Earned Value Mode 1

What is Earned Value to GSA?

The goal of the Earned Value (EV) solution is to meet GSA EV Measure guidelines and to provide flexibility by means of 2 separate ePM modes of operation to either (EV) Mode1 or (EV) Mode 2. Below are explanations for each type of (EV) Mode:

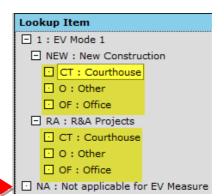
EV MODE 1: Start with a Contract (at <u>any SOV workflow state</u>) automating Schedule documents only editable in the EV utility based on the spread of saved Spend Plan projections.

The EV Mode is a 3 level hierarchy Lookup identifying the EV Mode at level 0 followed by **New Construction** or **R&A Project** details at levels 1 & 2. The "3 level lookup hierarchical value" determines how the S-curve equations are calculated and spread in the Schedule Spend Plan Projections.

Who Will Use This?

- ✓ GSA Project Manager & Staff
- ✓ EXT Project Manager
- ✓ EXT Architect/Engineer & Staff
- ✓ EXT CMa
- ✓ EXT General Contractor, CMc
- ✓ GSA Contracting Officer & Staff
- ✓ GSA Contracting Officer Rep
- Regional Administrator
- ✓ GSA EV Measures Admin

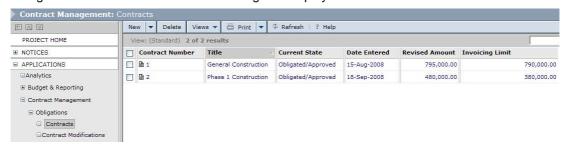
□ DETAILS	
Current State	Pending SOV
Title	GSA Mockup B
Contract Number	GSA-2
Contract Classification	02 : Contract
Description	
Cost Period	Jan 2012 (01/01/2012 to 01/31/2012)
Planned Obligation Period	Jan 2012 (01/01/2012 to 01/31/2012)
Included in EV Measure	✓
Contractor Type	CC : Construction Contract
EV Mode	1.NEW.CT : Courthouse





Contract Creation with EV Settings

- 1. Log into ePM as a user with the Contract Creator security role, then navigate to the appropriate project.
- Navigate to your Contracts register by clicking on Applications > Contract Management >
 Obligations > Contracts. The Contracts register displays.



3. Click the arrow next to the 'New' button, and select 'Contract'.

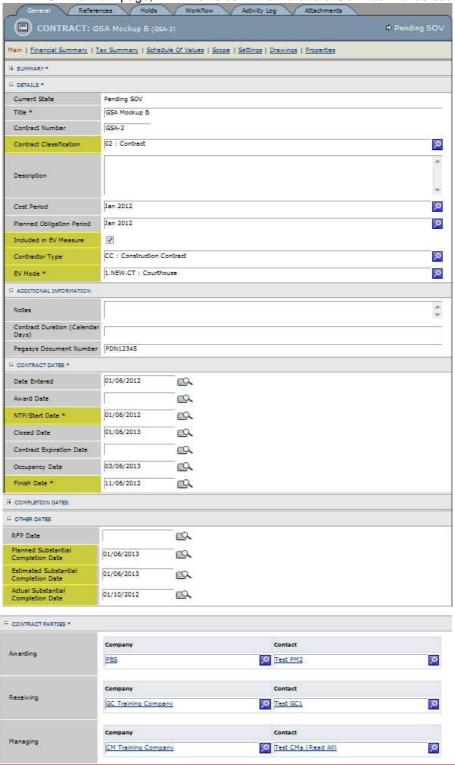


A blank Contract document displays





4. On the Main page, fill in the fields in the Details & Contract Dates section.



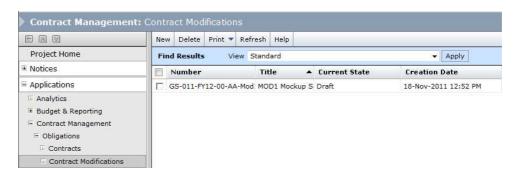
Notes:

- The **Contract Number** is the GSA contract number from Comprizon.
- Planned Obligation Period is required at Planned Obligation state
- Contract Classification, Contractor Type, EV Mode, Contract Start & Finish Dates are required at Pending SOV and all proceeding SOV states.
- Contract must be in an SOV state with all required fields before the EV Utility can display and open that contract.
- In the 'Contract Parties' section, (although not shown with an asterisk), the Main Contact in the 'Procuring Office' and 'Vendor' fields are required.
- The Estimated and Actual Substantial Completion Dates are intended to entered by either the PM, PM Staff, CMa (who is typically involved awarding or managing the contract)
- The Planned
 Substantial Completion
 Date is intended for the
 new "Measures
 Manager" role
 represented by staff in
 the GSA Central Office.
 Their primary role is to
 manage this date during
 their cycles of baselining
 the EV Schedule within
 the EV Utility.

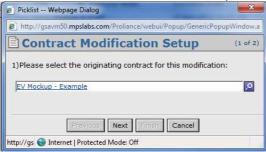


Modification Creation with EV Settings

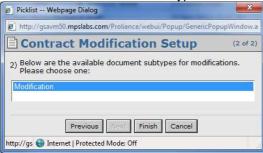
- 1. Log into ePM as a user with the Change Order Creator security role, then navigate to the appropriate project.
- 3. Navigate to your Contracts register by clicking on Applications > Contract Management > Obligations > Modifications. The Modifications register displays.



4. Click the arrow next to the 'New' button, and select 'Contract'.



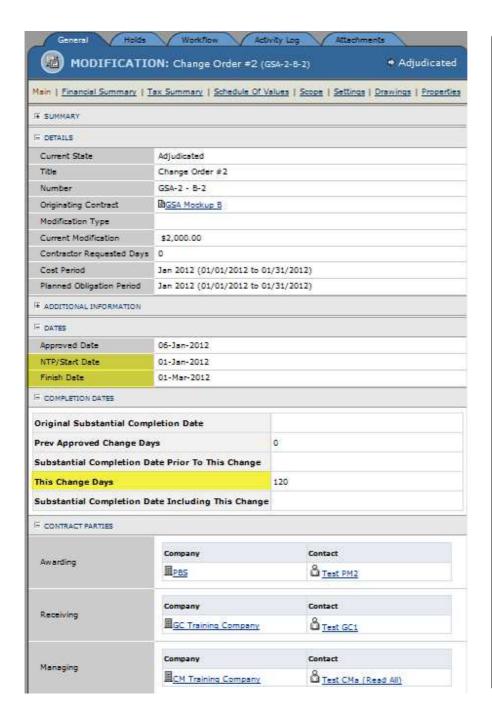
- 5. Select Next
- 6. Select Modification doc sub trype



- 7. Select Finish.
- **8.** On the **Main** page, fill in the fields in the Details & Dates section. If a Modification is extending the Contract Finish Date, enter the "This Change Days" to indicate that schedule impact.







Notes:

- The Modification Number is the GSA contract number from Comprizon.
- Planned Obligation Period is required at Planned Obligation state
- Modification NTP/Start & Finish Dates are required at Pending SOV state
- New processes and business rules apply to new workflow 'Pending Adjudication' and 'Adjudicated' workflow states. Fields are required on the Cost Allocation Line Item level
- This Change Days field on the Main page of the Modification document must be specified if a MOD is extending the scheduled Contract Finish Date.
- In the 'Contract Parties' section, all parties from parent Contract are automatically linked and displayed





9. Select the Schedule Of Values page and ensure all required fields and Cost Accounts are selected before the document enters the Pending SOV state. These same fields are required at the Pending SOV Approval and Approved SOV states. If there are Cost Account Allocation Line Items that need to be submitted for Adjudication, then enter additional required fields at the Cost Account Allocation Line Items grid and workflow the document to the Pending Adjudication state. The Measures Manager with Modification document and eventually will workflow to the Adudicated workflow state.

New Field Notes:

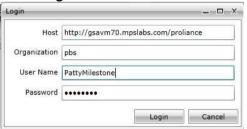
- Request Adjudication (Yes/No) Lookup: The Project Manager decides which Cost Allocations will be submitted to the Central Office Measures Administrator as (Yes/No) for 'Request Adjudication'. This is a required field when entering the Pending Adjudication workflow state.
- * Is Adjudicated (Yes/No) Lookup: The Central Office Measures Administrator will finalize which Cost Allocations are truly adjudicated and enter a Yes/No value for the 'Is Adjudicated" Lookup. This is a required field when entering the Adjudication workflow state.
- <u>Adjudication Changed Days:</u> Either the Project Manager or Central Office Measures Manager can enter the changed days to the Contract Finish Date relevant to only this Cost Account Allocation line item.
- * Adjudication Number: This is a required field for the Modification 'Adjudicated' workflow state. Upon request for Modification items pending Adjudication, the PM will enter the Adjudication Number.
- Adjudication Notes: This is a free text field to describe any further details regarding this Adjudicated Modification and is editable by either the PM or Measures Administrator

ADDITIONAL NOTE: It is possible to have multiple line items (Work Items) in your MOD Schedule Of Values (SOV) grid with only partial items having "Yes" = *Is Adjudicated* while others may not be requested for Adjudication or flagged as Is Adjudicated.

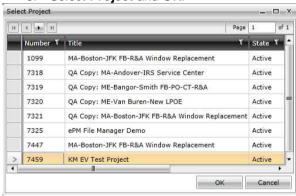


Earned Value Data Entry & Update Utility

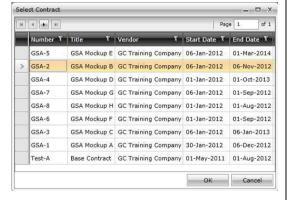
- 1. Launch EV Utility Application through Silverlight
- 2. Select Login icon and enter credentials.



3. Select Project and OK.



4. Select Contract and OK.



Notes:

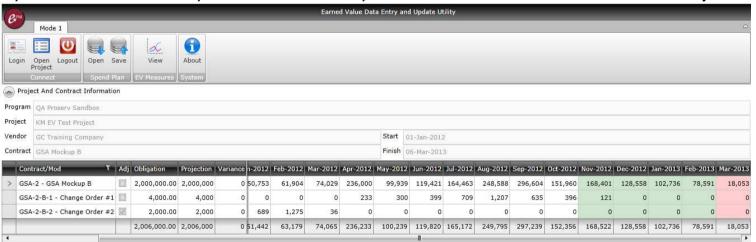
 Only Contracts with the following conditions will appear in the Select Project list if they have the EV Mode, NTP/Start Date, and Finish Dates identified:

Contract Classification = 02 Contracts

Contractor Type = CC, CMc, or D/B

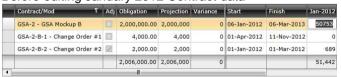
Earned Value Data Entry & Update Utility, cont.

5. The EV Utility Application displays the Spend Plan based on the Obligation (Contracts & Modifications) Start & Finish Dates and spreads the dollars based on calculated business rules derived by the EV Mode Lookup (3 level) value disgnated for that Contract document. The Contract will always be in the first row with all Modifications in either a SOV specific workflow state, Pending Adjudication, and/or Adjudicated workflow state. All Adjudicated Modifications in Adjudicated workflow state with contain a checkbox in the "Adj" column.



a. Validations will appear in red displaying Variances as dollars are subtracted or added from one month to the other. Total Variance must be "0" with orange validation in order to successfully Save the Spend Plan.

Before editing January 2012 Contract data



After Editing January 2012 Contract data





Earned Value Data Entry & Update Utility, cont.

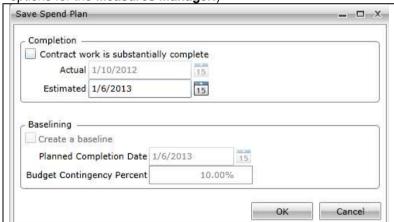
6. Select 'Save' icon from the Spend Plan toolbar section to save the Spend Plan and edit the Estimated Substantial Completion Date if necessary.



7. If the Measures Manager user logins, the Planned Completion Date and Budget Contingency Percent are editable. Baselining is a necessary action for the Measures Manager. So, the "Create a baseline" optionbox will automatically be checked and is non-editable to ensure a schedule baseline action is taken every time a Spend Plan is saved by selecting the OK button.

(Note: The Completion section provides data entry options for the Project Manager while the Baselining section provides data entry

options for the **Measures Manager**.)



- Completion section (Project Manager): Edits and updates the Estimated Completion Date.
 NOTE: If the option for "Contract work is substantially complete" is selected, the PM can edit the Actual Completion Date. If unchecked, the PM cannot edit this date.
- Baselining section (Measures Administrator): Edits the Planned Completion Date and Budget Contingency Percentage.

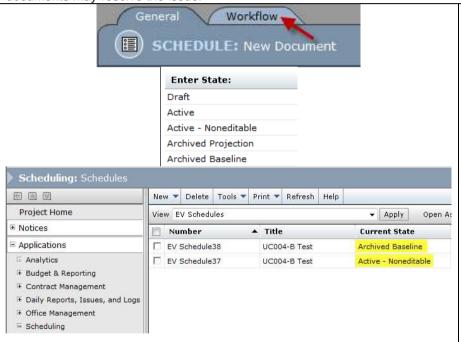
<u>NOTE:</u> By default, the "*Create a baseline*" will be checked and noneditable to ensure this is selected before selecting OK.



Troubleshooting

8. 'EV Shedule' document sub type

If a user is experiencing trouble in saving a spend plan, it can often be corrected by conducting an investigation of the schedule documents may resolve the issue.



For the end user's reference, the Workflow plan (as shown to the left) can be viewed by selecting a "EV Schedule" document and "Workflow" tab within the Schedule register.

The workflow states are automated by use of the Earned Value Data Entry & Update Utility to ensure a historical record of actions can be auditable. The end user will not be required to edit EV Schedule documents through the UI. They are for reference to view with the Gantt views.

As users perform either a "Save - Spend Plan" or "Save - Baseline" action from the Earned Value Data Entry & Update Utility, the previous schedule document instance will automate workflow to an Archived state.

A "Save - Spend Plan" action will automate the previous schedule document to the 'Archived Projection' workflow state and a new Schedule document will be created and moved into the 'Active – Noneditable' state. A "Save - Baseline" action will automate the previous schedule document to the 'Archived Baseline' workflow state and a new Schedule document will be created and moved into the 'Active – Noneditable' state.

EV Schedule Parameters:

- EV Schedule documents are automated from **Draft** to **Active** to **Active Non-editable** workflow states when the **Spend Plan** is saved using the Silverlight application.
- Schedule documents in the **Active Non-editable** workflow state are not functional through the user interface. The end user must use the EV Silverlight Application to function **EV schedule** activities.





Troubleshooting, cont.

- As an **EV Schedule** is "Baselined", the previous Schedule document is transitioned to the **Archived Baseline** workflow state and a new EV Schedule is automated from **Draft** to **Active** to **Active Non-editable** workflow states once again.
- As an **EV Schedule** Spen Plan projections are updated and saved, the previous Schedule document is transitioned to the **Archived Projection** workflow state and a new EV Schedule is automated from **Draft** to **Active** to **Active Non-editable** workflow states once again.





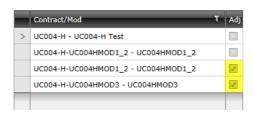
Tips





Reference **QRG.106 EV Meausures** to view all charts and GSA business rules related to On Schedule and On Budget measures





(Adj) Adjudicated column in the Spend Plan grid displays a check mark those Modifications that have "Yes" value for the "Is Adjudicated" Lookup as indicated on the Contract Cost Allocation line item grid in the UI and must be in the Adjudicated workflow state.

- Use the "Save Spend Plan" to baseline and save projection data sets so 'EV Measures' charts can be viewed in respective to various data sets
- Invoices in **Pending** workflow state will not appear as Actual (WIP) in the 'EV Measures' charts
- Roles are only permissible to the Measures Administrator for any baselining activities and Planned Substantial Completion Date data entries.
- Spend Plan Projections and EV Measures are not accessible through the UI. Business Intelligence reports and the Earned Value utility will provide these details.
- Actual (WIP) are plotted based on the Billing End Date field, not the end of the cost period.
- All **Adjudicated Modifications** are identified with the **Is Adjudicated** Lookup at the the Contract Cost Allocation Line Item grid.
 - When a Modification is extending the Contract Finish Date, the "This Changed Days" field on the Main page of the ePM document must be specified.
 - When Modifications to be Adjudicated are extending the Contract Finish Date, the "This Changed Days" field on the Main page AND the "Adjudication Changed Days" field on the Schedule of Values page of the ePM document must be specified.
- Contracts must specify the following in order for them to function with the EV utility:
 - "02: Contract" for the Contract Classification, EV Mode 1 Lookup specified, NTP/Start/Finish Dates identified





