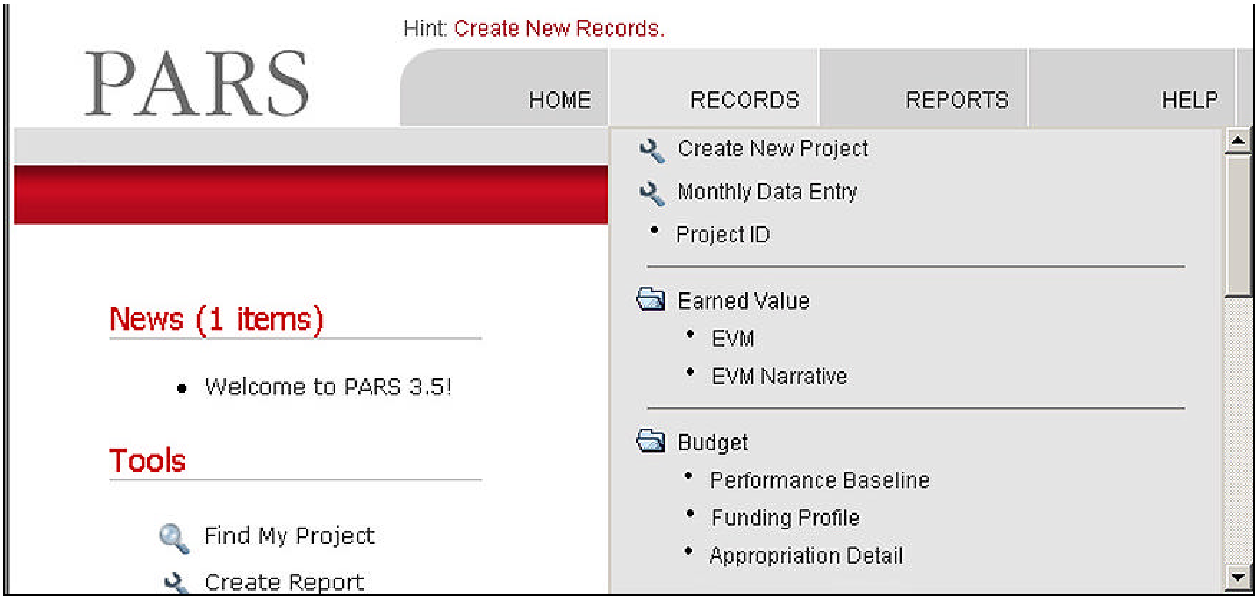

Figure 13: Records Menu

3.2.5.2. Using the Report Title Header

Another way to create a new record is to use the title header of the particular table to which you want to add a record. This is a good way to quickly add a record directly from your Full Project view or your My Project's Detail report. To do this, follow these steps:

1. Click on the bolded title of the table header as shown in **Error! Reference source not found.**.

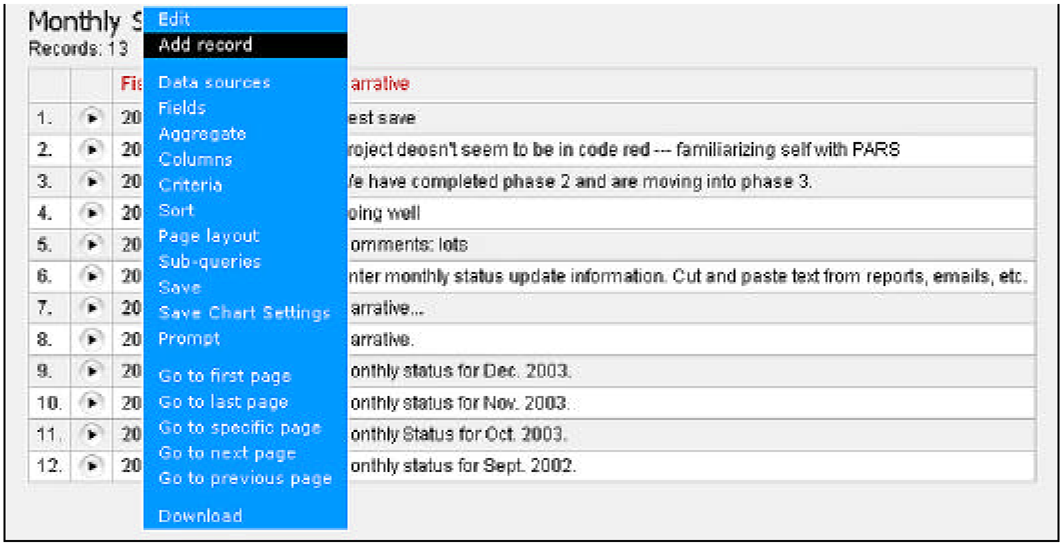

Figure 14: Add Record from Report Title Header

2. This will bring up a menu, from which you select *Add Record*. A screen will appear with unpopulated fields. You need to fill in the DOE Project ID to tie that particular record to your specific project.
3. Once you have filled in the necessary fields you can save the data for later acceptance. See Section 3.2.6 Saving and Accepting for additional information.

3.2.5.3. Monthly Data Entry Wizard

The PARS requires that data elements be reported at different times during the project life cycle. Figure 10 displays the update frequency schedule for key project parameters. Each month, there are three tables that must be updated. These tables include the EVM table, the EVM Narrative table, and the Project Status table. Milestones are defined by the Federal Project Director and may also be updated on a monthly basis from the **Records Menu**.

The Monthly Data Entry Wizard is a tool that makes the OECM mandated monthly data input simple and straightforward. You can access this wizard on the Start Page in the Tools section, or from the **Records Menu** along the navigation bar. Once the Monthly Data Entry screen opens, you only have to enter your Project ID once, along with the month and the fiscal year for which you want to enter data, and then fill in the appropriate fields. Once all of your monthly data is entered, click on <Save> and your data will be saved to your Inbox. Remember you must next accept the data, or send it to someone who can, so that the information is finalized into the system. These records are added to your inbox as three separate records – one for EVM, one for EVM Narrative, and one for Monthly Status – and as a result, must be accepted separately.

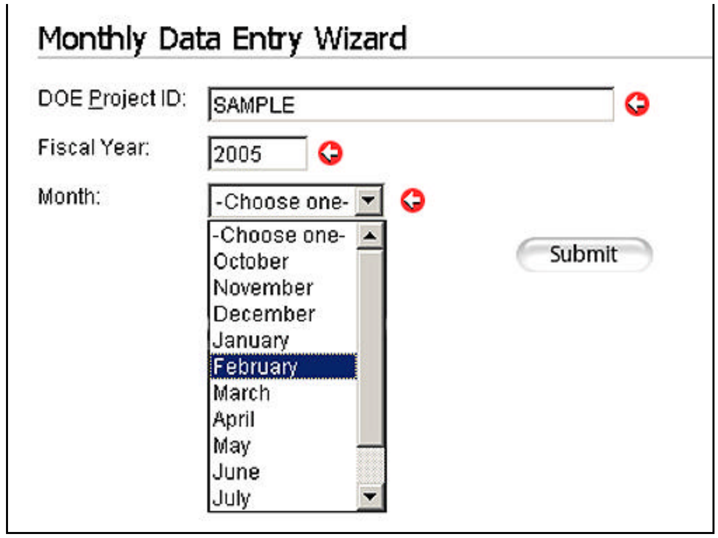

Figure 15: Monthly Data Entry Wizard

3.2.5.4. Examples

3.2.5.4.1. How to add a new project

You add a new project to the database by creating it.

1. On the navigation bar, place your mouse over the ***Records Menu*** and select *Project ID* or click on the tool, *Create New Project*. You can also use the *Create New Project* tool under Tools on the Start Page.
2. Enter the project data. Much of the data contains information that needs to be keyed into the appropriate boxes. Some fields provide pick lists to select the appropriate data. Be careful to review your data as you enter it to make sure that it is accurate. You must enter all data with the red arrow to the right of the field, as these are system required fields.
3. Click <Save> or <Save/Done> to save your data for later acceptance. Once all data has been entered, follow the two-step data entry and review process described in the 3.2.6 Saving and Accepting section. For more information about sending a new project and/or record, please refer to the Using Your Inbox section.

3.2.5.4.2. How to do your monthly update

There are several ways to update your project with monthly data in PARS, but the recommended way is to select the tool on the Start Page called the *Monthly Data Entry Wizard*. The *Monthly Data Entry Wizard* can also be found under the **Records Menu** as well.

This tool allows you to update your EVM, EVM Narrative and Monthly Status records in one data entry screen.

1. Once the Monthly Data Wizard screen opens, you must enter your Project ID, fiscal year and month for which you would like to enter data, as shown in Figure 15. This information will then be populated for all three records.

2. Complete the update of your EVM, EVM Narrative, and Monthly Status records. Be careful to review your data as you enter it to make sure that it is accurate. You must enter all data with the red arrow to the right of the field, as these are system required fields.
3. Once all of your monthly data is entered, click on <Save> and your data will be saved to your Inbox. Remember you must next accept the data, or send it to someone who can, so that the information is finalized into the system. These records are added to your inbox as three separate records – one for EVM, one for EVM Narrative, and one for Monthly Status – and as a result, must be accepted or sent individually.

3.2.5.4.3. How to enter your budget and funding data

You enter budget and funding information based on your approved budget.
First, you must enter a Performance Baseline record, and then you must add funding profiles for each year within the project life cycle. These funding profiles must be tied back to the Performance Baseline record, so each Funding Profile record has both a Fiscal year field and a Budget Fiscal Year field. The Budget Fiscal Year is the year that the Budget was approved, and is the year that you will have entered in your Performance Baseline record. The Fiscal Year is the year for which you are entering that specific Funding Profile record. To enter budget and funding data follow the steps below:

1. You must first enter a Performance Baseline. Click on *Performance Baseline,* which is found under the Budget table in the **Records Menu** along the navigation bar.
2. Fill in all necessary fields, including your DOE Project ID. Threshold values are maximums, while objective values are minimums.
3. After you have entered all of your project data, click on <Save>, for later acceptance. See the Saving and Accepting section for more details.
4. Your *Performance Baseline* must be accepted into the system before you can enter the *Funding Profile* for your project. Your funding profile must link to an already established Performance Baseline record. After your Performance Baseline record has been accepted, you can move on and add a Funding Profile for your project.
5. Under the Budget folder in the **Records Menu** along the navigation bar, click on *Funding Profile.*
6. Once the Funding Profile screen opens, enter your funding profile data. Remember to tie this data to both your project (by entering the DOE Project ID) and to your Performance Baseline (by entering in the Budget Fiscal year of when the budget was approved).
7. Be sure to enter the fiscal year for which you are entering funding profile data.
8. After you are finished entering your funding profile data, click on <Save> to save the record for later acceptance. Again, see the Saving and Accepting section for additional information.
9. You may now enter funding data for additional fiscal years – one profile for each fiscal year.

3.2.6. Saving and Accepting

PARS is designed with a dual entry and review process. If you are responsible for entering the initial data, you must save your changes and then forward the changes to your Federal Project Director for final review and acceptance into the database. Generally speaking, the person responsible for entering data should not commit the data to the database. By enforcing this two-step data entry and review cycle in the work process, fewer errors will be made. The established system of rights and permissions is consistent with this work process. Users who are responsible for entering data typically have the privilege to save data. Once all data has been entered, click <Save> or <Save/Done>.

When all changes have been saved, you have several options that appear on the **Row Menu**.
These options may include (depending on your permissions) *Accept Changes*, *Send*, *Add Remark*, *Delete* or *Undo*. Use the appropriate action to complete the next step of your Saving process.

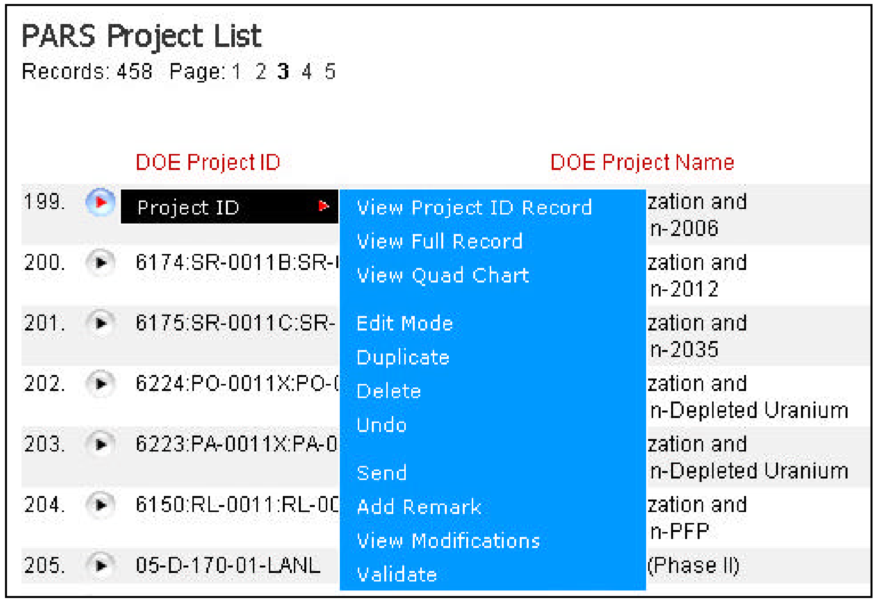

Figure 16: Row Menu

- *Accept changes* - You must approve changes by selecting *Accept changes*. Saved data will not be committed to the database until you accept it. All saved data is held in suspense from the real-time database until it has been accepted. Calculated fields will only be calculated using accepted data, not redlined markup text. All unaccepted data will appear as redlined markup text in reports run by other PARS users. If you choose not to approve the data for the time being, the record will be placed in your inbox for approval at a later time;
- *Send* - You may forward a project record with comments to other users (normally your Federal Project Director) via the PARS internal mail system by selecting *Send* from the record menu. You should forward a project record to someone with accept privileges (normally your Federal Project Director) to comply with the two-step data entry and review process described in the Saving and Accepting section. For more information about sending a record, please refer to the Using Your Inbox section;
- *Add remark* - You may include a comment about the project by selecting *Add Remark* from the record menu. You should enter any useful remarks and click <OK> to insert the remarks into the modification history record. We advise you to include remarks on all your data edits as a memo for future reference. You should also forward remarks with your data to focus the recipient's attention on the specific changes that you have made. You will be prompted to add a remark anytime you send a record (see above);
- *Undo* – This option is used to undo any changes that have not yet been approved. Once you select to undo an action, that action cannot be reversed. This button has the

effect of erasing all the changes that were previously saved but not yet accepted. This is true for any redlined markup text in the record with which you are working, not only changes that you have made; or

- *Delete* – You may delete an entire record by selecting *Delete* from the record menu. This function will mark the entire record for deletion (not just the redlined markup text). You will still have to accept this deletion in the same way that you have to accept any other change that you make to your data.

However, those people who entered the data typically cannot commit these changes to the database since this privilege is reserved for a user with higher authority (typically a Project or Program Manager) who is responsible for verifying the accuracy of the data. Users who can commit data to the database will have the "Accept changes" option available to them on the record menu. If you do not see the "Accept changes" option on the record menu, then your group assignment established by your local Site or Program Administrator does not permit you to edit, save, or commit data to the database. For a more detailed description of the rights and permission system, please see Section 2.3 Rights and Permissions of this manual.

It is important to note again that saving data does not commit the data to the database but rather saves so that you can continue to add, edit, or delete at a later date. This data will be saved in your Inbox until it has been accepted. Saved data will appear on all queries configured to show redlined markups. Accepting data will commit it to the database. You must save and accept each record that you create or update in order to commit the data to the database.

3.2.6.1. Save vs. Save Done

At the bottom of most data entry screens, you will see the button <Save>, the button <Save/Done>, and the button <Cancel>. Clicking on <Cancel> simply cancels the entry of the record that you were entering, while the other two buttons are not so straightforward. Clicking on the <Save > button refreshes the page, so that the new data that you have entered is recognized in the system and is updated. You will be brought back to the same page, with all of the fields open, so that you can continue entering more data in the same table/record, if necessary. This button is important for frequent saving while you are working. However, clicking the <Save/Done> button will close all fields and should be used after you have completed your edits. Clicking on <Save/Done> also updates the system with the new data that you have entered, but you can continue on to your next task within PARS.

3.2.6.2. Data validation

PARS 3.5 contains new data validation rules that help to enforce accurate data entry. These rules correspond to specific tests that are performed whenever data is entered to ensure that the data will not create a database error or break a logical relationship with other data. When a test of your data fails, a warning message will appear.

These immediate pop-up validation errors are displayed prior to saving and warn of inappropriate data entry. For example, if a data field requires a date to be entered, and a character month is typed, a validation error message will appear, as shown in Figure 17. This field can be changed immediately, but if not changed, the inappropriate entry will not be included upon saving other acceptable data.

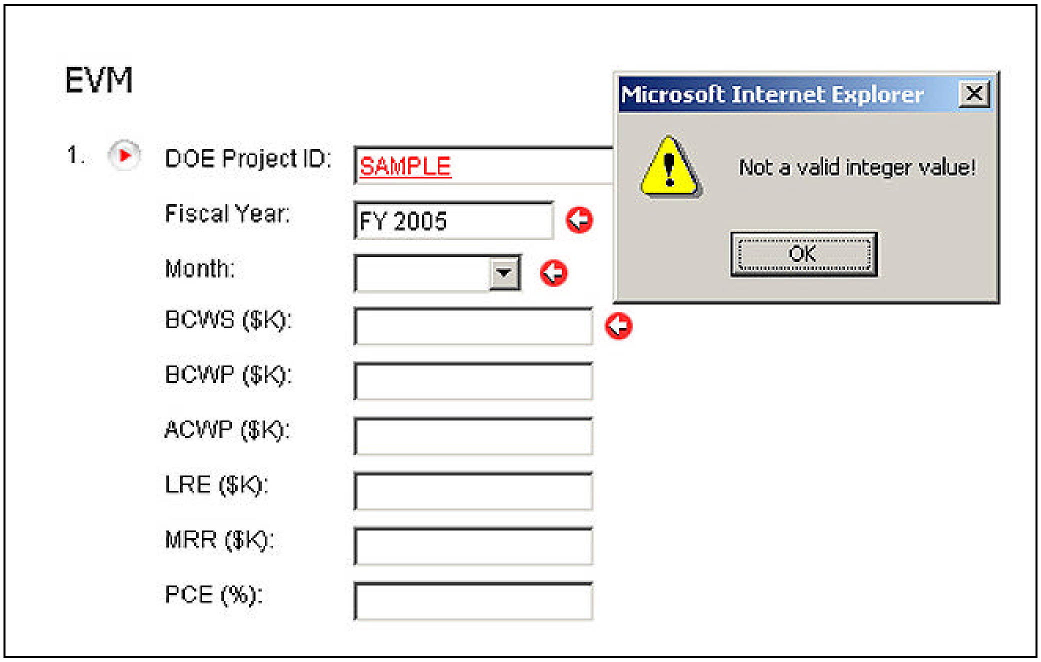

Figure 17: Validation Error

Upon clicking either the Save or the Save/Done button, you will activate another data validation system within PARS. If a "Warning" appears, then the data <u>must</u> be modified before anything from that entry can be accepted into the database. The validation warning, if any, will appear just below the modification history table and above your data. To correct any validation errors, you must select *Edit* from the ***Row Menu*** and make the necessary corrections.

The system is designed to generate "friendly messages" whenever a validation test fails. In certain cases, however, you may receive an application or database error message that appears very cryptic. When this occurs, please write down the error message and contact PARS Technical Support to report the problem.

3.2.6.3. Using your Inbox

You can use your inbox to view, accept or send records that are new or redlined. Items that are saved, but not yet fully integrated into the PARS system are placed in your inbox. These items are awaiting final acceptance before they can be finalized in the system as black data.
You can see items in your inbox on your Start Page as well as in the Home menu on the navigation bar. To access items in your inbox, take the following steps:

1. Click on the table name for the records that you would like to *Accept* or *Send*.
2. From this screen, you have the ability to *View* the record, *Delete* the record, *Undo* any uncommitted changes, *Send* the record to another individual for approval, or *Accept* the changes to the record. To take any of these actions, place your mouse on the red

triangle icon to pull up the ***Row Menu***. From this menu, you may select the action that you would like to take. By clicking *View Record*, you will be able to view any comments that were made by the user who created or edited this record.
3. After Viewing the record, you will be able to take any of the above mentioned actions.

You may also use the inbox to send internal mail (comments) to other PARS users. Since most comments are usually with regard to a particular project, the project record is sent along with the comment to the recipient. To send a project record along with a comment:

1. Locate the specific record in your inbox or from the full project record.
2. Place your mouse over the red (or black) triangle icon (the ***Row Menu***) to the left of the record that you would like to send and select *Send* from the menu.
3. You will come to a screen that contains a list of all PARS users. Select the user(s) that you would like to send this record to. You may select more than one user by holding down the Ctrl key while selecting the users with your mouse.
4. Enter any remarks that you would like the user to see with the record that you are sending.
5. Click on the <Send> button. The next time the recipient(s) logon, they will be notified that their inbox has a message awaiting them.

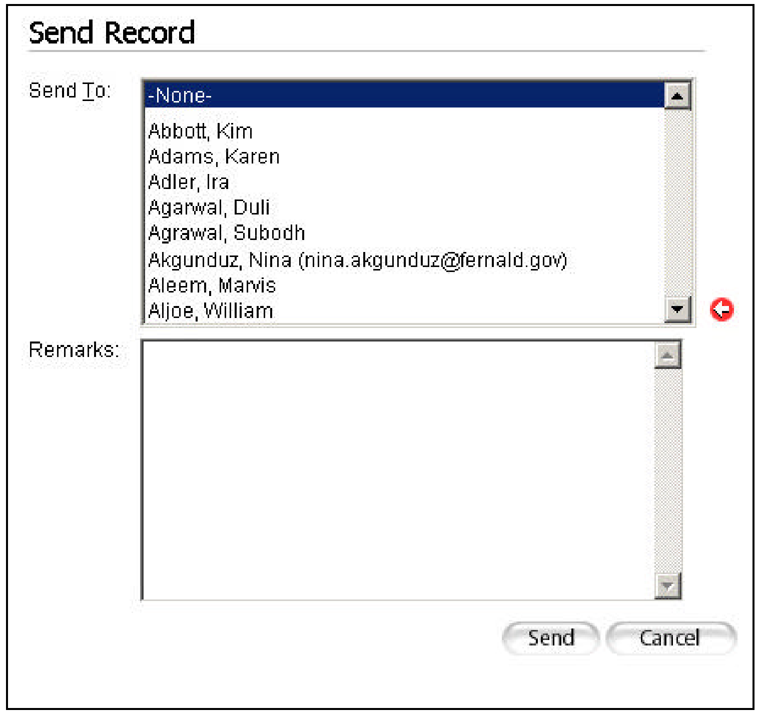

Figure 18: Send Record

3.2.6.4. Accepting Data

Once a record has been saved, it can be accepted into the PARS database. There are two ways to accept a record. The first ways allows a record to be accepted immediately after being saved, so long as it meets all validation rules. This method uses the ***Row Menu*** directly from the screen that appears after the Saving the record. First, it may be a good idea to click on *Validate* to ensure that a record meets all necessary rules. If no errors appear on the screen, then the ***Row Menu*** can be used to *Accept* the record.

1. Mouse over the ***Row Menu*** to the left of the record, and move over to the right until you see a relatively long menu of options.
2. From this menu, select *Accept* by clicking on the menu option.

3. You will see the screen refresh and a screen will inform you that you have “Records: None” for that specific type of record. Your data is now available in black lettering and has been finalized and accepted into the system.

The other way to accept records is from your Inbox. See the Using your Inbox section for reference.

1. After Viewing your redlined record in your Inbox, mouse on the ***Row Menu*** to the left of the record, and mouse over to the right until you see the long menu of options.
2. From this menu, select *Accept* by clicking on the menu option.
3. You will see the screen refresh and a screen will inform you that you have “Records: None” for that specific type of record. Your data is now available in black lettering and has been finalized and accepted into the system.

3.2.7. Modifying a Record

You may edit any project that has already been populated with data, provided you have the proper permissions. There are two different ways that you can edit a project. You can change existing project data or you can add new project data.

This section describes the process for changing existing project data. To update your project with new data, please see the Using the Record Menu section or the Monthly Data Entry Wizard section of this manual.

One of the best ways to modify a record within PARS is to use the **Row Menu**, identified by a triangle in a circle to the left of the title of each table.

To use the **Row Menu** icon to modify a record, use the following steps:

1. Locate the record within your project that you would like to modify.
2. Place your mouse over the **Row Menu** to the left of the record that you would like to edit. When the **Row Menu** appears, select *Edit*. All fields within the record will become editable text boxes and you will have the ability to make any necessary changes.
3. Once all changes have been made, you must save the data by clicking either the <Save> or <Save/Done> buttons.
4. When all changes have been saved, follow the two-step data entry and review process described in the Saving and Accepting section.

You can modify multiple records in the same table you can put the table into Edit Mode. This will make all of the fields in the selected table editable. To do this:

1. Click on the Report or Sub-report Title to get the drop-down menu.
2. Select *Edit* from the menu list and the page will refresh in edit mode. All of the fields that you have permissions to change will be editable.
3. You can change the value in any of the editable fields, and once you are done, you can <Save> the new data.

This mode allows you to selectively change any field that you wish, so long as you have permissions. Remember that changes made to the data are not fully incorporated into the system until they have been accepted. Each record will appear in your Inbox individually and must be accepted or sent individually as well.

3.2.8. Removing Data

3.2.8.1. Delete

To delete a record, simply mouse over the record menu icon to the left of the title of the table, within which the record that you wish to delete is nested. Select *Delete* from the record menu list and the page will refresh with the record in redlined font with a line through the record. This record has been marked for deletion, as a note at the top of the page will indicate.

3.2.8.2. Delete Record Example: Delete an Entire Project

PARS has implemented safeguards to prevent accidental deletion of projects from the PARS database. If your project is not active, you may simply change the Project Status field in the Project ID table. The project status options include: *Active, Not Started (Pre CD-0), Completed (CD-4), Closeout, Cancelled, On Hold*, or *Other*. If your project does not meet the criteria for any of the project status options and must be removed from the database, please contact the PARS HelpDesk.

3.2.8.3. Delete Record Example: Delete Selected Project Data

First you need to open your project in Full Record View. For information on how to find your project see the Find a Project Record section of this manual. Once you are viewing the full project record on your screen, take the following steps to delete selected data in the project record:

1. Locate the record or individual field(s) that you would like to delete.
   - If you would like to delete an entry in a single field, place your mouse over the **Row Menu** and select *Edit*. Place your mouse in the field that you would like to delete, highlight the data, and press the delete key on your keyboard. You may enter as many changes and deletions as you desire. Click <Save> or <Save/Done> to save the field changes and deletions. This will mark the record for deletion; or
   - If you want to delete an entire record, place your mouse over the **Row Menu** to the left of the individual record and select *Delete*.

2. When a deletion or change is made, the data will be marked with a red strikeout (for deletions) or a red underline (for changes). You have four options after saving your record. You must take the appropriate action consistent with your rights and permissions associated with your user group assignment.
   - *Accept Changes* - You must approve changes by selecting *Accept changes*. Saved data will not be committed to the database until you accept it. All saved data is held in suspense from the real-time database until it has been accepted. Calculated fields will only be calculated using accepted data, not redlined markup text. All unaccepted data will appear as redlined markup text in reports run by

other PARS users. If you choose not to approve the data for the time being, the record will be placed in your inbox for approval at a later time;

- *Send* - You may forward a project record with comments to other users (normally your Federal Project Director) via the PARS internal mail system by selecting *Send* from the record menu. You should forward a project record to someone with accept privileges (normally your Federal Project Director) to comply with the two-step data entry and review process described in the Saving and Accepting section. For more information about sending a record, please refer to the Using Your Inbox section;
- *Add Remark* - You may include a comment about the project by selecting *Add remark* from the record menu. You should enter any useful remarks and click <OK> to insert the remarks into the modification history record. We advise you to include remarks on all your data edits as a memo for future reference. You should also forward remarks with your data to focus the recipient's attention on the specific changes that you have made. You will be prompted to add a remark anytime you send a record (see above); or
- *Undo* – You may undo any changes that have not yet been approved by selecting *Undo* from the record menu. Once you select to undo an action, that action cannot be reversed. This button has the effect of erasing all the changes that were previously saved but not yet accepted. This is true for any redlined markup text in the record with which you are working, not only changes that you have made.

Once a project record that has been marked for deletion is accepted, it is permanently erased from the database. This action cannot be reversed and the data cannot be retrieved. The only way to restore the project data is to manually reenter the data. Use caution when deleting project records.

3.2.8.4. Undo

If for any reason you have entered data that you do not want to undergo the final acceptance step in the system, you can undo it. If data is in your inbox, or if you have rights to accept, you have the option to undo the redlined data. The undo process will remove all of the data associated with the selected record that has not yet been accepted into the system. Thus, if data were already in the system, and a modification were made and not yet accepted, that modification would be deleted if Undo were selected. The original record would still remain in the system. Similarly, when a new record that had not been accepted into the system had been marked for deletion and then undone, the entire record would be removed. To undo a record, use the following steps:

1. Mouse over the **Row Menu** to the left of the record that you wish to undo. Move the cursor to the right until you see the long menu of options.
2. Select *Undo* from the menu by clicking on it, shown in Figure 19.
3. The redlined data will disappear and a screen will inform you that "Records: None" for the type of record that you just undid. The redlined changes to that record will no longer be in the system.

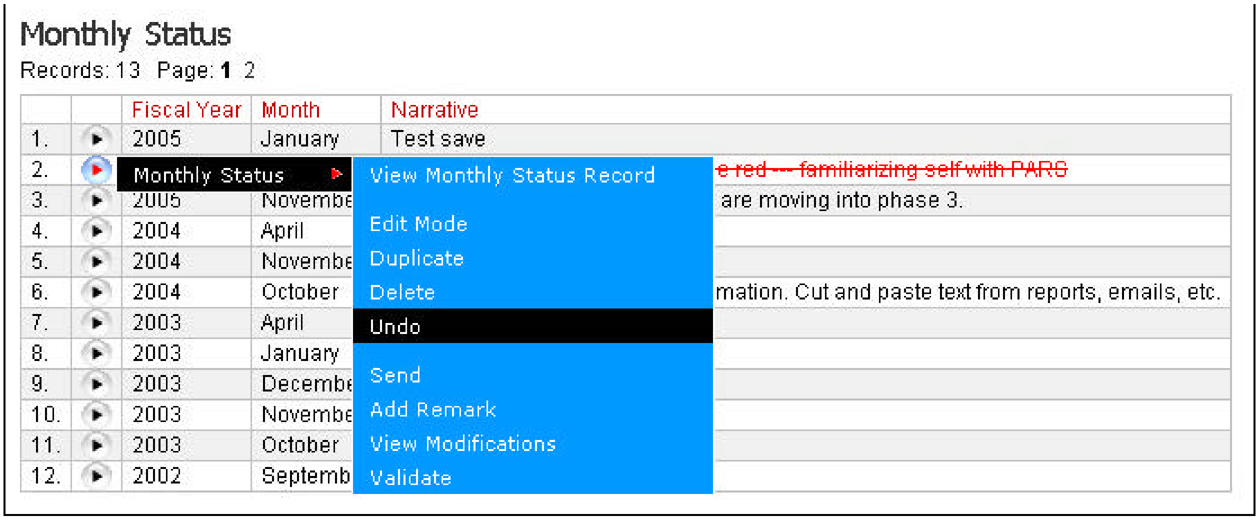

Figure 19: Undo Changes to Record

3.3. Reporting

PARS was designed to provide a robust reporting system in order to analyze all of PARS data. All PARS data must be viewed through a report, previously known as a query in earlier versions of PARS. PARS uses a system of reports to find projects meeting user-specified criteria. The search results can then be displayed, filtered, and sorted using any one of several reporting options. The PARS system also contains a set of standard reports and custom reports for quick review and analysis of key project data. Depending on the design of a report, a report can simply call information from a single project or it can call records to all of the projects in the PARS database, and can organize the data in a user-specified way.

3.3.1. Viewing Data

A report is simply a way of displaying certain data in the PARS database. All project data is viewed by creating and/or running a report.

3.3.1.1. Find My Project

You can access your PARS project information in multiple ways. The PARS system was set up this way to maximize user options from any screen in the system. The Find My Project Tool is a quick way of obtaining all information about your project. Another method of finding your project involves searching the PARS Project List. Finally, you can call up your project data by customizing the Standard Report "My Project Detail."

The Find My Project Tool is available on the Start Page. Use this tool to immediately access your specific project data upon entering its DOE Project ID.

The PARS Project list is a standards report that displays identifying [project information for all of the projects in PARS. Scroll through the projects until you find your desired project. Remember there are likely several pages of the PARS Project list, so do not forget to scroll through the additional pages. Once you find your project, click on the record menu (the arrow icon to the left of the project name) and select View Full Record or whatever option you choose to use from there.

Custom reports are coded to a prescribed format in accordance with DOE requirements. One example is the Quad Chart, which contains summary project information organized into four quadrants on the page. Although these reports minimize work for the user, such custom reports do limit your ability to choose what data is actually presented in the report and how that data is to be presented (e.g. sort order). Because of this, other custom reports may be developed in the future.

If you want to create a quick report that will call up information from one (or more) of your projects without having to search in the PARS Project List, you should set up a customized My Project Detail. See Section 3.3.5 Modify an Existing Report.

3.3.1.2. View Full Record

To view all information, records and data for any individual project, use the View Full Record option. The View Full Record option is a report that is built into the individual record menus of each project. To access the "View Full Record" click the arrow icon to the left of the project name and select view full record from the menu choices. This will display all of the entered information and data for that particular project.

3.3.1.3. Quad Chart

The quad chart is designed to present a concise overview of essential project information. It is available for every project in the PARS system. The pre-designed quad chart is a way of reporting data from a single project. The quad chart displays particularly important data and fields that can be used to get a good sense of the overall status of a project. It is a report that contains vital project data, including a short description of the project, mission need, project attachments, earned value data, the project funding profile, project contacts, key milestones, and an interactive, printable graph available in three formats. Quad charts may not be modified. To access a quad chart, take the following steps:

1. Access a list of your projects either from a report that you have created (see the <u>Modify a Report</u> section for further information) or from the "PARS Project List" under "Standard Reports" on the start page.
2. Find your project, place your mouse over the triangle icon to the left of the project to pull up the ***Record Menu***, select *Project ID* and then select *View Quad Chart*.

3.3.2. Report Types

3.3.2.1. Standard Reports

Standard Reports are built-in reports available to all users with the most commonly reported data. They are found in the Reports tab in the Navigation Bar as well as on the Start Page. These reports can serve as templates for your own modifications.

Standard Reports are formal reports that have been created within PARS. These reports contain different sets of frequently accessed project data. The OECM Representative and PARS Administrator work together to create these reports.

Several standard reports have been created in the PARS system for quick viewing of the most commonly requested project data. These reports may change over time in response to user demands. A list of standard reports is located on the start page. To view a report, simply click on the name of the report. The OECM representative and PARS Administrator have worked together to create these reports.

Table 2 below includes descriptions of the standard reports currently available on the PARS system.

Report Name	Report Description (including displayed fields)
PARS Project List	DOE Project ID, DOE Project Name, Site Name, Managing Office, Project Size, Active Status.
Project Contacts	Contact Type, Name, Email Address, Phone Number.
Project Type and Active Status	Project Type, Active Status
Funding and Appropriations Report	Fiscal Year, TPC, TEC, Funding Plan and Appropriations by Year, Total Funding and Total Appropriations
Funding Report	Chart of Funding Plan and Appropriations.
TPC & TEC Report	Fiscal Year, TPC, TEC, OPC
EV Performance Metrics	Fiscal Year, Month, CPI, Cum CPI, CPI Rating, SPI, Cum SPI, SPI Rating.
EVM Status	Month, Fiscal Year, % Complete, CPI, Cum CPI, CPI Rating, SPI, Cum SPI, SPI Rating.
Project BCWS - Cum	Chart of BCWS, BCWP, and ACWP.
My Projects Template	A template for creating a "My Projects" list.
My Projects Detail Template	A template for a detailed report containing all key data fields. This is a printable report of your project data.

Table 2: Standard Reports

These reports are read only. You can modify the standard reports, but you must save the modified version under a new name. When a report is changed and saved, it will appear in your My Reports folder. Instructions on how to modify a report are described in Section 3.3.5 Modify an Existing Report.

3.3.2.2. Shared Reports

After creating a custom report, you have the ability to share your report with other users in the PARS community. When you save a report, you are able to select individual users with whom you would like to share the report as well as user groups with whom you would like to share the report. All shared reports created by other users on the system will be located in your "Shared Reports" folder (remember, your own custom reports appear in your "My Reports" folder). If an individual does not have the rights and permission to view the data (see the Rights and Permissions section for further information), then he or she cannot view the report even though you have shared it with him or her.

For information about how to share a report, please refer to the Create a Customized Report section.

3.3.2.3. My Reports

If you would like to easily retrieve a set of project data that is not already presented in a standard report, you can create a custom report (or modify a standard report) that meets your specific needs (see the Modify a Report or the Create a Customized Report section for more information). After creating (and saving) a custom report, a "My Reports" folder will appear on your Start

Page. The newly created report will be in this folder. All future custom reports that you create will also appear in this folder.

The most common report for users to create is a "My Projects" report. This report can be quickly created by modifying the Standard Report titled "My Projects Template." This will provide you with a shortcut to your individual project list. For further information on creating a "My Projects" report, please refer to Section 3.3 Reporting. There is also a tutorial available online in the News section titled "How to Customize the My Projects Template."

3.3.3. Changing the Data View

3.3.3.1. Quick Filter

You can filter the results of your reports in two ways. Report results may be filtered to return projects that match your criteria by way of a "Quick Filter." This filtering is separate from the report wizard definition where you specify the criteria and save it with your report.

A quick filter is applied by clicking on the value to be used as the filter criteria. Click on any individual field within a report. This menu provides you with the functionality to filter the report based on several different criteria: records with fields *Equal to* the selected value, *Not equal* to the selected value, *Greater than* the selected value, *Greater than or equal* to the selected value, *Less* than the selected value, or *Less than or equal* to the selected value.

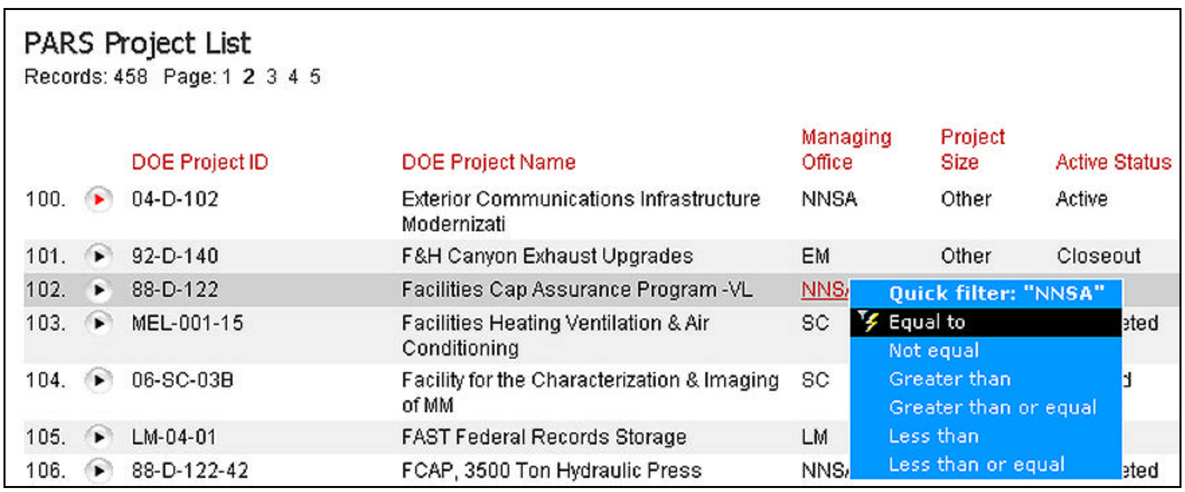

Figure 20: Quick Filter

Selecting a quick filter will "re-run" the report and return all the records that meet the specified criteria. You may remove a filter by clicking the name of the filter (its variable name) and then clicking <Yes> when prompted to remove the filter. A quick filter changes the current display of the data, but it doesn't save the results for future usage of that particular report. To setup up a filter that can be saved with the report, please see Section 3.3.4 Create a Customized Report.

3.3.3.2. Quick Sorting

All data, including report results, can be sorted according to fields the user has selected. This function is especially useful when the report is likely to return many projects and you want the projects to appear in a certain order. Like a Quick Filter, Quick Sort cannot be saved. Please see Section 3.3.4 Create a Customized Report to setup a sort order that can be saved with the report. When a report is sorted according to a particular column or columns, an arrow (and number) will appear next to the variable name indicating the order and direction of the sort.

To perform a Quick Sort, click on the heading of the variable you wish to sort to pull up the **Column Menu**. You may then choose from the following options: Sort or Multisort.

- *Sort* (ascending or descending) – Choosing sort will display the records in ascending or descending order;
- *Multisort* (ascending or descending) – Multisort allows you to sort by more than one variable. This is done by first clicking the primary variable and selecting "multisort," and then clicking the secondary variable and selecting "multisort."

3.3.3.3. Graphing

After generating the list of report results, you can graph the results by using the **Column Menu**. To access the **Column menu**, click the variable's name that you would like to graph and select *Graph by* or *Graph value* from the menu.

- *Graph By* – This defines the variable to graph by. This will be the variable that will appear on the X-axis in a typical X-Y graph.
- *Graph Value* – This defines which variables contain the numeric data that will be graphed. This will be the variable that will appear on the Y-axis in a typical X-Y graph. You may select more than one value to graph.

After you define both an X (graph by) and Y (graph value) variable, a graphic will be automatically generated and displayed.

If you are using Windows NT or Windows 2000 operating systems, you will need administrator privileges for your PC to load Chart FX, a self-loading graphics plug-in. This plug-in only needs to be installed once, not every time you generate a graph. If you do not have administrator privileges to load the software on your PC, call your local computer support help desk and request their assistance. If you do not have this software, no graphics will be displayed.

There are several types of graphs that can be created using Chart FX. These include: column graphs, bar graphs, line graphs, pie charts, XY scatter plots, area graphs, doughnut graphs, radar graphs, and surface graphs. To change the graph type, right click on the graph and select *Gallery*. Click on the shape of the type of graph that you would like to display your data.

Chart FX provides you with the ability to manipulate the generated graph in a number of different ways within your browser. After generating a graph, you can access a menu of options by right clicking on the graph. These options include:

- Toolbar – Places a tool bar on the graph that provides short cuts to several options as well as giving access to additional features.
- Data Editor – Provides a data table that can be edited to adjust your graph without tampering with the data in the PARS database.
- Data Legend – Allows you to add or remove the legend from the graph.
- Gallery – Allows you to change the type of graph (for example, bar graph to pie chart etc.)
- Color – Allows you to change the color scheme of the graph.
- Edit Title – Allows you to add or edit a title for the graph.
- Point Labels – Adds data labels to the graph elements (values).
- Font – Allows you to change the font size and style.
- Properties – Provides an additional menu that includes information regarding data series information (if you are graphing more than one value), axis information, three-dimensional graphing information and other general information.

The Chart FX plug-in contains a toolbar that provides short cuts to many options as well as several additional features. The toolbar can be selected from the main graphing menu (pictured above).

The most notable of these features is the ability to print graphs from PARS without printing a full report. It is also possible to save graphs to your drives; however, you are using Chart FX as a web browser plug-in and would need to purchase the software to manipulate the graphs outside of the web application.

You may further manipulate the graphic using the sorting and grouping options described in the Quick Sorting section.

3.3.4. Create a Customized Report

PARS 3.5 contains a powerful report engine that allows you to create reports in a way that your data is displayed in a manner that suits your needs. The “Report Wizard” provides a simple means for you to build a new report from start to finish to filter for project data that meet your specified criteria. The Report Wizard walks you through the report building process step-by-step to create a customized report. This wizard is found in the Reports tab in the Navigation Bar, as well as in the Tools section of the Start Page.

PARS 3.5 includes a new feature that allows you to prompt any new reports such that whenever they are used again, the system will automatically bring up a criteria screen for a very specific, efficient and powerful report.

To create a completely new report, you must step through the report wizard and design the report definition that will call your specific project data. To use the report wizard, place your mouse over the ***Reports Menu*** on the navigation bar and select *Create report using wizard*.

The report wizard steps you through the process of creating a report from scratch. The steps for creating a report using the wizard are located on the left side of each page within the wizard. These steps include:

- Data Sources - Select tables containing data from the PARS data model
- Join – Specify how you want to combine (join) data from multiple tables
- Fields - Select the individual fields that will appear in the columns of your report
- Aggregate – Organize complex or abundant data using Aggregate functions (Avg, Max, Min, Sum, etc.)
- Columns – Customize the displayed ordering of columns, create special calculated fields, and hide selected fields
- Criteria – Specify filters to restrict the report dataset
- Sort – Specify the sort order for displaying the dataset
- Page Layout – Control the appearance on the screen and printed page
- Sub-reports – Create separate tables of data within a larger table
- Save – Save your report and share your report with other users
- Prompt – Place a prompt on the report to target specific subsets of data every time the report is run
- Run – Run report to generate data particular to that report

After you have entered the Report Wizard, you must walk through the steps listed above to create the report definition. Let's say for example, you want to show Critical Decision information for all active projects showing site names instead of codes. The following steps are used to create such a Critical Decision report. This report will serve as an example for using the Report Wizard for creating other reports.

3.3.4.1. Create a New Report Example: A Report for Project Critical Decision Information

The very first step of report creation is to visualize how you want your data to look in the report that you are creating. Most often, when the report is calling upon several projects, the data is organized by Project ID. In this example, we want each project to be organized by Project ID as well as by Site Name. The information that you want displayed affects how you will set up your report. In this example, we want to display all Critical Decision information for the projects. The first step is complete with the visualization of the report organized by Project ID and Site Name, with each individual project having its Critical Decision information listed below its identifying information.

Data Sources
From here, the actual report creation begins at the "Data Sources" step of the Report Wizard, where you select the tables that you would like to include in your report. These tables are basically how the data in the report is organized. You may want to refer to the Data Model under the Help tab listing descriptions of each table in PARS 3.5. After selecting one or more tables from the list (hold down the control key to select more than one table), you may refresh the page

or advance to the next step of the Report Wizard. For this report, we will select both the Project ID table and the Site Lookup table.

The Site Lookup table allows you to display the actual Site Name as opposed to only the Site Code, because this table includes the field for Site Name. For example, “Richland” will be shown as opposed to “RL.” When only one table is selected in this “Data Sources” step, you will skip over the Join step of the Report Wizard since there are no tables to join together. However, because we selected both tables in this example, the next step is to advance to the join step of the Report Wizard.

Join

On this page, we select the tables to be joined together as well as the fields that uniquely tie (join) the records from one table to another. The first table is basically the primary table, often the one with the most fields to be displayed. The second table is the secondary table, in this case, the Site table. These tables must first be chosen from the pick list before actually joining the tables. Then click on the update or advance button to move on. After the joined tables are selected, the boxes below that determine which records are selected must be checked. Most often, the box should be checked next to the label for all records from the primary (first) table. In this case, because we need all records from the Project ID table to be shown, we check that corresponding box by clicking on it.

Next, from the new pick lists displayed, the fields that are selected must match between both tables (Source field must be the same as Target field). This step allows the system to know how to link the information from each of the tables together. In this report, we will be joining the Project ID table with the Site table using the Site Code field. Basically, in this step we are telling the system that we want information from the Site table to be aligned with each Project ID listing based on the Site Code. After joining the tables, you will advance to the Fields step of the Report Wizard.

Fields

From the Fields page, select the fields that you would like to include in your report. You may select more than one field at a time by holding down the control or shift keys on your keyboard. In this example, we select the identifying information from the Project ID table fields such as ID, Name, Managing Office Code, and Project Status.

Be sure to select fields from all tables that you have selected for the report.

After selecting the appropriate fields from the list, you may refresh the page or advance to the next step of the Report Wizard.

Aggregate

The Aggregate step of the Report Wizard allows you to use aggregate functions such as maximum, minimum, count, sum, etc. This can be used when there are multiple entries for one field, and the idea is to get a generalized picture of the data. For example, you could want to display all of the funding information for all of your projects, but there are more TEC entries for a particular year than you want to show. If you just want a general idea of TEC for that year, you could select Aggregate data for that field so that perhaps you get an average TEC for that year instead.

In this step of the Report Wizard, if one field is used with Aggregate data, then all fields must have Aggregate information entered in the Wizard. So, for example, you only want the TEC field to show aggregate data, you must click on "Group By" for all other fields in the report. This functionality is not needed for this Critical Decision report so we can simply pass over this step. To move on, either click on the Columns step in the Report wizard or click on the advance button on the bottom of the screen.

Columns
After advancing to the Columns step of the Report Wizard, you will be able to customize the columns in your report. From this page, you are able to select the position of the fields that will be displayed in your report (from left to right); you will be able to make certain fields invisible (they will not appear in your report); and create any new calculated fields. Making fields invisible by unchecking the box by the "visible" label, is used when you would like to filter a specific field, but not necessarily display the field in your report. Order the fields to be displayed by changing the number in the pick list next to the "position" label. This will alter the position of that field (from left to right) in your report. If you wish to make new calculable fields, type in the function that you intend to be calculated in the "formula" section.

When you are pleased with the column layout, you may advance to the Criteria step of the Report Wizard.

Criteria
From the Criteria step of the Report Wizard, you can set the criteria with which you would like to apply to filter your report. Technically, you can select certain criteria from each field, but usually criteria are only set for a couple of fields. For this example, we want Critical Decision data only
from projects with an Active status. To set the report to filter for only Active projects, you must type "Active" next to the Project Status field box on the Criteria page.

When specifying particular ranges or data types to be included in the report, some fields are very particular in their recognition of formats. Usually, criteria are entered with an operator before the critical value. An operator is a function key that specifies a particular action to be used when calculating a certain field in the PARS system. Some quick operator keys are listed in the Help menu bar under Supported Functions, while others must be remembered. For example, if data to be included must be greater than or equal to a certain amount, then >= should be typed in as the "operator" followed by that value. When specifying a numerical value in the criteria step, the value simply needs to be typed in, with no formatting or units, as in entering data. However, textual or character data as well as date datatypes that are used in the criteria step should be entered with quotations on either side, as in our "Active" example.

An operator can be mathematical (like many in the Supported Functions list), textual (words such as LIKE, NOT, OR, AND), and functional. Keep in mind that when OR is used between two specified criteria, the system will report for data matching one criteria or the other. OR is a good operator when trying to select for the inclusion of two types of data. The operator AND indicates that the data must match both criteria listed on either side of the operator in that field.

When attempting to report projects with information from a field that was originally selected from a table displaying codes (rather than the full word for the field) the associated codes must be used instead of the actual value or term when specifying the criteria. For example, if we wanted to select only for projects under the Managing Office: Science, we would have to type "SC" as the Managing Office Code, rather than the word "Science". This is because the table that we selected – Project ID – only has the field for Managing Office Code, not Managing Office lookup.

Click on Sort in the Report Wizard or on the advance button to advance to the Sort step of the Report Wizard.

Sort

This step of the Report Wizard allows you to organize the way that your data is displayed based on particular filtering. Most text populated fields are sorted alphabetically, while dates and numbers are sorted in ascending or descending order, based on what is selected in the "order" section of this step. It is possible to sort the displayed data by multiple fields (up to four hierarchal sorts are possible), with "Sort 1" being the primary sort and "Sort 2" sorting within that first organization of data and so on. It is important to remember that there are quick filters once the data is displayed (see the Filters section for more information), but these are not saved permanently into the report. If you want your data permanently sorted, then the sort must be entered in the Sort step of the Report Wizard. Once you are finished sorting your report, click on the advance button to continue.

Page Layout

The Page Layout step enables you to organize the general layout and color schema for your report. We will simply use the default values for this example. Often, it is helpful to display a long list of projects on one page, rather than clicking on multiple pages to scroll through the list. Such page layout changes can be made during this step, simply by increasing the number of rows per page, or by limiting the output. You can click on the Sub-report step to advance to the next step of the Report Wizard.

Sub-report

You can create as many sub-reports as are necessary to satisfactorily present your project data. This section is necessary for our example. Since we want to show Critical Decision data for each project, we need to have a sub-report. Basically, sub-reports make sub-tables under the main report heading (in our case, Project ID information). Simply enter a name for your sub-report and click <Create Sub-report>. In our example we will type Critical Decisions as the sub-report name.

After selecting <Create Sub-report>, you will come to a recursive Report Wizard. This wizard contains the exact steps as the original Report Wizard except that the Save and Run steps are replaced with "Done" (which is used when you are finished creating your sub-report). You will now be able to select the tables and fields in Data sources that you would like to include in your sub-report using the same process as above. In this case, we select the Critical Decision table and several fields in that table.

You can now advance to the Page Layout step of the Report Wizard to customize the look of the sub-report. After you have set the Page Layout to your liking, you may click on the <Done> button to complete the sub-report definition. You will return to the original Report Wizard where you will be prompted to join the sub-report to the report using a unique matching field (typically the DOE Project ID). This join acts exactly like the report Join, in that it links all information together.

Prompt
This feature is new to the PARS version 3.5 report wizard. The prompt step of the report wizard is similar to the criteria step in that it specifies a subset of data to report. However, the prompt allows for future data retrieval processes to be tailored to the needs of the user at that particular time. For example, let's say you wanted to run the critical decision report that we designated as our previous example, but today you wanted projects with NNSA as the Managing Office and tomorrow you know you will need the same report but for projects managed by Science. The flexible and efficient way to design it would be to add a prompt.

Adding a prompt is relatively simple. Once you have designed your overall report, as above, you will advance to the Prompt step.

As in the Criteria step, you will see a list of all of your selected fields that may be broken into criteria. This part of the prompt step allows you to choose whether you want criteria for your report this time through, and for future use. If you want to select criteria for this particular report you choose an operator from the picklist and then type in your specific value that corresponds to the particular criteria (as you would in the criteria step). In order to place a prompt on a specific field, check the box that corresponds to the table that you want to prompt for. You may prompt for more than one field as well.

In our example, we want to select the operator "=" and type in NNSA in the value field for the Managing Office Code. And because we know that we will be using different Managing Office criteria next time (tomorrow) for the same type of report, we will also check the prompt box to the far right of the Managing Office Code value field.

You may leave the Operator and Value fields blank if you do not want to include criteria in your current report. If you do not check the prompt box, however, there will be no prompt attached to this report and the report will have to be modified in order to add criteria or to add a recurring prompt for criteria. When a box is checked, every time that the report is used, a prompt pop-up will display and allow you to choose criteria for that particular report. The fact that the report will not run before asking for criteria is what makes this reporting technique so efficient at displaying only pertinent data.

Once you have added a time-saving prompt to your report, you may move on by clicking <Run> or by advancing the page. If you are not happy with the results of your report, you may go back through any of the previous steps and change your selections to make the report more appropriate to your needs.

Save
If you are happy with your results, click on the title of the report (currently "Adhoc") to pull up the ***Report Menu*** and select *Save.*

From the Save screen, give the report a name (and folder if desired) and share the report with any users or groups that might want to run the report. Click on the <Save> button to save the report in your "My Reports" folder.

3.3.5. Modify an Existing Report

An easy way to quickly create a report is to modify an existing report that resembles the report you want to produce. First choose an existing report that most closely matches your desired report. You may choose from any Standard Report, Shared Report, or My Reports that you have previously created. To modify the report design, click on the Report Title Header and select the stage of the report design that you wish to modify. Clicking on your selection will take you to that page of the Report Wizard. From here, you can modify any of the report specifications or you can simply view the current settings. To keep all of your changes, be sure to save the report under a different name, and you will see it in your list of My Reports.

3.3.5.1. Modify Report Example: Adding or Removing Fields

To add or remove fields in a report, again modify that report by clicking on the name of the report and selecting Data Sources from the pop-up menu. In the Data Sources step of the Report Wizard, select the tables that you would like to be included in your report. If you would like to remove tables, click the box with the heading "remove this table from report." You can similarly add and remove fields from your report via the Fields step of the Report Wizard. Again, if you wish to keep your changes to the report, save the changed report (either by overwriting the existing report or by saving it as a different name) via the Save step of the Report Wizard.

3.3.6. Share report with other users

You can share a report with other users from the Save step of the Report Wizard. (For more information about accessing the Report Wizard see <u>Create a Customized Report</u>). Select either the individual or class of users with whom you would like to share the report from the select boxes. To select more than one user or class of users, hold down the <Ctrl> key while clicking. After you save the report, it will appear in the "Shared Reports" folder for all individuals with whom you have shared it.

3.3.7. Downloading

Data from any report can be downloaded from reports into Microsoft Word, Excel, Access or HTML formats. This feature permits you to use PARS data in other applications without reentering data. This feature can be used to create custom documents, tables, and graphics in other programs, or conduct further analysis in an Excel spreadsheet. You create a custom report containing the data to be downloaded and then execute the download command from the Report Menu. To do this, take the following steps:

1. Open the report (or create a new report) containing the data that you want to download. Be sure that all the fields you want to download are listed as column headings in your report.
2. Click on the title of your report to invoke the ***Report Menu*** and select *Download*.
3. Choose the program that you would like to download the data into using the dropdown menu.
4. Select the download range; All, Records, or Pages.
   - All - Downloads all results return from the report;
   - Records - Allows you to select specific records to download; or
   - Pages - Allows you to select specific pages to download.

   Click <OK> to begin the downloading process.

3.3.8. Printing Reports

Standard Reports, Shared Reports, Custom Reports, graphs and any other reports in your "My Reports" folder can be printed directly from your browser.

1. Make sure that the desired report is visible in the active window.
2. Click the <Print> button on your browser.

If necessary, follow the instructions on the print pull-down menu, located under the <File> button in your browser.

To print your full project record, it is recommended that you use the My Projects Detail report. This report has been customized to print all essential project data in landscape format. For information about how to customize this report, please refer to the Modify Existing Reports section.

3.3.9. Manage Reports

Manage all of your existing reports using the Manage Reports Tool. This PARS tool is available on your Start Page, and it can also be found under the Reports tab along the navigation bar. Use this tool to organize, delete and change your display of existing reports.

3.3.9.1. Organizing

You can organize any of your reports into specific, personalized folders for easy access. Mouse over the Report tab in the navigation bar, and select the report that you want to put into a folder. Click on the title of the report to access the Report Menu and select *Report Wizard.* From the Save step of the Report Wizard, type a Folder name into the Folder field and save the report. Your report will then appear under this folder on the My Reports page.

Or, if you are creating a new report and wish to place it into an existing folder, use the Report tab and select “Create report using wizard.” Create your report. From the save step, just type the name of the desired destination folder in the Folder field exactly as it appears on your My Reports page. Your report will then appear under this folder on the My Reports page.

3.3.9.2. Deleting

Reports that you have created, and no longer wish to keep, can be removed from your My Reports. Mouse over the Report tab in the navigation bar and select Manage Reports. From this list, find the report that you want to delete and mouse over the Record Menu button (triangle icon). Select *Delete*. This will permanently delete your report, as long as it is one that you have created and saved. You cannot delete Standard Reports or Shared Reports that other users have shared with you.

4. Getting Help

You can find help and assistance using PARS through four different types of resources. The first is through the internal help system, so if you have a question while you are in the system, you can find answers almost immediately. Additional information can be found in the downloadable documents available from the **Help Menu**. These documents can be printed and used as reference materials. The third help resource is the PARS Helpdesk, for all technical problems and questions that you cannot find answers to using the other help resources. Finally, we also offer training opportunities.

4.1. Internal Help System

4.1.1. Helpful Hints

Hints on how to perform tasks are available on the right-hand side of most screens in PARS. They contain everything from how to use a wildcard character when entering criteria for a report to links to other help resources.

4.1.2. Quick Start Guide

This is a dynamic page that allows you to find the answer to a specific question. It is designed primarily to assist brand-new users get started with basic navigation and data entry. It can also serve as good refresher for those users who have not used in the system for an extended period of time.

4.1.3. FAQ

This is a dynamic page which allows you to find answers to the most commonly asked questions we receive at the Helpdesk.

4.1.4. Supported Functions

This is a listing of the different mathematical functions that PARS supports when creating customized calculated fields in your reports.

4.2. Downloadable Resources

The following sections describe the resources that can be downloaded or printed as reference materials. They are found under the **Help Menu**.

4.2.1. User Manual

This document is designed to provide you with all of the information needed to navigate and use PARS. It contains step-by-step instructions, examples and explanations, along with screenshots to help you learn to use PARS effectively.

4.2.2. Getting Started Guide

A two-page reference for getting started with PARS. It contains brief explanations for getting an account, logging in, basic navigation, and common tasks like data entry and data retrieval.

4.2.3. FAQ Top 10

This is a one-page sub-set of the *most* frequently asked questions in the FAQ system.

4.2.4. Data Model

A graphical representation of the structure of the database. It shows you the database tables, how the tables relate to each other, and the fields found within the tables. This resource is extremely helpful when trying to design or edit reports.

4.2.5. Data Dictionary

If you do not know what type of data is supposed to be entered in a particular field, how a value is calculated, or where you would find the information you need to enter, consult this resource. This is a document provides you with definitions and external sources for all fields in PARS.

4.3. PARS HelpDesk

For all system questions that you cannot find answers to in the internal and downloadable resources, or for any technical problems you are experiencing, please contact the PARS Helpdesk at 703-748-7022. All phone messages will be received through voicemail. The Helpdesk support staff guarantees a response to your message within one business day. We check the voicemail and email between the hours of 8 am and 5 pm EST.

When contacting the Helpdesk, please provide us with the following information to help us better assist you:

- Name
- Site location and Managing Office
- Best method of contacting you
- Detail about the nature of the problem you are experiencing
- Project ID number

4.4. On-Site Training

Please contact your program or site administrator if you are interested in having PARS training at your location. All training inquiries can be addressed to the PARS Helpdesk at 703-748-7022, or parshelp@ppc.com.