

**Summary of Spending BY09**

Provide the total estimated life-cycle cost for this investment by completing the following table. All amounts represent budget authority in millions, and are rounded to three decimal places. Federal personnel costs should be included only in the row designated "Government FTE Cost," and should be excluded from the amounts shown for "Planning," "Full Acquisition," and "Operation/Maintenance." The "TOTAL" estimated annual cost of the investment is the sum of costs for "Planning," "Full Acquisition," and "Operation/Maintenance." For Federal buildings and facilities, life-cycle costs should include long term energy, environmental, decommissioning, and/or restoration costs. The costs associated with the entire life-cycle of the investment should be included in this report.

SUMMARY OF SPENDING FOR PROJECT STAGES

Toggle Excel Import | View Accessible Table | Hide All | Level 1 | \* Costs in thousands

	2001	2002	2003	2004	2005	2006	2007	PY 2008	CY 2009	BY 2010	BY + 1 2011	BY + 2 2012	2013	2014	2015
<b>Planning</b>															
Budgetary Resources	10	20	30	40	50	60	70	80	90	100	110	120	130	140	1
<b>Acquisition</b>															
Budgetary Resources	10	20	30	40	50	60	70	80	90	100	110	120	130	140	1
Software															
Hardware															
Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
<b>Subtotal Planning &amp; Acquisition</b>															
Budgetary Resources	20	40	60	80	100	120	140	160	180	200	220	240	260	280	3
<b>Operations &amp; Maintenance</b>															
Budgetary Resources	10	20	30	40	50	60	70	80	90	100	110	120	130	140	1
<b>TOTAL</b>															
Budgetary Resources	30	60	90	120	150	180	210	240	270	300	330	360	390	420	4
<b>Government FTE Costs</b>															
Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Planning															
Operational Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	

Update Datagrid Values

Note: For the cross-agency investments, this table should include all funding (both managing partner and partner agencies). Government FTE Costs should not be included as part of the TOTAL represented.

Investment Financial Totals and Balance Table (Read Only)

Total Financial Breakdown

This table displays the Total of the Summary of Spending (Total plus FTE Costs) and the Funding Sources Total for each budget year. The Financial Balance Row is the difference between the two, and should be equal to zero for a properly balanced investment.

Select Financial View: Complete Financials | \* Costs in thousands

	PY - 1 and Prior	PY 2008	CY 2009	BY 2010	BY + 1 2011	BY + 2 2012	BY + 3 2013	BY + 4 and Beyond	Total
SOS TOTAL <sup>1</sup>	840	240	270	300	330	360	390	1860	4590
SOS Government FTE Costs Total <sup>2</sup>	0	0	0	0	0	0	0	0	0
SOS and FTE Costs Total <sup>3</sup>	840	240	270	300	330	360	390	1860	4590
FS Total <sup>4</sup>	840	240	270	300	330	360	390	1860	4590
Balance <sup>5</sup>	0	0	0	0	0	0	0	0	0

The values displayed in this table are aggregated from the Summary of Spending and Funding Source Tables. They cannot be edited directly in this table.

Toggle DME vs SS Breakouts

### 4.19.7 Performance Baseline Tables

For the release v3.3, the Performance Baseline tables have been introduced into the system. The **Performance Baseline** tables are located in the sub-section of the *Cost and Schedule Performance* sections of Part II.C, Part III.B, and Part IV.C. The selection made within the field, "What kind of investment will this be in this budget year" found in the *IA: Overview* section and *Descriptive Information* sub-section of the Exhibit 300 processes, will determine which table(s) will need to be filled out.

What kind of investment will this be in this budget year:	Performance Baseline Table
Full Acquisition	<b>Part II.C</b> Comparison of Initial Baseline and Current Approved Baseline
E-Gov/LoB Oversight	<b>Part IV.C</b> Comparison of Initial Baseline and Current Approved Baseline (EGov)
Mixed Life Cycle	<b>Part II.C</b> Comparison of Initial Baseline and Current Approved Baseline
Operations and Maintenance	<b>Part III.B</b> Comparison of Plan vs. Actual

	<i>Performance Table</i>
Planning	<b>Part II.C Comparison of Initial Baseline and Current Approved Baseline</b>

Each table has two views: the **OMB Required View** and the **All Fields View**. Whenever you enter a sub-section containing one of the performance baseline tables, the default view will be the OMB Required View. The All Fields View is the same for each of the three performance baseline tables [*Comparison of Initial Baseline and Current Approved Baseline, Comparison of Plan vs. Actual Performance Table, Comparison of Initial Baseline and Current Approved Baseline (EGov)*]. The All Fields View contains additional fields / columns that are not a required by OMB (per the A-11 Guidance) but that capture data that will allow the computation of Project Summary (EVMS) and Monthly Calculations in future releases of eCPIC. These fields were incorporated in v3.3 to allow investment managers to manage their work breakdown structure in the new format immediately, despite the fact that the Project Summary Calculations do not utilize the milestones in the performance baseline tables at this time.

#### 4.19.7.1 Viewing Performance Baseline Tables

In general, all three performance baseline tables’ work in a similar manner, however, the information collected in the OMB Required View for each table will change depending on the OMB requirement. The ‘All Fields View’ for each performance baseline table is the same.

When a user accesses a new performance baseline table for the first time (prior to data being entered and assuming the data has not been imported into the Investment from a revision) only the table headings will be visible.

Locked columns in the Performance Baseline table are indicated with a lock icon (🔒) in the column header. When one or more columns are locked, users will also no longer be able to add new milestones, delete milestones, import from MS Project and import from another Performance Baseline table. Modifications to the performance baseline table will need to be completed via a Performance Baseline Change Request.

View Accessible Table | Legend | Show All Rows \* Costs in thousands

Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Pe Cor
		Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost	
				Planned	Actual	Planned	Actual			
Project Totals										

Update Values    Reset Values

Below are the three OMB Required Views of each performance baseline table, as well as the All Fields View.

#### **Part II.C. Comparison of Initial Baseline and Current Approved Baseline**

Comparison of Initial Baseline and Current Approved Baseline

Select View: OMB Required View

View Accessible Table | Toggle MS Project Import | Toggle Baseline Import | Legend | Show All Rows

\* Costs in thousands

Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete	Add Sub
		Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost		
				Planned	Actual	Planned	Actual				
<b>Project Totals</b>											

Update Values | Reset Values | Add Milestone

**Part III.B. Comparison of Plan vs. Actual Performance Table**

Comparison of Plan vs. Actual Performance Table

Select View: OMB Required View

View Accessible Table | Toggle MS Project Import | Toggle Baseline Import | Legend | Show All Rows

\* Costs in thousands

Milestone Number	Description of Milestone	Planned		Actual		Variance		Add Sub
		Completion Date	Total Cost	Completion Date	Total Cost	Schedule (# days)	Cost	
<b>Project Totals</b>								

Update Values | Reset Values | Add Milestone

**Part IV.C. Comparison of Initial Baseline and Current Approved Baseline (EGov)**

Comparison of Initial Baseline and Current Approved Baseline (EGov)

Select View: OMB Required View

View Accessible Table | Toggle MS Project Import | Toggle Baseline Import | Legend | Show All Rows

\* Costs in thousands

Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete	Agency Responsible for Activity	Milestone Type	Add Sub
		Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost				
				Planned	Actual	Planned	Actual						
<b>Project Totals</b>													

Update Values | Reset Values | Add Milestone

**All Fields View**

Comparison of Initial Baseline and Current Approved Baseline

Select View: All Fields View

View Accessible Table | Toggle MS Project Import | Toggle Baseline Import | Legend | Show All Rows

\* Costs in thousands

Current Baseline				Current Baseline Variance			Schedule (# days)	Cost	Percent Complete	Agency Responsible for Activity	Milestone Type	In Calc	Add Sub
Planned		Actual		Schedule (# days)	Cost								
Completion Date	Duration (Days)	Duration (Hours)	Total Cost			Start Date							
<b>Project Totals</b>													

Update Values | Reset Values | Add Milestone

**4.19.7.2 Performance Baseline table Navigation**

The Performance Baseline table now contains a freeze pane, similar to Microsoft Excel, that will allow users to view data from within the table while still being able to view which Milestone they are currently working on. The *Milestone Number* and *Description of Milestone* columns will remain fixed as the user scrolls to the right, allowing the user to always see what milestone is currently being edited.

### 4.19.7.2.1 Performance Baseline Table Navigation – OMB View

Below is an example of the Performance Baseline table header lock with the OMB View selected:

Milestone Number	Description of Milestone	Total Cost (Estimated)	Completion Date		Total Cost		Current Baseline Variance		Percent Complete	Add Sub
			Planned	Actual	Planned	Actual	Schedule (# days)	Cost		
2	Milestone B	\$51	10/31/2007	10/31/2007	\$60	\$69	0	-\$9	100.00	Add
3	Milestone C	\$101	8/29/2007	8/31/2007	\$100	\$200	-2	-\$100	100.00	Add
4	Milestone D	\$51	10/31/2007	10/31/2007	\$60	\$69	0	-\$9	100.00	Add
5	Milestone E	\$101	8/29/2007	8/31/2007	\$100	\$200	-2	-\$100	100.00	Add
6	Milestone F	\$51	10/31/2007	10/31/2007	\$60	\$69	0	-\$9	100.00	Add
7	Milestone G	\$101	8/29/2007	8/31/2007	\$100	\$200	-2	-\$100	100.00	Add
8	Milestone H	\$51	10/31/2007	10/31/2007	\$60	\$69	0	-\$9	100.00	Add
Project Totals		\$608	10/31/2007	10/31/2007	\$640	\$1,076	0	-\$436.00	100.00	

### 4.19.7.2.2 Performance Baseline Table Navigation – All View

Below is an example of the Performance Baseline table header lock with the All View selected:

Milestone Number	Description of Milestone	Completion Date	Total Cost	Schedule (# days)	Cost	Current Baseline Variance	Percent Complete	Agency Responsible for Activity	Milestone Type	In Calc	Add Sub
2	Milestone B	10/31/07	\$69	0	-\$9	100.00		DME	<input checked="" type="checkbox"/>	Add	
3	Milestone C	10/31/07	\$200	-2	-\$100	100.00		DME	<input checked="" type="checkbox"/>	Add	
4	Milestone D	10/31/07	\$69	0	-\$9	100.00		DME	<input checked="" type="checkbox"/>	Add	
5	Milestone E	10/31/07	\$200	-2	-\$100	100.00		DME	<input checked="" type="checkbox"/>	Add	
6	Milestone F	10/31/07	\$69	0	-\$9	100.00		SS	<input checked="" type="checkbox"/>	Add	
7	Milestone G	10/31/07	\$200	-2	-\$100	100.00		SS	<input checked="" type="checkbox"/>	Add	
8	Milestone H	10/31/07	\$69	0	-\$9	100.00		SS	<input checked="" type="checkbox"/>	Add	
Project Totals		10/31/2007	\$1,076	0	-\$436.00	100.00					

### 4.19.7.3 Designation of DME and SS Milestones

In the Performance Baseline Table, each milestone can be designated as either a DME or SS milestone. The designation can be viewed by showing the “All Fields” view of the Performance Table in the “Milestone Type” column. Also, milestones are now color coded depending on their state, with orange representing DME milestones, blue representing steady state milestones, and white representing mixed milestones. A

milestone is of mixed type if it has at least one child that is DME and at least one milestone that is SS. An example of the color coding is shown below. The “Legend” link will display a legend explaining the color coding.

View Accessible Table | [Legend](#) | Show All Rows \* Costs in thousands

	Milestone Number	Description of Milestone	Initial Baseline			Current			
			Planned Start Date	Planned Completion Date	Total Cost (Estimated)	Planned			
						Start Date	Completion Date	Duration (Days)	Duration (Hours)
	1	Deployment and Operations	7/2/2007	7/2/2008	\$3,000	7/2/2007	7/2/2008	367	0.00
	2	Requirements 2	1/1/2007	7/1/2007	\$10,300	1/1/2007	7/1/2007	182	0.00
	2.1	Testing	6/1/2007	7/1/2007	\$300	6/1/2007	7/1/2007	31	0.00
	2.2	Dev	1/1/2007	6/30/2007	\$10,000	1/1/2007	6/30/2007	181	0.00
	Project Totals		1/1/2007	7/2/2008	\$13,300	1/1/2007	7/2/2008	549	0.00

Update Values    Reset Values

Upon clicking Legend, the legend appears:

**Milestone Type:**  
 DME = Orange  
 SS = Blue  
 Mixed (SS and DME) = White

View Accessible Table | [Legend](#) | Show All Rows \* Costs in thousands

Select View: All Fields View

	Milestone Number	Description of Milestone	Initial Baseline			Current			
			Planned Start Date	Planned Completion Date	Total Cost (Estimated)	Planned			
						Start Date	Completion Date	Duration (Days)	Duration (Hours)
	1	Deployment and Operations	7/2/2007	7/2/2008	\$3,000	7/2/2007	7/2/2008	367	0.00
	2	Requirements 2	1/1/2007	7/1/2007	\$10,300	1/1/2007	7/1/2007	182	0.00
	2.1	Testing	6/1/2007	7/1/2007	\$300	6/1/2007	7/1/2007	31	0.00
	2.2	Dev	1/1/2007	6/30/2007	\$10,000	1/1/2007	6/30/2007	181	0.00
	Project Totals		1/1/2007	7/2/2008	\$13,300	1/1/2007	7/2/2008	549	0.00

**NOTE: By default, all milestones will be designated as DME milestones.**

#### 4.19.7.4 Changing Performance Baseline Table Views

To change between the **OMB Field View** and **All Field View** in the performance baseline tables, a drop-down box located above each table on the right hand side. Select the desired view from this box to switch the display between the OMB required information and all Earned Value (EV) columns.

The example below shows the **OMB Field View** with data already entered.

Comparison of Initial Baseline and Current Approved Baseline

Select View: OMB Required View

View Accessible Table | Toggle MS Project Import | Toggle Baseline Import | [Legend](#) | Show All Rows \* Costs in thousands

	Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance			
			Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost	Percent Complete	Add Sub
					Planned	Actual	Planned	Actual				
	1	Project1	9/30/2008	\$275,000	9/30/2008		\$6,500	\$1,200	\$2,005.8	49.32	Add	
	Project Totals		9/30/2008	\$275,000	9/30/2008		\$6,500	\$1,200	0	\$2,005.80	49.32	

Update Values    Reset Values    Add Milestone

Clicking on the **Select View** drop-down box will allow users to change to the **All Fields View**. This displays all columns / fields that exist for the table. Since there are numerous columns, some of the columns may be hidden. To view these columns use the scroll bar at the bottom of the control. If there are numerous milestones use the application scroll bar on the right to scroll vertically down the page.

Comparison of Initial Baseline and Current Approved Baseline

Select View: All Fields View

View Accessible Table | Toggle MS Project Import | Toggle Baseline Import | Legend | Show All Rows

Current Baseline						Current Baseline Variance		Percent Complete	Agency Responsible for Activity	Milestone Type	In Calc	Add Sub
Planned			Actual			Schedule (# days)	Cost					
Completion Date	Duration (Days)	Duration (Hours)	Total Cost	Start Date	Completion Date			Total Cost				
9/30/2008	366	72983.00	\$6,500	10/1/2007		\$1,200	0	\$2,005.8	49.32			Add
								\$2,005.80	49.32			

\* Costs in thousands

Update Values | Reset Values | Add Milestone

Keep in mind that these are different views of the same information and not separate tables. Therefore the fields that exist in both views will maintain their data across views. The data entry form that appears below the table when adding new milestones is dependent on the selected view. Only the fields that belong to a particular view will be available to be completed or updated.

#### 4.19.7.5 Adding Performance Baseline Milestones

To Add a Milestone to one of the performance baseline tables:

1. Click on either of the **Add Milestone** links.

View Accessible Table | Toggle MS Project Import | Toggle Baseline Import | Legend | Show All Rows

Add Milestone

\* Costs in thousands

	Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete	Add Sub
			Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost		
					Planned	Actual	Planned	Actual				
	1	Project1	9/30/2008	\$275,000	9/30/2008		\$6,500	\$1,200		\$2,005.8	49.32	Add
		Project Totals	9/30/2008	\$275,000	9/30/2008		\$6,500	\$1,200	0	\$2,005.80	49.32	

Update Values | Reset Values | Add Milestone

The page will refresh to display the data entry form for adding a new milestone under the table. Required fields are designated with a red asterisk. The fields that are displayed in the form are dependent on which of the performance baseline tables you are in as well as the selected view.

**Add/Modify a Milestone**  
To add or modify a milestone, complete the data entry form below and click **Save**.

**General Information**  
Milestone Number: \*  Description of Milestone: \*   
250 characters remaining

**Initial Baseline**  
Planned Completion Date:  Total Cost (Estimated):

**Current Baseline - Planned Information**  
Planned Completion Date:  Total Cost:

**Current Baseline - Actual Information**  
Percent Complete: \*   
Actual Completion Date:  Total Cost:

2. Enter the data needed for each field. Users can click on the **date chooser** drop down to assist them in selecting a date.

**Add/Modify a Milestone**  
To add or modify a milestone, complete the data entry form below and click **Save**.

**General Information**  
Milestone Number: \*  Description of Milestone: \*   
250 characters remaining

**Initial Baseline**  
Planned Completion Date:

**Current Baseline - Planned Information**  
Planned Completion Date:  Total Cost (Estimated):   
Total Cost:

**Current Baseline - Actual Information**  
Percent Complete: \*   
Actual Completion Date:  Total Cost:

For cost information, the System Administrator will define the format for entering costs into the table and it will be labeled on the right hand side above the table. The I.H Dollar Input setting may be Dollars, Thousands, or Millions.



	Actual Value	Data Input Value (into eCPIC)	XML Exported Value (for OMB)
<b>Data Entry in Millions</b>	\$152,575.00	\$0.152575 (Actual/1,000,000)	\$0.152575 (Actual)
<b>Data Entry in Thousands</b>	\$152,575.00	\$152.575 (Actual/1,000)	0.152575 (Input/1,000)
<b>Data Entry in Dollars</b>	\$152,575.00	\$152,575.00 (Actual)	0.152575 (Input/1,000,000)

**Note: OMB requires reporting in millions to six decimal places. Therefore, values**

**will be rounded to the nearest millionth.**

The 'IN EVMS' checkbox is available in the **All Fields View** to be checked so that data incorporated in the table may be used to calculate project summary (EVMS) values.

3. Click **Save** to save the data and add the milestone to the table or **Cancel** to undo any data entered and close the add milestone form without adding the milestone to the table.

**Add/Modify a Milestone**  
To add or modify a milestone, complete the data entry form below and click **Save**.

**General Information**  
Milestone Number: \* 10 Description of Milestone: \* Milestone A  
239 characters remaining

**Initial Baseline**  
Planned Completion Date: 6/1/2007 Total Cost (Estimated): 20000

**Current Baseline - Planned Information**  
Planned Completion Date: 6/15/2007 Total Cost: 25000

**Current Baseline - Actual Information**  
Percent Complete: \* 90  
Actual Completion Date: 6/15/2007 Total Cost: 25000

**Save** **Cancel**

If required data is missing or invalid data has been entered when users click **Save**, validation messages are displayed indicating what changes need to be made.

**Add/Modify a Milestone**  
To add or modify a milestone, complete the data entry form below and click **Save**.

The following error(s) occurred:

- Milestone Name is a required field

**General Information**  
Milestone Number: \* 10 Description of Milestone: \*  
250 characters remaining

**Initial Baseline**  
Planned Completion Date: 6/1/2007 Total Cost (Estimated): 20000

**Current Baseline - Planned Information**  
Planned Completion Date: 6/15/2007 Total Cost: 25000

**Current Baseline - Actual Information**  
Percent Complete: \* 90  
Actual Completion Date: 6/15/2007 Total Cost: 25000

**Save** **Cancel**

Once all the fields are entered and contain valid data, the new milestone will be added.

This process can be repeated for each new Milestone that needs to be added to the table. Data in red is calculated by the system.

**Note: Milestones are ordered by Milestone Number by default in the**

**performance baseline tables, with letters and decimals used for defining the milestone number. Milestone numbers are not auto-generated by the application; they are manually entered by the user.**

#### 4.19.7.5.1 Adding and Removing Sub-Milestones

The Performance Baseline tables allow users to create sub-milestones and convert main milestones to sub-milestones. Additionally, users can add sub-milestones to sub-milestones, sub-milestones to sub-sub milestones, etc.

To Add a Sub-Milestone:

1. Click on the **Add Sub** link for the milestone to add a sub-milestone to.

View Accessible Table | Toggle MS Project Import | Toggle Baseline Import | Legend | Show All Rows Add Milestone  

\* Costs in thousands

Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete	Add Sub
		Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost		
				Planned	Actual	Planned	Actual				
10	Milestone A	6/1/2007	\$20,000	6/15/2007	6/15/2007	\$25,000	\$25,000	0	-\$2,500	90.00	Add
20	Milestone B	6/14/2007	\$30,000	6/30/2007	6/30/2007	\$30,000	\$30,000	0	\$	100.00	Add
30	Milestone C	7/1/2007	\$15,000	7/1/2007	7/1/2007	\$15,000	\$15,000	0	\$	100.00	Add
40	Milestone D	7/16/2007	\$20,000	7/16/2007	7/16/2007	\$20,000	\$20,000	0	-\$2,000	90.00	Add
<b>Project Totals</b>		7/16/2007	\$85,000	7/16/2007	7/16/2007	\$90,000	\$90,000	0	-\$4,500.00	95.00	

Update Values | Reset Values | Add Milestone

Clicking the ‘Add’ link will refresh the page to reveal two association boxes below the table.

Selected Milestone: 10 Milestone A

Select sub milestones from the following list or create a new milestone by clicking the **New** button below.

20 Milestone B  
30 Milestone C  
40 Milestone D

The box under the ‘New’ button will contain the list of existing milestones available to add as a sub-milestone. The list of milestones available includes milestones of all levels (*main and sub-milestones*), but does not include the selected milestone.

The other box to the right contains the sub-milestones that already exist as children for the selected milestone. If there is only one milestone within the table, both boxes will be empty.

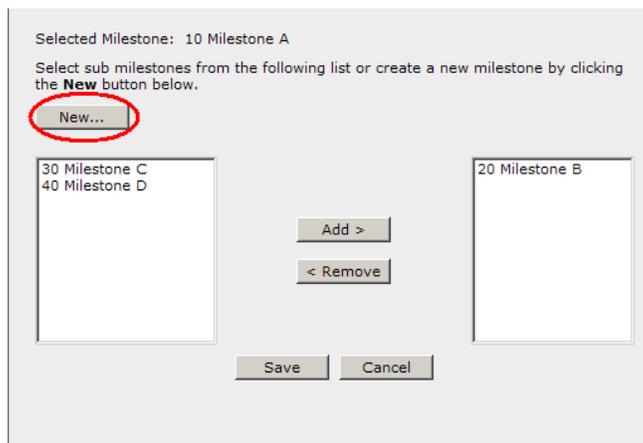
2. Select the milestone(s) to be added or removed.

**Note: Holding ‘Shift’ while selecting milestones will highlight multiple milestones at one time in the order which they are listed. Holding ‘Ctrl’ while selecting milestones, will allow users to highlight a milestone and select other milestones that may not be in order.**

3. Click on the **Add** button to add milestones as children or click on the **Remove** button to remove milestones from the selected milestone.



If the desired sub-milestone is a new milestone that is not already present in the table, click on the **New** button above the milestone assignment boxes.



This will bring up the milestone data entry form below the two assignment boxes. From there, users can fill out all appropriate information and add the milestone as described above.

**Add/Modify a Milestone**  
 To add or modify a milestone, complete the data entry form below and click **Save**.

**General Information**  
 Milestone Number: \*  Description of Milestone: \*   
250 characters remaining

**Initial Baseline**  
 Planned Completion Date:  Total Cost (Estimated):

**Current Baseline - Planned Information**  
 Planned Completion Date:  Total Cost:

**Current Baseline - Actual Information**  
 Percent Complete: \*  Total Cost:   
 Actual Completion Date:

- Click **Save** to save the data and add the milestone to the table or **Cancel** to undo any data entered and close the add milestone form without adding the milestone to the table.

The sub-milestone(s) will be added under the selected milestone and the selected milestone will now have an expand  icon next to it. This + indicates that the milestone has sub-milestone(s). Clicking on this icon will display the associated sub-milestones.

View Accessible Table | Toggle MS Project Import | Toggle Baseline Import | Legend | Show All Rows Add Milestone

\* Costs in thousands

	Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete	Add Sub
			Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost		
					Planned	Actual	Planned	Actual				
	10	Milestone A	6/14/2007	\$30,000	6/30/2007	6/30/2007	\$30,000	\$30,000	0	\$	100.00	Add
	20	Milestone B	6/14/2007	\$30,000	6/30/2007	6/30/2007	\$30,000	\$30,000	0	\$	100.00	Add
	30	Milestone C	7/1/2007	\$15,000	7/1/2007	7/1/2007	\$15,000	\$15,000	0	\$	100.00	Add
	40	Milestone D	7/16/2007	\$20,000	7/16/2007	7/16/2007	\$20,000	\$20,000	0	-\$2,000	90.00	Add
	Project Totals		7/16/2007	\$65,000	7/16/2007	7/16/2007	\$65,000	\$65,000	0	-\$2,002.00	96.92	

The sub-milestone added will now appear below the parent milestone. If users have any more new sub-milestones to enter, repeat the process of clicking the **New** button, completing the data entry form, and clicking the **Save** button below the form. This will complete the process of defining the sub-milestones for the selected parent.

Once a sub-milestone is added, the parent milestones values are replaced with the roll of values of all the sub-milestones assigned to it. Additionally, in the All Fields View, the In EVMS checkbox will be disabled for parent milestones. The calculations in all the baseline tables will be calculated from the lowest milestone level; therefore users are unable to check “In EVMS” for parent milestones.

Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Percent Complete	Add Sub
		Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost			
				Planned	Actual	Planned	Actual		
10	Milestone A	6/14/2007	\$30,000	6/30/2007	6/30/2007	\$30,000	\$30,000	0	100.00
20	Milestone B	6/14/2007	\$30,000	6/30/2007	6/30/2007	\$30,000	\$30,000	0	100.00
30	Milestone C	7/1/2007	\$15,000	7/1/2007	7/1/2007	\$15,000	\$15,000	0	100.00
40	Milestone D	7/16/2007	\$20,000	7/16/2007	7/16/2007	\$20,000	\$20,000	0	90.00
Project Totals		7/16/2007	\$65,000	7/16/2007	7/16/2007	\$65,000	\$65,000	0	96.92

The Parent Milestones now contain the roll up values of the Child Milestone

**Note: The Performance Baseline variance calculations will work as follows: The variances are calculated on a milestone by milestone basis. If the milestone has children, the variance is then calculated based upon the rolled up dates and costs of its children. If no costs or end dates are entered into a child milestone then that child milestone will not affect the calculations of its parent milestone. If costs or end dates are partially entered into a child milestone, the data that was entered in for the child milestone will roll up to the parent milestone ignoring the missing values, and will factor into the variance calculation for the parent milestone.**

*Parent Milestone:*

Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete	Add Sub
		Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost		
				Planned	Actual	Planned	Actual				
10	Milestone A	7/31/2007	\$60,000	7/31/2007	8/7/2007	\$60,000	\$60,000	-7	-\$1,998	96.67	
30	Milestone C	7/1/2007	\$30,000	7/1/2007	7/1/2007	\$30,000	\$30,000	0	\$	100.00	
40	Milestone D	7/4/2007	\$15,000	7/4/2007	7/9/2007	\$15,000	\$15,000	-5	-\$4,500	70.00	
Project Totals		7/31/2007	\$105,000	7/31/2007	8/7/2007	\$105,000	\$105,000	-7	-\$6,499.50	93.81	

- Schedule (# of days) is a simple subtraction of dates of the *Planned Completion* date 7/4/2007 – *Actual Completion* date 7/9/2007= -5 variance.
- Cost Variance is: *BAC (Budget at Completion)* 15,000 \* *Percent Complete* 70% – *Actual Cost* 15,000= -4,500.

*Parent Milestone with children:*

Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete	Add Sub
		Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost		
				Planned	Actual	Planned	Actual				
10	Milestone A	7/31/2007	\$60,000	7/31/2007	8/7/2007	\$60,000	\$60,000	-7	-\$1,998	96.67	
101	Milestone A.1	7/16/2007	\$20,000	7/16/2007	7/20/2007	\$20,000	\$20,000	-4	-\$2,000	90.00	
102	Milestone A.2									0.00	
103	Milestone A.3	7/31/2007	\$40,000	7/31/2007	8/7/2007	\$40,000	\$40,000	-7	\$	100.00	
30	Milestone C	7/1/2007	\$15,000	7/1/2007	7/1/2007	\$15,000	\$15,000	0	\$	100.00	
40	Milestone D	7/16/2007	\$20,000	7/16/2007	7/16/2007	\$20,000	\$20,000	0	-\$2,000	90.00	
Project Totals		7/31/2007	\$95,000	7/31/2007	8/7/2007	\$95,000	\$95,000	-7	-\$3,999.50	93.79	

Rolled up the latest end date.

Simple roll up of costs. Ignored the empty cost of Milestone A.2

Difference based upon the roll up dates from the children 7/31/2007 - 8/7/2007

Difference based upon the roll up values of the children. 60,000 \* 96.67% -

**Note: In Part 3, the Percent Complete is considered 100%.**

	Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete	Add Sub
			Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost		
					Planned	Actual	Planned	Actual				
+	10	Milestone A	7/31/2007	\$60,000	7/31/2007	8/7/2007	\$60,000	\$60,000	-7	-\$1,998	96.67	Add
	30	Milestone C	7/1/2007	\$30,000	7/1/2007	7/1/2007	\$30,000	\$30,000	0	\$	100.00	Add
	40	Milestone D	7/4/2007	\$15,000	7/4/2007	7/9/2007	\$15,000	\$15,000	-5	-\$4,500	70.00	Add
	50	Milestone E	8/1/2007	\$4,000	8/1/2007	8/31/2007	\$4,000	\$4,200	-30	-\$200	100.00	Add
	Project Totals		8/1/2007	\$109,000	8/1/2007	8/31/2007	\$109,000	\$109,200	-30	-\$6,696.40	94.04	

The Cost Variance in Part 3:  $BAC (Budget\ at\ Completion) 4,000 * Percent\ Complete\ 100\% - Actual\ Cost\ 4,200 = -200$ .

**Note: Prior to v3.4, the Project Totals row in the Performance Baseline tables was simply summing the Percent Complete column for each top level milestone within the table. The Percent Complete Total row is now a weighted average based on the Planned Total Cost and the Percent Complete. The algorithm is as follows:**

$$\frac{\text{SUM}([\text{Actual Percent Complete}] * [\text{Current Baseline Planned Total Cost}])}{\text{SUM}([\text{Current Baseline Planned Total Cost}])}$$

	Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete	Add Sub
			Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost		
					Planned	Actual	Planned	Actual				
+	10	Milestone A	7/31/2007	\$60,000	7/31/2007	8/7/2007	\$60,000	\$60,000	-7	-\$1,998	96.67	Add
	101	Milestone A.1	7/16/2007	\$20,000	7/16/2007	7/20/2007	\$20,000	\$20,000	-4	-\$2,000	90.00	
	102	Milestone A.2										
	103	Milestone A.3	7/31/2007	\$40,000	7/31/2007	8/7/2007	\$40,000	\$40,000	-7			
	30	Milestone C	7/1/2007	\$30,000	7/1/2007	7/1/2007	\$30,000	\$30,000	0			
	40	Milestone D	8/1/2007	\$4,000	8/1/2007	8/31/2007	\$4,000	\$4,200	-30			
	Project Totals		8/1/2007	\$94,000	8/1/2007	8/31/2007	\$94,000	\$94,200	-30			

Weighted Average:  
 Child 90% \* 20,000 = 1,800,000  
 Child 100% \* 40,000 = 4,000,000  
 1,800,000 + 4,000,000 = 5,800,000  
 5,800,000 / Parent 60,000 = 96.67

#### 4.19.7.5.2 Managing Milestones/Sub-Milestones

Each of the performance baseline tables have functionality for expanding and collapsing the child rows of any given parent milestone. Any milestone with a plus  $\oplus$  has sub-milestones; however, these rows are currently in a collapsed state and hidden from view. They can be expanded by clicking on the  $\oplus$  icon to display any sub-milestones. Any milestone with a minus  $\ominus$  is expanded and can be collapsed by clicking on the icon to hide the sub-milestones.

### 4.19.7.5.2.1 Showing/Hiding Table Rows

For each milestone, any number of sub-milestones may be added. Additionally, any sub-milestone may also be assigned to any other sub-milestone. In order to see all milestones within the tables, users can select the **Show All Rows** link. This will expand all of the rows in the table and reveal all the milestones that have been created.

The screenshot shows a table with the following data:

Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete	Add Sub
		Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost		
				Planned	Actual	Planned	Actual				
10	Milestone A	7/31/2007	\$60,000	7/31/2007	8/7/2007	\$60,000	\$60,000	-7	-\$1,998	96.67	Add
30	Milestone C	7/1/2007	\$30,000	7/1/2007	7/1/2007	\$30,000	\$30,000	0	\$	100.00	Add
40	Milestone D	8/1/2007	\$4,000	8/1/2007	8/31/2007	\$4,000	\$4,200	-30	-\$200	100.00	Add
Project Totals		8/1/2007	\$94,000	8/1/2007	8/31/2007	\$94,000	\$94,200	-30	-\$2,202.20	97.87	

To collapse the entire table to view only the top level main milestones, click on the **Hide All Rows** link. This will collapse the entire table and only the main or parent milestones will be displayed.

The screenshot shows the table with sub-milestones expanded:

Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete	Add Sub
		Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost		
				Planned	Actual	Planned	Actual				
10	Milestone A	7/31/2007	\$60,000	7/31/2007	8/7/2007	\$60,000	\$60,000	-7	-\$1,998	96.67	Add
101	Milestone A.1	7/16/2007	\$20,000	7/16/2007	7/20/2007	\$20,000	\$20,000	-4	-\$2,000	90.00	Add
102	Milestone A.2									0.00	Add
103	Milestone A.3	7/31/2007	\$40,000	7/31/2007	8/7/2007	\$40,000	\$40,000	-7	\$	100.00	Add
30	Milestone C	7/1/2007	\$30,000	7/1/2007	7/1/2007	\$30,000	\$30,000	0	\$	100.00	Add
40	Milestone D	8/1/2007	\$4,000	8/1/2007	8/31/2007	\$4,000	\$4,200	-30	-\$200	100.00	Add
Project Totals		8/1/2007	\$94,000	8/1/2007	8/31/2007	\$94,000	\$94,200	-30	-\$2,202.20	97.87	

### 4.19.7.5.2.2 508 Compliance and Accessibility

For 508 Compliance, the ability to expand and collapse rows can be disabled by clicking on the **View Accessible Table** link at the top left of the table.

The screenshot shows the table with the 'View Accessible Table' link circled in red:

Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete	Add Sub
		Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost		
				Planned	Actual	Planned	Actual				
10	Milestone A	7/31/2007	\$60,000	7/31/2007	8/7/2007	\$60,000	\$60,000	-7	-\$1,998	96.67	Add
30	Milestone C	7/1/2007	\$30,000	7/1/2007	7/1/2007	\$30,000	\$30,000	0	\$	100.00	Add
40	Milestone D	8/1/2007	\$4,000	8/1/2007	8/31/2007	\$4,000	\$4,200	-30	-\$200	100.00	Add
Project Totals		8/1/2007	\$94,000	8/1/2007	8/31/2007	\$94,000	\$94,200	-30	-\$2,202.20	97.87	

Clicking this link displays all the milestones with no expanding and collapsing functionality.

View Standard Table | Toggle MS Project Import | Toggle Baseline Import | Legend | Add Milestone

\* Costs in thousands

	Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete	Edit	Add Sub
			Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost			
					Planned	Actual	Planned	Actual					
	<b>10</b>	<b>Milestone A</b>	<b>7/31/2007</b>	<b>\$60,000</b>	<b>7/31/2007</b>	<b>8/7/2007</b>	<b>\$60,000</b>	<b>\$60,000</b>	<b>-7</b>	<b>-\$1,998</b>	<b>96.67</b>	Edit	Add
	101	Milestone A.1	7/16/2007	\$20,000	7/16/2007	7/20/2007	\$20,000	\$20,000	-4	-\$2,000	90.00	Edit	Add
	102	Milestone A.2									0.00	Edit	Add
	103	Milestone A.3	7/31/2007	\$40,000	7/31/2007	8/7/2007	\$40,000	\$40,000	-7	\$	100.00	Edit	Add
	30	Milestone C	7/1/2007	\$30,000	7/1/2007	7/1/2007	\$30,000	\$30,000	0	\$	100.00	Edit	Add
	40	Milestone D	8/1/2007	\$4,000	8/1/2007	8/31/2007	\$4,000	\$4,200	-30	-\$200	100.00	Edit	Add
	<b>Project Totals</b>		<b>8/1/2007</b>	<b>\$94,000</b>	<b>8/1/2007</b>	<b>8/31/2007</b>	<b>\$94,000</b>	<b>\$94,200</b>	<b>-30</b>	<b>-\$2,202.20</b>	<b>97.87</b>		

Update Values    Reset Values    Add Milestone

### 4.19.7.6 Editing Milestones

To Edit a Milestone:

1. Click the cell containing the data that will be edited and make the appropriate changes.
2. Click the **Update Values** button.

**Note:** Any number of updates can be made to editable cells in the table. However, none of these changes will be made permanent (saved to the database) until the ‘Update Values’ button has been pressed. Therefore, do not navigate away from this page before the changes have been committed, otherwise all new information will be lost. This includes clicking the Add (Sub) and Add Milestone buttons as well.

View Standard Table | Toggle MS Project Import | Toggle Baseline Import | Legend | Add Milestone

\* Costs in thousands

	Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete	Edit	Add Sub
			Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost			
					Planned	Actual	Planned	Actual					
	<b>10</b>	<b>Milestone A</b>	<b>7/31/2007</b>	<b>\$60,000</b>	<b>7/31/2007</b>	<b>8/7/2007</b>	<b>\$60,000</b>	<b>\$60,000</b>	<b>-7</b>	<b>-\$1,998</b>	<b>96.67</b>	Edit	Add
	101	Milestone A.1	7/16/2007	\$20,000	7/16/2007	7/20/2007	\$20,000	\$20,000	-4	-\$2,000	90.00	Edit	Add
	102	Milestone A.2									0.00	Edit	Add
	103	Milestone A.3	7/31/2007	\$40,000	7/31/2007	8/7/2007	\$40,000	\$40,000	-7	\$	100.00	Edit	Add
	30	Milestone C	7/1/2007	\$30,000	7/1/2007	7/1/2007	\$30,000	\$30,000	0	\$	100.00	Edit	Add
	40	Milestone D	8/1/2007	\$4,000	8/1/2007	8/31/2007	4000	\$4,200	-30	-\$200	100.00	Edit	Add
	<b>Project Totals</b>		<b>8/1/2007</b>	<b>\$94,000</b>	<b>8/1/2007</b>	<b>8/31/2007</b>	<b>\$94,000</b>	<b>\$94,200</b>	<b>-30</b>	<b>-\$2,202.20</b>	<b>97.87</b>		

Update Values    Reset Values    Add Milestone

For parent milestones any values that are roll ups from the children milestones cannot be edited and will be disabled for editing. Only the lowest level milestones can be edited.

### 4.19.7.7 Resetting Values

Clicking the **Reset Values** button will reset all of the data in the table to the state that it was last saved (Update Values). Note that clicking this button does not simply undo the last edit, but ALL edits that are different from the values that exist in the database. On reset, a confirmation warning will be displayed to be sure that all values should be reverted.

Microsoft Internet Explorer

Are you sure you want to reset this data table? Any changes made to this table since the last save will be lost.

View Standard Table | Toggle MS Project Import | To

Select View: OMB Required View

\* Costs in thousands

Milestone Number	Description of Milestone	Date	Planned	Actual	Planned	Actual	Variance	Cost	Percent Complete	Edit	Add Sub
10	Milestone A	7/31/2007	\$60,000	7/31/2007	8/7/2007	\$60,000	\$60,000	-7	96.67	Edit	Add
101	Milestone A.1	7/16/2007	\$20,000	7/16/2007	7/20/2007	\$20,000	\$20,000	-4	90.00	Edit	Add
102	Milestone A.2								0.00	Edit	Add
103	Milestone A.3	7/31/2007	\$40,000	7/31/2007	8/7/2007	\$40,000	\$40,000	-7	100.00	Edit	Add
30	Milestone C	7/1/2007	\$30,000	7/1/2007	7/1/2007	\$30,000	\$30,000	0	100.00	Edit	Add
40	Milestone D	8/1/2007	\$4,000	8/1/2007	8/31/2007	\$4,200	\$4,200	-30	100.00	Edit	Add
Project Totals		8/1/2007	\$94,000	8/1/2007	8/31/2007	\$94,200	\$94,200	-30	97.88		

Update Values | Reset Values | Add Milestone

### 4.19.7.8 Deleting Milestones

To Delete a Milestone:

1. Click the row select box or to the left of every row to highlight the entire row.

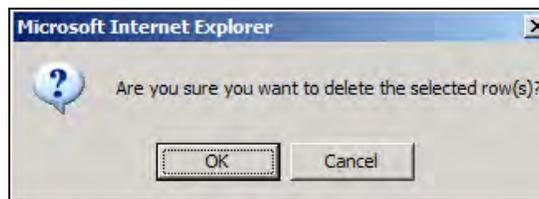
View Standard Table | Toggle MS Project Import | Toggle Baseline Import | Legend |

\* Costs in thousands

Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete	Edit	Add Sub
		Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost			
10	Milestone A	7/31/2007	\$60,000	7/31/2007	8/7/2007	\$60,000	\$60,000	-7	96.67	Edit	Add	
101	Milestone A.1	7/16/2007	\$20,000	7/16/2007	7/20/2007	\$20,000	\$20,000	-4	90.00	Edit	Add	
102	Milestone A.2								0.00	Edit	Add	
103	Milestone A.3	7/31/2007	\$40,000	7/31/2007	8/7/2007	\$40,000	\$40,000	-7	100.00	Edit	Add	
30	Milestone C	7/1/2007	\$30,000	7/1/2007	7/1/2007	\$30,000	\$30,000	0	100.00	Edit	Add	
40	Milestone D	8/1/2007	\$4,000	8/1/2007	8/31/2007	\$4,200	\$4,200	-30	100.00	Edit	Add	
Project Totals		8/1/2007	\$94,000	8/1/2007	8/31/2007	\$94,200	\$94,200	-30	97.88			

Update Values | Reset Values | Add Milestone

2. Click the **Delete** button found on the keyboard.
3. Confirm deletion. Select **OK**.



**Note:** For sub-milestones, each cell can be deleted by placing the cursor in the cell and deleting the highlighted text. Because parent milestones data is disabled, if a user tries to delete a field within a parent milestone, a warning will appear asking if the user wants to delete the select row.

**Note:** Upon deleting a sub-milestone, the parent milestones values will be recalculated.

**Note: If a parent milestone is deleted, then all of its children rows are also deleted.**

### 4.19.7.9 Duplicating (Copy) Performance Baseline Milestones

The Performance Baseline table allows for duplication of existing milestones. This will assist users in recreating a milestone and sub-milestone structures without having to manually enter new milestone data.

The steps below detail how to duplicate existing milestones:

1. Navigate to the Performance Baseline table within the desired investment
2. Highlight the desired row to copy

	Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete
			Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost	
					Planned	Actual	Planned	Actual			
☒	1	Milestone 1		\$	10/10/2005	10/8/2007	\$6,000	\$5,955.44	-728	-\$3,481.0	41.24
	2	Sub-Milestone 9		\$	6/30/2004	6/30/2004	\$500	\$499	0	-\$387	22.40
	3	Sub-Milestone 8		\$	5/31/2004	5/30/2004	\$500	\$498.5	1	-\$386	22.50
	4	Sub-Milestone 7		\$	4/30/2004	4/29/2004	\$500	\$498	1	-\$498	0.00
	5	Sub-Milestone 6		\$	3/31/2004	3/30/2004	\$500	\$497.46	1	-\$344.46	30.60
	6	Sub-Milestone 5		\$	2/28/2004	2/27/2004	\$500	\$497	1	\$2.95	99.99
	7	Sub-Milestone 4		\$	10/10/2005	10/8/2007	\$500	\$496.98	-728	-\$496.98	0.00
	8	Sub-Milestone 3		\$	10/10/2005	10/8/2007	\$500	\$496	-728	-\$121	75.00
	9	Sub-Milestone 2		\$	11/30/2003	11/30/2003	\$500	\$495.5	0	\$4.5	100.00
	10	Sub-Milestone 12		\$	10/10/2005	10/8/2007	\$500	\$495	-728	\$5	99.10
	11	Sub-Milestone 11		\$	10/10/2005	10/8/2007	\$500	\$494.5	-728	-\$494.5	0.00
	12	Sub-Milestone 10		\$	10/10/2005	10/8/2007	\$500	\$494	-728	-\$382	22.40
	13	Sub-Milestone 1		\$	10/10/2005	10/31/2003	\$500	\$493.5	710	-\$378.9	22.92
▶	15	Milestone 2		\$	10/31/2003	10/31/2003	\$500	\$499.78	0	\$22	100.00
	Project Totals			\$	10/10/2005	10/8/2007	\$6,500	\$6,455.22	-728	-\$3,480.82	45.76

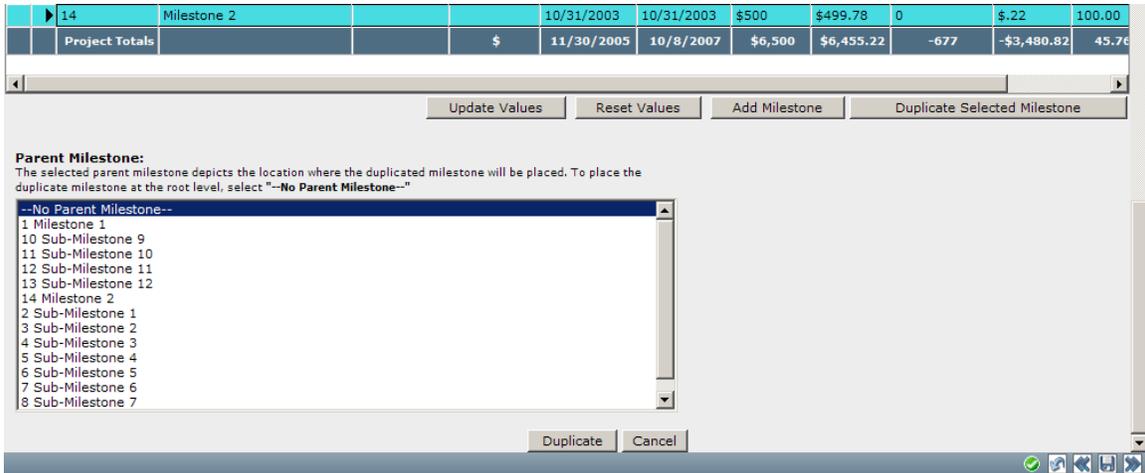
Update Values   Reset Values   Add Milestone   Duplicate Selected Milestone

3. Click Duplicate Selected Milestone

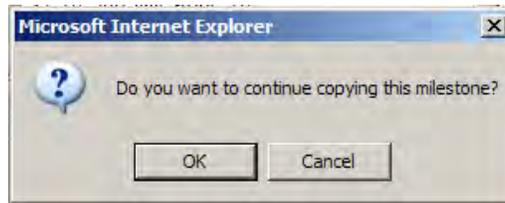
	Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete
			Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost	
					Planned	Actual	Planned	Actual			
☒	1	Milestone 1		\$	10/10/2005	10/8/2007	\$6,000	\$5,955.44	-728	-\$3,481.0	41.24
	2	Sub-Milestone 9		\$	6/30/2004	6/30/2004	\$500	\$499	0	-\$387	22.40
	3	Sub-Milestone 8		\$	5/31/2004	5/30/2004	\$500	\$498.5	1	-\$386	22.50
	4	Sub-Milestone 7		\$	4/30/2004	4/29/2004	\$500	\$498	1	-\$498	0.00
	5	Sub-Milestone 6		\$	3/31/2004	3/30/2004	\$500	\$497.46	1	-\$344.46	30.60
	6	Sub-Milestone 5		\$	2/28/2004	2/27/2004	\$500	\$497	1	\$2.95	99.99
	7	Sub-Milestone 4		\$	10/10/2005	10/8/2007	\$500	\$496.98	-728	-\$496.98	0.00
	8	Sub-Milestone 3		\$	10/10/2005	10/8/2007	\$500	\$496	-728	-\$121	75.00
	9	Sub-Milestone 2		\$	11/30/2003	11/30/2003	\$500	\$495.5	0	\$4.5	100.00
	10	Sub-Milestone 12		\$	10/10/2005	10/8/2007	\$500	\$495	-728	\$5	99.10
	11	Sub-Milestone 11		\$	10/10/2005	10/8/2007	\$500	\$494.5	-728	-\$494.5	0.00
	12	Sub-Milestone 10		\$	10/10/2005	10/8/2007	\$500	\$494	-728	-\$382	22.40
	13	Sub-Milestone 1		\$	10/10/2005	10/31/2003	\$500	\$493.5	710	-\$378.9	22.92
▶	15	Milestone 2		\$	10/31/2003	10/31/2003	\$500	\$499.78	0	\$22	100.00
	Project Totals			\$	10/10/2005	10/8/2007	\$6,500	\$6,455.22	-728	-\$3,480.82	45.76

Update Values   Reset Values   Add Milestone   Duplicate Selected Milestone

4. The Duplicate Milestone window will display



5. Select the desired Parent Milestone or select **—No Parent Milestone--**
6. Click **Save**
7. A pop-up message will display asking if you want to continue copying this milestone



8. Click **OK** to proceed
9. The copied milestone will now be visible within the Performance Baseline table

View Accessible Table | Toggle MS Project Import | Toggle Baseline Import | Legend | Show All Rows \* Costs in thousands

	Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete
			Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost	
					Planned	Actual	Planned	Actual			
	<b>1</b>	<b>Milestone 1</b>		\$	<b>10/10/2005</b>	<b>10/8/2007</b>	<b>\$6,000</b>	<b>\$5,955.44</b>	<b>-728</b>	<b>-\$3,481.0</b>	<b>41.24</b>
	1.1	Sub-Milestone 1		\$	10/10/2005	10/31/2003	\$500	\$493.5	710	-\$378.9	22.92
	1.2	Sub-Milestone 2		\$	11/30/2003	11/30/2003	\$500	\$495.5	0	\$4.5	100.00
	1.3	Sub-Milestone 3		\$	10/10/2005	10/8/2007	\$500	\$496	-728	-\$121	75.00
	1.4	Sub-Milestone 4		\$	10/10/2005	10/8/2007	\$500	\$496.98	-728	-\$496.98	0.00
	1.5	Sub-Milestone 5		\$	2/28/2004	2/27/2004	\$500	\$497	1	\$2.95	99.99
	1.6	Sub-Milestone 6		\$	3/31/2004	3/30/2004	\$500	\$497.46	1	-\$344.46	30.60
	1.7	Sub-Milestone 7		\$	4/30/2004	4/29/2004	\$500	\$498	1	-\$498	0.00
	1.8	Sub-Milestone 8		\$	5/31/2004	5/30/2004	\$500	\$498.5	1	-\$386	22.50
	1.9	Sub-Milestone 9		\$	6/30/2004	6/30/2004	\$500	\$499	0	-\$387	22.40
	1.10	Sub-Milestone 10		\$	10/10/2005	10/8/2007	\$500	\$494	-728	-\$382	22.40
	1.11	Sub-Milestone 11		\$	10/10/2005	10/8/2007	\$500	\$494.5	-728	-\$494.5	0.00
	1.12	Sub-Milestone 12		\$	10/10/2005	10/8/2007	\$500	\$495	-728	\$5	99.10
	2	Milestone 2		\$	10/31/2003		\$500				0.00
	2	Milestone 2		\$	10/31/2003	10/31/2003	\$500	\$499.78	0	\$.22	100.00
	<b>Project Totals</b>			\$	<b>10/10/2005</b>	<b>10/8/2007</b>	<b>\$7,000</b>	<b>\$6,455.22</b>	<b>-728</b>	<b>-\$3,480.92</b>	<b>42.49</b>

**Note: The milestone copy will only copy the milestone name, number, planned dates and costs, responsible agency, and milestone type. Actual dates and costs and percent complete will not be copied over to ensure that the user is entering accurate actual data.**

#### 4.19.7.10 Microsoft Project Import and Export

eCPIC provides the capability of importing MS Project 2003 \*.mpd files into the Performance Baseline tables.

##### 4.19.7.10.1 Field Breakdown and Import Overview

<b>eCPIC Field</b>	<b>MS Project Field</b>
Description	Name
Planned Start Date	Start
Planned End Date	Finish
Planned Duration Days	Number2
Planned Duration Hours	Duration1
Planned Cost	Cost
Agency Responsible for Activity	Text1
Actual Start Date	Start1
Actual End Date	Finish1
Percent Complete	Number1
Actual Cost	Cost1
“As Of” Date	Date1
Initial Baseline Planned Start Date	Date10
Initial Baseline Planned End Date	Date9
Initial Baseline Planned Cost	Cost2
Milestone Type	Text2
Cost Schedule ID	Text3

In order to successfully import from MS Project into the eCPIC Performance Baseline tables, the required fields for this table will need to be completed in MS Project.

The required fields are:

- Description (Name)
- Planned Start Date (Start)
- Planned End Date (Finish)
- Planned Duration Days (Number2)

##### 4.19.7.10.1.1 Planned Duration Hours (Duration1)

This field will default to 0 in the MS Project template provided by eCPIC and a value of 0.00 will be imported if the user does not explicitly enter a value.

**4.19.7.10.1.1.2 Planned Cost (Cost)**

This field will default to \$0.00 in the MS Project template provided by eCPIC and a value of \$0.000 will be imported if the user does not explicitly enter a value.

**4.19.7.10.2 MS Project Field Roll Ups**

All task values in the eCPIC MS Project template rollup to their respective parent tasks except for Funding Agency (Text1), “As of Date” (Date1) and depending on user settings in MS Project, Percent Complete (Number1). The “As of Date” is used to calculate the “Project Summary” (EVMS) values during the import. The “As of Date” used for the calculations will be retrieved from the very first row (first task) in the project file. If this field is blank, the calculation will not take place even if there is a date in this column in a different task, and the user will be notified by an error message. The percent complete column in eCPIC for parent milestones is a weighted average of the children. A Visual Basic for Applications (VBA) macro has been included in the eCPIC MS Project template that will calculate the weighted average percent complete for parent milestones. When the macro is not explicitly enabled by the user, the values do not roll up, are not a weighted average, and are therefore incorrect. The weighted average percent complete for parent milestones will always be calculated by the eCPIC application during the import process and any values entered explicitly or implicitly in the template for parent milestones will be ignored. Therefore, the percent complete calculation produced by the VBA macro in MS Project are for display purposes only, and the enablement of the macro is not a requirement for importing into eCPIC.

**4.19.7.10.2.1 MS Project 2003 Planned Cost Rollup Issue**

MS Project 2003 has an issue rolling up the Planned Cost (Cost) value for a parent task when that parent task has a cost value entered for it prior to being made a parent. For example:

1. Create a new task and name it “Parent 1”. In the Planned Cost (Cost) column enter 100.00
2. Create a new task and name it “Child 1”. In the Planned Cost (Cost) column enter 10.00

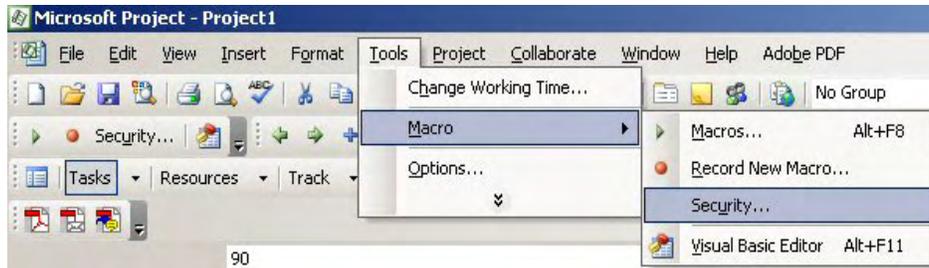
		Task Name	* Planned Start Date	* Planned End Date	* Duration Days	* Duration Hours	* Planned Cost
1		Parent 1	Sat 1/1/00	Sat 1/1/00	1	0 hrs	\$100.00
2		Child 1	Sat 1/1/00	Sat 1/1/00	1	0 hrs	\$10.00

3. Now make task “Child 1” a child of task “Parent 1”. The rollup Planned Cost (Cost) value is now incorrect.

	Task Name	* Planned Start Date	* Planned End Date	* Duration Days	* Duration Hours	* Planned Cost
	Parent 1	Sat 1/1/00	Sat 1/1/00	1	0 hrs	\$110.00
	Child 1	Sat 1/1/00	Sat 1/1/00	1	0 hrs	\$10.00

**4.19.7.10.3 Enabling the MS Project Percent Complete Macro**

In order to enable the VBA macro for calculating the percent complete weighted average value for parent milestones, the following steps must be taken within MS Project. The macro security level must be lowered from its default value of High to Medium. Within MS Project, from the Tools menu at the top of the screen select TOOLS → MACRO → SECURITY

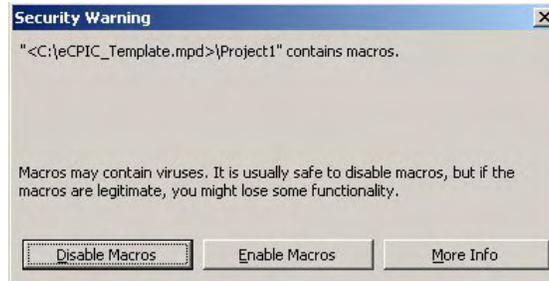


*In the security dialog, select Medium and click “OK”. This change allows the user to be prompted about the use of macros and asked if they would like to enable the macro. The default setting, High, only allows digitally signed macros from a trusted source to be allowed to run.*



*The next time the user opens the eCPIC MS Project template they will be prompted with a dialog box asking them if they would like to enable the macros contained in the*

*file. Enabling the macro will provide the percent complete weighted average rollup functionality within Microsoft Project.*



#### 4.19.7.10.4 Importing from Microsoft Project

All fields that will be imported into eCPIC from the eCPIC MS Project template have been marked with an asterisk (\*). Users may add additional fields to the MS Project files, but these additional fields will not be imported into the I.H.4 table within eCPIC.

An “Import MS Project” link button has been added to the Performance Baseline Tables for the BY2008 and BY2009 templates. Clicking on this link will reveal an upload control (“Browse...”) that will allow the user to browse to their Microsoft Project Database (.mpd) file on their local computer. Below the MS Project upload control is a checkbox that allows the user to indicate that they would like to recalculate all the values in the Project Summary (“EVMS”) section using the “As of Date” from the first row of the project file being imported.

The screenshot shows the "OMB Approved Baseline and Actuals" interface. It features a header with navigation icons and a text input field. Below the header, there are instructions: "Identify the phase or segment/module that corresponds to the data in the I.H.4 table." and "Comparison of OMB-Approved Baseline and Actual Outcome for Phase/Segment/Module of a Project (Investment)". A button labeled "Add Milestone" is visible. The interface includes links for "Import I.H.2", "Import I.H.3", and "Import MS Project". A note says "Enter dollar amounts in thousands." Below this is a table with columns for Description, Schedule (Start Date, End Date), Duration (Days, Hours), Plan Cost, Funding Agency, and Actual (Start Date, End Date, % Complete, Actual Cost). The table contains one row: "1 Management/Admin Support" with values: Start Date: 10/01/2000, End Date: 10/11/2000, Days: 11, Hours: 45.00, Plan Cost: \$1,620.000, Funding Agency: HUD, Start Date: 10/01/2000, % Complete: 9.54, Actual Cost: \$222.350. Action buttons "Edit | Add Sub" and "Modify Costs" are at the end of the row. Below the table, there is another "Add Milestone" button, a note "Enter dollar amounts in thousands.", and a checkbox labeled "Calculate Project Summary on Import (EVMS)".

After clicking the “Upload” button, the user will be prompted with a message warning them that importing into the I.H.4 table will erase all current milestone data and cannot be undone. At this point the user has a chance to cancel or proceed with the import. If the

import is not successful or is only partially successful, custom error messages will be displayed above the I.H.4 table.

#### **4.19.7.10.5 Microsoft Project Export**

An export icon () above the Performance will export the entire Performance Baseline table into the eCPIC Microsoft Project Database template. This function will prompt the user to save or open the document after selecting the icon.

#### **4.19.7.11 Performance Baseline Table Data Import**

eCPIC allows users to import performance baseline data from one performance baseline table to another within the same investment. This will assist users with migrating their performance baseline table data when the state of their investment changes. To import data from into a performance baseline table from a different table within the same investment:

1. Browse to the appropriate section/subsection of the Performance Baseline you wish to import into.
2. Click on “Toggle Baseline Import”
3. Choose the Performance Baseline Table that contains the data you want to import into the current table
4. Click the “Import” Button
5. A confirmation dialog will appear, click “OK” to continue. The data from the source table will have replaced the current table data

#### **4.19.8 Performance Baseline Change Requests (PBCR)**

As a means of providing tighter control over investment work breakdown structures and performance baseline table data, performance baseline change management functionality has been introduced into eCPIC. This change management system will allow administrators to manage the number and type of updates made to the approved performance baseline table within eCPIC processes, allowing users to initiate change request prior to making baseline updates. These updates can then be monitored, managed, edited, and approved by eCPIC administrators and will provide agencies with tighter control over the data being captured and utilized in EVM calculations as well as the data being submitted to OMB.

A Performance Baseline Table Change Request (PBCR), when initiated, will create an independent working copy of the approved Performance Baseline table and its data, allowing users to make updates to data, without modifying the approved baseline. Users can then submit the PBCR for approval by an eCPIC administrator. Administrators can