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SSI QBD Tools

Overview

The Percent Complete, or performance value, of a task with a long duration may appear to be subjective without Quantifiable Backup Data (QBD). QBD provides the objective evidence to support a task's performance assessment.

Using a 45-day task named "Generate Drawing Package" as an example, it would be difficult to defend its performance value while the task is in-progress without having tangible proof to support the percent complete recorded as task progress. If, however, we knew that the drawing package includes 10 equally weighted individual drawings and that 6 of those drawings are complete, we can easily justify taking 60% complete for the performance value.

So, in the example above, why not just put 10 individual drawing tasks in the schedule and make "Generate Drawing Package" a summary? The answer is often that those 10 drawings can be performed in no particular order so it would not be practical to show their level of detail in the schedule and try to guess the order the drawings will be performed. Sometimes it's just more effective to manage a task at a higher level in the schedule and provide its supporting tangible performance increments as a list of QBD subordinate steps.

Definitions

For the purpose of this document:

- **Task** refers to a line item in the schedule with predecessors, successors, work or cost factors, if needed, and Earned Value identification values such as a Work Package ID.
- **Step** refers to a task increment that provides QBD to support the performance value or percent complete of an in-progress task.
- **SSI Analysis Tools Database** refers to an external storage system used, among other things, to trace QBD steps to their parent task and project.

Where to Get Help

How-to video: [SSI's Quantifiable Backup Data \(QBD\) Management Tools](#)

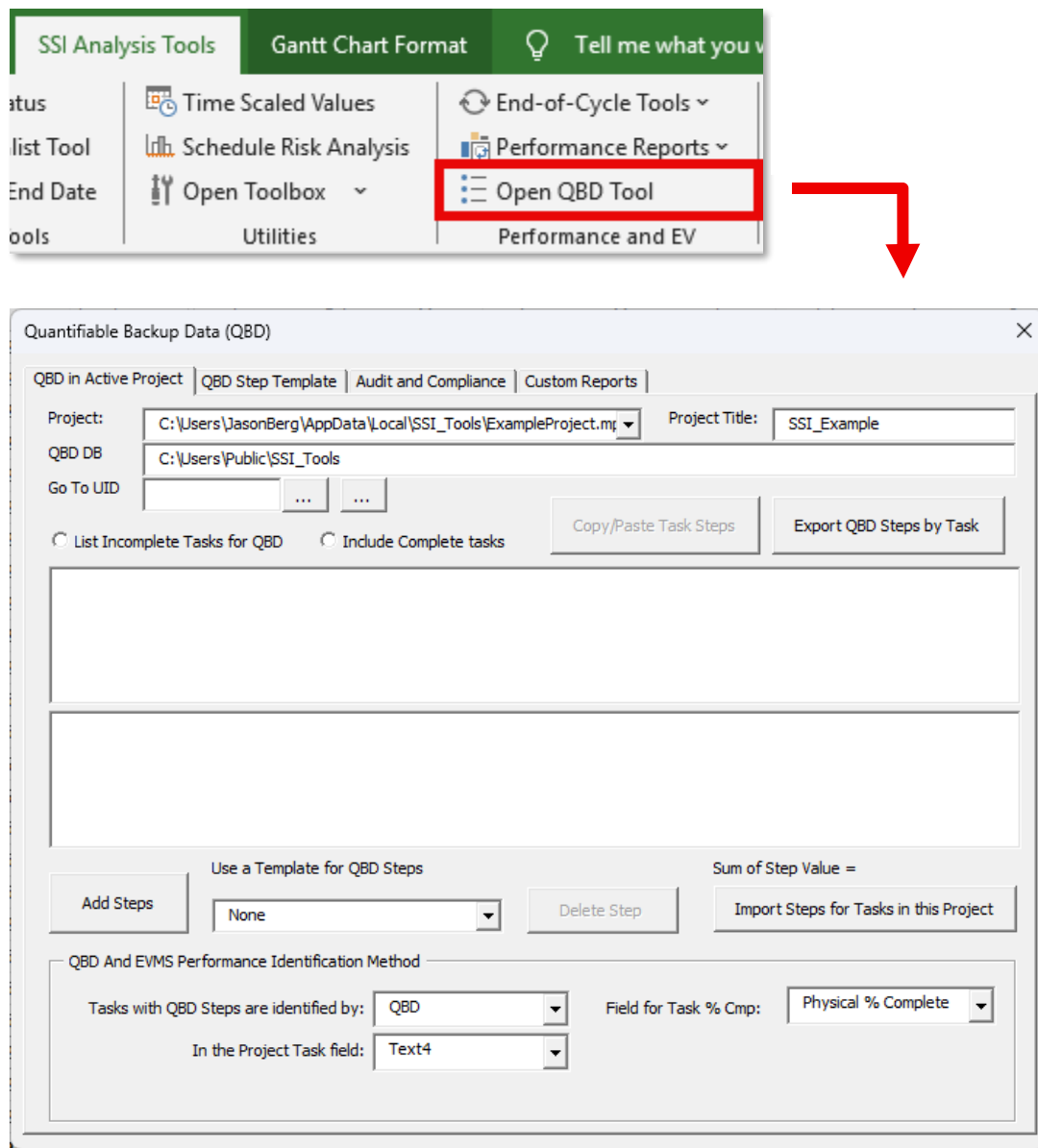
Online Help and User's guide:

https://ssitools.com/helpandsupport/ssianalysishelp/ssi_qbd_tools.htm

Data Architecture for SSI QBD Tools

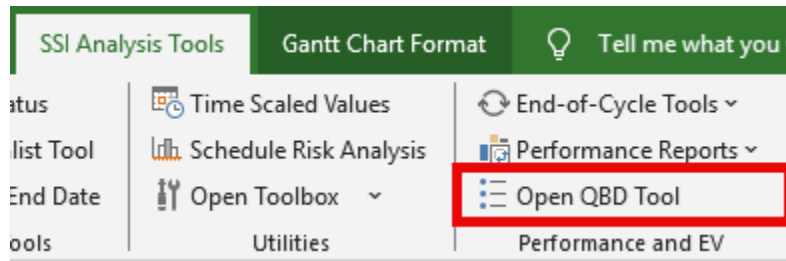
SSI's QBD tools uses an external database where projects can record and track QBD. The name of the database is **fixed** as **SSI_Analysis_DB.mdb**. However, it can be created in any location on your system.

One or more projects can all communicate with the SSI Analysis Tools Database by browsing to the location of database. The single **SSI Analysis Tools Database** can be used by more than one Microsoft Project schedule as long as the project titles are unique and the task Unique IDs remain constant throughout the life of a project.

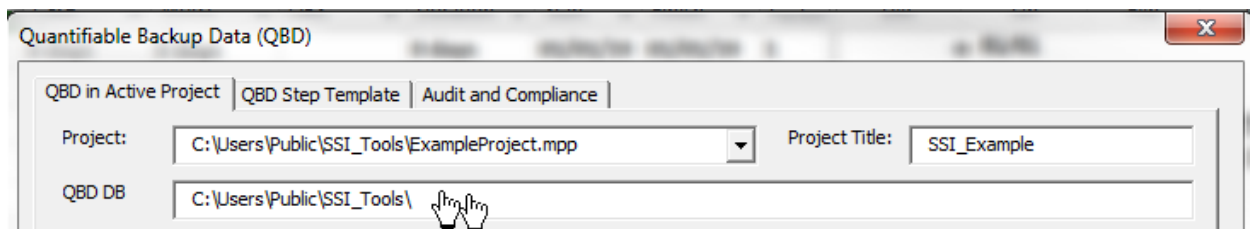


Quick Start Guide for SSI QBD Tools

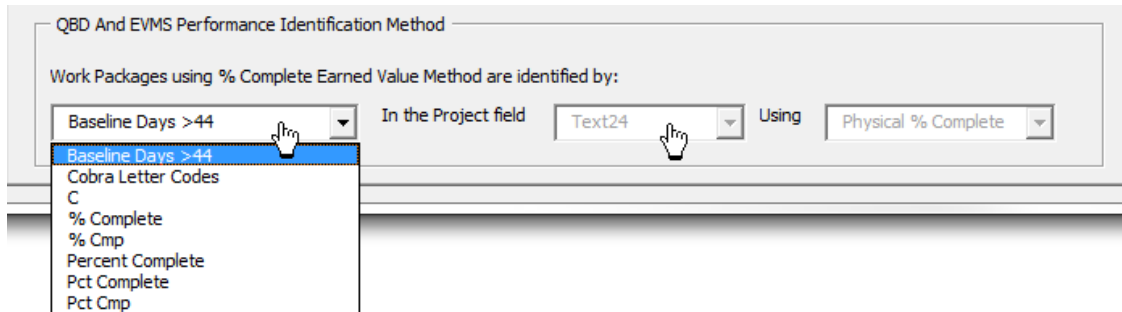
1. Open a file in Microsoft Project and click **Open QBD Tool**.



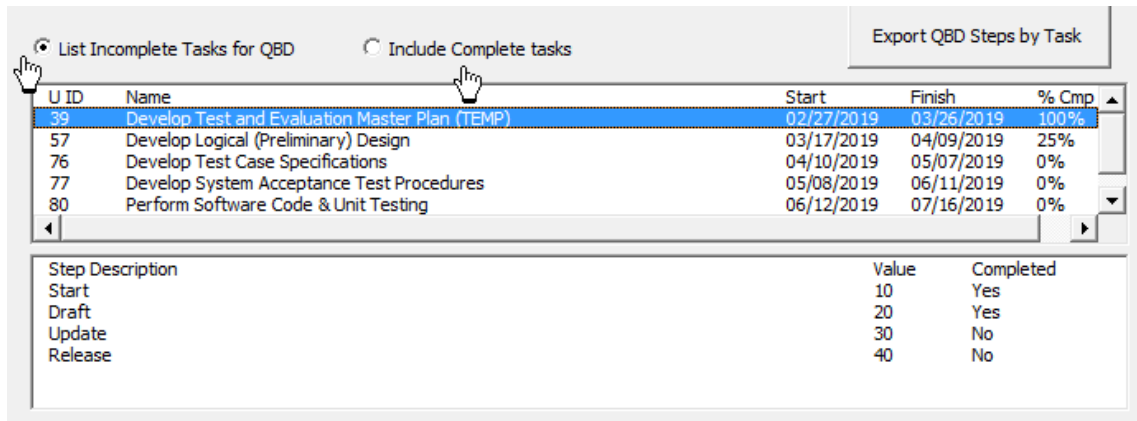
2. On the tab named **QBD in Active Project**, double-click **QBD DB** to set the location of the SSI Analysis Tools Database. (If this database already exists, SSI Tools will use it. If the database does not exist in the selected system location, SSI Tools will create a new empty database for QBD.)



3. Select the method you use to identify tasks that require QBD steps. The drop-down list in this section provides some popular methods such as "Baseline Days >44" and "Cobra Letter Codes". You can change the numeric part of the "Baseline Days >" option or you can even just **type in your own criteria**. (If you select anything other than the Baseline Days option, you will need to specify the project field where the value will be found.)



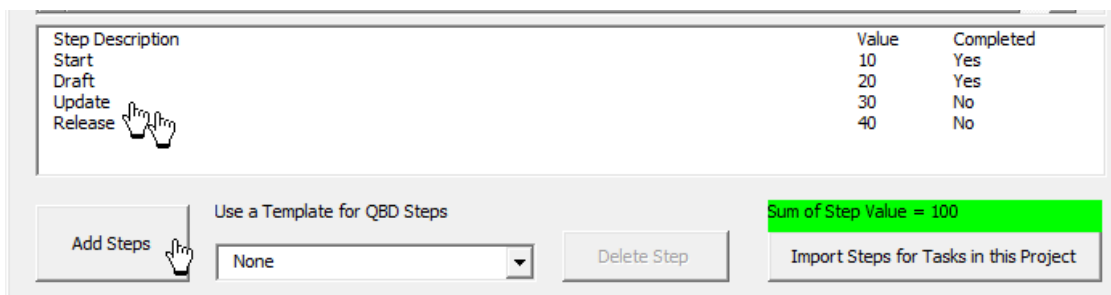
4. Select the option to **List Incomplete Tasks for QBD ONLY** or **Include Completed Tasks** to show tasks that require QBD steps in a list that displays their Unique ID (as UID), Name, Start, Finish and Physical % Complete (as % Cmp)



U ID	Name	Start	Finish	% Cmp
39	Develop Test and Evaluation Master Plan (TEMP)	02/27/2019	03/26/2019	100%
57	Develop Logical (Preliminary) Design	03/17/2019	04/09/2019	25%
76	Develop Test Case Specifications	04/10/2019	05/07/2019	0%
77	Develop System Acceptance Test Procedures	05/08/2019	06/11/2019	0%
80	Perform Software Code & Unit Testing	06/12/2019	07/16/2019	0%

Step Description	Value	Completed
Start	10	Yes
Draft	20	Yes
Update	30	No
Release	40	No

5. Select a task in the list to see its QBD steps in the list below the task names
6. If QBD steps exist for a task, double-click a Step to Edit or Post its completion status
7. If no QBD steps exist for a task, or to add a new step, click the button named **Add Steps**. You can even add steps using a Template that may contain a standard set of steps for certain task types.



Step Description	Value	Completed
Start	10	Yes
Draft	20	Yes
Update	30	No
Release	40	No

Add Steps
Use a Template for QBD Steps
None
Delete Step
Sum of Step Value = 100
Import Steps for Tasks in this Project

Detailed User's Guide for SSI QBD Tools

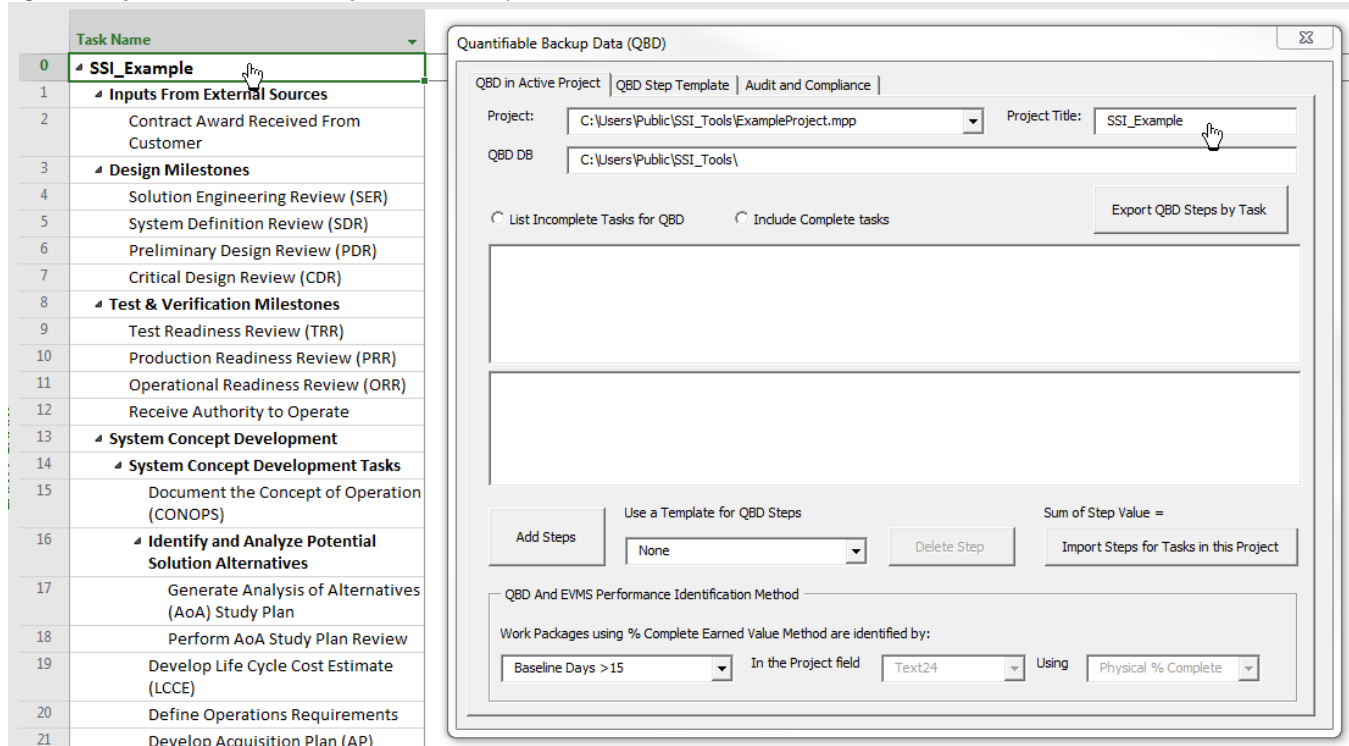
Setup the System Location for the SSI Analysis Database for QBD

SSI QBD Tools uses an external database to keep track of QBD Steps by Project and Tasks within a Project. QBD steps are organized in the database by their **Project Title** and **Task Unique ID**. Pay careful attention to these two identifiers when you link your project to the SSI Analysis Database for QBD.

Be careful not to change a Project's Title or a Task's Unique ID when using the SSI Analysis Database for QBD since both are key to matching data in a project to its QBD steps in the database. The Advanced Topics show you how to open and use the database directly. This may be necessary if you need to remap Project Title or Unique ID.

Project Title can be set one of two ways. The easiest way is to simply display Row 0 in your project by selecting Project Summary Task from the **Show/Hide** group on the **Format** menu in Microsoft Project. The second way to set the Project title is to select Project Information from the File menu and see the Title displayed on the Properties Summary form.

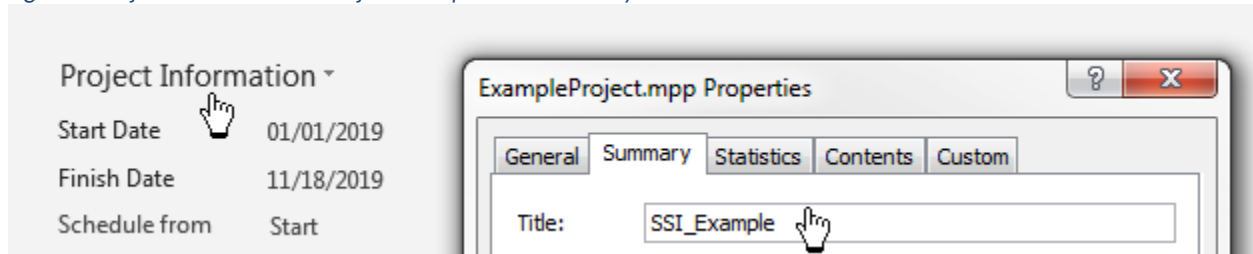
Figure 1 Project Title from the Project's Summary task



The screenshot displays the SSI QBD Tools interface. On the left, a task list is shown with Row 0 selected, labeled 'SSI_Example'. The main window, titled 'Quantifiable Backup Data (QBD)', contains the following fields and controls:

- Project:** C:\Users\Public\SSI_Tools\ExampleProject.mpp
- Project Title:** SSI_Example
- QBD DB:** C:\Users\Public\SSI_Tools\
- Radio Buttons:**
 - ☐ List Incomplete Tasks for QBD
 - ☐ Include Complete tasks
- Buttons:** Add Steps, Use a Template for QBD Steps (set to None), Delete Step, Import Steps for Tasks in this Project, Export QBD Steps by Task.
- QBD And EVMS Performance Identification Method:**
 - Work Packages using % Complete Earned Value Method are identified by:
 - Baseline Days > 15
 - In the Project field: Text24
 - Using: Physical % Complete

Figure 2 Project Title from the Project's Properties Summary form



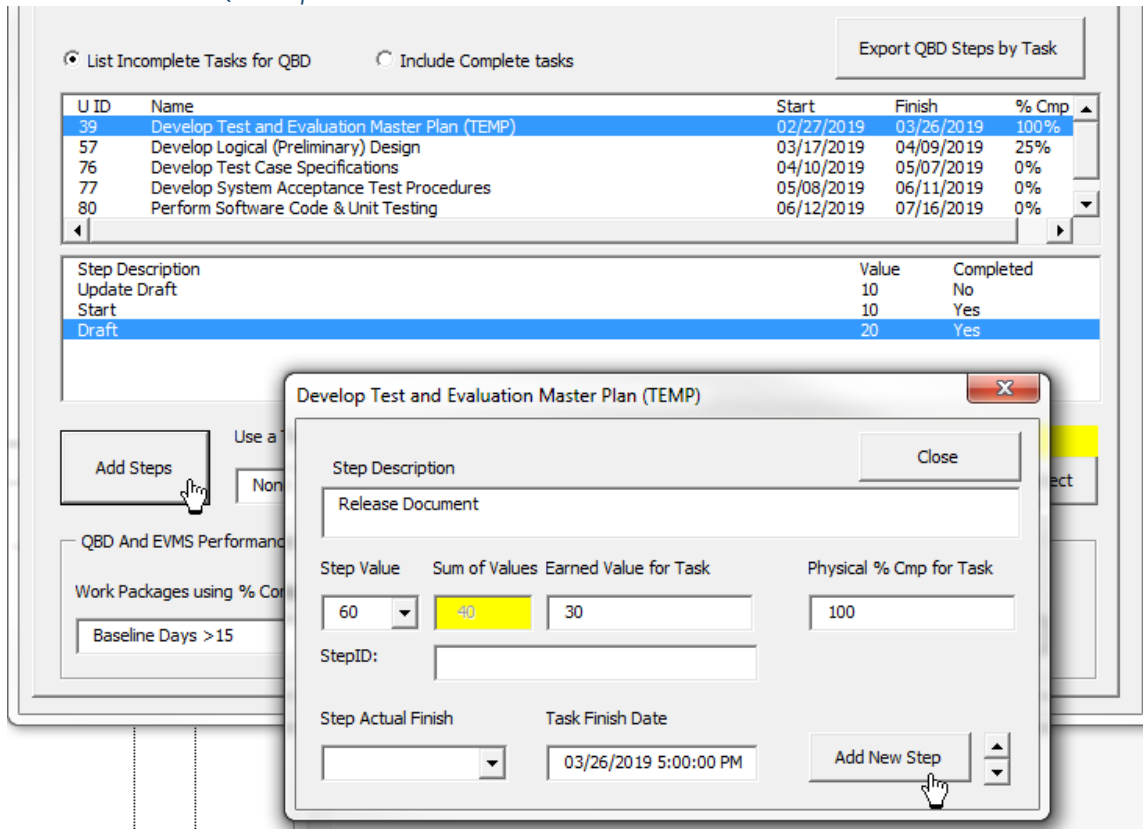
Task Unique ID is the unique number given to a task by Microsoft Project. This number is assigned and can't be changed unless you copy or insert one project's tasks into another.

Adding Individual QBD Steps to a task

When a task has no QBD Steps identified, you have three options for adding steps

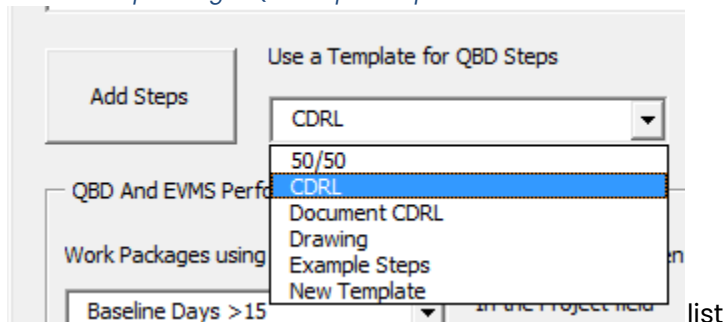
1. First, you can add each step one at a time by clicking the button named Add Steps and completing the QBD Step.

Figure 3 Show Task and QBD Steps



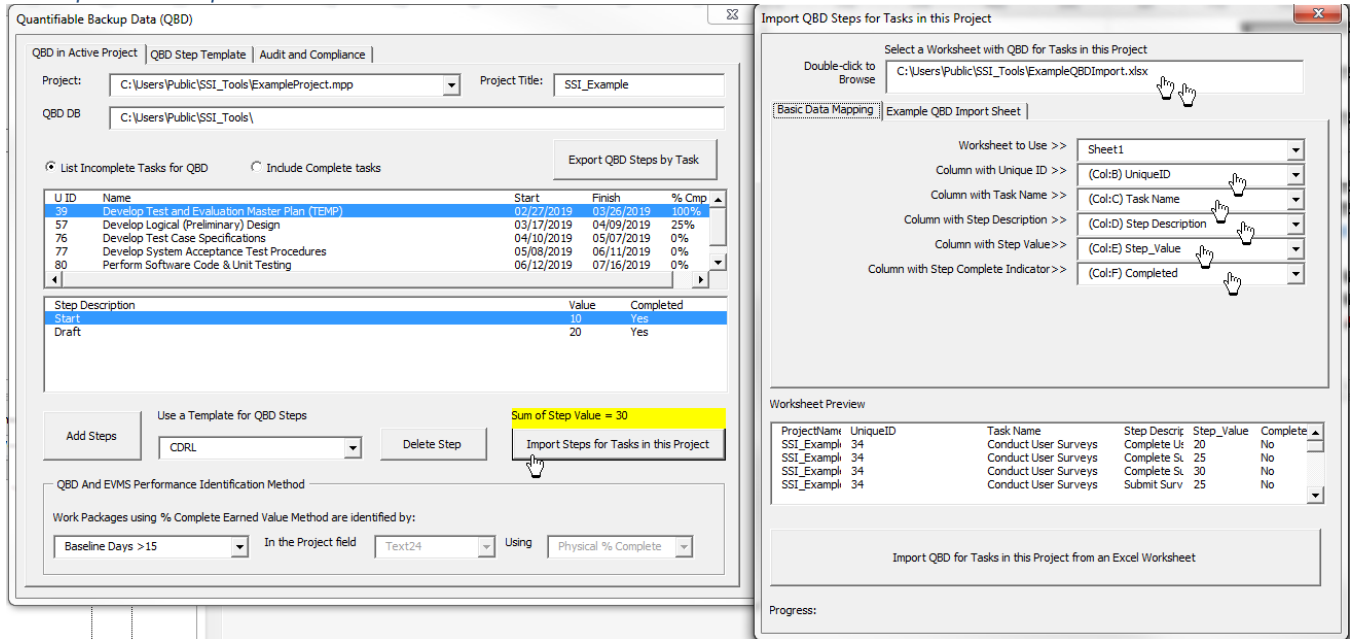
2. Second, you can pick a QBD Steps template from the drop-down list named Use a Template for QBD Steps

Figure 4 Add Steps Using a QBD Steps Template



- The third method is to import QBD steps by clicking the button named **Import Steps for Tasks in this Project**. Select an Excel file with columns for **Unique ID, Task Name, Step Description, Step Value** and **Step Complete**. You can import an Excel worksheet with QBD Steps for one, many or all the tasks in a project.

Figure 5 Import QBD Steps



Quantifiable Backup Data (QBD)

QBD in Active Project | QBD Step Template | Audit and Compliance

Project: C:\Users\Public\SSi_Tools\ExampleProject.mpp Project Title: SSI_Example

QBD DB: C:\Users\Public\SSi_Tools\

☒ List Incomplete Tasks for QBD ☐ Include Complete tasks

Export QBD Steps by Task

U ID	Name	Start	Finish	% Cmp
63	Develop Test and Evaluation Master Plan (TEMP)	07/27/2019	07/28/2019	100%
57	Develop Logical (Preliminary) Design	03/17/2019	04/09/2019	25%
76	Develop Test Case Specifications	04/10/2019	05/07/2019	0%
77	Develop System Acceptance Test Procedures	05/08/2019	06/11/2019	0%
80	Perform Software Code & Unit Testing	06/12/2019	07/16/2019	0%

Step Description Value Completed

Start	10	Yes
Draft	20	Yes

Add Steps Use a Template for QBD Steps CDRL Delete Step

Sum of Step Value = 30

Import Steps for Tasks in this Project

QBD And EVMS Performance Identification Method

Work Packages using % Complete Earned Value Method are identified by:

Baseline Days > 15 In the Project field Text24 Using Physical % Complete

Import QBD Steps for Tasks in this Project

Select a Worksheet with QBD for Tasks in this Project

Double-click to Browse C:\Users\Public\SSi_Tools\ExampleQBDImport.xlsx

Basic Data Mapping Example QBD Import Sheet

Worksheet to Use >> Sheet1

Column with Unique ID >> (Col:B) UniqueID

Column with Task Name >> (Col:C) Task Name

Column with Step Description >> (Col:D) Step Description

Column with Step Value >> (Col:E) Step_Value

Column with Step Complete Indicator >> (Col:F) Completed

Worksheet Preview

ProjectName	UniqueID	Task Name	Step Descr	Step_Value	Complete
SSI_Example	34	Conduct User Surveys	Complete Us	20	No
SSI_Example	34	Conduct User Surveys	Complete Sl	25	No
SSI_Example	34	Conduct User Surveys	Complete Sl	30	No
SSI_Example	34	Conduct User Surveys	Submit Surv	25	No

Import QBD for Tasks in this Project from an Excel Worksheet

Progress:

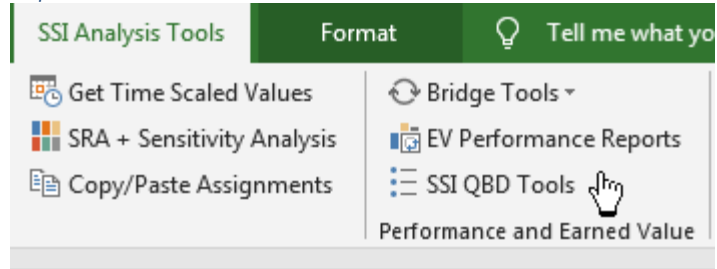
Class Exercise – Setting up QBD

Open the Microsoft Project file named ExampleProjectQBD.mpp.

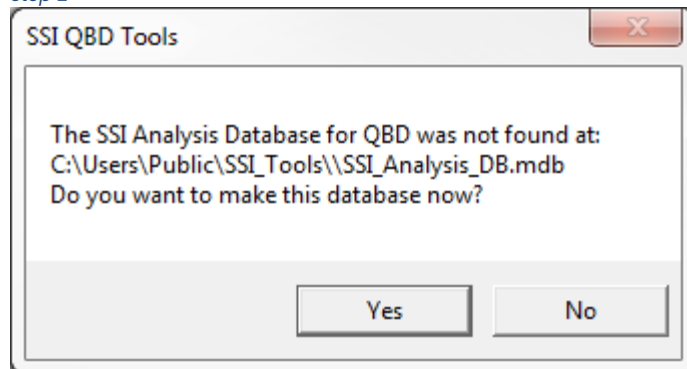
If needed, download this file at: [Example Project for QBD Tools](#)

1. Click **SSI QBD Tools** from the **SSI Analysis Tools** menu
2. Respond "Yes" if prompted to make the QBD database
3. Display Text 4 (used for PMT/EVT) in the Example Project and Filter the Duration column for tasks with a duration > 20 days

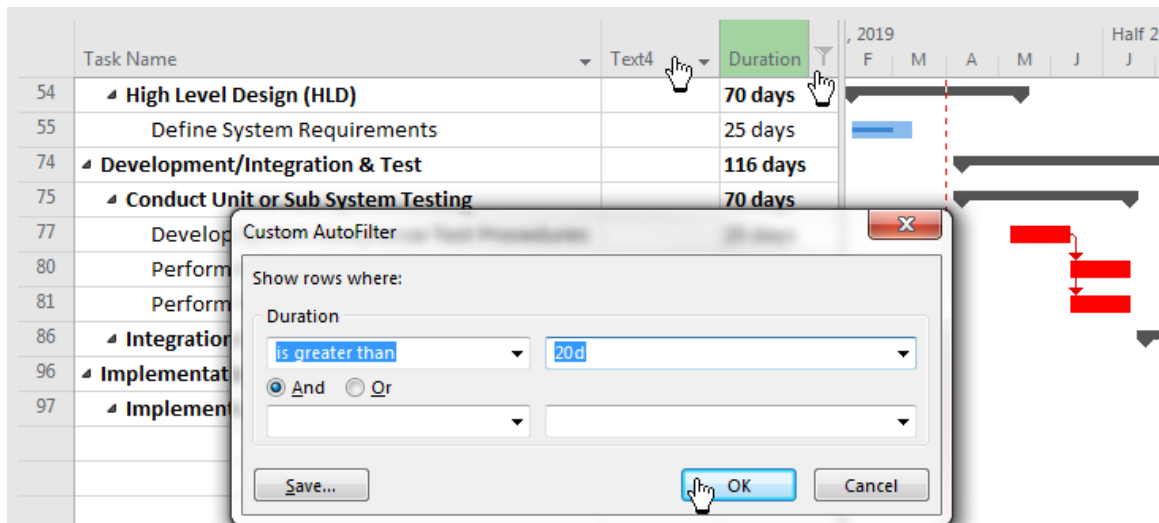
Step 1



Step 2



Step 3



4. Enter "Pct Cmp" in Text 4 (used for PMT/EVT) of the tasks with a duration > 20 days

Task Name	Text4	Duration	2019	Half 2, 2019
54	High Level Design (HLD)	70 days	F M A M J J A S	
55	Define System Requirements	Pct Cmp 25 days		
74	Development/Integration & Test	116 days		
75	Conduct Unit or Sub System Testing	70 days		
77	Develop System Acceptance Test Procedures	Pct Cmp 25 days		
80	Perform Software Code & Unit Testing	Pct Cmp 25 days		
81	Perform Module Testing	Pct Cmp 25 days		

5. On the **Quantifiable Backup Data (QBD)** form, enter "Pct Cmp" and "Text4" below "Work Packages using % Complete Earned Value Method are identified by:" in the section named **QBD And EVMS Performance Identification Method** at the bottom of the form
6. Select **List Incomplete Tasks for QBD** to see a list of all tasks that require QBD

Name	PMT/EVT	Phy
SSi Example QBD		13%
High Level Design (HLD)		0%
High Level Design (HLD)		0%
Define System Requirements	Pct Cmp	0%
Development/Integration & Test		0%
Conduct Unit or Sub System Testing		0%
Develop System Acceptance Test Procedures	Pct Cmp	0%
Perform Software Code & Unit Testing	Pct Cmp	0%
Perform Module Testing	Pct Cmp	0%

Quantifiable Backup Data (QBD)

QBD in Active Project
QBD Step Template
Audit and Compliance

Project: C:\Users\Public\SSi_Tools\ExampleProjectQBD.mpp
Project Title: SSi Example QBD
QBD DB: C:\Users\Public\SSi_Tools
Go To UID:

☒ List Incomplete Tasks for QBD
☐ Include Complete tasks
Copy/Paste Task Steps
Export QBD Steps by Task

U ID	Name	Start	Finish	% Cmp
55	Define System Requirements	02/03/2021	03/12/2021	0%
77	Develop System Acceptance Test Procedures	04/30/2021	06/03/2021	0%
80	Perform Software Code & Unit Testing	06/04/2021	07/08/2021	0%
81	Perform Module Testing	06/04/2021	07/08/2021	0%

Step Description
Value
Completed

Use a Template for QBD Steps
Sum of Step Value =

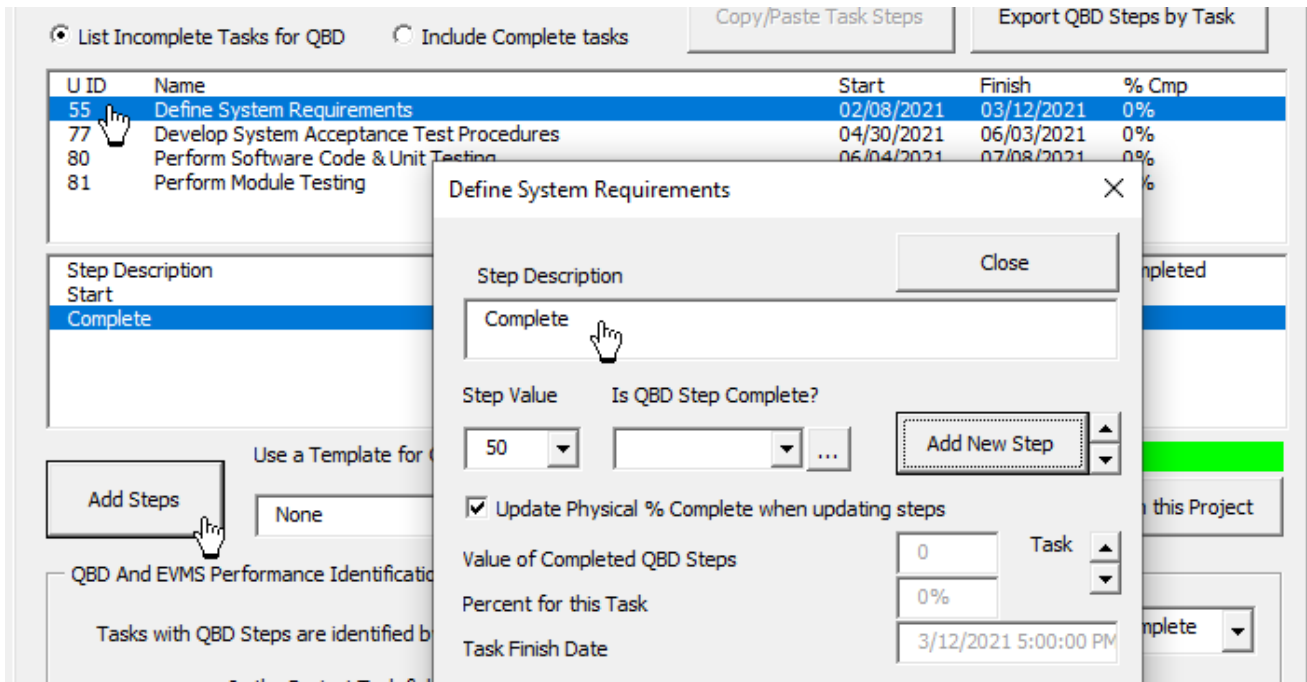
Add Steps
None
Delete Step
Import Steps for Tasks in this Project

QBD And EVMS Performance Identification Method

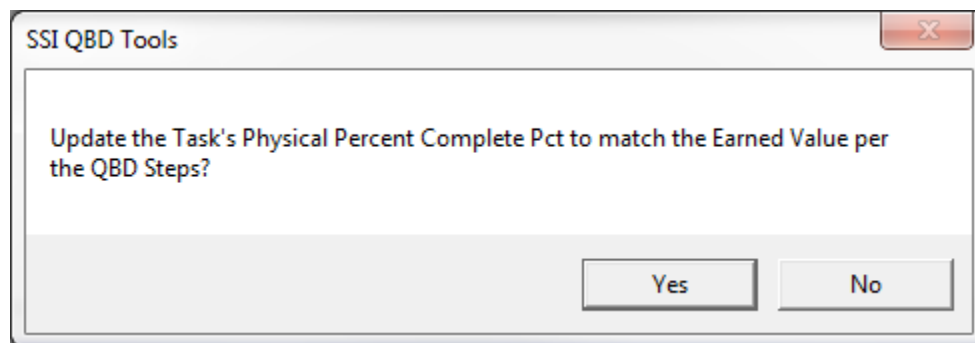
Tasks with QBD Steps are identified by: Pct Cmp
Field for Task % Cmp: Physical % Complete

In the Project Task field: Text4

7. Select the first item in the list "Define System Requirements" and Click **Add Steps** to add the QBD Steps as follows:
 - a. **Step Description** = "Start", **Step Value** = 50
 - b. **Step Description** = "Finish", **Step Value** = 50



8. As you add QBD Steps, SSI Tools compares the task's Physical % Complete to the QBD Step value. Whenever the tasks Physical % Complete does not match QBD Step value a message appears asking if you want to Update the Tasks Physical % Complete to match the Earned Value of the QBD Steps.





9. Select the next item in the task list named "Develop System Acceptance Test Procedures"
10. This time, **Use a Template for QBD Steps** by selecting the Template named "Example Steps"
11. Press **Add Steps** to add 5 new QBD steps to the task using the **Example Steps** template

U ID	Name	Start	Finish	% Cmp	Task Wght
55	Define System Requirements	02/08/2021	03/12/2021	0%	0
77	Develop System Acceptance Test Procedures	04/30/2021	06/03/2021	0%	0
80	Perform Software Code & Unit Testing	06/04/2021	07/08/2021	0%	0
81	Perform Module Testing	06/04/2021	07/08/2021	0%	0

Step Description	Value	Completed
Start	10	No
Submit for Peer Review	25	No
Update per Peer Review	25	No
Submit for Final Review	25	No
Complete	15	No

Use a Template for QBD Steps

Sum of Step Value = 100

Add Steps Example Steps Delete Step Import Steps for Tasks in this Project

12. Select the next item in the task list named "Perform Software Code & Unit Testing"
13. Change "Example Steps" to "None" (type "None" if it is not in the drop-down list)
14. Click **Add Steps** to add the QBD Steps as follows:
 - a. **Step Description** = "Software Code Completed", **Step Value** = 50
 - b. **Step Description** = "Module Test Started", **Step Value** = 25
 - c. **Step Description** = "Module Test Completed", **Step Value** = 25

QBD DB C:\Users\Public\SSI_Tools\

☒ List Incomplete Tasks for QBD ☐ Include Completed Tasks

U ID	Name
55	Define System Requirements
77	Develop System Acceptance Test Procedures
80	Perform Software Code & Unit Testing
81	Perform Module Testing

Step Description
Software Code Completed
Module Test Started
Module Test Completed

Add Steps

Use a Template for QBD Steps

None

Perform Software Code & Unit Testing

Close

Step Description
Module Test Completed

Step Value 25 Is QBD Step Complete?

Add New Step

☒ Update Physical % Complete when updating steps

Value of Completed QBD Steps 0 Task

Percent for this Task 0%

Task Finish Date 06/03/2021 5:00:00 P

15. Select the next item in the task list named "Perform Module Testing"
16. Click **Add Steps** to add any two or more QBD Steps you like for this task

End of Practice Exercise

Editing and Posting Progress to QBD Steps

Editing and posting progress to an existing QBD Step is simple. Just double-click a line in the Step to open the QBD Step Edit form. You can change the **Step Description**, **Step Value** and **Step Actual Finish**. You can pick an actual Finish date for a step by double-clicking **Step Actual Finish** or just pick **Yes** from the drop-down list.

Figure 6 Edit or Post Status to QBD Step

Quantifiable Backup Data (QBD) ✕

QBD in Active Project | QBD Step Template | Audit and Compliance |

Project: Project Title:

QBD DB:

☒ List Incomplete Tasks for QBD ☐ Include Complete tasks Copy/Paste Task Steps Export QBD Steps by Task

U ID	Name	Start	Finish	% Cmp
55	Define System Requirements			0
77	Develop System Acceptance Test			0%
80	Perform Software Code & Unit Test			0%
81	Perform Module Testing			0%

Step Description:
Finish:

☐ QBD And EVMS Performance Identification

QBD Steps for: Define System Requirements ✕

Step Description:

Step Value: Is QBD Step Complete? ...

☒ Update Physical % Complete updating steps

Value of Completed QBD Steps: Task:

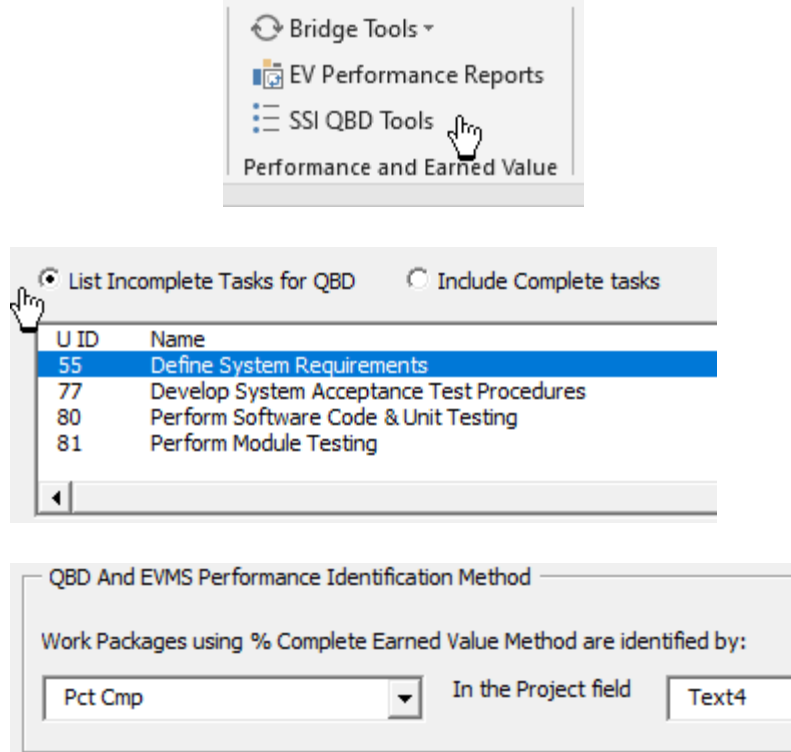
Physical % Complete for this Task:

Task Finish Date:

Class Exercise - Editing and Posting the Status of QBD Steps

Use the project from the last exercise

1. Click **SSI QBD Tools** from the **SSI Analysis Tools** menu
2. Respond "Yes" if prompted to make the QBD database
3. Click **List Incomplete Tasks for QBD** but be sure the test **Pct Cmp** is in Text 4 (or the field named PMT/EVT)

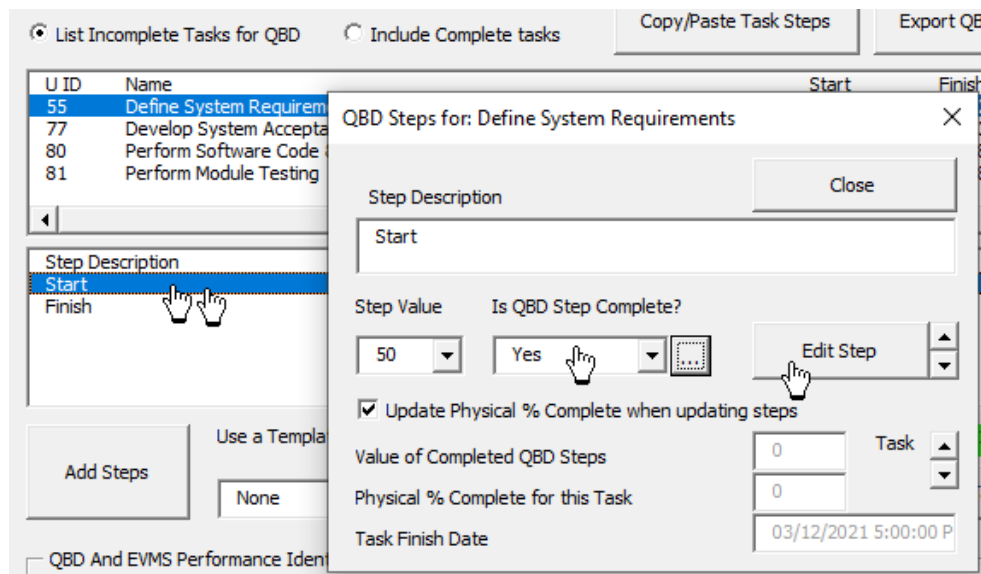


The screenshot shows the 'Bridge Tools' menu with 'SSI QBD Tools' selected. Below it, the 'List Incomplete Tasks for QBD' dialog box is open. It has two radio buttons: 'List Incomplete Tasks for QBD' (selected) and 'Include Complete tasks'. Below the radio buttons is a table with the following data:

U ID	Name
55	Define System Requirements
77	Develop System Acceptance Test Procedures
80	Perform Software Code & Unit Testing
81	Perform Module Testing

Below the table is a section titled 'QBD And EVMS Performance Identification Method'. It contains a text box 'Work Packages using % Complete Earned Value Method are identified by:' followed by a dropdown menu set to 'Pct Cmp', the text 'In the Project field', and a text box containing 'Text4'.

4. Double-click the "Start" step for the task named **Define System Requirements** and mark it as completed by selecting Yes for the **Step Actual Finish**. Then press **Edit Step**



The screenshot shows the 'QBD Steps for: Define System Requirements' dialog box. It has a 'Close' button in the top right. Below it is a 'Step Description' text box containing 'Start'. Below that is a 'Step Value' dropdown set to '50' and an 'Is QBD Step Complete?' section with a 'Yes' radio button selected. To the right of the 'Is QBD Step Complete?' section is an 'Edit Step' button. Below these are three checkboxes: 'Update Physical % Complete when updating steps' (checked), 'Value of Completed QBD Steps' (set to '0'), and 'Physical % Complete for this Task' (set to '0'). At the bottom is a 'Task Finish Date' text box containing '03/12/2021 5:00:00 P'. In the background, the 'List Incomplete Tasks for QBD' dialog box is visible with the 'Start' step selected in the 'Step Description' list.

End of Practice Exercise

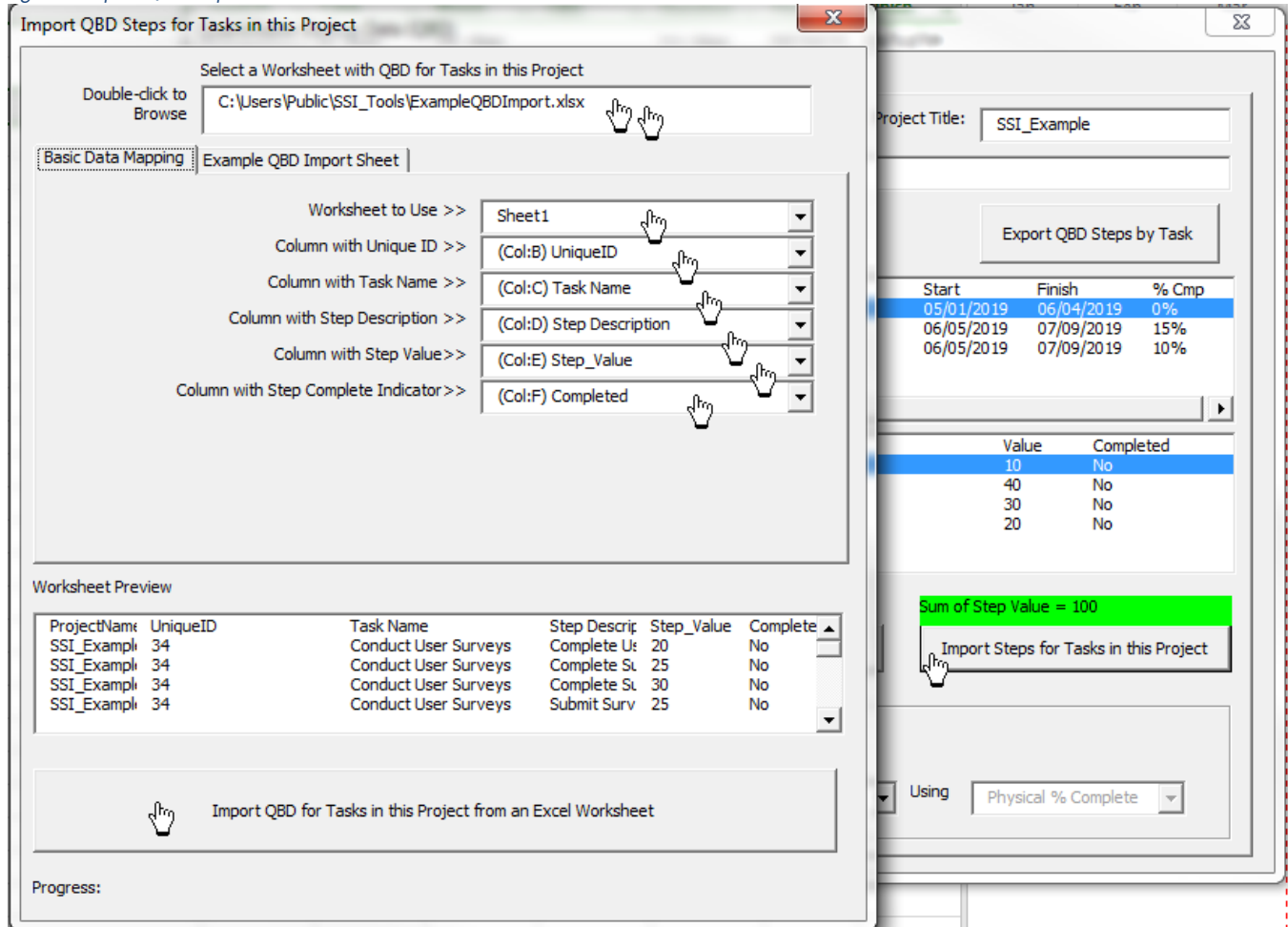
Importing and Exporting QBD Steps

Click **Import Steps for Tasks in this Project** to open the QBD Step Import form. Double-click to field on the top of the form to select an Excel Workbook with QBD Steps. Select the **Worksheet to Use**, Column with associated task's **Unique ID** and **Task Name**, **Step Description**, **Step Value** and **Step Complete Indicator**. The preview window shows the first few rows of the selected worksheet. Finally, click **Import QBD for Tasks in this Project from an Excel Worksheet**.

Imported QBD Steps are automatically given the Title of the active project and will be added to any existing steps for their respective task. Imported steps are visible you click an item in the Task list. Imported steps can be edited and updated just like any other QBD Step.

Exporting QBD Steps is even easier. Just click the button named **Export QBD Steps** by task to generate an Excel worksheet of all the existing QBD Steps in the active project. Exporting QBD Steps can be a great way to make a worksheet template for adding, editing, posting performance and importing QBD Steps or Step updates.

Figure 7 Import QBD Steps from Excel



Import QBD Steps for Tasks in this Project

Select a Worksheet with QBD for Tasks in this Project

Double-click to Browse C:\Users\Public\SSI_Tools\ExampleQBDImport.xlsx

Basic Data Mapping Example QBD Import Sheet

Worksheet to Use >> Sheet1

Column with Unique ID >> (Col:B) UniqueID

Column with Task Name >> (Col:C) Task Name

Column with Step Description >> (Col:D) Step Description

Column with Step Value >> (Col:E) Step_Value

Column with Step Complete Indicator >> (Col:F) Completed

Worksheet Preview

ProjectName	UniqueID	Task Name	Step Descrip	Step_Value	Complete
SSI_Example	34	Conduct User Surveys	Complete Us	20	No
SSI_Example	34	Conduct User Surveys	Complete St	25	No
SSI_Example	34	Conduct User Surveys	Complete St	30	No
SSI_Example	34	Conduct User Surveys	Submit Surv	25	No

Import QBD for Tasks in this Project from an Excel Worksheet

Progress:

Project Title: SSI_Example

Export QBD Steps by Task

Start	Finish	% Cmp
05/01/2019	06/04/2019	0%
06/05/2019	07/09/2019	15%
06/05/2019	07/09/2019	10%

Value	Completed
10	No
40	No
30	No
20	No

Sum of Step Value = 100

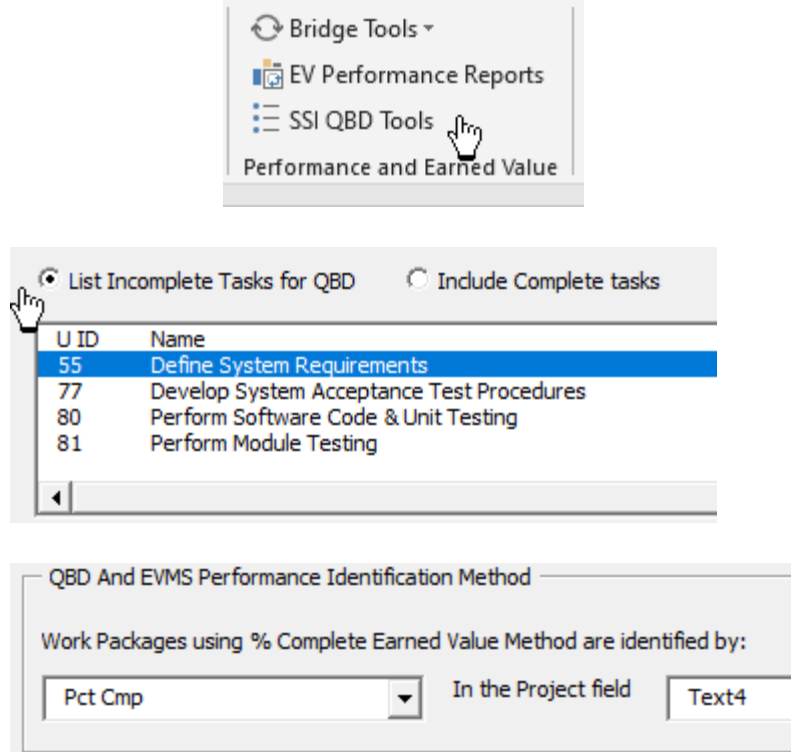
Import Steps for Tasks in this Project

Using Physical % Complete

Class Exercise - Importing QBD Steps

Use the project from the last exercise and download the Import QBD Steps file [here](#):

1. Open the **SSI QBD Tools** from the **SSI Analysis Tools** menu
2. Respond "Yes" if prompted to make the QBD database
3. Click **List Incomplete Tasks for QBD** but be sure the test **Pct Cmp** is in Text 4 (or the field named PMT/EVT)

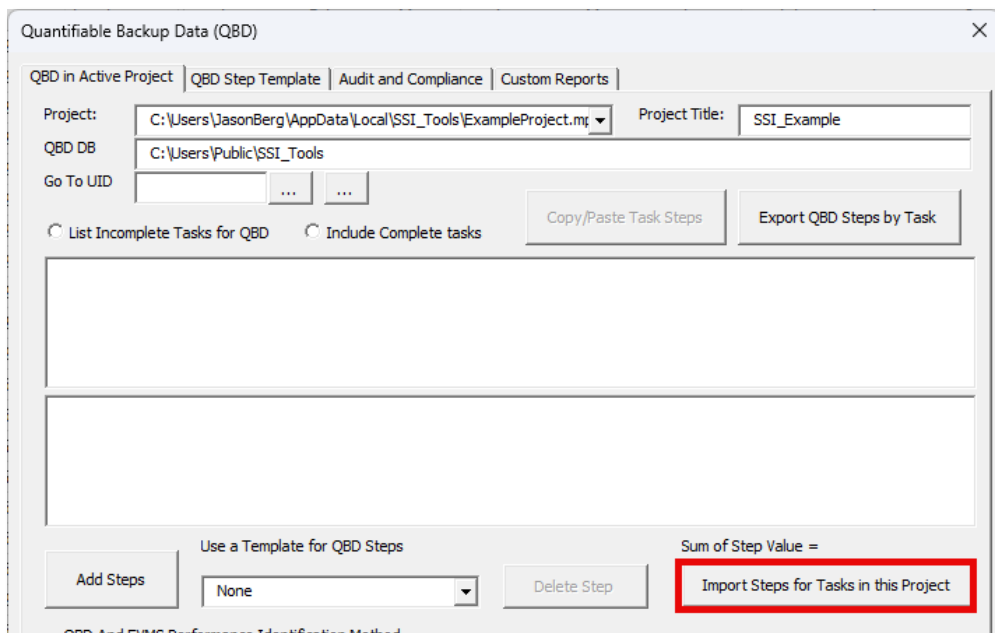


The screenshot shows the 'Bridge Tools' menu with 'SSI QBD Tools' selected. Below it, the 'List Incomplete Tasks for QBD' dialog box is open. It has two radio buttons: 'List Incomplete Tasks for QBD' (selected) and 'Include Complete tasks'. Below the radio buttons is a table with the following data:

U ID	Name
55	Define System Requirements
77	Develop System Acceptance Test Procedures
80	Perform Software Code & Unit Testing
81	Perform Module Testing

Below the table is a section titled 'QBD And EVMS Performance Identification Method'. It contains the text 'Work Packages using % Complete Earned Value Method are identified by:' followed by a dropdown menu set to 'Pct Cmp', the text 'In the Project field', and a text box containing 'Text4'.

4. click the **"Import Steps for Tasks in this Project"** button in the lower right corner of the QBD Tool form.



The screenshot shows the 'Quantifiable Backup Data (QBD)' dialog box. It has four tabs: 'QBD in Active Project', 'QBD Step Template', 'Audit and Compliance', and 'Custom Reports'. The 'QBD in Active Project' tab is active. It contains the following fields and buttons:

- Project:** C:\Users\JasonBerg\AppData\Local\SSI_Tools\ExampleProject.m...
- Project Title:** SSI_Example
- QBD DB:** C:\Users\Public\SSI_Tools
- Go To UID:** [Empty field] [Go] [Cancel]
- Radio Buttons:** 'List Incomplete Tasks for QBD' (selected) and 'Include Complete tasks'.
- Buttons:** 'Copy/Paste Task Steps' and 'Export QBD Steps by Task'.
- Bottom Section:**
 - Use a Template for QBD Steps:** [Add Steps] [None] [Delete Step]
 - Sum of Step Value =** [Import Steps for Tasks in this Project] (highlighted with a red box)



5. In the **Import QBD Steps** form, double-click in the top window to browse to the Import QBD Steps Excel file you downloaded at the beginning of this exercise. Then choose the worksheet and columns in the Excel file that correspond to the necessary fields in the form and click **Import QBD for Tasks in the Project from an Excel Worksheet**.

Import QBD Steps for Tasks in this Project

Select a Worksheet with QBD for Tasks in this Project

Double-click to Browse C:\Users\JasonBerg\Downloads\ImportQBDSteps.xlsx

Basic Data Mapping | Example QBD Import Sheet

Worksheet to Use >> Sheet4

Column with Unique ID >> (Col:A) Task UID

Column with Task Name >> (Col:B) Task Name

Column with Step Description >> (Col:C) Step Desc

Column with Step Value >> (Col:D) Step Value

Column with Step Complete Indicator >> (Col:E) Step Cmp

Worksheet Preview

Task UID	Task Name	Step Desc	Step Value	Step Cmp	Notes
55	Define S...	Start	10	No	Note for this st...
55	Define S...	Submit for Peer Review	25	No	

Import QBD for Tasks in this Project from an Excel Worksheet

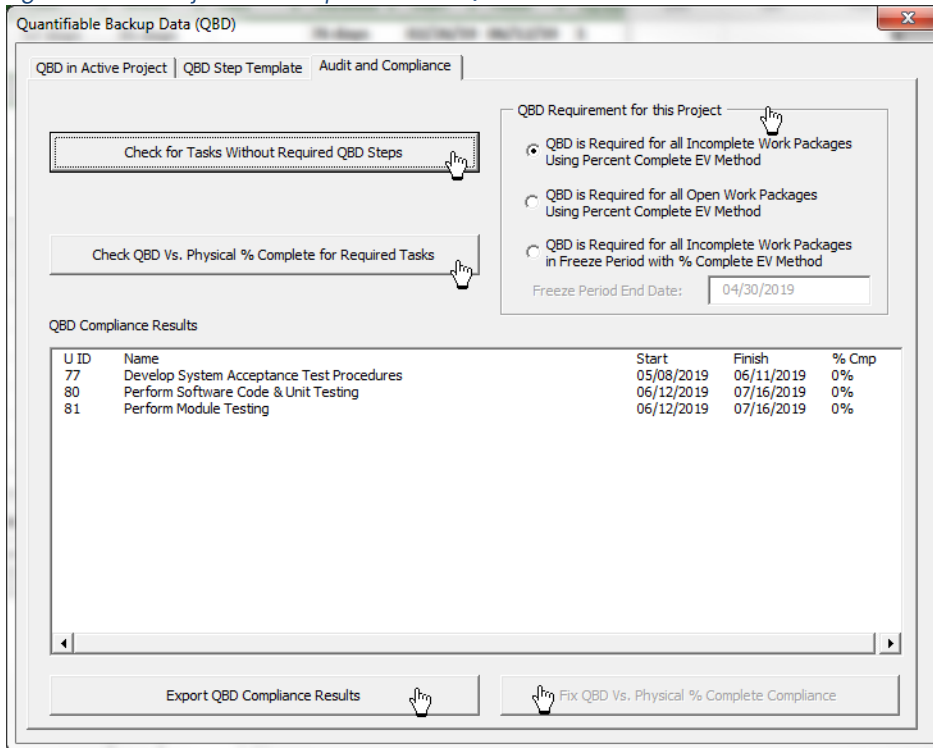
End of Practice Exercise

QBD Compliance Reports

Use the **Audit and Compliance** tab on the QBD form to check the project for these conditions:

- Tasks in the project that should have QBD Steps but none have been identified so far. In addition to the Identification method you selected on the tab named **QBD in Active Project**, you can also specify three additional criteria for tasks that should have QBD Steps. These are based on time and performance factors in a project as follows:
 - “QBD is Required for all Incomplete Work Packages Using Percent Complete EV Method” (per the criteria on the form named **QBD in Active Project**)
 - “QBD is Required for all Open Work Packages Using Percent Complete EV Method”. An open work package is one that has an actual start date or performance has been taken already. These in-progress work packages also meet the identification criteria on form named **QBD in Active Project**.
 - “QBD is Required for all Incomplete Work Packages in Freeze Period with % Complete EV Method”. Use this option if you only need to define QBD Steps through a certain period in a project when changes are not allowed, usually referred to as the “Freeze Period”. The calendar control lets you pick the end date of the period.
- Tasks that have QBD Steps, but the cumulative total of the completed QBD Step Value does not equal the associated task’s Physical % Complete. These can be fixed automatically by clicking the button named “Fix QBD Vs. Physical % Complete Compliance”.
- Export QBD Compliance results as an Excel worksheet if needed.

Figure 8 Audit Project for Compliance with QBD Best Practices



Quantifiable Backup Data (QBD)

QBD in Active Project | QBD Step Template | Audit and Compliance

Check for Tasks Without Required QBD Steps

Check QBD Vs. Physical % Complete for Required Tasks

QBD Requirement for this Project

- ☒ QBD is Required for all Incomplete Work Packages Using Percent Complete EV Method
- ☐ QBD is Required for all Open Work Packages Using Percent Complete EV Method
- ☐ QBD is Required for all Incomplete Work Packages in Freeze Period with % Complete EV Method

Freeze Period End Date: 04/30/2019

QBD Compliance Results

U ID	Name	Start	Finish	% Cmp
77	Develop System Acceptance Test Procedures	05/08/2019	06/11/2019	0%
80	Perform Software Code & Unit Testing	06/12/2019	07/16/2019	0%
81	Perform Module Testing	06/12/2019	07/16/2019	0%

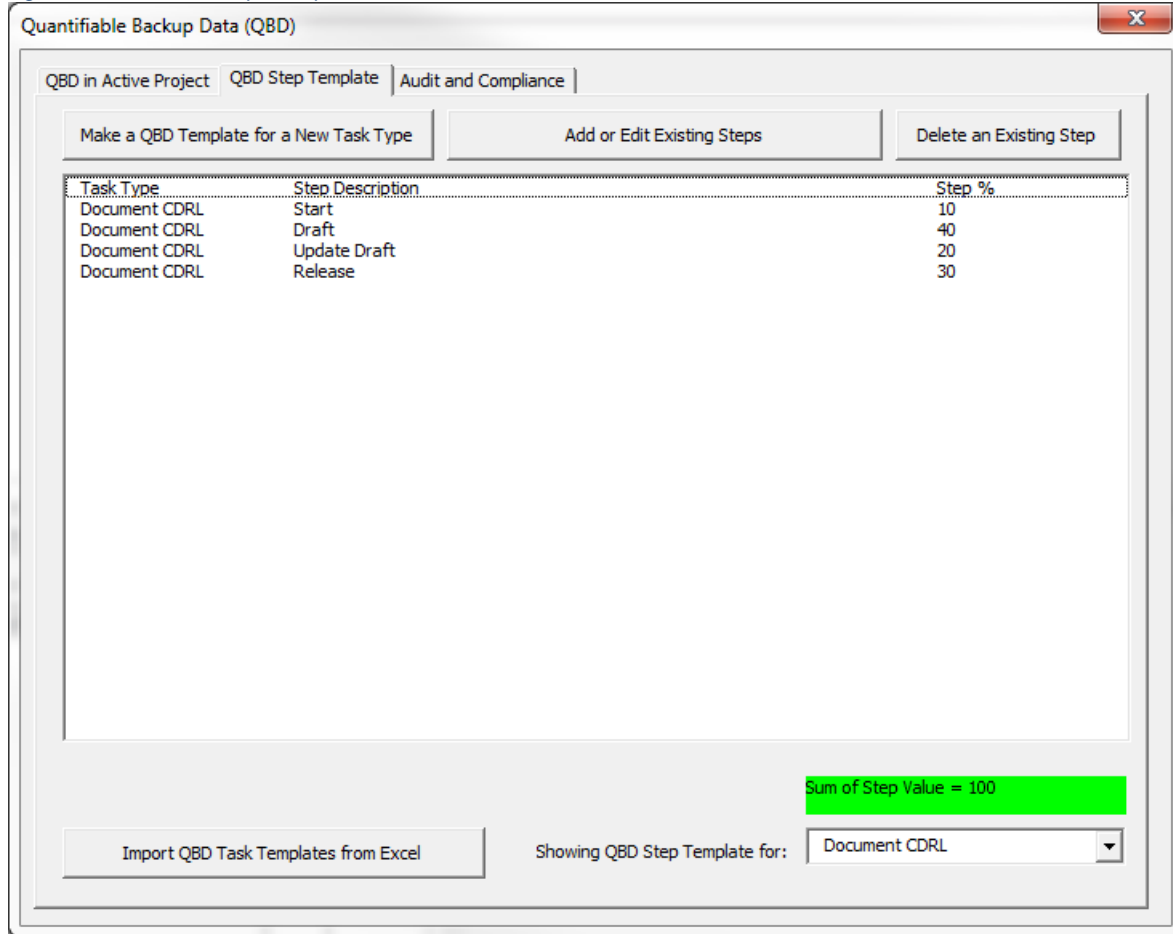
Export QBD Compliance Results

Fix QBD Vs. Physical % Complete Compliance

Making a new QBD Step Template

- The tab named QBD Step Template is where you will:
- Make a QBD Template for a New Task Type
- Add or Edit or Delete Existing Steps
- Import QBD Task Templates from Excel
- Show QBD Steps for an existing Template

Figure 9 Make QBD Step Templates



Quantifiable Backup Data (QBD)

QBD in Active Project | **QBD Step Template** | Audit and Compliance

Make a QBD Template for a New Task Type | Add or Edit Existing Steps | Delete an Existing Step

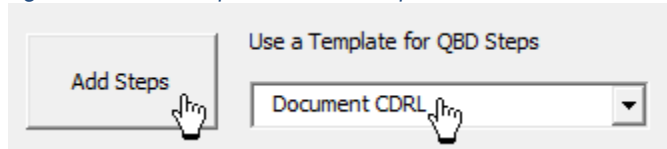
Task Type	Step Description	Step %
Document CDRL	Start	10
Document CDRL	Draft	40
Document CDRL	Update Draft	20
Document CDRL	Release	30

Sum of Step Value = 100

Import QBD Task Templates from Excel | Showing QBD Step Template for: Document CDRL

After you make a QBD Step Template, you can add those steps to any task using the form named **QBD in Active Project**.

Figure 10 Use a Template for QBD Steps on the form named QBD in Active Project



Use a Template for QBD Steps

Add Steps | Document CDRL

Working Directly in the SSI_Analysis_DB with QBD Steps

SSi Tools uses a Database to keep its catalog of QBD Steps by Project Title and Task Unique ID. If either of these changes, you can open the database directly in Microsoft Access by finding the file named "SSI_Analysis_DB.mdb". In the example below, that database will be located in the system folder "C:\Users\Public\SSi_Tools\". QBD Steps are found in the table named "QBD_Steps" and QBD Step Templates are in the table named "QBD_StepTemplate". Either of these can be opened much like a worksheet in Microsoft Access by double-clicking the table name in the list of Access Objects.

Figure 11 Location of SSI_Analysis_DB for QBD Steps

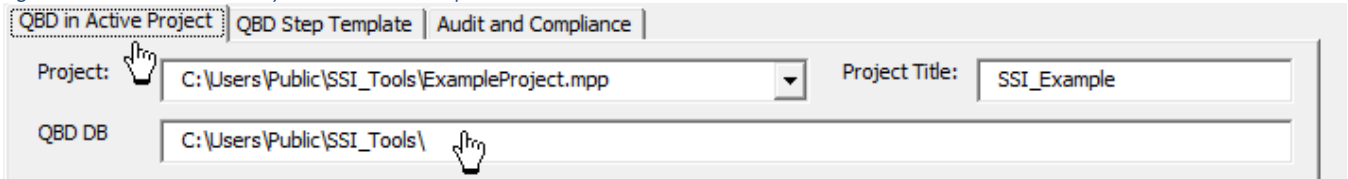
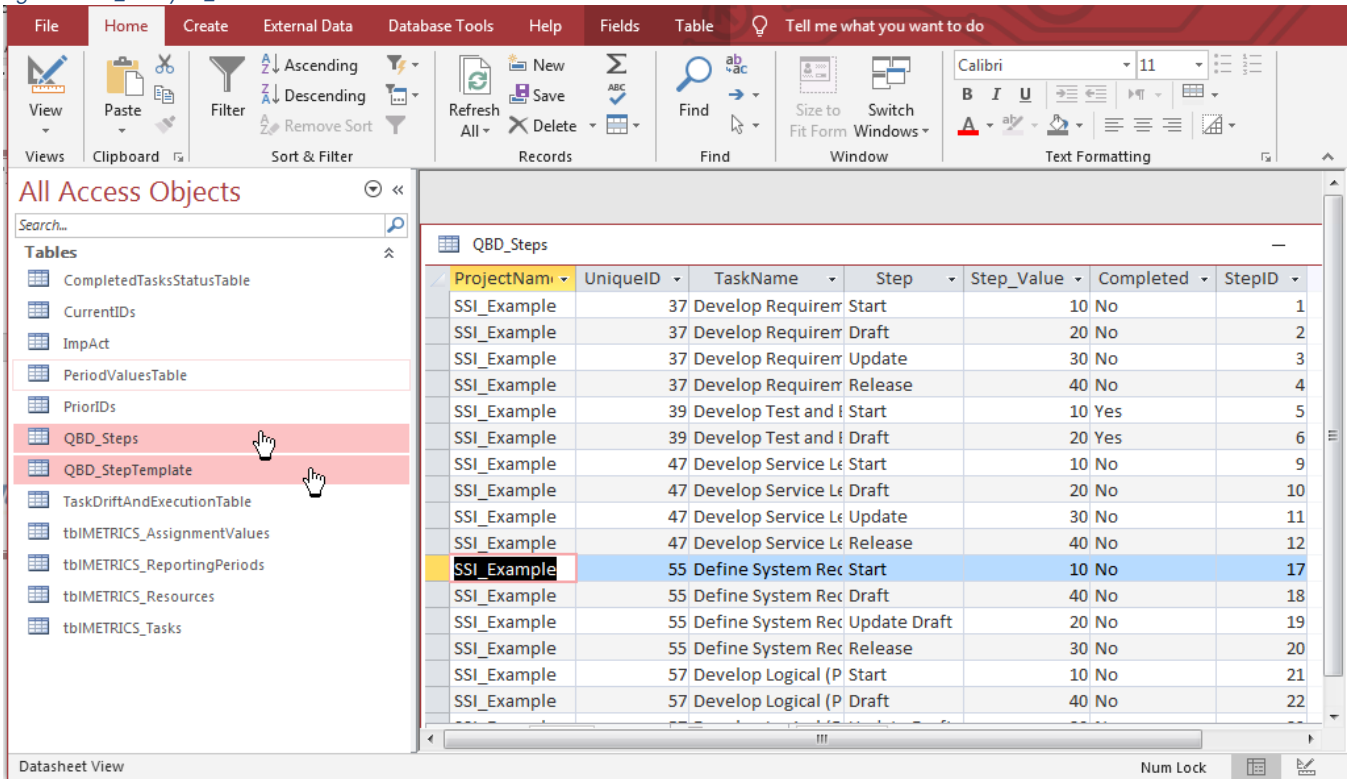


Figure 12 SSI_Analysis_DB in Microsoft Access



ProjectName	UniqueID	TaskName	Step	Step_Value	Completed	StepID
SSI_Example	37	Develop Requirem	Start	10	No	1
SSI_Example	37	Develop Requirem	Draft	20	No	2
SSI_Example	37	Develop Requirem	Update	30	No	3
SSI_Example	37	Develop Requirem	Release	40	No	4
SSI_Example	39	Develop Test and	Start	10	Yes	5
SSI_Example	39	Develop Test and	Draft	20	Yes	6
SSI_Example	47	Develop Service Le	Start	10	No	9
SSI_Example	47	Develop Service Le	Draft	20	No	10
SSI_Example	47	Develop Service Le	Update	30	No	11
SSI_Example	47	Develop Service Le	Release	40	No	12
SSI_Example	55	Define System Rec	Start	10	No	17
SSI_Example	55	Define System Rec	Draft	40	No	18
SSI_Example	55	Define System Rec	Update Draft	20	No	19
SSI_Example	55	Define System Rec	Release	30	No	20
SSI_Example	57	Develop Logical (P	Start	10	No	21
SSI_Example	57	Develop Logical (P	Draft	40	No	22