


**Change Management:
The Only Thing That's Constant Is Change**

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Agenda

- ▶ Introduction
- ▶ Methods to track change
- ▶ Cobra Project Preferences
- ▶ Cobra 5.1.2 new feature
- ▶ Change Log
- ▶ Summary

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Introduction

- ▶ **Topic:** In the world of project controls the saying "The only thing that's constant is Change" is all too true. The accurate tracking and reporting on change in a project is extremely important to a project's success. In this session we will explore a number of different implementation approaches for tracking change within the Deltek Cobra application in conjunction with a scheduling application. The pros and cons of each approach will be discussed and how to best determine what is the best way for your organization. In addition we will take a look at some of Cobra's new functionality that makes a big impact in how changes are tracked.
- ▶ **Bio:** Keith Anderson leads the Implementation and Technology practice at Prime Project Management. PrimePM functions as the consulting and software implementation services group for Deltek's Integrated Program Management (IPM) suite of products which includes Deltek Cobra. Keith has over a decade of hands-on experience in consulting management, software implementations, product management, and product design. He is a dedicated project management professional with a talent for looking at the big picture and envisioning total solutions for a client.

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Methods to Track Changes

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Method 1

One cost class for the Original Budget and a second cost class for all pending changes. Code fields at the WP level capture the change number.

The screenshot shows a SAP Resource Assignments table with columns for Code, Description, UBR, OBR, LUP, Description, Basis, Work Package Change Number, and COB. A red box highlights the 'Work Package Change Number' column, showing values like 45000, 45001, 45002, and 45003. Below the main table, there is a 'Resource Assignments' section with a 'Total' row and a 'Grand Total' row.

Method 1

Report showing the pending and current budget.

The screenshot shows a budget report table with columns for Work Package, Resource Assignment, Budget, Pending Budget Changes, and monthly totals (JAN09 to MAY09). A red box highlights the 'Budget' and 'Pending Budget Changes' columns. Below the main table, there is a 'Grand Total' row and a 'Currency reported in: Dollars' section.

Method 1

Reclass used to reclassify the "Changes" cost class to the "Budget" Cost Class. The result can be seen in the Log Report.

The screenshot shows a Log Report table with columns for End Amount, Date, Transaction Number, Change Number, Change Comment, Credit, Debit, Amount, and User Name. A red box highlights the 'Amount' column, showing values like 2,210,000, 2,280,000, 0, and 20,000.

Method 1

Pros	Cons
Simple method to control and see change before approving.	Limited reporting on original and changes to budget. Audit reports are used to report changes.
Low system administration. Reuse same cost class.	Assume one change at a time per WP. Cannot store multiple changes per WP.

Method 2

One cost class for the Original Budget, a second cost class included in totals for all project changes, and a third cost class not included in totals for all pending changes.

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Method 2

Reclass used to move the change from the pending "Changes" class to the "Modifications" class which holds the approved project budget changes.

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Method 2

Reclass used to move the change from the pending "Changes" class to the "Modifications" class which holds the approved project budget changes.

Work Package	Resource Assignment	JAN09	FEB09	MAR09	APR09	MAY09	JUN09
1.2.1 / 1220 / 02 Ignitions	Budget	12,055.40	12,218.65	10,415.25	12,587.21	11,202.38	4,119.59
	Modifications	956.82	591.52	680.25	591.52	680.25	525.55
	DRAFT Draftsmen	686.27	1,022.92	1,200.45	4,826.14	3,873.36	505.56
	EWG Electrical Engineers	8,704.14	7,194.85	4,732.44	3,358.44	3,739.29	1,660.36
	Modifications	296.82	292.52	680.25	292.52	680.25	225.52
	Personnel Management	1,292.29	1,929.21	2,128.99	2,021.93	2,223.70	928.21
	Tech Technicians	1,872.74	2,055.65	2,261.34	2,158.68	2,364.00	1,007.35
Grand Total	Budget	17,095.40	12,218.65	10,415.25	12,587.21	11,202.38	4,119.59
	Modifications	956.82	591.52	680.25	591.52	680.25	525.55

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Method 2

Pros	Cons
Simple method to control and see change before approving.	All changes are grouped together in the same cost class. Cannot report timephased by individual change.
Low system administration. Reuse same cost class.	Assume one change at a time per WP. Cannot store multiple changes per WP.
Can report on original budget and all changes separately.	

Method 3

This method uses one cost class for the Original Budget and multiple other cost classes per change.

Resource	Description	Class	Class Description	Time Phase	Result	Units	TOTAL	JAN08	FEB08	MAR08	APR08	
DRAFT	Draftwork	485133	Change (COST)	Person		100.00	11.06	18.34			21.09	
DRAFT	Draftwork	485132	Change (COST)	HOURS	HOURS	40.00	4.42	7.24			8.44	
DRAFT	Draftwork	Budget	Current Budget (COST)	FFP	HOURS	9.20	0.03	0.05			0.05	
ENGR	Electrical Engineers	Budget	Current Budget (COST)	DIRECT	DOLLARS	539.00	59.41	94.82			119.16	
MANAGE	Management	Budget	Current Budget (COST)	FRANGE	DOLLARS	18.48	2.04	3.39			3.90	
TECH	Technicians	Budget	Current Budget (COST)	OVERHEAD	DOLLARS	81.97	9.07	10.03			12.29	
ENGR	Electrical Engineers	Modifications	Modifications to Baseline	G&A	DOLLARS	62.85	6.95	11.52			13.25	
				COM	DOLLARS	25.89	6.27	10.40			11.95	
Total Currency							217.88	82.71	137.18			157.74

Method 3

Pros	Cons
Ultimate fidelity in reporting changes	Complicated to administer.
Can keep track of multiple changes in a WP.	Changes are brought directly into the change class that is part of the budget. No preview of the change cost impact.
Can report on original budget and all individual changes separately.	

Cobra Project Preferences



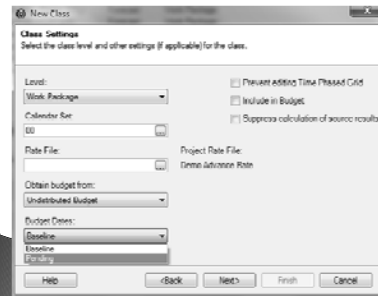
Category	Option	Selected	Secure	
Actual Costs	Apply historical changes as an adjusting entry in the current status period.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Update existing Work Package baseline dates to match the schedule.	<input type="checkbox"/>	<input type="checkbox"/>	
	Update Control Account dates to span Work Package dates exactly.	<input type="checkbox"/>	<input type="checkbox"/>	
	Update the description for existing Control Accounts and Work Packages.	<input type="checkbox"/>	<input type="checkbox"/>	
	Recalculate existing milestone weights.	<input type="checkbox"/>	<input type="checkbox"/>	
	Delete items from Cobra that are no longer in the schedule.	<input type="checkbox"/>	<input type="checkbox"/>	
	Delete Control Accounts and Work Packages no longer in the schedule.	<input type="checkbox"/>	<input type="checkbox"/>	
	Update resource assignments on items in the workfile.	<input type="checkbox"/>	<input type="checkbox"/>	
	ANSI X12	Check Control Account key field 2 structure for parent-child uniqueness.	<input type="checkbox"/>	<input type="checkbox"/>
		Check Control Account key field 3 structure for parent-child uniqueness.	<input type="checkbox"/>	<input type="checkbox"/>
Allow changes to occur for an in-progress Control Account/Work Package.		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Prevent editing of historical time-phased values.		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Integration Wizard	Use an adjusting entry to remove EV from deferred budget.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Force the SPI of an opportunistic resource to match source SPI.	<input type="checkbox"/>	<input type="checkbox"/>	
	Earned value by:	Budget		

Cobra 5.1.2 new feature

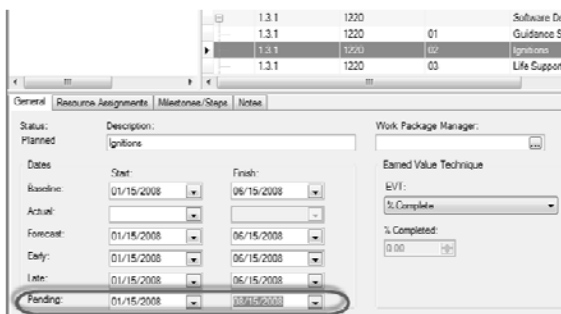


Budget Dates

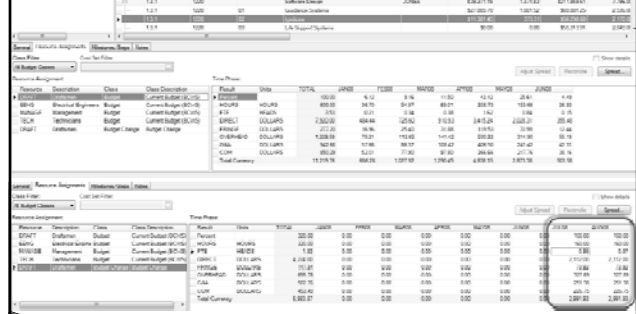
- ▶ Establish pending dates for cost classes
- ▶ Non-BCWS budget classes only



Budget Dates



Budget Dates



Change Log

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Project Audit

- ▶ Track changes to Budget cost classes.
- ▶ “Log time phased changes” supports IPMR Format 3

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Project Audit

- ▶ Define the level to retain in the baseline log
- ▶ Take time to determine the right level

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Project Audit

Control Account

Cost Account	Date	Transaction Number	Change Number	Change comment	Credit	Debit	Amount
	1/31/2008	321	Initial			AUV	0
	1/31/2008	321	Initial		UB		2,770,000
	1/31/2008	321	Initial			CTC	2,790,000
	1/31/2008	321	Initial		MB		20,000
1.1.1.f/1400	1/31/2008	321	Initial		DB	UB	73,863
1.1.1.f/1400	1/31/2008	321	Initial		DB	UB	274,563
1.1.1.f/1600	1/31/2008	321	Initial		DB	UB	53,055
1.1.2.f/1600	1/31/2008	321	Initial		DB	UB	5,763
2.1.1.f/1332	1/31/2008	321	Initial		DB	UB	187,774
2.1.2.f/1331	1/31/2008	321	Initial		DB	UB	73,728
2.2.f/1000	1/31/2008	321	Initial		DB	UB	223,495
3.1.f/1220	1/31/2008	321	Initial		DB	UB	212,396
3.2.f/1220	1/31/2008	321	Initial		DB	UB	35,302
4.f/1000	1/31/2008	321	Initial		DB	UB	45,340
8.f/1000	1/31/2008	321	Initial		DB	UB	1,307,738
3.1.f/1220	1/31/2008	322	12345	MB	DB	UB	5,954

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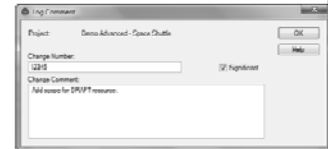
Project Audit

Work Package

Work Package	Date	Transaction Number	Change Number	Change Comment	Credit	Debit	Amount
	1/31/2008	222	Initial		MR		20,000
	1/31/2008	325	Initial			ALLOW	0
	1/31/2008	323	Initial		UB		2,270,000
	1/31/2008	325	Initial			CTC	2,240,000
1.3.2 / 1220 / 01	1/31/2008	323	Initial		DB	UB	21,038
1.3.2 / 1220 / 02	1/31/2008	222	Initial		DD	UD	32,265
1.4 / 1500 / 01	1/31/2008	323	Initial		DD	UB	1,649
1.4 / 1500 / 02	1/31/2008	325	Initial		DB	UB	1,365
1.4 / 1500 / 03	1/31/2008	325	Initial		DB	UB	2,323
1.4 / 1500 / 04	1/31/2008	325	Initial		DB	UB	2,752
1.4 / 1500 / 05	1/31/2008	325	Initial		DD	UB	37,547
1.3.1 / 1220 / 02	1/31/2008	321	12345	Add new scope for DRAFT resource.	DB	UB	5,881

Project Audit

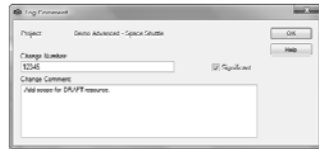
Resource Assignment



Resource Assignment	Date	Transaction Number	Change Number	Change Comment	Credit	Debit	Amount	User Name	Significant?
	1/31/2008	104	Initial		UB	CTC	0.000000	SYSTEMADMIN	N
	1/31/2008	323	Initial			MR	20,000.000000	SYSTEMADMIN	N
	1/31/2008	323	Initial			ALLOW	0.000000	SYSTEMADMIN	N
1.1.1 / 1400 / 01 / DRAFT	1/31/2008	322	Initial		DB	UB	3,430.000000	SYSTEMADMIN	N
1.1.1 / 1400 / 01 / MANAGE	1/31/2008	104	Initial		DB	UB	1,000.000000	SYSTEMADMIN	N
1 / 1500 / 04 / TECH	1/31/2008	104	Initial		DB	UB	625.000000	SYSTEMADMIN	N
1 / 1500 / 04 / ACTING	1/31/2008	323	Initial		DD	UD	1,113.000000	SYSTEMADMIN	N
1 / 1500 / 04 / CENG	1/31/2008	323	Initial		DD	UD	790.000000	SYSTEMADMIN	N
1 / 1500 / 04 / MANAGE	1/31/2008	323	Initial		DB	UB	332.000000	SYSTEMADMIN	N
1 / 1500 / 04 / DRAFT	1/31/2008	323	Initial		DB	UB	9,337.000000	SYSTEMADMIN	N
1 / 1500 / 02 / REVE	1/31/2008	323	Initial		DB	UB	22,492.000000	SYSTEMADMIN	N
1 / 1500 / 05 / TECH	1/31/2008	323	Initial		DB	UB	6,881.000000	SYSTEMADMIN	N
1.1 / 1220 / 02 / DRAFT	1/31/2008	327	12345	Add scope for DRAFT resource.	DB	UB	5,884.000000	SYSTEMADMIN	Y

Project Audit

Resource Assignment



Resource Assignment	Date	Transaction Number	Change Number	Change Comment	Credit	Debit	Amount	User Name	Significant?
	1/31/2008	322	Initial		UB		22,000.000000	SYSTEMADMIN	N
	1/31/2008	222	Initial			CTC	2,260,000.000000	SYSTEMADMIN	N
	1/31/2008	104	Initial		UB		30,000.000000	SYSTEMADMIN	N
	1/31/2008	323	Initial			ALLOW	0.000000	SYSTEMADMIN	N
1.1.1 / 1400 / 01 / DRAFT	1/31/2008	322	Initial		DB	UB	5,400.000000	SYSTEMADMIN	N
1.1.1 / 1400 / 01 / MANAGE	1/31/2008	104	Initial		DB	UB	1,500.000000	SYSTEMADMIN	N
1 / 1500 / 04 / TECH	1/31/2008	104	Initial		DB	UB	625.000000	SYSTEMADMIN	N
1 / 1500 / 04 / ACTING	1/31/2008	323	Initial		DD	UD	1,113.000000	SYSTEMADMIN	N
1 / 1500 / 04 / CENG	1/31/2008	323	Initial		DD	UD	790.000000	SYSTEMADMIN	N
1 / 1500 / 04 / MANAGE	1/31/2008	323	Initial		DB	UB	332.000000	SYSTEMADMIN	N
1 / 1500 / 04 / DRAFT	1/31/2008	323	Initial		DB	UB	8,337.000000	SYSTEMADMIN	N
1 / 1500 / 05 / E/ENG	1/31/2008	323	Initial		DB	UB	21,140.000000	SYSTEMADMIN	N
1 / 1500 / 05 / TECH	1/31/2008	323	Initial		DB	UB	6,881.000000	SYSTEMADMIN	N
1.1 / 1220 / 02 / DRAFT	1/31/2008	327	12345	Add scope for DRAFT resource.	DB	UB	5,708.000000	SYSTEMADMIN	Y

Summary

- ▶ Consider the right method for your Organization / Program.
- ▶ Consider the log level.
- ▶ IPMR Format 3 requirements.

Questions?



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