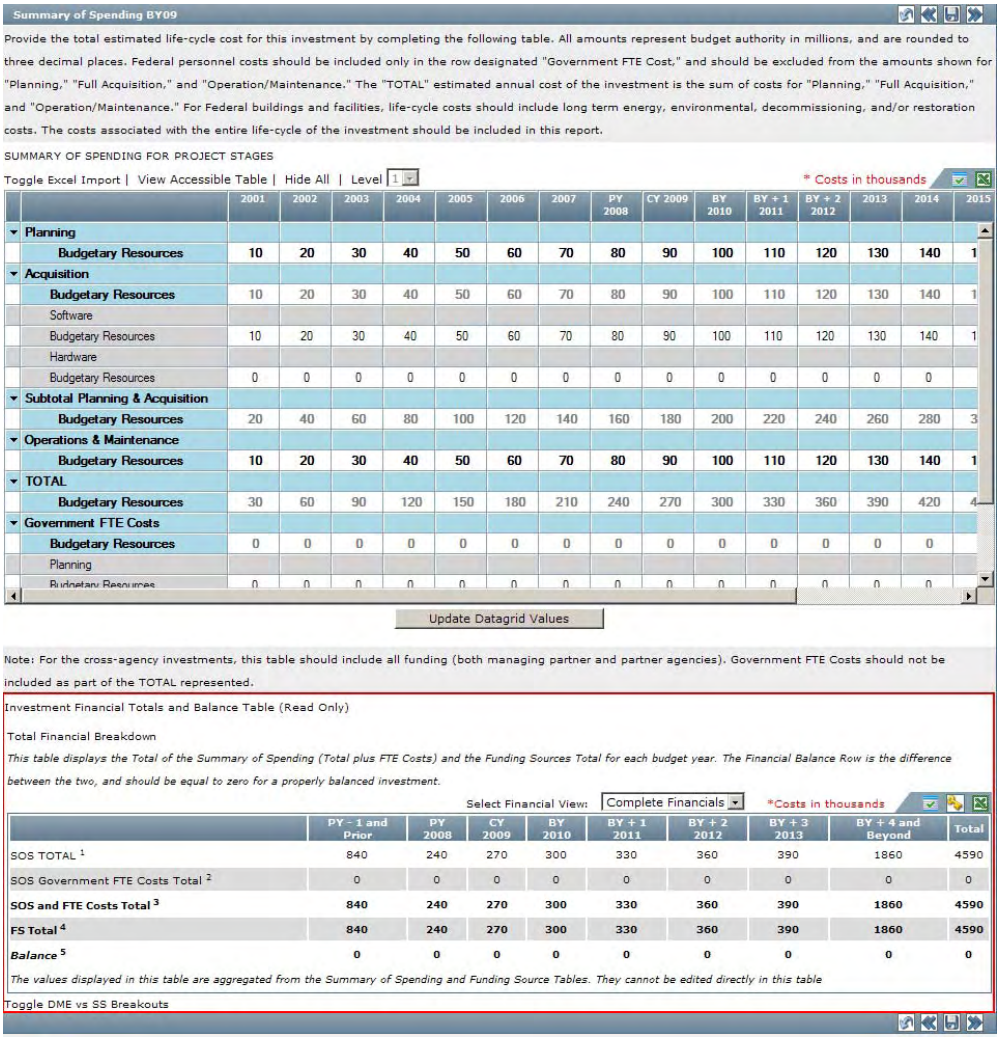


4.19.7 Performance Baseline Tables

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 *I.A: 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	**Part II.C** *Comparison of Initial Baseline and Current Approved Baseline*
E-Gov/LoB Oversight	**Part IV.C** *Comparison of Initial Baseline and Current Approved Baseline (EGov)*
Mixed Life Cycle	**Part II.C** *Comparison of Initial Baseline and Current Approved Baseline*
Operations and Maintenance	**Part III.B** *Comparison of Plan vs. Actual*

	Performance Table
Planning	**Part II.C** *Comparison of Initial Baseline and Current Approved Baseline*

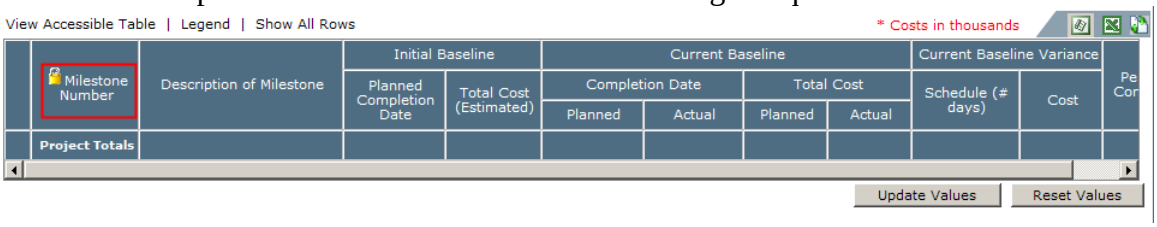
Each table has two views: the **OMB Required View** and the **All Fields View**. Whenever you enter a sub-section containing one of the performance baseline tables, the default view will be the OMB Required View. The All Fields View is the same for each of the three performance baseline tables [*Comparison 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.

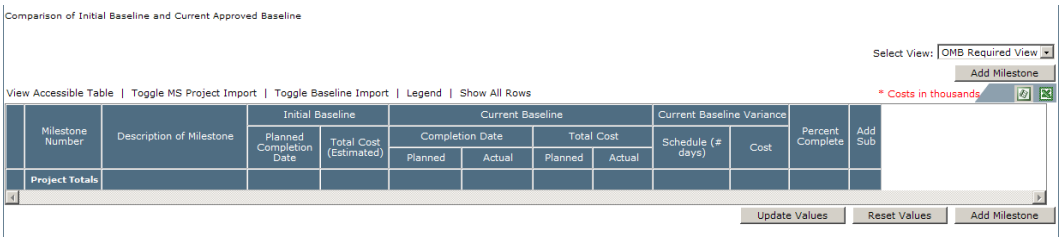
When a user accesses a new performance baseline table for the first time (prior to data being entered and assuming the data has not been imported into the Investment from a revision) only the table headings will be visible.

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.

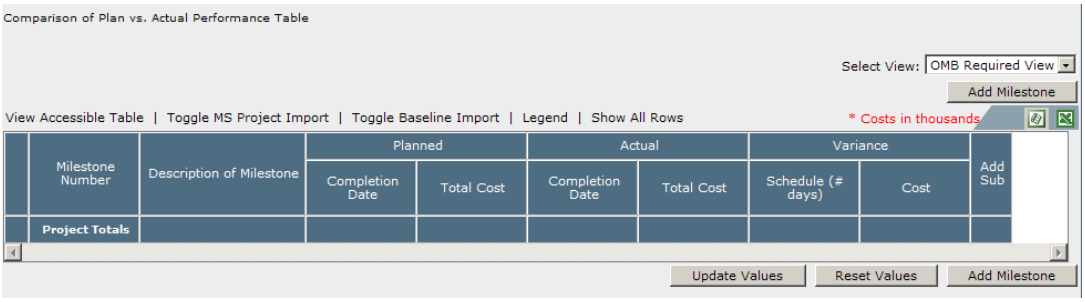


Below are the three OMB Required Views of each performance baseline table, as well as the All Fields View.

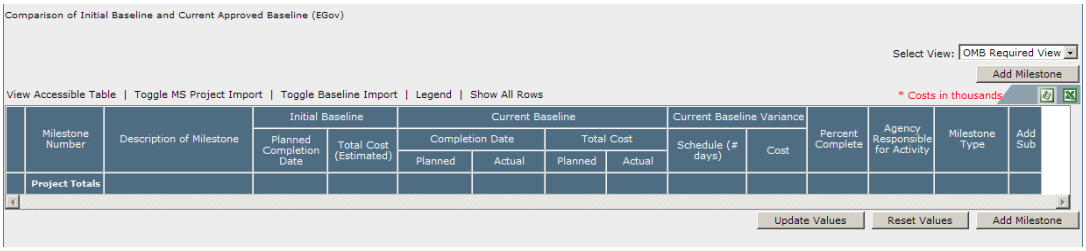
Part II.C. *Comparison of Initial Baseline and Current Approved Baseline*



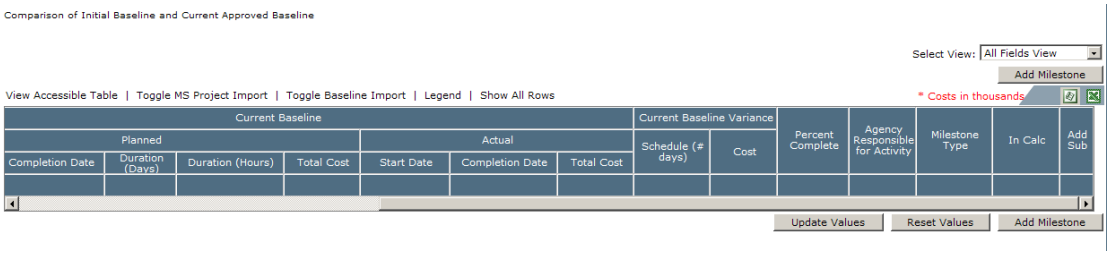
Part III.B. *Comparison of Plan vs. Actual Performance Table*



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



All Fields View

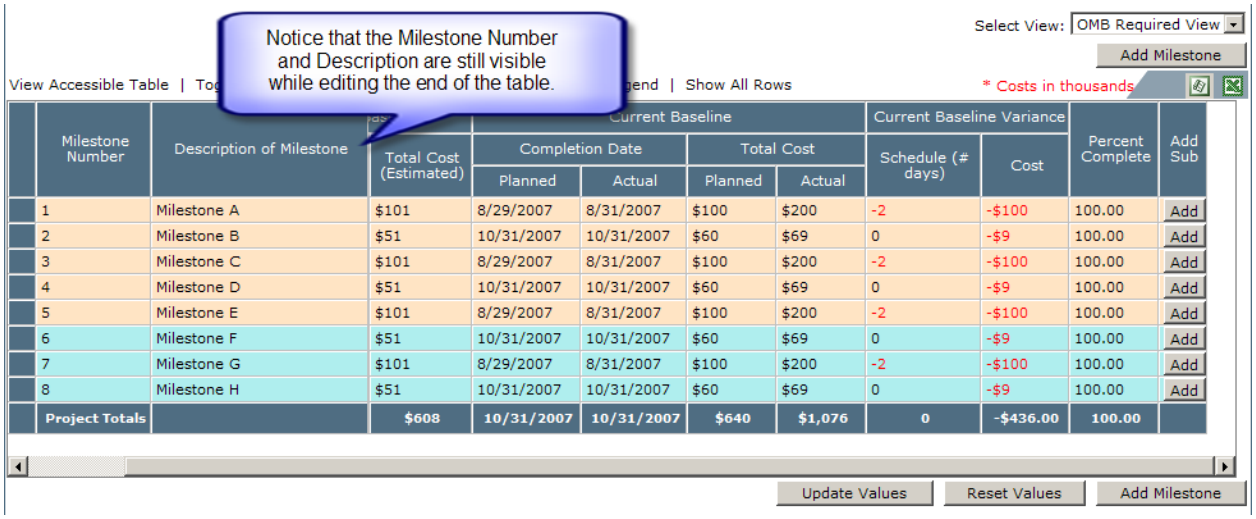


4.19.7.2 Performance Baseline table Navigation

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

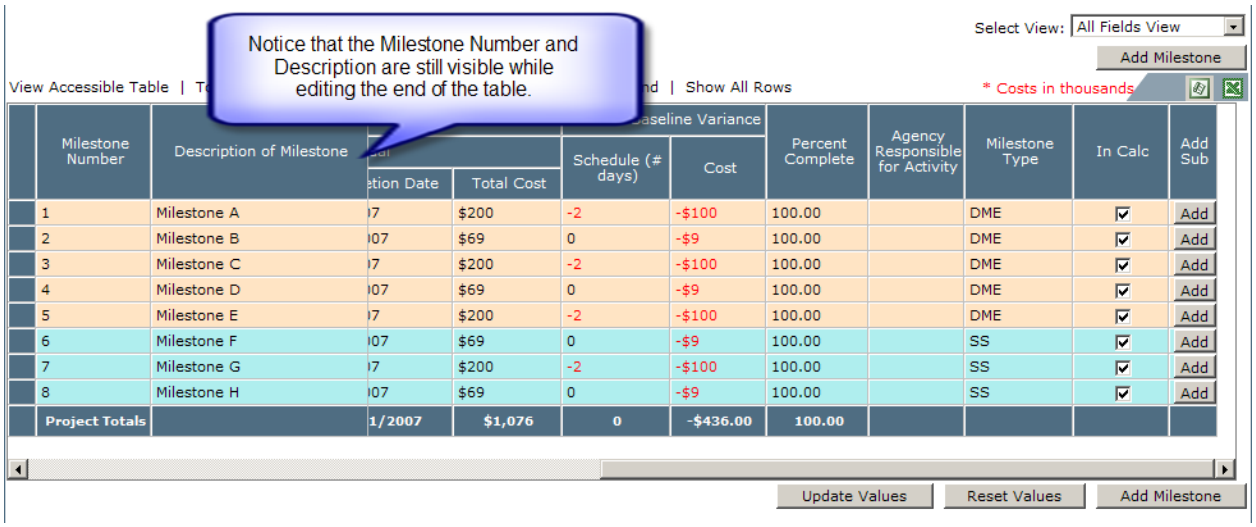
Below is an example of the Performance Baseline table header lock with the OMB View selected:



Milestone Number	Description of Milestone	Total Cost (Estimated)	Current Baseline				Current Baseline Variance		Percent Complete	Add Sub
			Completion Date		Total Cost		Schedule (# days)	Cost		
			Planned	Actual	Planned	Actual				
1	Milestone A	$101	8/29/2007	8/31/2007	$100	$200	-2	-$100	100.00	Add
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:

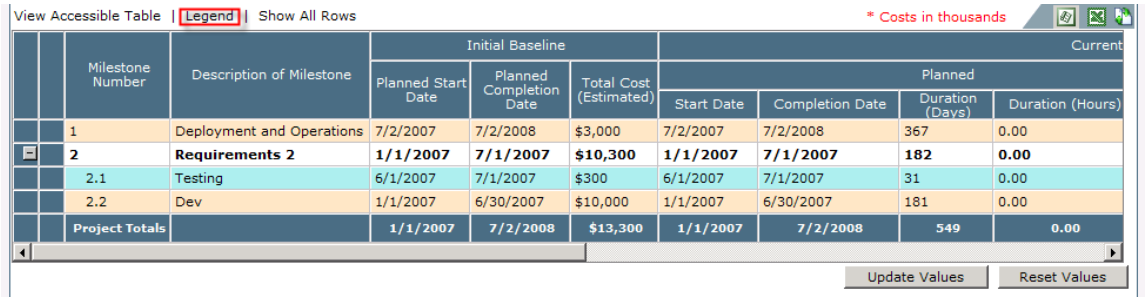


Milestone Number	Description of Milestone	Total Cost	Schedule (# days)	Cost	Percent Complete	Agency Responsible for Activity	Milestone Type	In Calc	Add Sub
1	Milestone A	$200	-2	-$100	100.00		DME	☑	Add
2	Milestone B	$69	0	-$9	100.00		DME	☑	Add
3	Milestone C	$200	-2	-$100	100.00		DME	☑	Add
4	Milestone D	$69	0	-$9	100.00		DME	☑	Add
5	Milestone E	$200	-2	-$100	100.00		DME	☑	Add
6	Milestone F	$69	0	-$9	100.00		SS	☑	Add
7	Milestone G	$200	-2	-$100	100.00		SS	☑	Add
8	Milestone H	$69	0	-$9	100.00		SS	☑	Add
Project Totals		$1,076	0	-$436.00	100.00				

4.19.7.3 Designation of DME and SS Milestones

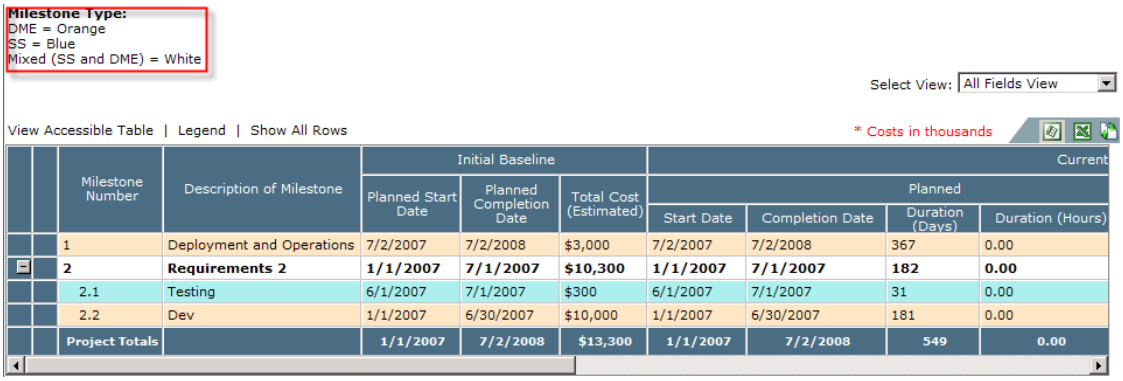
In the Performance Baseline Table, each milestone can be designated as either a DME or SS milestone. The designation can be viewed by showing the "All Fields" view of the Performance Table in the "Milestone Type" column. Also, milestones are now color coded depending on their state, with orange representing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



		Milestone Number	Description of Milestone	Initial Baseline			Current			
							Planned			
				Planned Start Date	Planned Completion Date	Total Cost (Estimated)	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**

Upon clicking Legend, the legend appears:



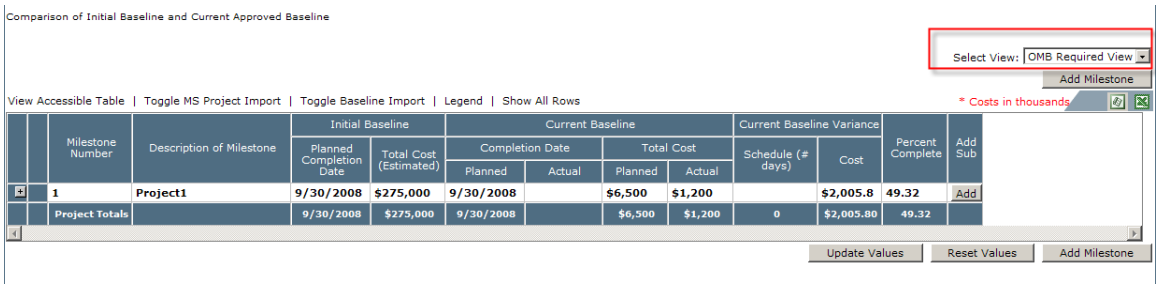
		Milestone Number	Description of Milestone	Initial Baseline			Current			
							Planned			
				Planned Start Date	Planned Completion Date	Total Cost (Estimated)	Start Date	Completion Date	Duration (Days)	Duration (Hours)
		1	Deployment and Operations	7/2/2007	7/2/2008	$3,000	7/2/2007	7/2/2008	367	0.00
−		**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

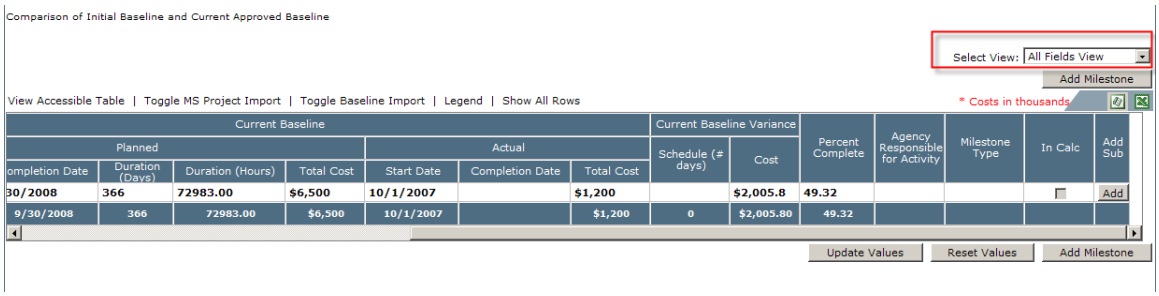
To change between the **OMB Field View and All Field View** in the performance baseline tables, a drop-down box located above each table on the right hand side. Select the desired view from this box to switch the display between the OMB required information and all Earned Value (EV) columns.

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



		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	

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.

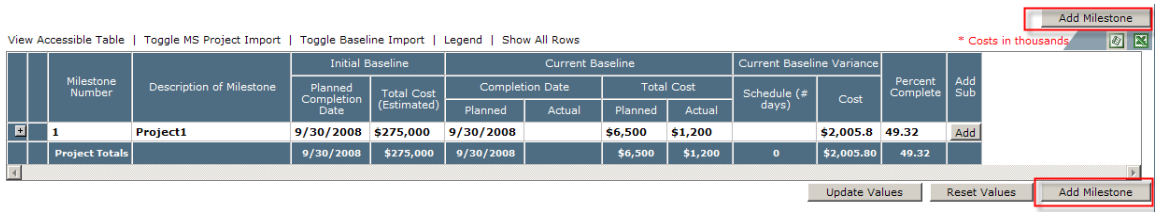


Keep in mind that these are different views of the same information and not separate tables. Therefore the fields that exist in both views will maintain their data across views. The data entry form that appears below the table when adding new milestones is dependent on the selected view. Only the fields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

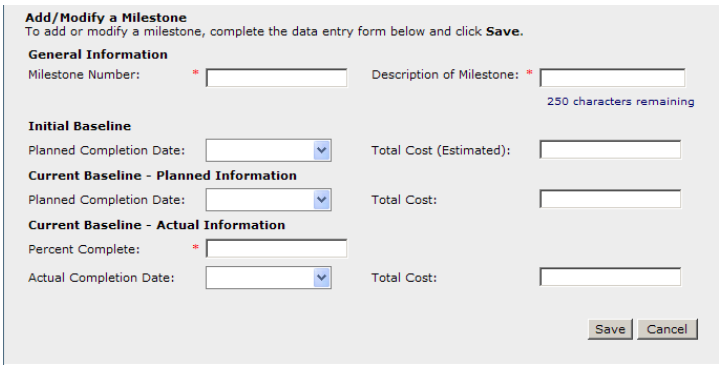
4.19.7.5 Adding Performance Baseline Milestones

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

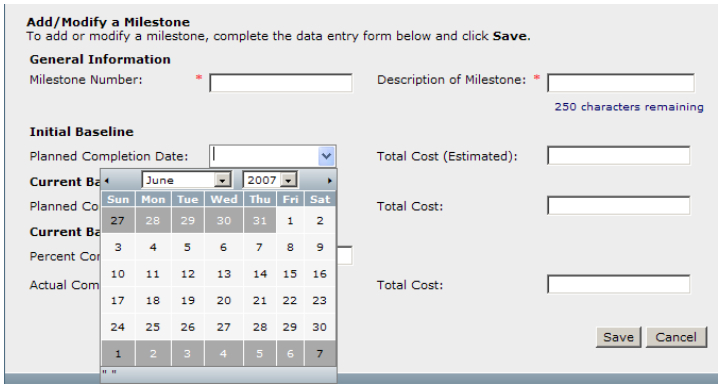
1. Click on either of the **Add Milestone** links.



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.



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



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.

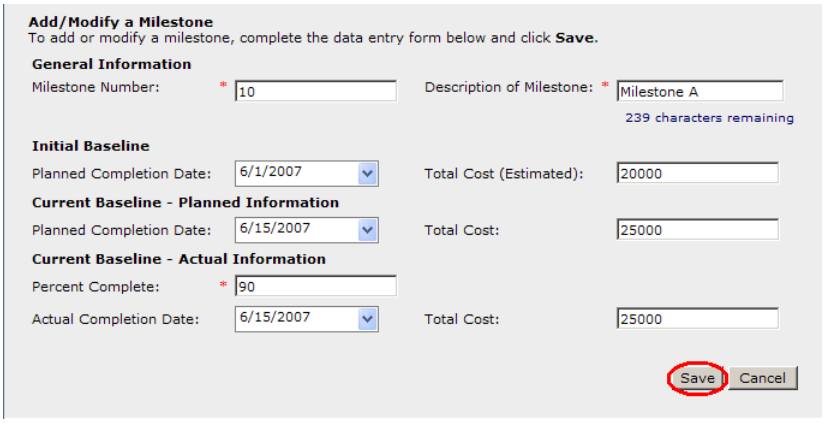
	Actual Value	Data Input Value (into eCPIC)	XML Exported Value (for OMB)
Data Entry in Millions	$152,575.00	$0.152575 (Actual/1,000,000)	$0.152575 (Actual)
Data Entry in Thousands	$152,575.00	$152.575 (Actual/1,000)	0.152575 (Input/1,000)
Data Entry in Dollars	$152,575.00	$152,575.00 (Actual)	0.152575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

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

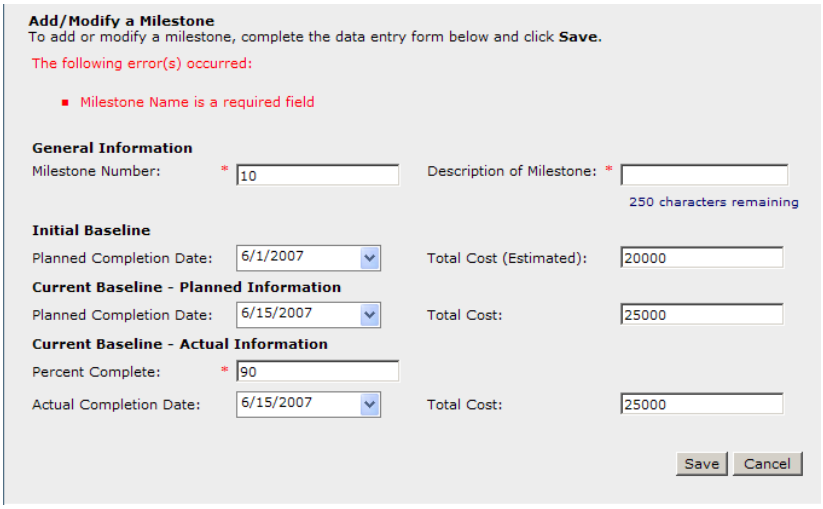
will be rounded to the nearest millionth.

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.



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.



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

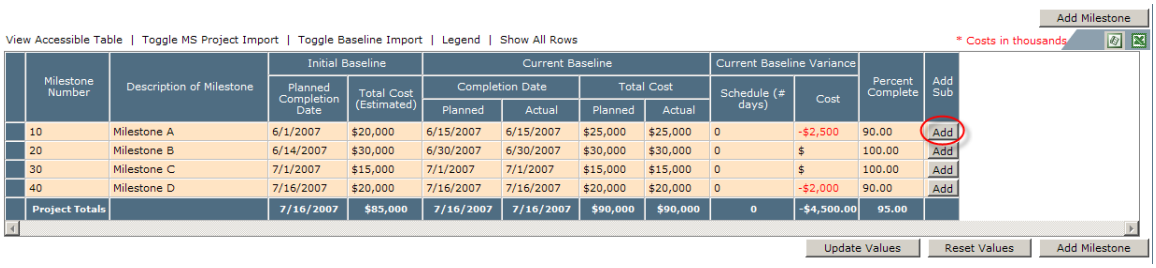
performance baseline tables, with letters and decimals used for defining the milestone number. Milestone numbers are not auto-generated by the application; they are manually entered by the user.

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.

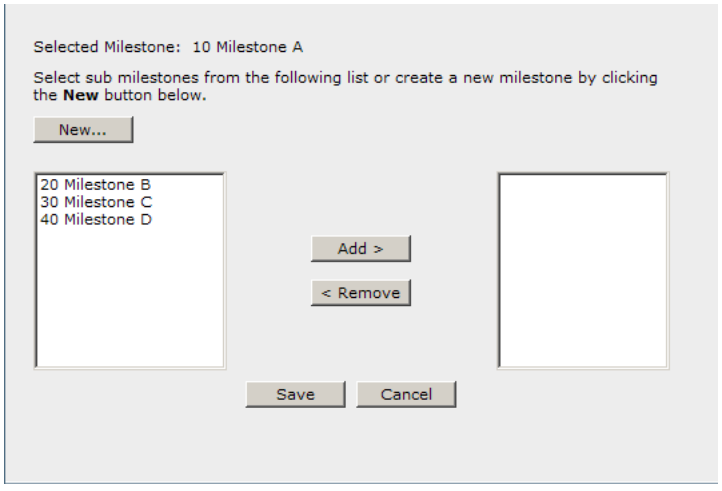
To Add a Sub-Milestone:

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



	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
	Project Totals		**7/16/2007**	**$85,000**	**7/16/2007**	**7/16/2007**	**$90,000**	**$90,000**	**0**	**-$4,500.00**	**95.00**	

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



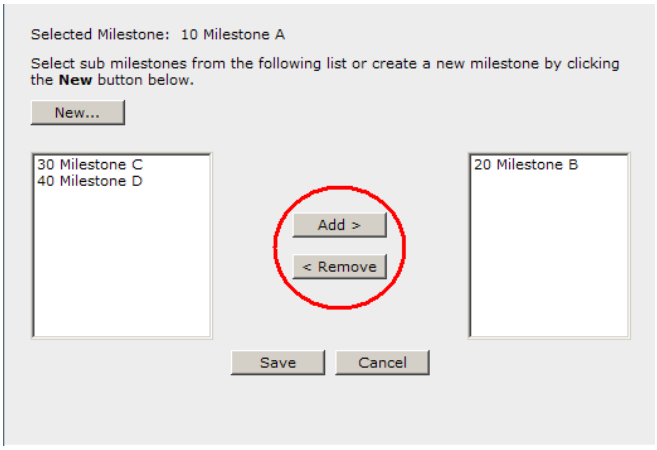
The box under the 'New' button will contain the list of existing milestones available to add as a sub-milestone. The list of milestones available includes milestones of all levels (*main and sub-milestones*), but does not include the selected milestone.

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.

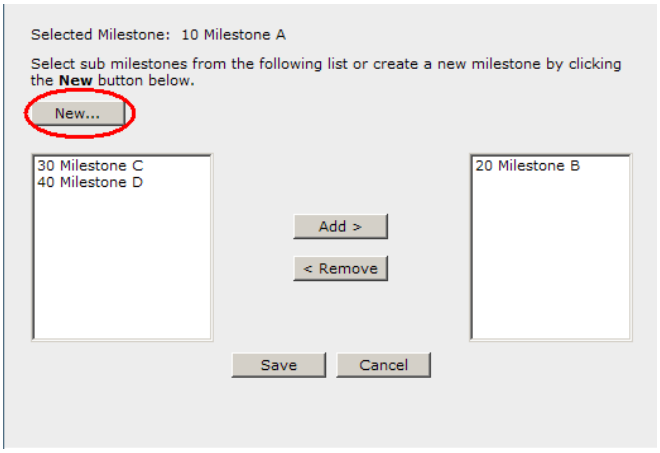
2. Select the milestone(s) to be added or removed.

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.

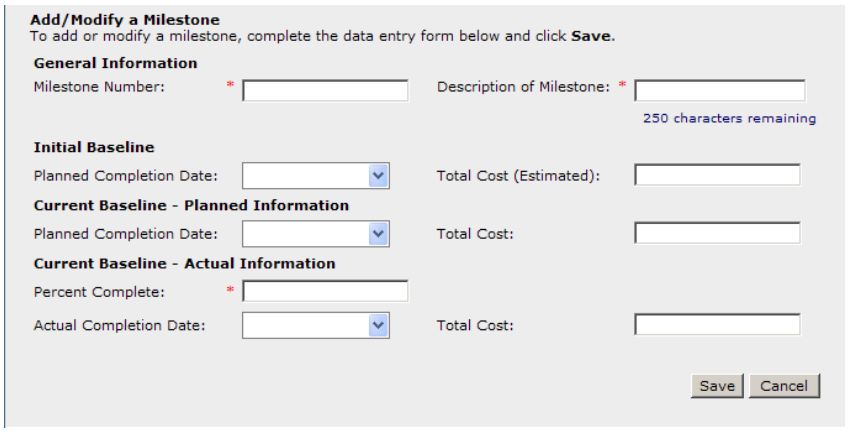
3. Click on the **Add** button to add milestones as children or click on the **Remove** button to remove milestones from the selected milestone.



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.

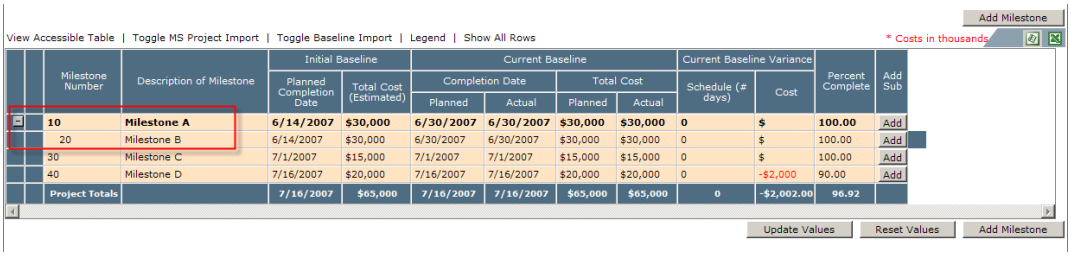


This will bring up the milestone data entry form below the two assignment boxes. From there, users can fill out all appropriate information and add the milestone as described above.



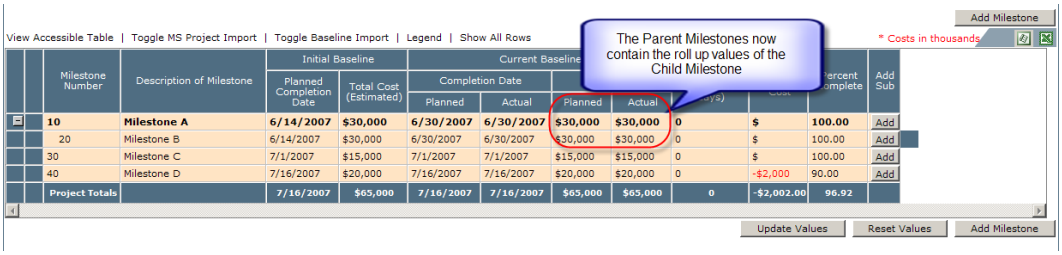
4. Click **Save** to save the data and add the milestone to the table or **Cancel** to undo any data entered and close the add milestone form without adding the milestone to the table.

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.



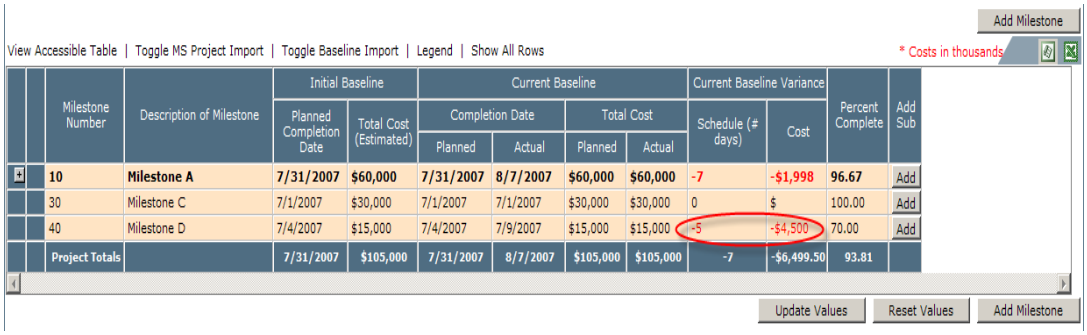
The sub-milestone added will now appear below the parent milestone. If users have any more new sub-milestones to enter, repeat the process of clicking the **New** button, completing the data entry form, and clicking the **Save** button below the form. This will complete the process of defining the sub-milestones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



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.

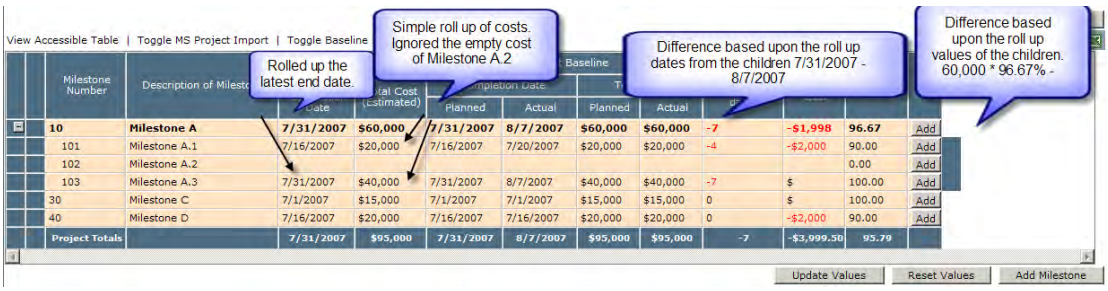
Parent Milestone:



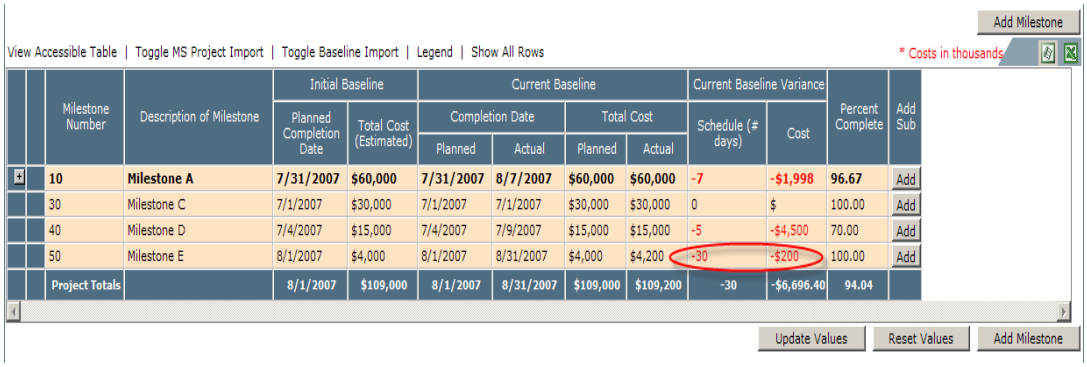
- Schedule (# of days) is a simple subtraction of dates of the *Planned Completion* date 7/4/2007 – *Actual Completion* date 7/9/2007= -5 variance.

- Cost Variance is: *BAC (Budget at Completion)* 15,000 * *Percent Complete* 70% – *Actual Cost* 15,000= -4,500.

Parent Milestone with children:



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



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

Add Milestone

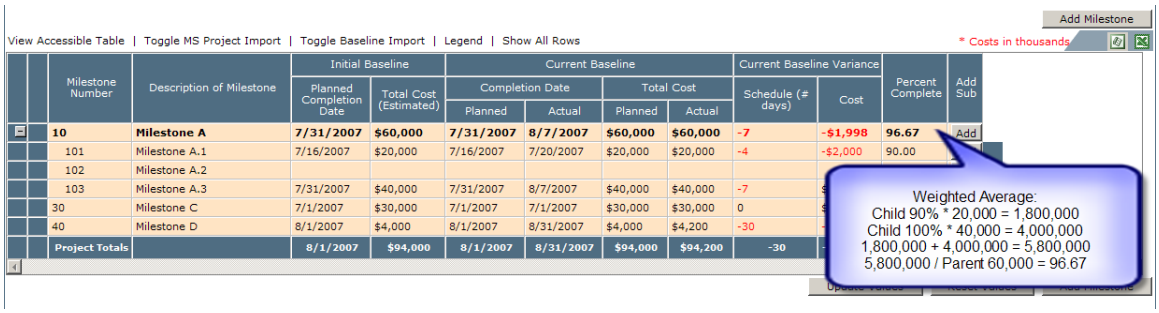
Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percent Complete	Add Sub
		Planned Completion Date	Total Cost (Estimated)	Completion Date		Total Cost		Schedule (# days)	Cost		
				Planned	Actual	Planned	Actual				
10	**Milestone A**	**7/31/2007**	**$60,000**	**7/31/2007**	**8/7/2007**	**$60,000**	**$60,000**	**-7**	**-$1,998**	**96.67**	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**	

Update Values | Reset Values | Add Milestone

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:

SUM([Actual Percent Complete]*[Current Baseline Planned Total Cost]) / SUM([Current Baseline Planned Total Cost])



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

Add 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**	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**			

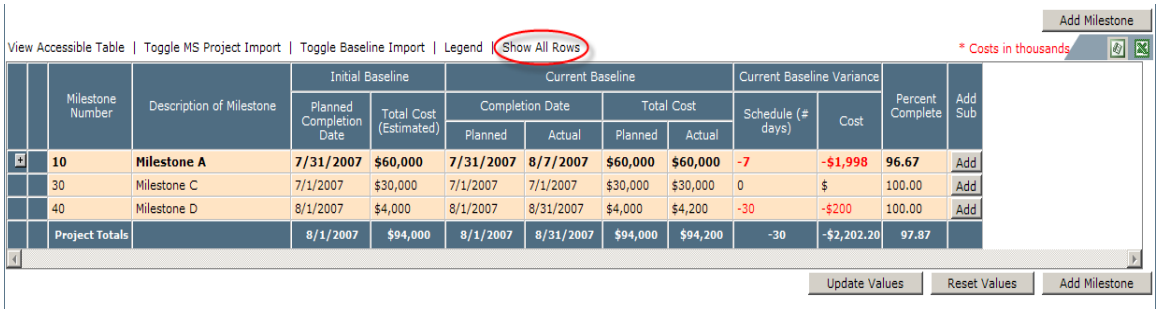
Weighted Average:
Child 90% * 20,000 = 1,800,000
Child 100% * 40,000 = 4,000,000
1,800,000 + 4,000,000 = 5,800,000
5,800,000 / Parent 60,000 = 96.67

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 ⊞ has sub-milestones; however, these rows are currently in a collapsed state and hidden from view. They can be expanded by clicking on the ⊞ icon to display any sub-milestones. Any milestone with a minus ⊟ is expanded and can be collapsed by clicking on the icon to hide the sub-milestones.

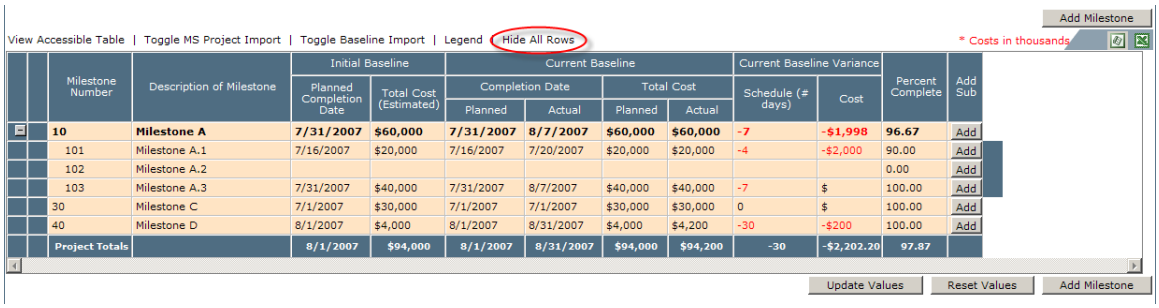
4.19.7.5.2.1 Showing/Hiding Table Rows

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.



		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**	

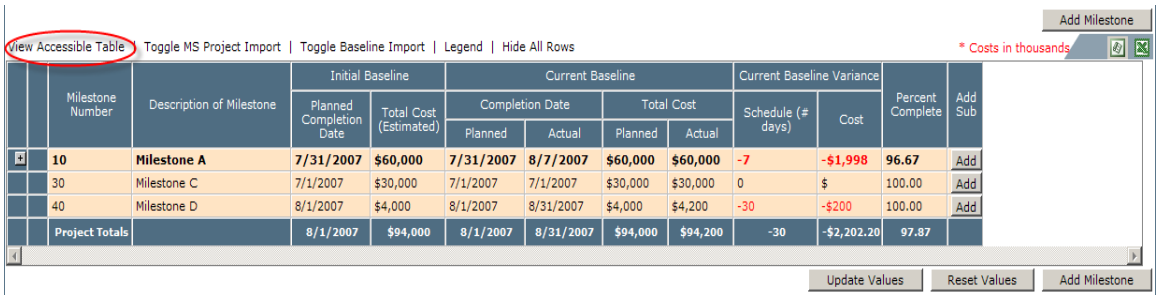
To collapse the entire table to view only the top level main milestones, click on the **Hide All Rows** link. This will collapse the entire table and only the main or parent milestones will be displayed.



		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**	

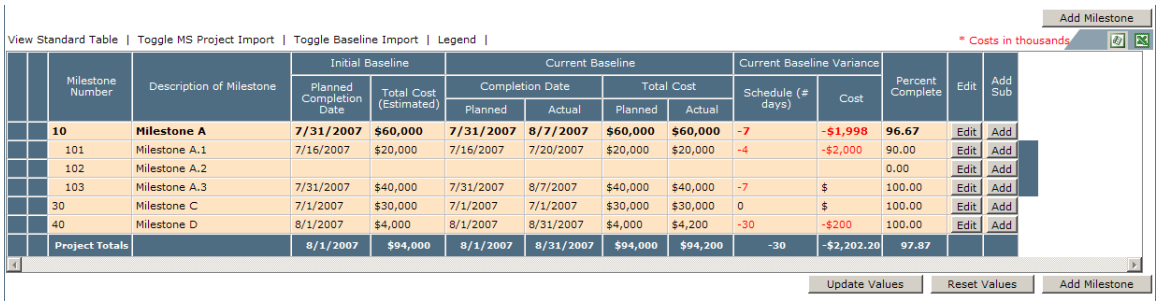
4.19.7.5.2.2 508 Compliance and Accessibility

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.



		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.



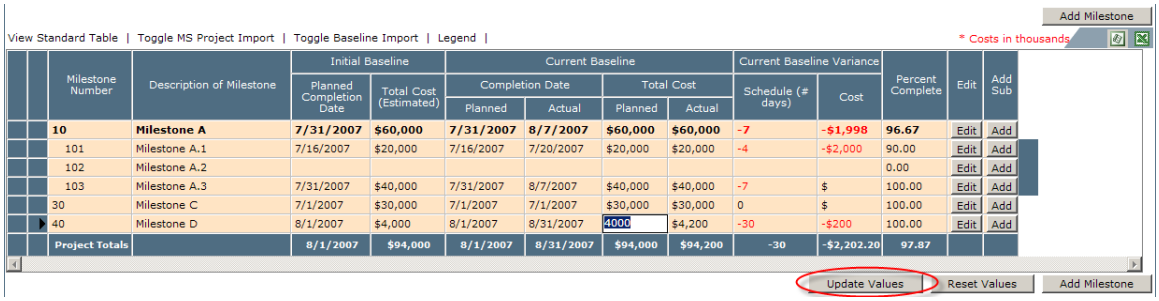
4.19.7.6 Editing Milestones

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.

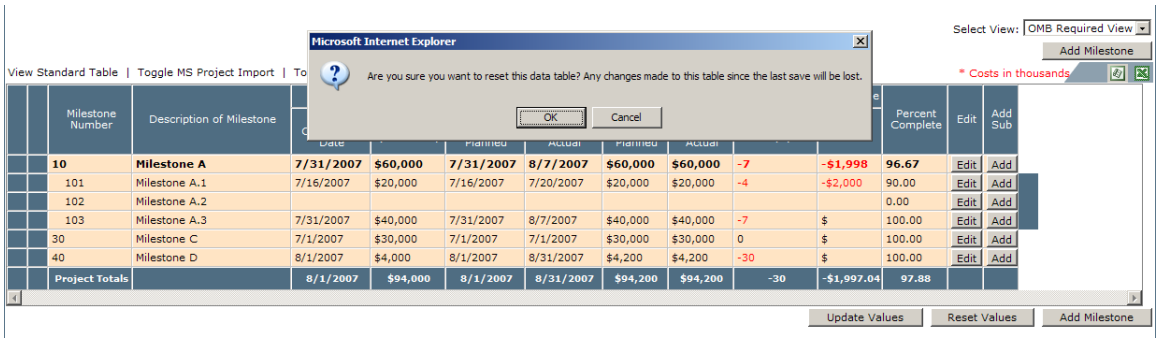
Note: Any number of updates can be made to editable cells in the table. However, none of these changes will be made permanent (saved to the database) until the 'Update Values' button has been pressed. Therefore, do not navigate away from this page before the changes have been committed, otherwise all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



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 Reseting Values

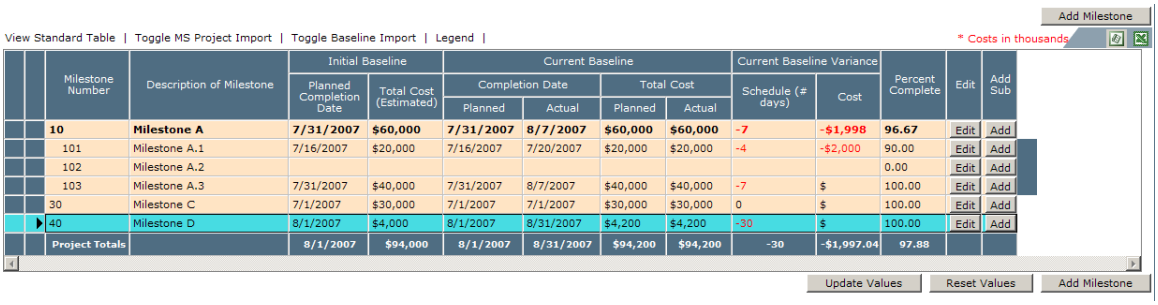
Clicking the **Reset Values** button will reset all of the data in the table to the state that it was last saved (Update Values). Note that clicking this button does not simply undo the last edit, but ALL edits that are different from the values that exist in the database. On reset, a confirmation warning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



4.19.7.8 Deleting Milestones

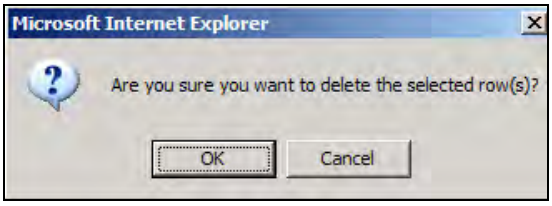
To Delete a Milestone:

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



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.

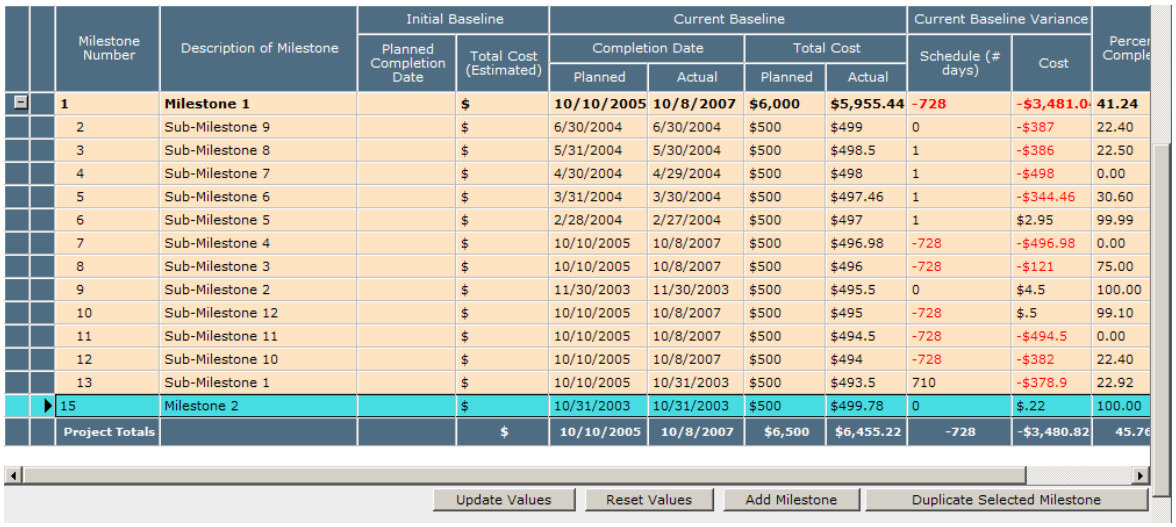
Note: If a parent milestone is deleted, then all of its children rows are also deleted.

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

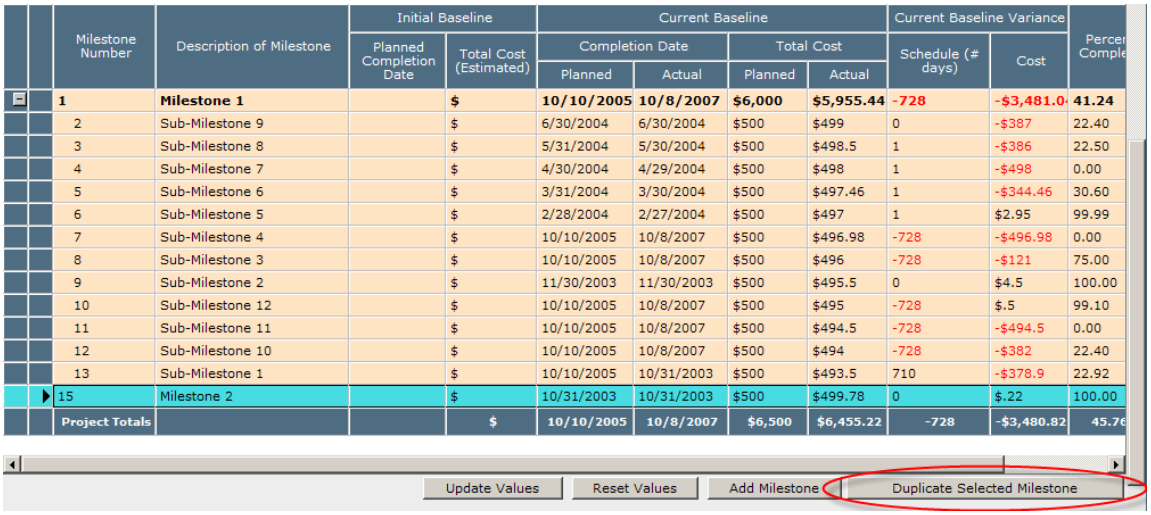
2. Highlight the desired row to copy



Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percer Comple
		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

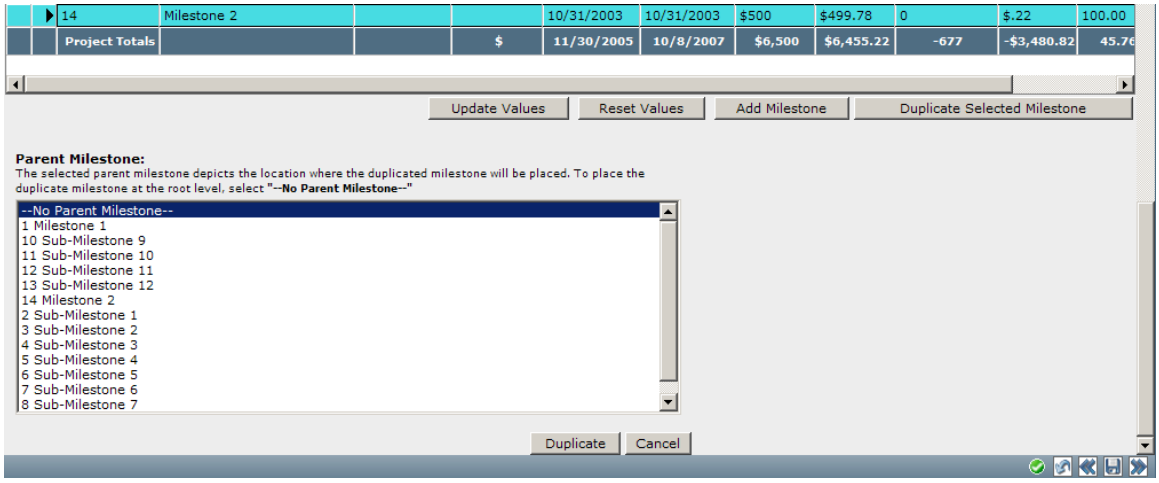
3. Click **Duplicate Selected Milestone**



Milestone Number	Description of Milestone	Initial Baseline		Current Baseline				Current Baseline Variance		Percer Comple
		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

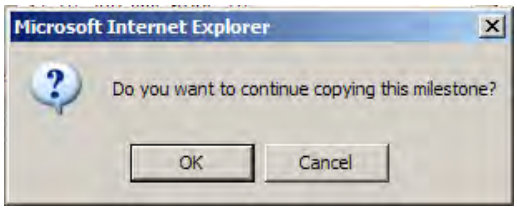
4. The Duplicate Milestone window will display



5. Select the desired Parent Milestone or select **—No Parent Milestone--**

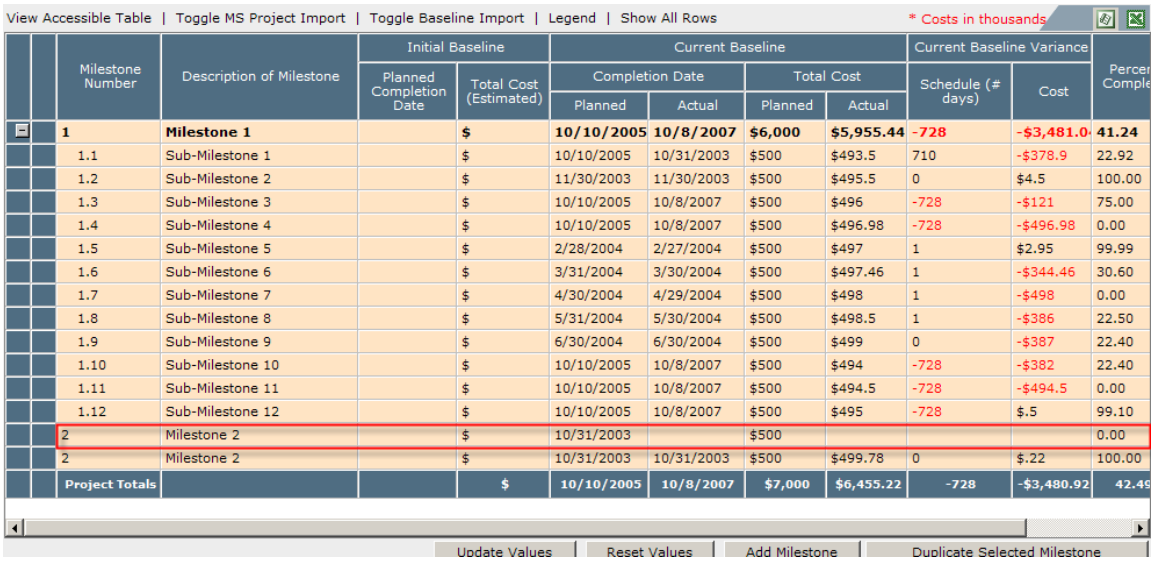
6. Click **Save**

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



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

eCPIC Field	**MS Project Field**
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)

4.19.7.10.1.1.1 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

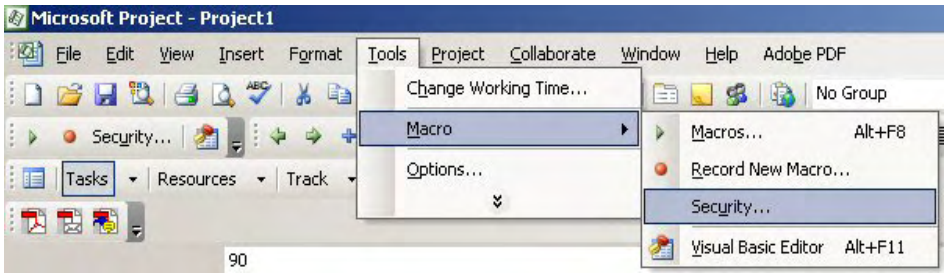
	Task Name	* Planned Start Date	* Planned End Date	* Duration Days	* Duration Hours	* Planned Cost
1	Parent 1	Sat 1/1/00	Sat 1/1/00	1	0 hrs	$100.00
2	Child 1	Sat 1/1/00	Sat 1/1/00	1	0 hrs	$10.00

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

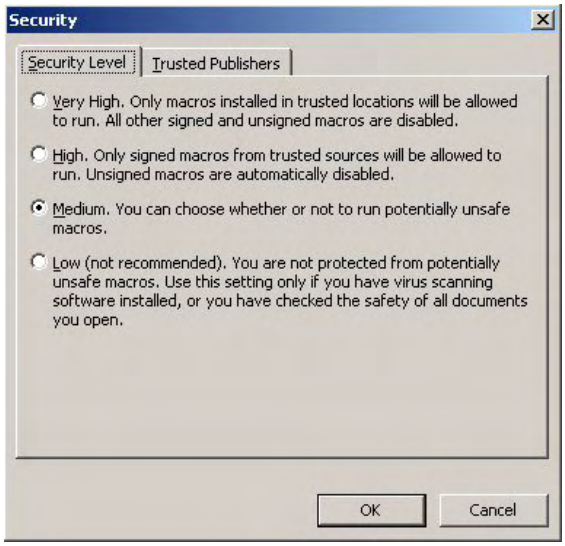
	Task Name	* Planned Start Date	* Planned End Date	* Duration Days	* Duration Hours	* Planned Cost
	Parent 1	**Sat 1/1/00**	**Sat 1/1/00**	**1**	**0 hrs**	**$110.00**
	Child 1	Sat 1/1/00	Sat 1/1/00	1	0 hrs	$10.00

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

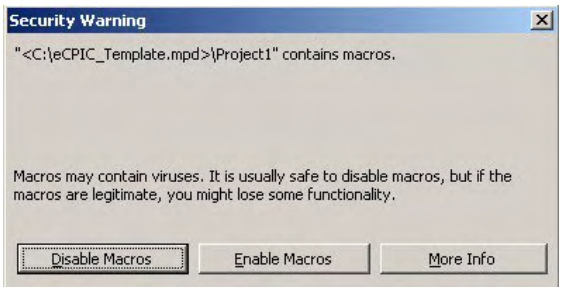


In the security dialog, select Medium and click "OK". This change allows the user to be prompted about the use of macros and asked if they would like to enable the macro. The default setting, High, only allows digitally signed macros from a trusted source to be allowed to run.



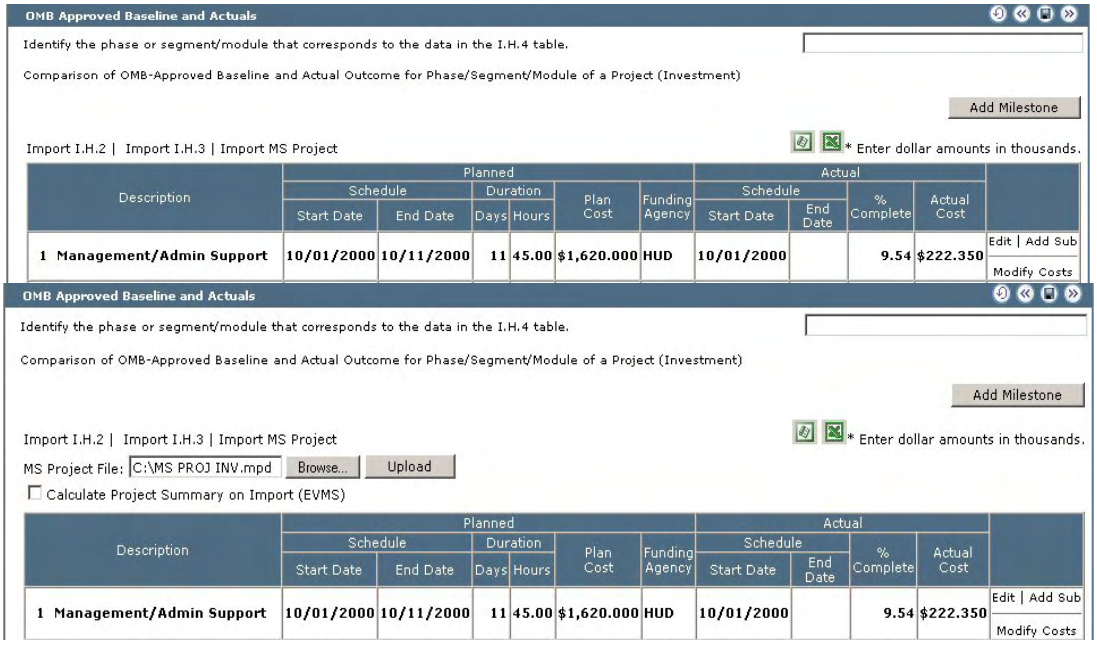
The next time the user opens the eCPIC MS Project template they will be prompted with a dialog box asking them if they would like to enable the macros contained in the

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.



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