

## Earned Value Management Practitioners Forum

### Using Cobra to Report Non-EVMS Data and Data Using Codes

Marsha Visser, PMP  
Visser Group, LLP

## Agenda

- » Creating Reports on Non-EVMS values in Cobra
- Creating reports using codes on resources

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## Reporting Non-EVMS Values

- ▶ The Finance Department must report on various fees and taxes and has decided to use Cobra to calculate the fees and taxes.
- ▶ We will be:
  - Adding results to the project
  - Adding rates to use in the calculations
  - Creating the calculation in the resource file
  - Create reports using the new results

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## Results to be added

- The reporting requires 2 results for fee which are calculated on the number of hours
  - DM
  - DMA
- There is one tax which will be calculated on the 2 fees & direct
  - LABTAX
- Below is the results and their calculations

Result	Calculation	Rate
DM	Rate * Hours	\$ 10 per hour
DMA	Rate * Hours	\$ 5 per hour
LABTAX	Rate * (DM+DMA+Direct)	.05 or 5%

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## Adding Results

- ▶ In order to add the results (DM, DMA & LABTAX) we need to use the Cobra's Data Tool
- ▶ Start>Program>Deltek>Cobra 5>Administration>Data Tool
- ▶ The **Data Sources** dialog box displays



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## Adding Results

- ▶ On the Data Sources dialog box, click next
- ▶ The Options dialog box is displayed
- ▶ Select: **Define results**
- ▶ Click **Next**



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## Adding Results

- ▶ The Define Results dialog box is displayed



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## Adding Results

- ▶ To add the new results, click the button **Add**
- ▶ The **Add Result** dialog box displays
- ▶ In the **Result Name** field enter: **DM**
- ▶ Click **OK**
- ▶ **Define Results** dialog box displays with new results in the list



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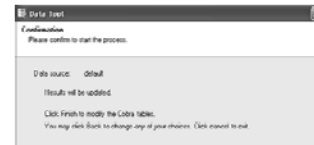
## Adding Results

- ▶ Click the button: **Add**
- ▶ In the **Result Name** field enter: **DMA**
- ▶ Click: **OK**
- ▶ Click the button: **Add**
- ▶ In the **Result Name** field enter: **LabTax**
- ▶ Click: **OK**

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## Adding Results

- ▶ Click **Next**
- ▶ The **Confirmation** dialog box displays
- ▶ Click **Finish**
- ▶ Once the process is complete, a dialog box will be displayed:



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## Adding Results

- ▶ Once the process is complete, a dialog box will be displayed:



- ▶ Close the dialog box
- ▶ Restart Cobra 5 to see the new results

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## Adding Rates

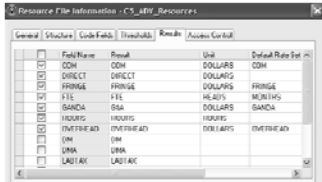
- ▶ Add the following rates:

Rate Set	Description	Date	Value
DM	DM Rate	01/01/2007	\$10.00
DMA	DMA Rate	01/01/2007	\$5.00
LabTax	Lab Tax Rate	01/01/2007	5% (.05)

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## Update the Resource File

- ▶ Open Resource File Information dialog box
- ▶ Select the Results tab



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## Update the Resource File

- ▶ Update the following results:

Result	Unit	Default Rate Set	Currency	Result Code
DM	Dollars	DM rate	Yes	None
DMA	Dollars	DMA rate	Yes	None
LabTax	Dollars	LabTax rate	Yes	None

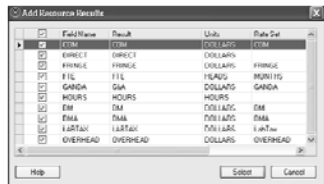
- ▶ The results:

Field Name	Result	Unit	Default Rate	Currency	Result Code
<input checked="" type="checkbox"/>	DM	DM	DOLLARS	DM	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	DMA	DMA	DOLLARS	DMA	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	LABTAX	LABTAX	DOLLARS	LABTAX	<input checked="" type="checkbox"/>

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## Update the Resources

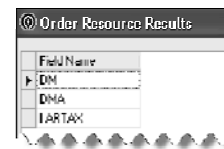
- ▶ Update resources to include new results
- ▶ With the resource selected:
  - Select the tab: **Calculation**
  - **Right-click** in the calculation section
  - Select: **Add Results**



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## Update the Resources

- ▶ After clicking the select button the dialog box will be displayed for new results being added:



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## Update the Resources

- ▶ The new results will be listed in the resource calculations:

Code	Unit	Rate	Quantity	Amount
DM	DM	100.00	1.00	100.00
DMA	DMA	100.00	1.00	100.00
DIR	DIR	100.00	1.00	100.00
LABTAX	LABTAX	100.00	1.00	100.00

## Update the Resources

- ▶ Update the formulas for the new results:
  - For **DM**, select the source: **Hours**
  - For **DMA**, select the source: **Hours**
  - For **LabTax**, select the source: **DM, DMA, Direct**
- ▶ The results for **LabTax**

Code	Unit	Rate	Quantity	Amount
DM	DM	100.00	1.00	100.00
DMA	DMA	100.00	1.00	100.00
DIR	DIR	100.00	1.00	100.00
LABTAX	LABTAX	100.00	1.00	100.00

## Review Budget

- ▶ Reviewing the budget for a resource using the new results:

Resource	Units	TOTAL
HOURS	HOURS	100.00
PTE	HEADS	376.00
DIRECT	DOLLARS	2.25
FREBAR	DOLLARS	8,076.00
OVERHEAD	DOLLARS	37,763
GSA	DOLLARS	1,080.76
LABR	DOLLARS	394.30
DM	DOLLARS	0.00
DMA	DOLLARS	0.00
LABTAX	DOLLARS	0.00
<b>Total Currency</b>		<b>12,876.00</b>

## Run Recalc Feature

- ▶ After adding new results, the Recalc feature needs to be run to update the results
- ▶ From the **Toolbar**, select: **Recalc**



## Recalc Feature Options

- ▶ Select the Project
- ▶ Select the options

**Options**  
Please select the options to use during the recalc.

Filter out only classes to be recalculated

Do not replace results with zero when the rate is not found

Allow recalculation of completed Control Accounts and Work Packages

**Criteria**  
Local Project

- ▶ Select the criteria
- ▶ Select classes to Recalc

**Classer**

Selected	Name	Description	Class Type
<input checked="" type="checkbox"/>	Actual	Actual From (A2/A3/P)	Actual
<input checked="" type="checkbox"/>	Budget	(Control Account) (A2/A3)	Budget

## Recalc Feature Options

- ▶ Select the Results
  - DM, DMA, LabTax

**Results**

- DM
- DIRECT
- DM
- DMA
- FRINGE
- FTE
- GSA
- HEADERS
- LAB TAX
- OVERHEAD

- ▶ Select the Date Range

**Date Range**

Recalc all periods in your snapshot.

## Review the Results

- ▶ Review the budget for the resource

Resource	Description	Class	Class Description	Amount	Unit	Rate	Amount
CDM	CDM	CDM	CDM	1,000.00	HOURS	7.34	7,340.00
DM	DM	DM	DM	300.00	HOURS	8.73	2,619.00
DMA	DMA	DMA	DMA	2.25	HEADS	0.05	0.11
LAB TAX	LAB TAX	LAB TAX	LAB TAX	2,000.00	DOLLARS	213.72	427,440.00
OVERHEAD	OVERHEAD	OVERHEAD	OVERHEAD	307.43	DOLLARS	7.45	2,287.43
FTE	FTE	FTE	FTE	1,408.00	DOLLARS	30.00	42,240.00
CLB	CLB	CLB	CLB	1,000.00	DOLLARS	25.00	25,000.00
CDM	CDM	CDM	CDM	904.30	DOLLARS	22.84	20,658.30
DM	DM	DM	DM	3,750.00	DOLLARS	87.90	331,500.00
DMA	DMA	DMA	DMA	1,875.00	DOLLARS	43.80	82,125.00
LAB TAX	LAB TAX	LAB TAX	LAB TAX	715.00	DOLLARS	17.21	12,305.25
OVERHEAD	OVERHEAD	OVERHEAD	OVERHEAD	15,215.00	DOLLARS	450.44	

## Run a Report

- ▶ Run a Time-phased Repeat Sub report
  - results of the fees for DM, DMA & the Lab Tax

	A	B	C	D	E	F	G	H	I	AD
1	Control Account	Result	Cost Set	JUN11	JUL11	AUG11	SEP11	OCT11	NOV11	Cumulative
65	Grand Total									
67		DM	Budget	6,484.70	6,862.10	11,569.24	17,663.22	21,817.86	20,605.42	299,528.33
68										
69		DMA	Budget	5,242.53	5,451.05	5,784.62	8,851.61	10,908.95	10,502.71	109,764.17
70										
71		LAB TAX	Budget	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	51,880.89
72										

## Questions



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## Agenda

- » Creating Reports on Non-EVMS values in Cobra
- » Creating reports using codes on resources

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## Creating reports using codes on resources

- » Management would like to create reports based on the Business Unit Type of resources
- » To accomplish this task the following will be completed:
  - Create Code file with Business Unit Types
  - Assign Code File to Resource File
  - Assign codes to resources
  - Produce reports based on Business Unit Type

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## Create a Code File

- » Create a non-significant code file named Business Unit Type
- » Add the following codes with descriptions as follows:

Code	Description
WOB	Women Owned Business
HZ	Hud Zone
SD	Service Disabled



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## Assign Code File to Resource file

- ▶ Open resource file
- ▶ Open Resource File Information dialog box and select the tab: **Codes Field**
- ▶ Assign the code file to the first code
  - prompt as: **Business Unit**
  - **Type as optional**
  - **File: Business Unit Type**



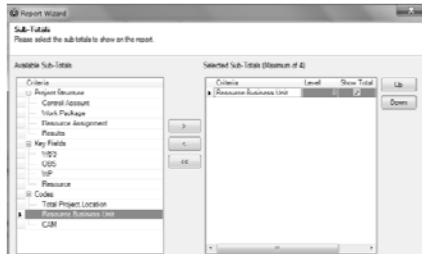
## Assign Codes to Resources

- ▶ Assign codes to resources

Resource	Description	Business Unit
IPS	IPS Project	
MULTIFIRM	Manpower	
DOC	DOC	
SUBTRACT	Subcontractors	
SUBC1	ABC Company	HZ
SUBC2	XYZ Company	SD
SUBC3	KLM Company	WDB
LABOR	Labor	
MFG	Manufacturing	
DES	Design	
AERO	Aeronautical Engineer	WDB
CTRL	Controls Engineer	HZ
CST ANAL	Cost Analyst	HZ
MED1	Mechanical	SD

## Assign Codes to Resources

- ▶ Timephased with criteria Business Unit Type




## Report by Business Unit Type

	A	B	C	D	E	F	G	H	I	J
1	Resource:Business Unit	9/1/2010	10/1/2010	11/1/2010	12/1/2010	1/1/2011	2/1/2011	3/1/2011	4/1/2011	5/1/2011
2	IP Prod Zone	Scheduled	968.00	968.00	968.00	968.00	3,112.88	3,112.88	3,112.88	3,112.88
3	WDB Women Owned Bus	Scheduled	20,151.70	21,241.29	21,167.01	11,991.52	12,252.82	12,158.94	4,178.10	6.00
4	Grand Total	Scheduled	21,199.70	22,215.19	22,135.01	12,959.52	17,518.70	24,989.25	15,255.34	5,902.37



**Questions**



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The slide features the word "Questions" in a bold, black, sans-serif font in the upper left corner. Below it, three light blue handprints are arranged in a triangular pattern, each containing a black question mark. The handprints have a fine, grid-like texture. In the bottom right corner, the text "EVMP Forum - July 2014 33" is displayed in a small, black, sans-serif font. The bottom-left corner of the slide has a dark grey, curved shadow effect.