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SSI Performance & Earned Value Management Tools

Overview

Structured Solutions Performance and Earned Value Tools includes built-in Earned Value reporting using project data. Data showing the Plan Value (aka PV or BCWS), the Earned Value (aka EV or BCWP) and Actual Value (aka AV or ACWP) can be determined by **Task Days**, **Task Work** or **Task Cost**.

- **When Using Task Days** as the EV Unit of Measure, SSI Tools reports the days of work scheduled through a reporting period vs. days of work performed (using the Baseline Duration as the basis) and the actual days taken to perform tasks in the schedule.
- **When Using Task Work** as the EV Unit of Measure, SSI Tools reports the hours of work scheduled through a reporting period vs. hours performed (using the Baseline Hours as the basis). The Actual Value for work hours can be taken from Microsoft Project or it can be imported and held outside Microsoft Project. Work hours can be reported at the Work Package level or rolled up to the Work Package Parent level.
- **When Using Task Cost** as the EV Unit of Measure, SSI Tools reports cost values scheduled through a reporting period vs. cost performance (using the Baseline Cost as the basis). Actual costs can be taken from Microsoft Project or imported and held outside Microsoft Project. Costs can be reported at a Work Package level or rolled up to the Work Package's Parent level.
 - **Resources** in Project should have cost rates.
 - **Resource Rates** should be burdened to include Overhead costs, Fringe costs, General & Administrative costs, Cost of Money, and any other burdens necessary for reporting.
 - **Burdens** in Project should be consistent with **Burdens** in Actual values.
 - **Rate Effective Dates** should be used if rates change over the period of the project's performance.

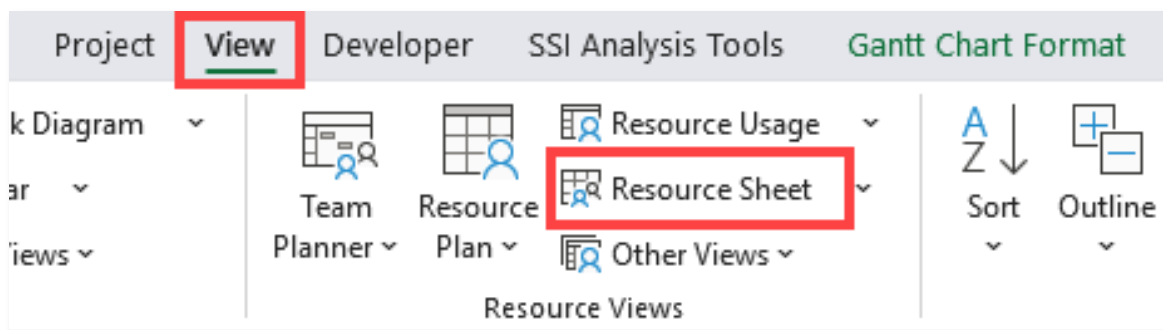
The Resource Sheet

The **Resource Sheet** is a special table in Microsoft Project used to **define, organize, and manage all resources** available for to be assigned to tasks in the project. It provides a centralized location where you can enter and edit details for each resource, such as their names, types, cost rates, and any custom fields. The resource sheet should be populated before resources are assigned to tasks.

	Resource Name ▾	Type ▾	Initials ▾	Group ▾	Max. ▾	Std. Rate ▾	Base Calendar ▾
1	SW Engineer	Work	S	Eng	1,000%	\$75.00/hr	Standard
2	HW Engineer	Work	H	Eng	1,000%	\$75.00/hr	Standard
3	Systems Engineer	Work	S	Eng	1,000%	\$75.00/hr	Standard
4	Program Manager	Work	P	PMO	1,000%	\$75.00/hr	Standard
5	PM Office	Work	P	PMO	1,000%	\$75.00/hr	Standard
6	Security Engineer	Work	S	Eng	1,000%	\$75.00/hr	Standard
7	Production Lead	Work	P	Mfg	1,000%	\$75.00/hr	Standard
8	Production Support	Work	P	Mfg	1,000%	\$75.00/hr	Standard
9	Test Engineer	Work	T	Test	1,000%	\$75.00/hr	Standard
10	Test Tech	Work	T	Test	1,000%	\$75.00/hr	Standard
11	Material	Material	M	Cost		\$1.00	

Displaying the Resource Sheet

There are several ways the resource sheet can be displayed in Microsoft Project, the most common is by clicking the **Resource Sheet** button in **Resource Views** group of the **View** tab:



Best Practices for Manually Adding Resources

When adding resources to the **Resource Sheet** in Microsoft Project, Structured Solutions strongly recommends following these best practices to ensure consistency, flexibility, and long-term maintainability of your project schedule.

Use Generic Resources (Roles, Not Individuals)

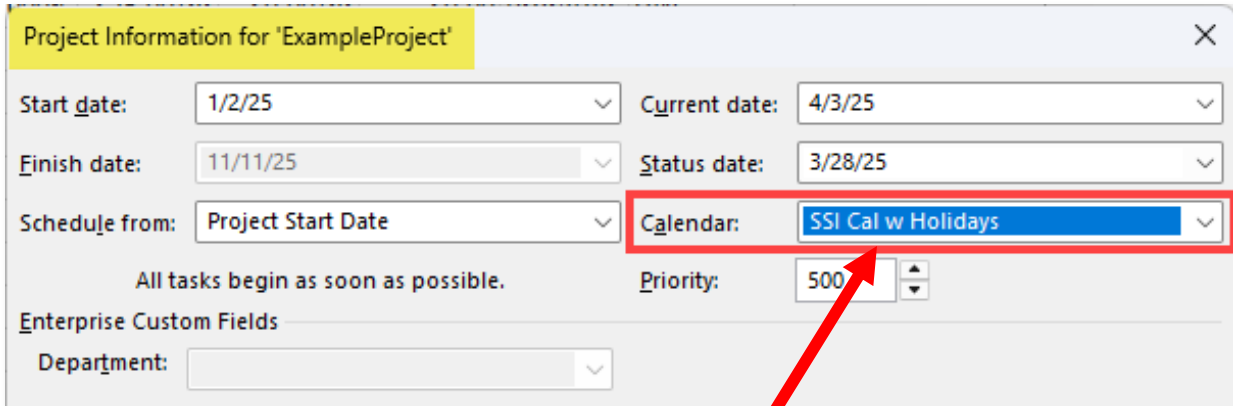
	Resource Name	Type	Initials	Group	Max.	Std. Rate	Base Calendar
1	SW Engineer	Work	S	Eng	1,000%	\$75.00/hr	Standard
2	HW Engineer	Work	H	Eng	1,000%	\$75.00/hr	Standard
3	Systems Engineer	Work	S	Eng	1,000%	\$75.00/hr	Standard
4	Program Manager	Work	P	PMO	1,000%	\$75.00/hr	Standard
5	PM Office	Work	P	PMO	1,000%	\$75.00/hr	Standard
6	Security Engineer	Work	S	Eng	1,000%	\$75.00/hr	Standard
7	Production Lead	Work	P	Mfg	1,000%	\$75.00/hr	Standard
8	Production Support	Work	P	Mfg	1,000%	\$75.00/hr	Standard
9	Test Engineer	Work	T	Test	1,000%	\$75.00/hr	Standard
10	Test Tech	Work	T	Test	1,000%	\$75.00/hr	Standard
11	Material	Material	M	Cost		\$1.00	
12	Travel	Material	T	Cost		\$1.00	
13	ODC	Material	O	Cost		\$1.00	

Resources should be entered as **generic roles** rather than named individuals. Unless it is essential that a specific person (e.g., "Sally" instead of "John") performs the work, use **roles** such as *developer*, *tester*, *architect*, *engineer*, *machinist*, or whatever other skills or job titles the work requires. Using roles makes the schedule more flexible and prevents complications. Assigning individuals directly can lead to a range of issues, including:

- The person may **leave the company** or be **reassigned**.
- Time off for **vacation**, **sick leave**, or **holidays** must be manually tracked.
- The individual's **billing rate** may be exposed to others with access to the file.
- It creates unnecessary complexity when updating or maintaining the resource sheet and resource assignments.

Align the Resource “Base Calendar” with the Project’s Base Calendar

Every **Labor** resource in Microsoft Project is tied to a **calendar**, which defines when the resource is available to work. It's important that each resource's **Base Calendar matches the Project’s Base Calendar**.



Project Information for 'ExampleProject'

Start date: 1/2/25 Current date: 4/3/25

Finish date: 11/11/25 Status date: 3/28/25

Schedule from: Project Start Date Calendar: SSI Cal w Holidays

All tasks begin as soon as possible. Priority: 500

Enterprise Custom Fields

Department:

	Resource Name	Type	Base Calendar	M
1	SW Engineer	Work	SSI Cal w Holidays	
2	HW Engineer	Work	SSI Cal w Holidays	
3	Systems Engineer	Work	SSI Cal w Holidays	
4	Program Manager	Work	SSI Cal w Holidays	
5	PM Office	Work	SSI Cal w Holidays	
6	Security Engineer	Work	SSI Cal w Holidays	
7	Production Lead	Work	SSI Cal w Holidays	
8	Production Support	Work	SSI Cal w Holidays	
9	Test Engineer	Work	SSI Cal w Holidays	
10	Test Tech	Work	SSI Cal w Holidays	
11	Material	Material		

Failing to do this can result in unexpected behavior when scheduling tasks, such as:

- Task start and finish dates at unexpected times
- Inconsistent working hours between the task and the resource
- Durations that do not line up to the duration between the task’s start and finish dates

This issue is often overlooked, especially when resources default to the built-in **Standard calendar** rather than the **custom calendar used by the project**.

If you intend to resource load your schedule, you should ensure that all labor resources use the **same base calendar** as your project as part of your initial setup to avoid logic and alignment issues down the road.

Understanding the different Resource Types

Microsoft Project allows the following resource types:

- **Work** – this resource type is for labor resources.
- **Material** – this resource type is for procured items on a Bill of Materials (BOM) or consumable supplies, such as steel, pipe, wire, concrete, or fuel.
- **Cost** – Use this resource type for financial costs such as travel expenses, food expenses, etc.

Resource Name	Type
Production Lead	Work
Production Support	Work
Test Engineer	Work
Test Tech	Work
Material	Material
Travel	Cost

Work-type resources can be associated with both labor hours and costs, as their cost is calculated based on assigned hourly rates and scheduled work. In contrast, **Material** and **Cost**-type resources are linked only to costs.

Note: Cost-type resources can be challenging to update once they are assigned to tasks. For greater flexibility and ease of use, SSI recommends using the "**Material**" resource type for both material and cost-related resources.

Standard Rates

The **Standard Rate** of a resource is the **cost per hour** for a labor resource to perform work. It is essential to apply rates to labor resources if you want to calculate labor costs.

Resource Name	Type	Max. Units	Std. Rate
SW Engineer	Work	1,000%	\$75.00/hr
HW Engineer	Work	1,000%	\$75.00/hr
Systems Engineer	Work	1,000%	\$75.00/hr
Material	Material		\$1.00

Standard rates can also be set for **material** resources to represent the **cost per unit** of a given material. If your material resources are meant to be generic, Structured Solutions recommends setting the standard rate to \$1.00. This makes it easy to input remaining cost values by simply entering the prime cost of material used.

Using Cost Rate Tables

In addition to the **standard rate**, you can also define multiple **Cost Rate Tables** to handle more complex cost structures—such as **rate escalations over time** or **additional rate tables**.

To access and modify a Cost Rate Table:

-  Cut
-  Copy
-  Paste
-  Paste Special...
-  Insert Resource
-  Delete Resource
-  Text Styles...
-  Information...
-  Notes...
-  Link

Resource Information
✕

General **Costs** Notes Custom Fields

Resource Name:

Cost rate tables

For rates, enter a value or a percentage increase or decrease from the previous rate. For instance, if a resource's Per Use Cost is reduced by 20%, type -20%.

A (Default)	B	C	D	E
	Effective Date	Standard Rate	Overtime Rate	Per Use Cost
	--	\$75.00/h	\$0.00/h	\$0.00

Cost accrual: Prorated

Help
Details...
OK
Cancel

For those needing to use a formal Earned Value Management System, SSI Tools includes data generators for **Deltak MPM** and **Cobra**. SSI's Cobra and MPM interface tools **make import/transaction files** that include **WBS, Planned Value, Earned Value**, and **Estimates to Complete**.

Common Definitions Used in Earned Value Management

Baseline: The "Planned Value" of the duration, start, finish and resource assignment values (if any) for a project. The Baseline is usually formally controlled in a project and does not change unless a formal change control review has been conducted and the change to the baseline has been approved. Terms and acronym used to describe the baseline include: Baseline, Budget, Planned Value (or PV), Budget Cost of Work Scheduled (or BCWS) and Budget at Complete (BAC).

Performance: The amount of progress taken on a task. Progress can be shown as a percent of the total task duration (% Complete), the percent of the total work or cost (Work % Complete) or as a percent of the Baselined duration, work, or cost (% of Baseline Earned or "Earned Value"). Terms and acronym used to describe Performance include: Earned Value, Budgeted Cost of Work Performed (EV, BCWP – when taken as a percent of the Baseline), % Complete, Work % Complete, and Physical % Complete.

Actual Values: The actual number of days, hours or cost taken to perform a task or a portion of a task. Except for Actual Days to perform a task, Actual Values are often captured at a "rolled-up" level meaning that its value is not recorded on a task-by-task level. Rolled-up values are often captured for a collection of tasks having something in common such as their performing organization or position in the Work Breakdown Structure of a project. Terms and acronym used to describe Actual Values include: Actual Cost (AC), Actual Cost of Work Performed (ACWP) or Actual Value (AV).

Current Schedule: The current value of the duration, start, finish and resource assignment values (if any) for a project. The Current Schedule is usually not formally controlled and reflects actual performance to date plus current projections for future tasks and associated resource needs. The Current Schedule changes at

the end of each reporting cycle and is used to yield the estimate to complete the project and its key program events. Terms and acronym used to describe the Current Schedule include: Estimate to Complete (ETC), current plan or current schedule.

Variances: The difference between the current schedule and the baseline is known as the Cumulative Variance. The difference between the current schedule and the schedule at the end of the prior reporting period is known as the Current Period Variance. Terms and acronym used to describe Variances include: Variance at Complete (VAC), Schedule Variance (SV), Cost Variance (CV) and Variance Analysis Reports (VAR).

Estimate at Complete: Equal to Remaining value of duration, work and cost, plus the actual values of the same to date. EAC is the acronym commonly used for Estimate at Complete.

Project Setup for SSI Earned Value Express Reporting

SSI Earned Value Management Tools (EVM) enables the maximum benefit from EVM accounting and reporting with minimal burden and cost of implementation. Minimum and our Suggested setup requirement for a project reporting Earned Value are as follows:

Minimum Requirements for EVM using SSI Tools

1. **Work Package IDs** – a unique code given to a task/activity in the schedule that represents work that will be performed in a project. Tasks having Work Package IDs will be known as **Work Packages**. You can use any convention you like for **Work Package IDs** such as WP001, WP002 and so on.
2. **Work Package Parents** – a rollup level used to Group several Work Packages for higher level reporting. You can use any convention you like for **Work Package Parent IDs** such as CA1, CA2, CA3 or 1.1, 1.2, 1.3 and so on.
3. **Performing Manager** – the *Organization* in charge of completing the work.
4. **Responsible Manager** – The *Person* responsible for completing the work.
5. **Earned Value Percent Complete** – An assessed % Complete field used to calculate BCWP. SSI highly recommends using Physical % Complete.

Optional but Recommended Setup

1. Use Intuitive **Work Package IDs** and **Work Package Parent IDs** to enable summarizing of like or common collections of Work Packages.
2. Add a **Performance Measurement Technique (PMT)**
3. Post project data from at least **two** reporting periods.

Note: This is required to calculate **Current Period** Earned Value data.

	Name	WP Parent	WP ID	Performing Manager	Responsible Manager	PMT
13	▲ System Concept Development					
14	▲ System Concept Development Tasks					
15	Document the Concept of Operation (CONOPS)	CA1	CA1.WP1	T.Jones	Sys Eng	0/100
16	▲ Identify and Analyze Potential Solution Alternatives					
17	Generate Analysis of Alternatives (AoA) Study Plan	CA1	CA1.WP2	T.Jones	Sys Eng	0/100
18	Perform AoA Study Plan Review	CA1	CA1.WP3	T.Jones	Sys Eng	0/100
19	Develop Life Cycle Cost Estimate (LCCE)	CA1	CA1.WP4	T.Jones	Sys Eng	0/100

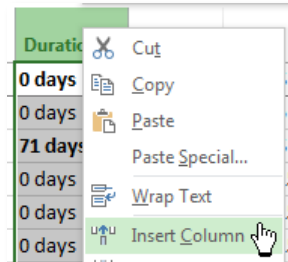
Practice on your own – SSI EV Express Setup

Open Microsoft Project and open the project named

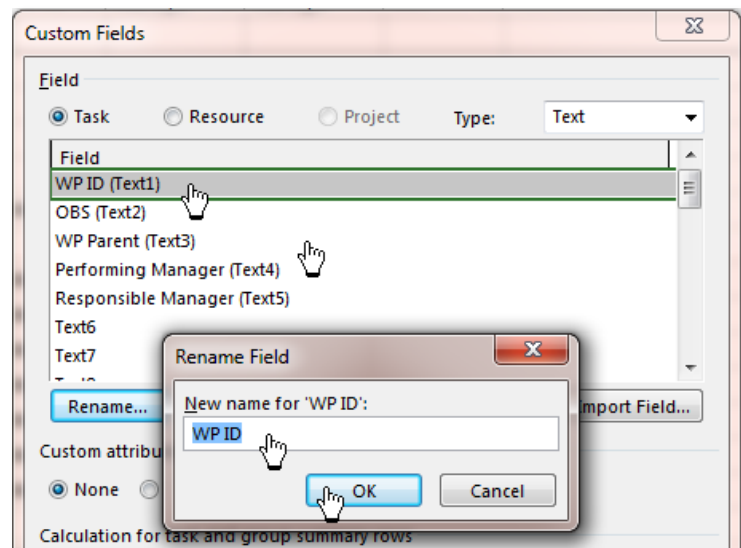
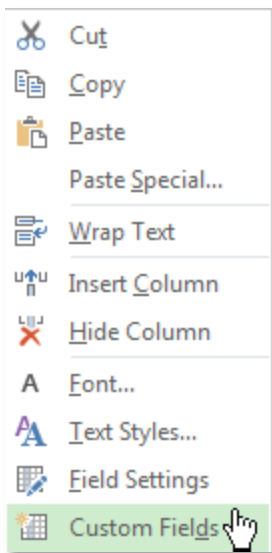
ExampleProjectEVMSetup.mpp

1. Insert **Text1**, **Text3**, **Text4**, **Text5** and **Text6** in the Gantt chart table by right-clicking on any column title in the table and selecting Insert Column.

Right-click Insert columns



2. Right-click on each of the added columns and select Customize Fields





3. Rename **Text1**, **Text3**, **Text4**, **Text5** and **Text6** as follows:

- Text1 – Rename as **WP ID**
- Text3 – Rename as **WP Parent**
- Text4 – Rename as **Performing Manager**
- Text5 – Rename as **Responsible Manager**
- Text6 – Rename as **PMT**

4. Add the Values shown below for **WP Parent**, **WP ID**, **Performing Manager**, **Responsible Manager** and **PMT** in lines 15 – 25

	Name	WP Parent	WP ID	Performing Manager	Responsible Manager	PMT
13	▲ System Concept Development					
14	▲ System Concept Development Tasks					
15	Document the Concept of Operation (CONOPS)	CA1	CA1.WP1	T.Jones	Sys Eng	0/100
16	▲ Identify and Analyze Potential Solution Alternatives					
17	Generate Analysis of Alternatives (AoA) Study Plan	CA1	CA1.WP2	T.Jones	Sys Eng	0/100
18	Perform AoA Study Plan Review	CA1	CA1.WP3	T.Jones	Sys Eng	0/100
19	Develop Life Cycle Cost Estimate (LCCE)	CA1	CA1.WP4	T.Jones	Sys Eng	0/100
20	Define Operations Requirements	CA1	CA1.WP5	T.Jones	Sys Eng	0/100
21	Develop Acquisition Plan (AP)	CA1	CA1.WP6	T.Jones	Sys Eng	0/100
22	Develop the Integrated Logistics Support Plan (ILSP)	CA1	CA1.WP7	T.Jones	Sys Eng	0/100
23	Establish Acquisition Program Baseline (APB)	CA1	CA1.WP8	T.Jones	Sys Eng	0/100

5. Scroll through the rest of the sections of the example project and see the values that have already been entered in the same text fields.

Notice that Earned Value coding is not needed on Summary tasks and milestones. Work Packages can be summarized by the codes or values in any Text field in Microsoft Project. For example, CA1.WP1 – CA1.WP8 can rollup their respective **WP Parent**, **Performing Manager**, **Responsible Manager**, **PMT** or any other value in a Microsoft Project Text field.

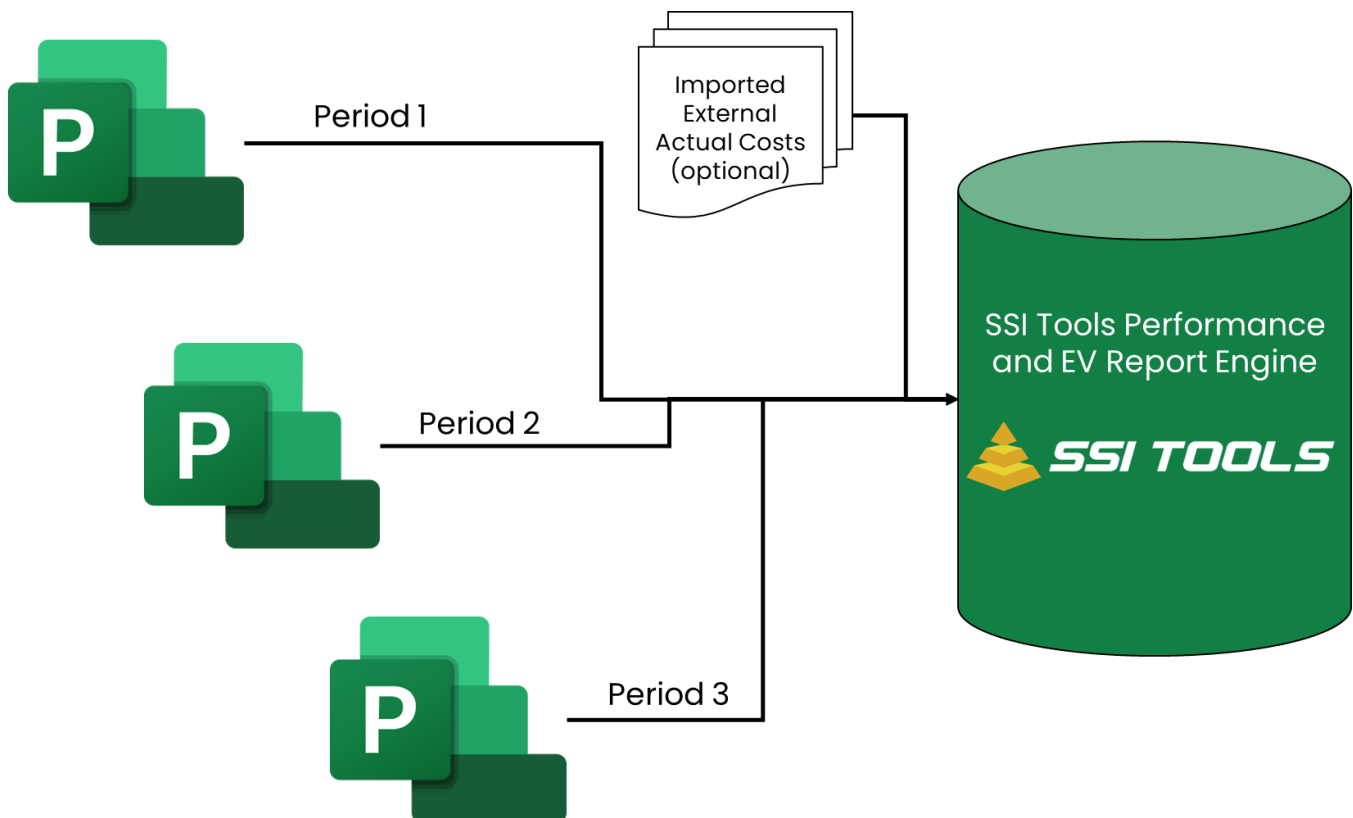
End of Exercise

Post Project Data to the SSI Project Performance Database

The Project Performance Database Records **Planned Value**, **Earned Value** and the **Estimate to Complete** from the current Microsoft Project schedule from one or more reporting periods. The **Actual Value** for EVM Work and Cost can come directly from the project or it can be imported from an external source.

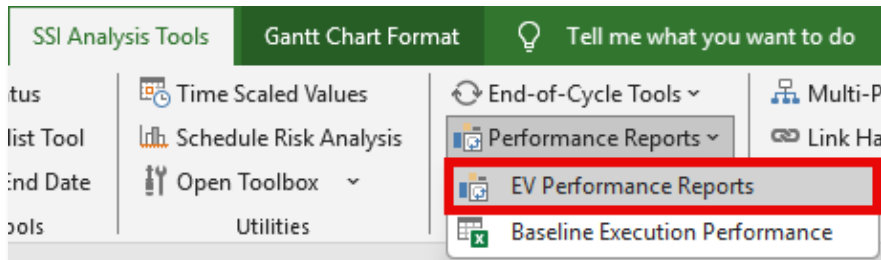
If data from two or more reporting periods is posted to the database each is stored separately. This enables **Current Period and Cumulative Earned Value Reporting** since current period earned value is always equal to current cumulative values minus the cumulative values at the end of the prior period.

NOTE: If the database contains data from one reporting period, only **Cumulative Earned Value** reporting is possible.

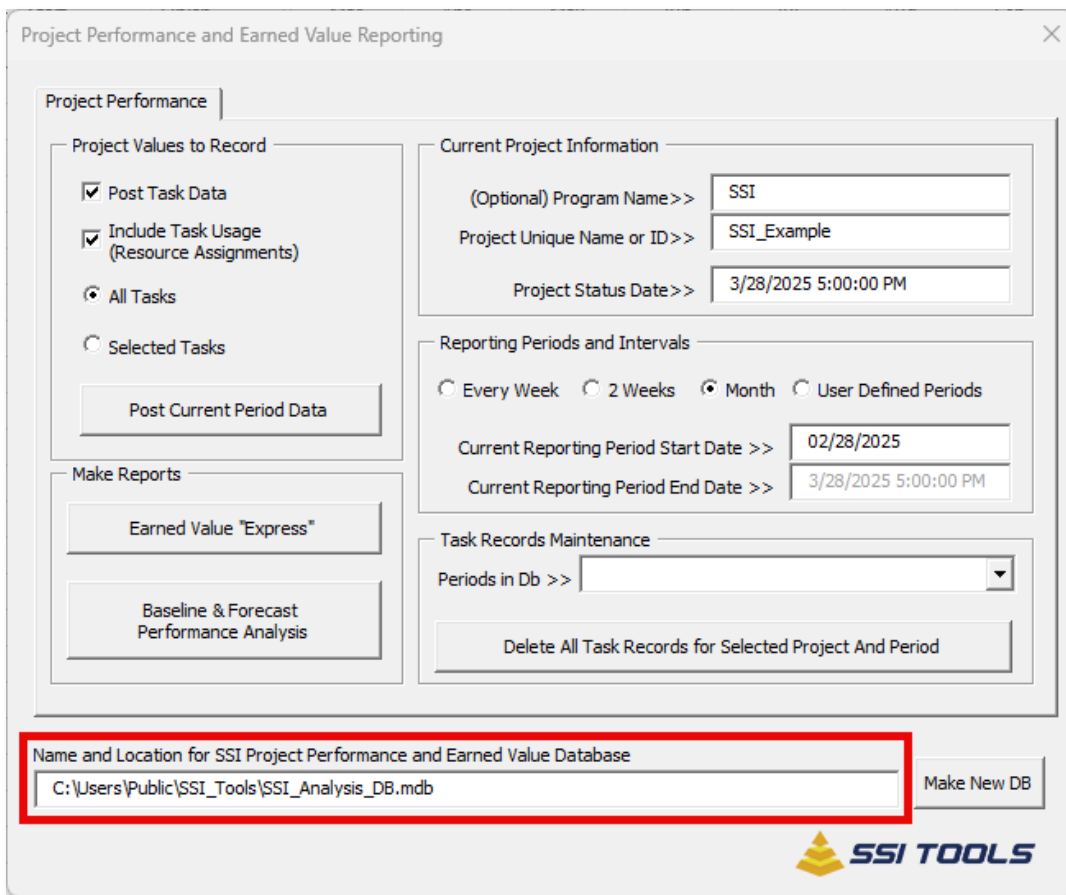


Open the EV Express Tool

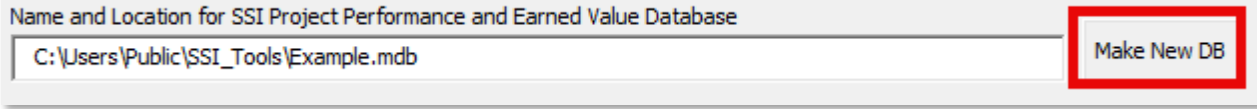
The EV Express Tool can be found in the **Performance and EV** Group of the SSI Analysis Tools ribbon. Click on the button named Performance Reports and then EV Performance Reports:



A form will open that allows you to define the **Project's Information**, your **Reporting Period Intervals**, and **Values to Record** when posting the project to the database. At the very bottom of the form you will see the Name and location of the SSI Earned Value Database. By default, this will be in the same folder that SSI Tools was installed in and the database will be named **SSI_Analysis_DB**.

The image shows a dialog box titled 'Project Performance and Earned Value Reporting'. It has several sections: 'Project Values to Record' with checkboxes for 'Post Task Data', 'Include Task Usage (Resource Assignments)', 'All Tasks', and 'Selected Tasks'; 'Current Project Information' with text boxes for '(Optional) Program Name >>' (containing 'SSI'), 'Project Unique Name or ID >>' (containing 'SSI_Example'), and 'Project Status Date >>' (containing '3/28/2025 5:00:00 PM'); 'Reporting Periods and Intervals' with radio buttons for 'Every Week', '2 Weeks', 'Month' (selected), and 'User Defined Periods', along with 'Current Reporting Period Start Date >>' (containing '02/28/2025') and 'Current Reporting Period End Date >>' (containing '3/28/2025 5:00:00 PM'); 'Task Records Maintenance' with a 'Periods in Db >>' dropdown and a 'Delete All Task Records for Selected Project And Period' button. At the bottom, there is a section 'Name and Location for SSI Project Performance and Earned Value Database' with a text box containing 'C:\Users\Public\SSI_Tools\SSI_Analysis_DB.mdb' and a 'Make New DB' button. The 'SSI TOOLS' logo is in the bottom right corner.

You can also create a new database by entering a name and location for the database and clicking the Make New DB button.



Name and Location for SSI Project Performance and Earned Value Database

C:\Users\Public\SSI_Tools\Example.mdb

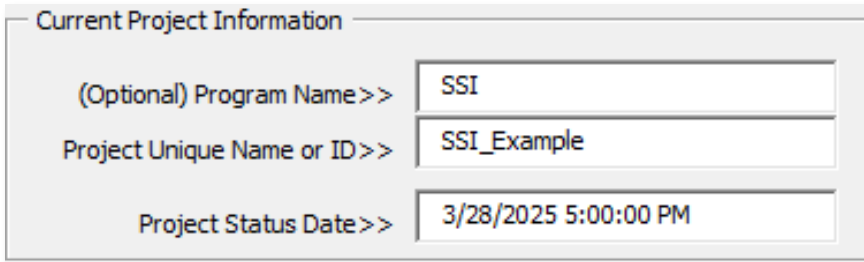
Make New DB

Current Project Information

In the options in the upper right corner, define **Project Information**. The Initial values are from the project's **Subject, Title** and **Status date**.

The *optional Program Name*, allows data from several projects to be combined in a **Program** level report. Be sure to use the **same** Program Name for each individual project if intending to utilize this option.

Records in the Database are stored separately by their **Project Unique Name or ID**. Each Project should have a unique **Project Unique Name or ID** to prevent data from one project mixing with data from another project.



Current Project Information

(Optional) Program Name>> SSI

Project Unique Name or ID>> SSI_Example

Project Status Date>> 3/28/2025 5:00:00 PM

Reporting Period Intervals

The next group of options are the **Reporting Period and Intervals**. Select one of the reporting intervals **Every Week, 2 Weeks, Month** or **User Defined Periods***.

- **Current Reporting Period End Date** is taken from the Project's Status date.
- **Current Reporting Period Start Date** is determined by the reporting interval.

*If **User Defined Periods** is selected, you will have to create a custom calendar. Select or create a **Defined Periods** table.

NOTE: If you use this option, the Status Date must match with the finish date of one of the periods of the User Defined Calendar.

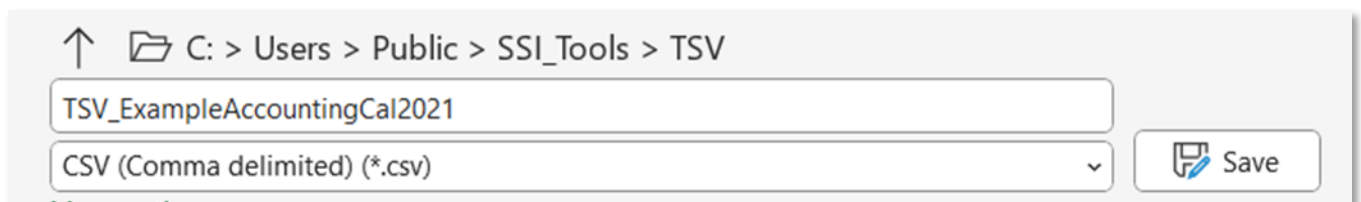
Creating Defined Period Calendar

Defined Periods are intervals of time that do not correspond to any standard calendar period and are defined by the user. These periods can be anything but are most often used to represent an organization's fiscal calendar.

The easiest way to create your own defined periods is in *Excel*. In an Excel worksheet, Column A will represent the **Period Label**, column B is the **Start date** of the period and column C is the **End date** of the period. A Period's **start date** must be the next day after the prior period **end date**.

	A	B	C
1	2019-01	12/29/2018	2/1/2019
2	2019-02	2/2/2019	3/1/2019
3	2019-03	3/2/2019	3/29/2019
4	2019-04	3/30/2019	5/3/2019
5	2019-05	5/4/2019	5/31/2019
6	2019-06	6/1/2019	6/28/2019
7	2019-07	6/29/2019	8/2/2019
8	2019-08	8/3/2019	8/30/2019

When finished creating the defined periods, the file **MUST** be saved as a .csv file and the file name **MUST** be prefixed with "TSV_". If these conventions are not followed, SSI will not be able to recognize the file as a defined periods file. Save the file in the TSV folder of the SSI Tools folder (most likely C:\Users\Public\SSI_Tools\TSV). This is the default location the Time Scaled Values tool will look to when the Defined Periods option is selected.

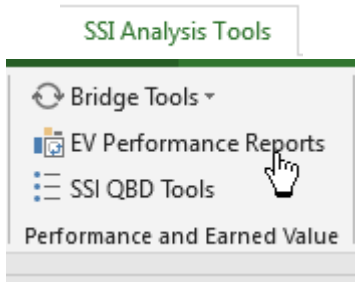
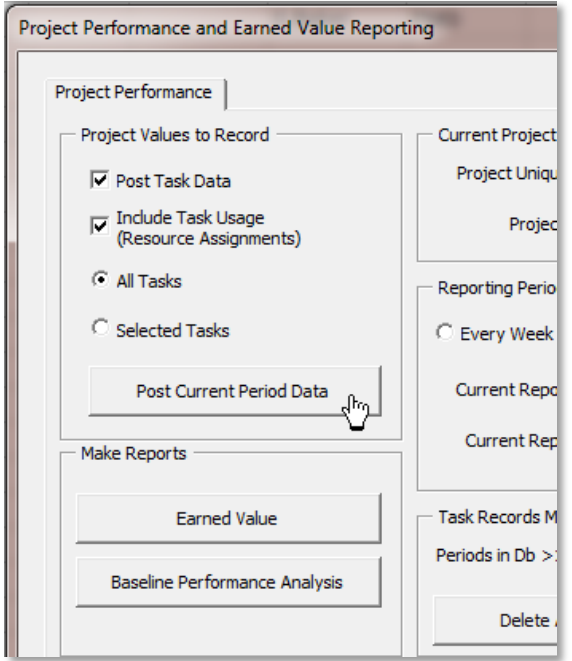
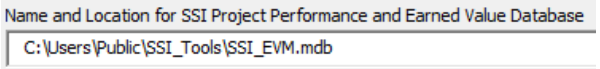
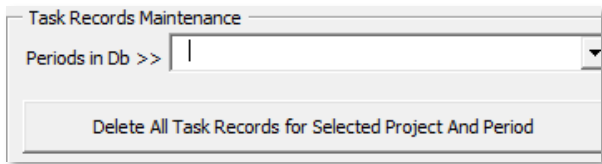


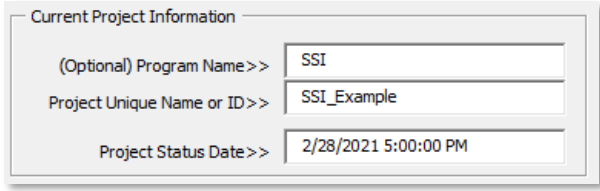
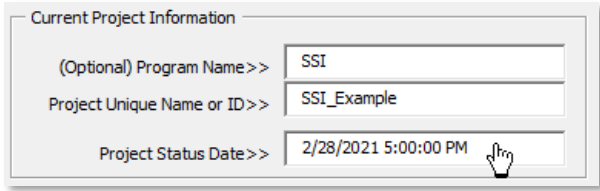
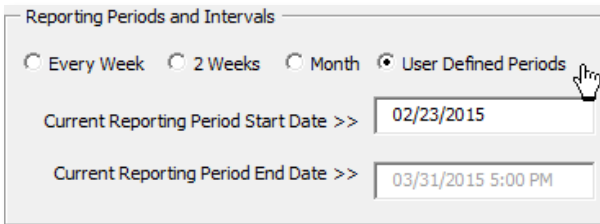
↑ C: > Users > Public > SSI_Tools > TSV

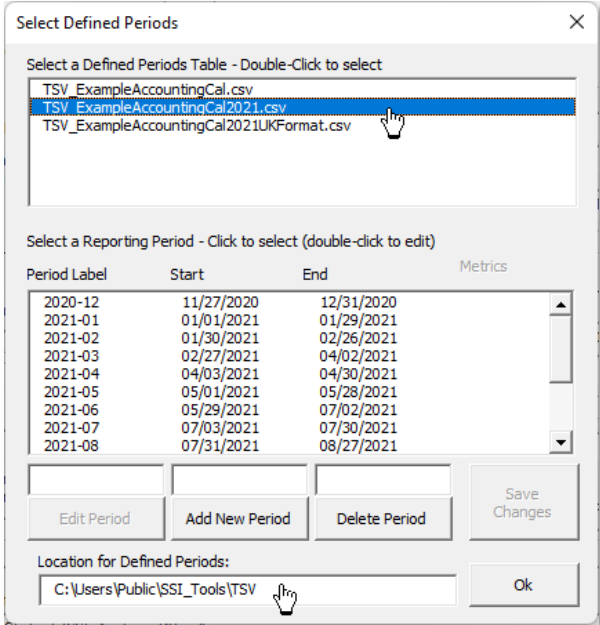
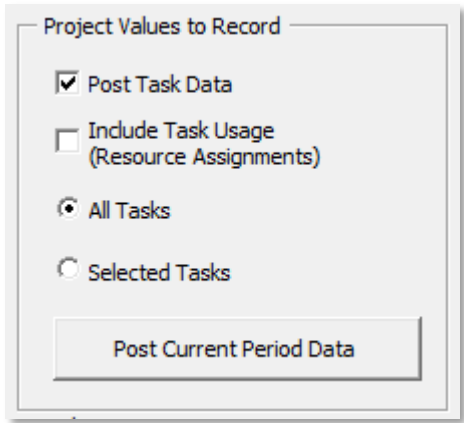
TSV_ExampleAccountingCal2021

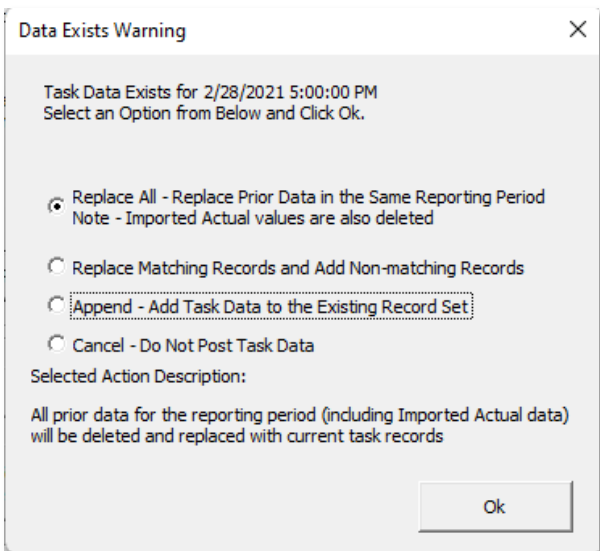
CSV (Comma delimited) (*.csv)

Save

Steps	Description / Image
Post Current Period Data into a new or existing Database for reporting Earned Value 1. Click Performance Vs. Baseline on the Performance and Earned Value group of the SSi Analysis Tools ribbon in Microsoft Project 	
2. Connect to an existing database or make a new one by entering a database name and location. 3. Name and Location for Metrics Records and Reporting Database can be a new value entered by the user or it can map to an existing record set for projects and reporting periods. 4. Task Records Maintenance shows existing Project and Periods in the Database. If necessary, use this control to Delete All Task Records for the selected project and reporting period.	Enter a name and location for the database. If the database does not exist, a new one will be created using the name and location provided  
5. Enter Program & Project Name or ID The Initial values are from the project's Subject, Title and Status date	Name of Program, Project and Reporting Period in Database

Steps	Description / Image
- Records in the Database are stored separately by their Program, Project Unique Name or ID and the reporting period. - Each Project should have a unique Project Unique Name or ID to prevent data from one project mixing with data from another project. - Data from one or more Project can be combined in a Program level report.	 Note – The Project Status Date should match the Current Period End Date in the section below
6. Double-click Project Status Date to open the Project Information form and select a Status date for the project. 7. Select Reporting Periods and Intervals - Select one of the reporting intervals (Every Week, 2 Weeks, Month or User Defined Periods*) Current Reporting Period End Date is taken from the Project's Status date Current Reporting Period Start Date is determined by the reporting interval *If User Defined Periods is selected, a list of custom calendars is displayed. Select or create a Defined Periods table and pick from the list of Reporting Periods if using this option - Double-click Select a Defined Periods Table to see its list of	Project Status Date  Reporting Intervals and Current Period Start and End Date  Note –the Current Period End Date should match the Project Status Date in the section above

Steps	Description / Image
Periods, Start and End dates in a table • Select a Reporting Period to use its Period Start and End date as the current period • The default System Location for Defined Periods is the installation location for SSI Tools. That location will contain sample Defined Periods record sets in a folder named "TSV". Another way to make your own defined periods tables is by using Excel to open the example files, edit them in Excel and save as a Comma Separated Values file format with a name that begins with "TSV"	
8. Click Post Current Period Data ○ Post Task Data records information about tasks in the schedule ○ Include Task Usage adds information about the resources assigned to tasks, if they exist ○ Select All Tasks to post information about each task in the active schedule or Selected Tasks to post data for the tasks in the current selection	Select which tasks to post to the database. 

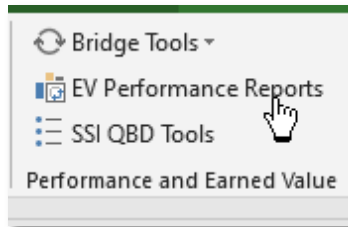
Steps	Description / Image
	Choose how to handle existing data if SSI Tools finds records for the same project in the same reporting period
Data Exists Warning Appears whenever data for the Program & Project exists in the same reporting period ○ Replace All completely removes data for the period and replaces with current records. ○ Replace Matching Records is a good option to use if you are correcting just one or a few tasks in the project and want to preserve all other records in the reporting period ○ Append is useful when you want to add more task to the existing record set in the database ○ Cancel allows you to exit to posting operation and go back to the previous form	

Practice on you own – Posting Project Data to the SSI Project Performance Database

Open Microsoft Project and open the Example project for SSI Project Performance:

[ExampleProjectEVMSetupSolution.mpp](#)

1. Click **Performance Vs. Baseline** on the **Performance and Earned Value** group of the **SSI Analysis Tools** ribbon in Microsoft Project



2. Enter **C:\Users\Public\SSI_Tools\SSI_Analysis_DB.mdb**, as shown below, for the **Name and Location for SSI Project Performance and Earned Value Database**

Name and Location for SSI Project Performance and Earned Value Database

C:\Users\Public\SSI_Tools\SSI_Analysis_DB.mdb

Make New DB

3. Set the Project Status Date to 02/28/21 by double-clicking **Project Status Date** and entering the status date on the Project Information form

Current Project Information

(Optional) Program Name >> SSI

Project Unique Name or ID >> SSI_Example

Project Status Date >> 2/28/2021 5:00:00 PM

4. Select **Month** for the reporting interval

Step 4

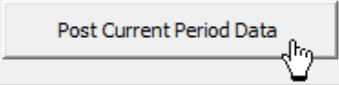
Reporting Periods and Intervals

☐ Every Week ☐ 2 Weeks ☒ Month ☐ User Defined Periods

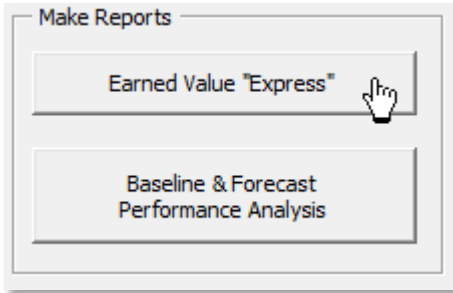
Current Reporting Period Start Date >> 01/28/2021

Current Reporting Period End Date >> 02/28/2021 5:00:00 PM

5. Select the options shown to the right, then click Click **Post Current Period Data**

	<i>Step 5</i> Project Values to Record ☒ Post Task Data ☐ Include Task Usage (Resource Assignments) ☒ All Tasks  ☐ Selected Tasks 
--	--

6. Make an **Earned Value** "Express" report for the project



7. Complete the **Project Earned Value Reporting** form as shown to the right

8. Click **Make EV Report**



Step 6

Project Earned Value "Express" Reporting

Earned Value Report | EVMS Reporting Options | Reporting Periods | ACWP Traceability

Project Performance Options

EV Element Unique ID for Traceability: UniqueID

Earned Value "Work Package" WP IDs: Text1

Earned Value WP Parent (Rollup) IDs: Text3

Work Package Performing Manager: Text4

Work Package Responsible Manager: Text5

Earned Value Method Field (EVM): Text6

Earned Value (EV) or BCWP is Based on: Physical % Complete

Earned Value Unit of Measure: Task Days

EV Actuals (AC) or ACWP is Based on: Project Actual Values

☐ Get Assignment Level EV Values

☐ Get Cumulative & Current Period EV ☒ Get Cumulative EV Only

☒ Make Pivot Table in Report ☒ Make Change Log

Notes for Project Performance Options

EV Element Unique ID for Traceability:	The Unique ID for Traceability is needed for tracking an Earned Value element from one reporting period to the next. Enables change logging and Current Period Data Calculation
Earned Value "Work Package" WP IDs:	Project field with Work Package ID
Earned Value WP Parent (Rollup) IDs in:	Project field with the primary rollup (summarization) for work packages. This is typically set to the Control Account or the Work Breakdown Structure (WBS)
Work Package Performing Manager. Work Package Responsible Manager.	Use these for the Control Account Manager or Organizational Breakdown Structure (OBS)



Earned Value Method Field (EVM):	Earned Value method or Performance Measurement Technique (EVM or PMT). Level of Effort (LOE) earned value methods are handled different than all other EVM/PMTs since Budgeted Cost of Work Performed (BCWP) is set equal to Budgeted Cost of Work Scheduled (BCWS) when a work package uses the LOE EVM/PMT
Earned Value (EV) or BCWP is Based on:	This can be set to the tasks % Complete or % Work Complete but we recommend using Physical % Complete . % Complete and % Work Complete are calculated and therefore can't be set by the user. Physical % Complete is a user defined value so you can match it to the EVM/PMT.
Earned Value Unit of Measure:	This can be set to Duration, Work or Cost Even projects with no resource assignments can run SSI EV Express when using duration as the Earned Value Unit of Measure. When work packages have resource assignments, Earned Value can be based on work or cost (cost can only be used if your resource table has cost rates for your resources).
EV Actuals (AC) or ACWP is Based on:	When using work or cost, you can use actual values from the project, or you can import actual values from an Excel worksheet. When using duration, actual values will use project actual duration.



Click the Excel Icon or activate Excel to see the Earned Value report created by SSI Tools

Does your report look like this?

SV	(All)		<< Variance Analysis	Cumulative EV Task Days											
CV	(All)														
VAC	(All)														
				BCWS, BCWP & ACWP			Variance Analysis				To/At Complete				
WP_Parent_ID	WP_ID	TaskName	Tot PV	Tot EV	Tot AV	Tot SV	SPI(t)	Tot CV	CPI(t)	Tot ETC	Tot BAC	Tot EAC	Tot VAC		
CA1	CA1.WP1	Document the Concept of Operation (CONOPS)	15	15	20	0	100%	(5)	75%	0	15	20	(5)		
	CA1.WP2	Generate Analysis of Alternatives (AoA) Study Plan	5	5	5	0	100%	0	100%	0	5	5	0		
	CA1.WP3	Perform AoA Study Plan Review	9	9	9	0	100%	0	100%	0	9	9	0		
	CA1.WP4	Develop Life Cycle Cost Estimate (LCCE)	5	5	5	0	100%	0	100%	0	5	5	0		
	CA1.WP5	Define Operations Requirements	5	5	5	0	100%	0	100%	0	5	5	0		
	CA1.WP6	Develop Acquisition Plan (AP)	5	5	5	0	100%	0	100%	0	5	5	0		
	CA1.WP7	Develop the Integrated Logistics Support Plan (ILSP)	5	5	5	0	100%	0	100%	0	5	5	0		
	CA1.WP8	Establish Acquisition Program Baseline (APB)	5	5	5	0	100%	0	100%	0	5	5	0		
	CA1.WP9	Conduct Solution Engineering Review (SER)	1	1	1	0	100%	0	100%	0	1	1	0		
CA1 Total			55	55	60	0	100%	(5)	92%	0	55	60	(5)		
CA2			62	23	22	(39)	37%	1	105%	129	151	151	0		
CA3			25	15	15	(10)	60%	0	100%	91	106	106	0		
CA4			0	0	0	0	0%	0	0%	168	168	168	0		
CA5			0	0	0	0	0%	0	0%	48	48	48	0		
Grand Total			142	93	97	(49)	65%	(4)	96%	436	528	533	(5)		

End of Exercise

Earned Value Performance Calculations

SSI EV Express uses the following project data and performance calculations to determine Earned Value in a project:

Budget at Complete (BAC) is equal to Baseline Work, Cost or Duration for tasks in Microsoft Project that have a Work Package ID.

Planned Value (PV or BCWS) is equal to the amount of time phased Baseline Work, Cost or Duration, through the Project's Status date, for tasks in Microsoft Project that have a Work Package ID.

Earned Value (EV or Work Performed or BCWP) is equal to your "**Assessed Percent Complete**" (you can set this to **Physical % Complete, % Complete or Work % Complete**) times Baseline Work, Cost or Duration for tasks in Microsoft Project that have a Work Package ID. **Level of Effort (LOE)** Work Packages are an exception to this method of determining Earned Value*

***Earned Value** for a **Level of Effort (LOE)** Work package is equal to its **Planned Value** regardless of its Percent Complete or its current Start, Finish or Duration.

Estimate to Complete (ETC) is the amount of Remaining Work, Cost or Duration for tasks in Microsoft Project that have a Work Package ID.

Actual Value (AV or ACWP) can use the actual values in your project or you can import actual values from your accounting system.

Schedule Variance (SV) is the difference between Earned Value and Planned Value. If a task has a negative SV, it is behind schedule. **SV = Earned Value minus Planned Value.**

Cost Variance (CV) is the difference between Earned Value and Actual Value. If a task has a negative AV, it is taking longer, costing more or consuming more work to finish than originally planned (per its baseline) schedule. **CV = Earned Value minus Actual Value.**



Schedule Performance Index (SPI) is the ratio of cost, work or task days performed vs. the amount planned. **$SPI = \text{Earned Value} \div \text{Planned Value}$** .

Cost Performance Index (CPI) is the ratio of cost, work or task days performed vs. actual values for the same. **$CPI = \text{Earned Value} \div \text{Actual Value}$** .

Estimate at Complete (EAC) is equal to the **Estimate to Complete** plus cumulative **Actual Values** to date.

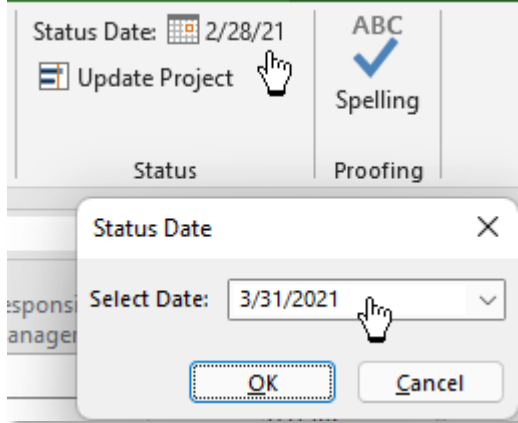
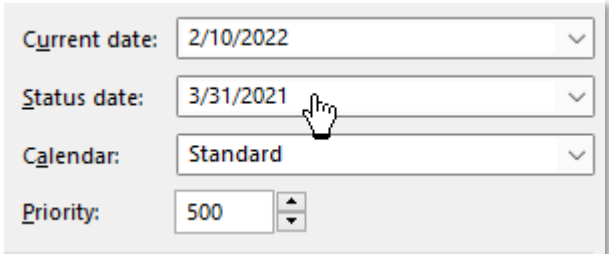
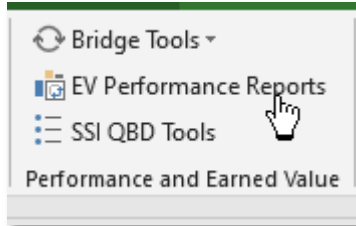
Variance at Complete (VAC) is the difference between **Estimate at Complete** and **Budget at Complete**

Adding Subsequent Reporting Periods to the Database

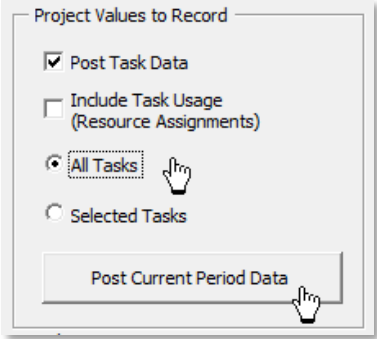
Whenever a **Project Performance and Earned Value Reporting** database contains two or more record sets from the same project, additional reporting options can be selected for Earned Value reports. The database keeps separate record sets for each project and for each project's reporting periods. Having two or more record sets enables current period as well as cumulative earned value reporting and the Baseline data from the current and prior periods can be inspected for changes.

Cumulative and Current Period EV shows planned value, earned value and actual value in the current period by subtracting cumulative values from the prior period from cumulative values in the current period.

Make Change Log compares data from the prior reporting period to data from the current reporting period and finds **Added** Work Packages, **Deleted** Work Packages and **Changes to the Baseline** Start date, Finish Date and Baseline Resource Assignment values. Adds, Deletes and Changes are recorded in a change log Excel worksheet that is included with an Earned Value report.

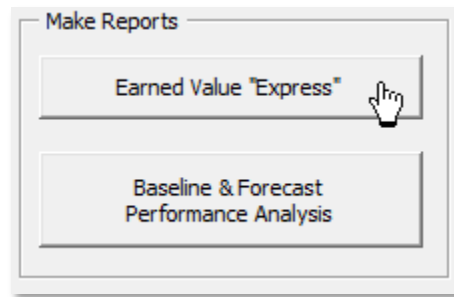
Steps	Description / Image
- Advance the Status date to the end of the next reporting period by selecting Status Date from the Status group of the Project menu or select Project Information from the Properties group of the Project menu. - Post status for all tasks in the project. If using Physical % Complete for Earned Value performance, it must be consistent with the Performance Measurement Technique (PMT)	Select Status Date from the Status group of the Project menu  Figure 1 Project Information from the Properties group of the Project menu 
- Click Performance Vs. Baseline on the Performance and Earned Value group of the SSI Analysis Tools ribbon in Microsoft Project. - Then select: Post Task Data - For All Tasks - Click Post Current Period Data.	Step 3 



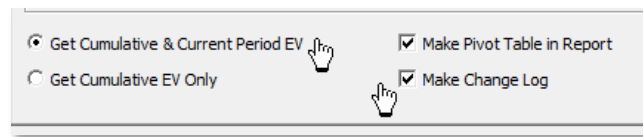
Steps	Description / Image
	<i>Steps 4 & 5</i> 

Whenever you have project data from 2 or more reporting periods, you can make an Earned Value report showing **Cumulative and Current Period EV** with a **Change Log** (showing baseline changes from one period to the next).

- Click the Earned Value "Express" button on **Project Performance and Earned Value Reporting**.



- Select the options named **Get Cumulative & Current Period EV**, **Make Pivot Table in Report** and **Make Change Log** on the form named **Project Earned Value Reporting** (see the example to the right).



- Click the Excel Icon or activate Excel to see the Earned Value report created by SSI Tools.

Practice on your own – Posting a new Reporting Period

Add a second reporting period to the same database. A summary of the steps taken in this section are as follows:

1. Advance the Reporting Period End Date to 03-28-2021 in the project from the previous exercise.
2. Status all tasks through the new status date.
3. Update Physical % Complete making sure all complete tasks show 100% complete in Physical % Complete and all in progress tasks reflect the Performance Measurement Technique (PMT) in Text6.
 - a. Therefore, if $PMT = 0/100$, Physical % Complete = 0 until the task is completed.
 - b. If $PMT = 50/50$, you can only take 50% Physical % Complete until the task is completed.
 - c. And so on for other PMT values.
4. Add a new Work Package, Delete an Existing Work Package and Change the Baseline for another Work Package.
5. Post Task and Task Usage for All Tasks to the database created in the prior steps.
- 6. Make an Earned Value report that shows *Cumulative and Current Period EV* with a Change Log (showing baseline changes from one period to the next).**

End of Exercise

Importing Actual Values

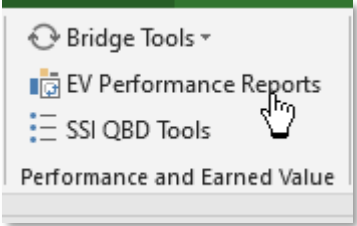
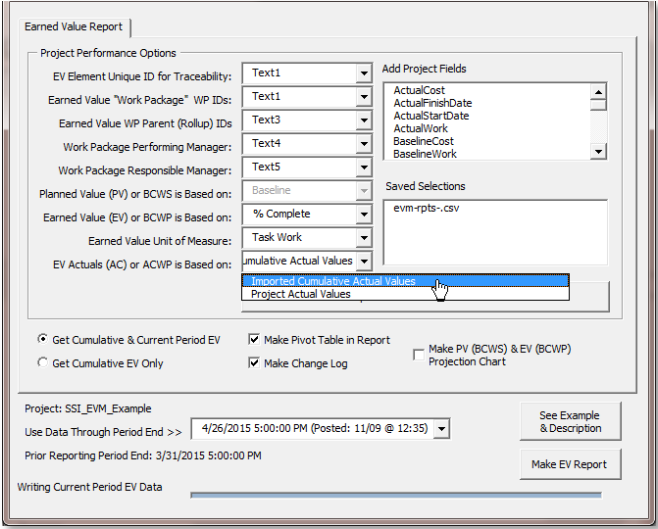
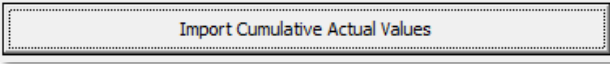
When using **Task Work** or **Task Cost** as the **Earned Value Unit of Measure**, you can override Microsoft Project's actual values by **Importing Cumulative Actual Values** from an Excel worksheet. You can import values **for each Work Package** or you can import values **at the Work Package Parent level**. The simple format for a worksheet contains imported values is as follows:

- Work Package or Work Package Parent ID
- Resource Name
- Resource Type (Labor, Material, Travel, Other Direct Cost for example)
- Cumulative Work amount (Optional if you use Cost as EV Basis)
- Cumulative Cost amount (Optional if you use Work as EV Basis)

Optionally, you can add a column to the import sheet showing the Cost Date (**Column with Cost Date**). A Cost date is useful if you plan to use the SPA Chart since that chart breaks down BCWS (S), BCWP (P) and ACWP (A) into reporting periods. When using this option, the Cost Date in

Below is an example of a worksheet in excel containing Actual values for a project

	A	B	C	D	E
1	WP ID Parent	Resource Name	Resource Type	Work	Cost
2	WP1	Systems Engineer	Labor	325	32500
3	WP2	HW Engineer	Labor	140	14000
4	WP2	Program Manager	Labor	20	2000
5	WP2	Security Engineer	Labor	100	10000
6	WP2	SW Engineer	Labor	60	6000
7	WP2	Systems Engineer	Labor	300	30000
8	WP2	Test Engineer	Labor	35	3500
9	WP3	HW Engineer	Labor	100	10000
10	WP3	Systems Engineer	Labor	35	3500
11	WP4	Test Engineer	Labor	35	3500
12	WP4	Test Tech	Labor	35	3500

Steps	Description / Image
1. Click Performance Vs. Baseline on the Performance and Earned Value group of the SSi Analysis Tools ribbon in Microsoft Project  2. Select Task Work or Task Cost as the Earned Value Unit of Measure and Imported Cumulative Actual Values as the EV Actuals (AC) or ACWP option	
3. Click Import Cumulative Actual Values	
4. Select the Name and Location of an Excel workbook containing actual values 5. Select the name of the Worksheet to Use in the selected workbook 6. Look at the Worksheet Preview and map the columns in the worksheet to the following key values for Earned Value reporting: • Column with Matching Work Package Id (If you don't match at the Work Package level, you can set this value to None) • Column with Matching Work Package Parent (Rollup) Id • Column with Resource Name • Column with Resource Type • Column with Work or Amt Value (optional if using Task Cost as EV basis) • Column with Cost Value (optional if using Task Work as EV basis) 7. Select the reporting period for cumulative values using the drop-down list next to "Actual Values are for Reporting Period Ending" 8. Click Import Actual Values	



Steps	Description / Image																				
	Import Cumulative Actual Values Select a Worksheet with Cumulative Actual Values Double-click to Browse: C:\Users\garya\OneDrive\SSITools\08 ClassMaterials\CurrentClassOfferings\SSITools Catalog\Version13TrainingSessionMaterials\07(13.X)-SSI_EVExpressExercises\ImportedActualValueSSI_EVM.xlsx Basic Data Mapping Additional Data Mapping Worksheet to Use >> March2021 Column with Cost Date (Optional) >> Column with Work Package (Optional) >> Column with Work Package Parent (or Control Act) >> (Col:D) CA Column with Resource Name >> (Col:B) Res Name Column with Resource Type >> (Col:C) Res Type Column with Work or Amt Value >> (Col:E) Work Column with Cost Value >> (Col:F) Cost Cumulative Actual Values are for Period Ending >> 3/31/2021 5:00:00 PM Project Name Override >> Worksheet Preview <table border="1"><thead><tr><th>Name</th><th>Res Name</th><th>Res Type</th><th>CA</th><th>Work</th></tr></thead><tbody><tr><td>Imported ACWP</td><td>Systems Engineer</td><td>Labor</td><td>CA1</td><td>128</td></tr><tr><td>Imported ACWP</td><td>Systems Engineer</td><td>Labor</td><td>CA1</td><td>40</td></tr><tr><td>Imported ACWP</td><td>Systems Engineer</td><td>Labor</td><td>CA1</td><td>16</td></tr></tbody></table> Imported Actual Records Maintenance Periods in Db >> Delete All Imported Actual Values for Selected Project And Period Import Actual Values	Name	Res Name	Res Type	CA	Work	Imported ACWP	Systems Engineer	Labor	CA1	128	Imported ACWP	Systems Engineer	Labor	CA1	40	Imported ACWP	Systems Engineer	Labor	CA1	16
Name	Res Name	Res Type	CA	Work																	
Imported ACWP	Systems Engineer	Labor	CA1	128																	
Imported ACWP	Systems Engineer	Labor	CA1	40																	
Imported ACWP	Systems Engineer	Labor	CA1	16																	

When to Use **Imported Actual Records Maintenance**:

Imported Actual Records Maintenance

Periods in Db >> 4/30/2015 5:00:00 PM (Posted: ImportedAct)

Delete All Imported Actual Values for Selected Project And Period

If your import worksheet already contains cumulative actuals you will need to delete values from a prior import by selecting **Periods in Db** and pressing **Delete All Imported Actual Values for Selected Project and Period**

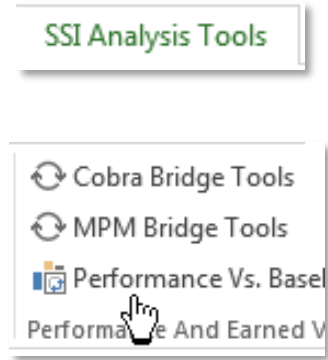
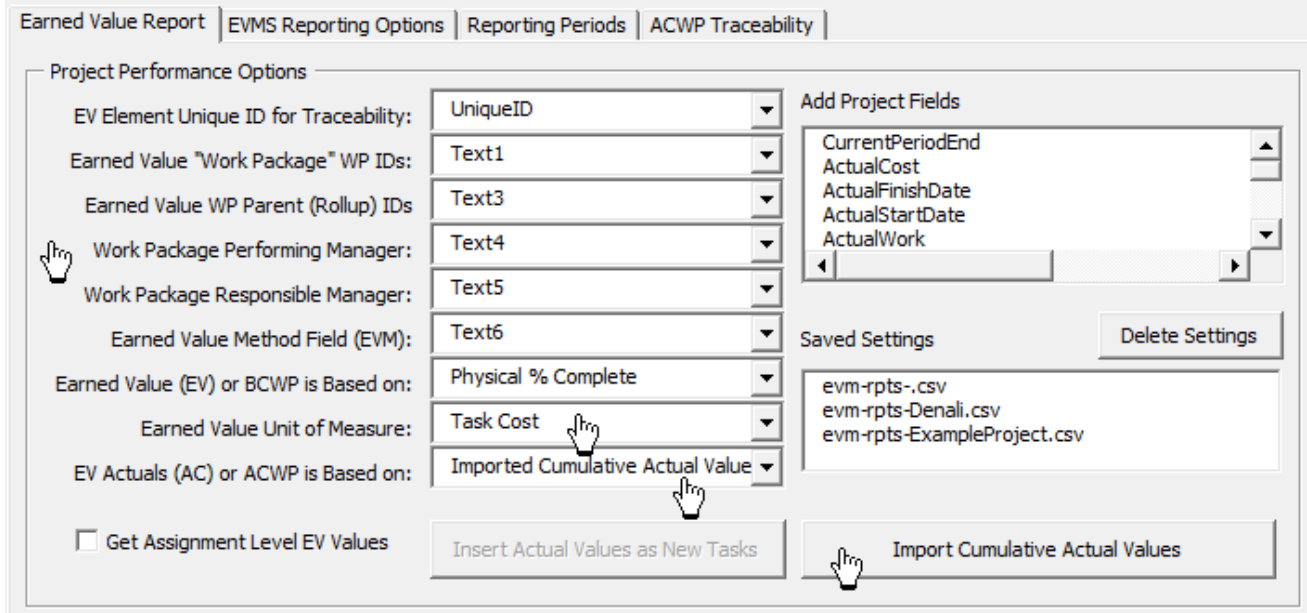
Periods in Db shows all prior Actuals value import period ending dates

When using Imported Actual Values that are rolled-up to the Work Package Parent level an Earned Value report will show zero in the **Tot AV** or **Cur_AV** column. In this case, SSI Tools adds a new Work Package named **WP-Imp-Act** at the **Work Package Parent** level. Since no actual values exist for Work Packages, you will only be able to perform analysis of Cost Variances (CV) at the Parent level.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	SV	(All)															
2	CV	(All)															
3	VAC	(All)	<< Variance Analysis														
4	Cur SV	(All)															
5	Cur CV	(All)															
6																	
7	WP_Parent_ID	WP_ID	Res_Name	Tot PV	Tot EV	Tot AV	Tot SV	Tot CV	Tot BAC	Tot ETC	Tot EAC	Tot VAC	Cur_PV	Cur_EV	Cur_AV	Cur_SV	Cur_CV
8	WP1	WP1.1	Systems Engineer	120	120	0	0	120	120	0	0	120	0	0		0	0
9		WP1.2	Systems Engineer	40	40	0	0	40	40	0	0	40	0	0		0	0
10		WP1.3	Systems Engineer	16	16	0	0	16	16	0	0	16	0	0		0	0
11		WP1.4	Systems Engineer	40	40	0	0	40	40	0	0	40	0	0		0	0
12		WP1.5	Systems Engineer	40	40	0	0	40	40	0	0	40	0	0		0	0
13		WP1.6	Systems Engineer	40	40	0	0	40	40	0	0	40	0	0		0	0
14		WP1.7	Systems Engineer	40	40	0	0	40	40	0	0	40	0	0		0	0
15		WP1.8	Systems Engineer	40	40	0	0	40	40	0	0	40	0	0		0	0
16		WP1.9	Systems Engineer	8	8	0	0	8	8	0	0	8	0	0		0	0
17		WP-ImpAct	Systems Engineer		0	425	0	(425)			425	(425)	0		100	0	(100)
18	WP1 Total			384	384	425	0	(41)	384	0	425	(41)	0	0	100	0	(100)

Practice on your own – Import Cumulative ACWP

Import actual work values into the Performance and Earned Value reporting database
Open the file named [ExampleProjectSSIEVM.mpp](#) in Microsoft Project

Steps	Description / Image
- Click Performance Vs. Baseline on the Performance and Earned Value group of the SSI Analysis Tools ribbon in Microsoft Project - Click Earned Value on the Project Performance and Earned Value Reporting form	
- Select the Project Performance Options shown below – be sure to select Task Cost as the Earned Value Unit of Measure and Imported Cumulative Actual Values for the option named “EV Actuals (AC) or ACWP is Based on” - Click the button named Import Cumulative Action Values	



5. Select the **Excel Workbook with Actual Values** named ["ImportedActualValueSSI_EVM.xlsx"](#)
6. Select "March2021" for **Worksheet to Use**
7. Look at the **Worksheet Preview** and map the columns in the worksheet to the following key values for Earned Value reporting: (See Example below)
 - **Column with Cost Date** – blank & **Column with Matching Work Package Id** = blank
 - **Column with Matching Work Package Parent (Rollup) Id** = CA
 - **Column with Resource Name** = Res Name, **Column with Resource Type** = Res Type
 - **Column with Work Value** = Work, **Column with Cost Value** = Cost
 - **Actual Values are for Reporting Period Ending** = 03/28/2021 5:00:00 PM
8. Click **Import Actual Values and** Close the form named **Import Actual Values** when done



Import Cumulative Actual Values

Double-click to Browse

Select a Worksheet with Cumulative Actual Values

C:\Users\Public\SSI_Tools\ImportedActualValueSSI_EVM.xlsx

Basic Data Mapping

Additional Data Mapping

Worksheet to Use >>

March2021

Column with Cost Date (Optional) >>

Column with Work Package (Optional) >>

Column with Work Package Parent (or Control Act) >>

(Col:D) CA

Column with Resource Name >>

(Col:B) Res Name

Column with Resource Type >>

(Col:C) Res Type

Column with Work or Amt Value >>

(Col:E) Work

Column with Cost Value >>

(Col:F) Cost

Cumulative Actual Values are for Period Ending >>

3/31/2021 5:00:00 PM

Project Name Override>>

Worksheet Preview

Name	Res Name	Res Type	CA	Work
Imported ACWP	Systems Engineer	Labor	CA1	128
Imported ACWP	Systems Engineer	Labor	CA1	40
Imported ACWP	Systems Engineer	Labor	CA1	16

Imported Actual Records Maintenance

Periods in Db >>

Delete All Imported Actual Values for Selected Project And Period

Import Actual Values

Use the settings shown below and click **Make EV Report** using data through 03/28/2021

Project Earned Value "Express" Reporting

Earned Value Report
EVMS Reporting Options
Reporting Periods
ACWP Traceability

Project Performance Options

EV Element Unique ID for Traceability:

UniqueID

Earned Value "Work Package" WP IDs:

Text1

Earned Value WP Parent (Rollup) IDs:

Text3

Work Package Performing Manager:

Text4

Work Package Responsible Manager:

Text5

Earned Value Method Field (EVM):

Text6

Earned Value (EV) or BCWP is Based on:

Physical % Complete

Earned Value Unit of Measure:

Task Cost

EV Actuals (AC) or ACWP is Based on:

Imported Cumulative Actual Value

☐ Get Assignment Level EV Values

Insert Actual Values as New Tasks

Import Cumulative Actual Values

Add Project Fields

CurrentPeriodEnd

ActualCost

ActualFinishDate

ActualStartDate

ActualWork

Saved Settings

Delete Settings

evm-rpts-.csv
evm-rpts-Denali.csv
evm-rpts-ExampleProject.csv

☐ Get Cumulative & Current Period EV
☒ Make Pivot Table in Report

☒ Get Cumulative EV Only
☒ Make Change Log

See Report Examples & Description

Project: SSI_Example

Use Data Through Period End >>

03/28/2021 5:00:00 PM (Posted: 11/02 @ 18:13)

Make SPA Chart

Make EV Report



Does your report look like this? Notice the lines for **Imported ACWP** – Since you imported ACWP at the WP Parent (or CA) level, ACWP is not shown for each Work Package – only at the Rollup level

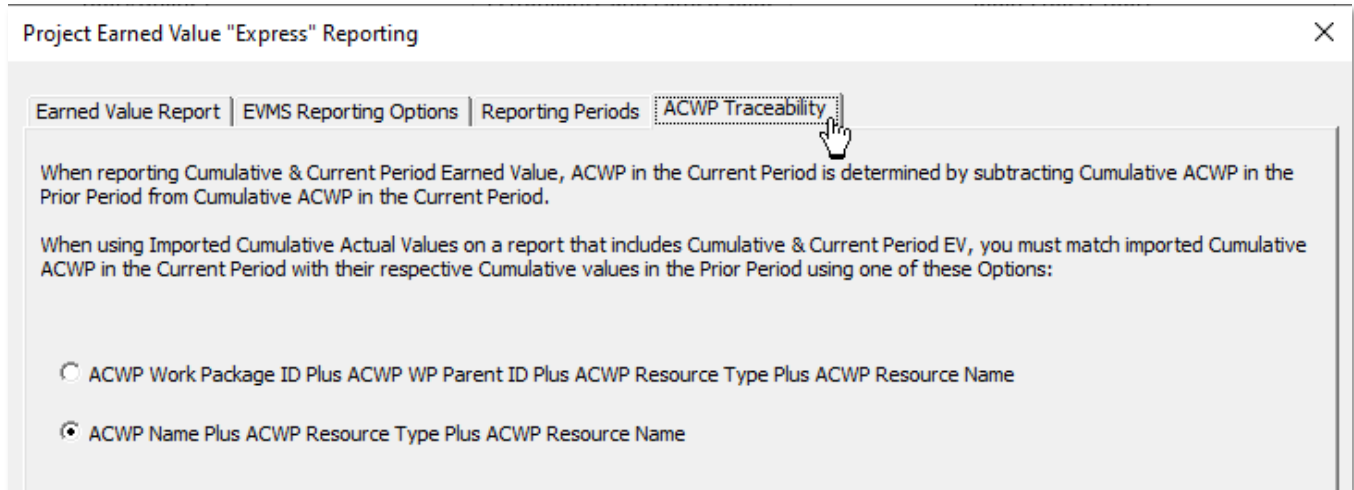
	A	B	C	D	E	F	G	H	I	J	K
1	SV	(All)									
2	CV	(All)	<< Variance Analysis								
3	VAC	(All)									
4											
5	WP Parent ID	WP ID	TaskName	BCWS, BCWP & ACWP			Variance Analysis				
6	CA1	CA1.WP.1	Document the Concept of Operation (CONOPS)	Tot PV	Tot EV	Tot AV	Tot SV	SPI(\$)	Tot CV	CPI(\$)	Tot ETC
7		CA1.WP.2	Generate Analysis of Alternatives (AoA) Study Plan	\$9,000	\$9,000	\$0	\$0	100%	\$9,000	0%	\$0
8		CA1.WP.3	Perform AoA Study Plan Review	\$3,000	\$3,000	\$0	\$0	100%	\$3,000	0%	\$0
9		CA1.WP.4	Develop Life Cycle Cost Estimate (LCCE)	\$1,200	\$1,200	\$0	\$0	100%	\$1,200	0%	\$0
10		CA1.WP.5	Define Operations Requirements	\$3,000	\$3,000	\$0	\$0	100%	\$3,000	0%	\$0
11		CA1.WP.6	Develop Acquisition Plan (AP)	\$3,000	\$3,000	\$0	\$0	100%	\$3,000	0%	\$0
12		CA1.WP.7	Develop the Integrated Logistics Support Plan (ILSP)	\$3,000	\$3,000	\$0	\$0	100%	\$3,000	0%	\$0
13		CA1.WP.8	Establish Acquisition Program Baseline (APB)	\$3,000	\$3,000	\$0	\$0	100%	\$3,000	0%	\$0
14		CA1.WP.9	Conduct Solution Engineering Review (SER)	\$600	\$600	\$0	\$0	100%	\$600	0%	\$0
15		ImportedActuals	Imported ACWP			\$29,550		0%	(\$29,550)	0%	
16	CA1 Total			\$28,800	\$28,800	\$29,550	\$0	100%	(\$750)	97%	\$0
17	CA2			\$58,500	\$54,735	\$53,410	(\$3,765)	94%	\$1,325	102%	\$9,440
18	CA3			\$14,294	\$12,540	\$12,529	(\$1,754)	88%	\$11	100%	\$56,771
19	CA4			\$225	\$0	\$0	(\$225)	0%	\$0	0%	\$73,500
20	CA5			\$0	\$0	\$0	\$0	0%	\$0	0%	\$71,700
21	Grand Total			\$101,819	\$96,075	\$95,489	(\$5,744)	94%	\$586	101%	\$211,411

End of Exercise

Determining Current Period ACWP

When reporting Cumulative & Current Period Earned Value, ACWP in the Current Period is determined by subtracting Cumulative ACWP in the Prior Period from Cumulative ACWP in the Current Period.

When using Imported Cumulative Actual Values on a report that includes Cumulative & Current Period EV, you must match imported Cumulative ACWP in the Current Period with their respective Cumulative values in the Prior Period using one of these Options:



Project Earned Value "Express" Reporting

Earned Value Report | EVMS Reporting Options | Reporting Periods | **ACWP Traceability**

When reporting Cumulative & Current Period Earned Value, ACWP in the Current Period is determined by subtracting Cumulative ACWP in the Prior Period from Cumulative ACWP in the Current Period.

When using Imported Cumulative Actual Values on a report that includes Cumulative & Current Period EV, you must match imported Cumulative ACWP in the Current Period with their respective Cumulative values in the Prior Period using one of these Options:

- ☐ ACWP Work Package ID Plus ACWP WP Parent ID Plus ACWP Resource Type Plus ACWP Resource Name
- ☒ ACWP Name Plus ACWP Resource Type Plus ACWP Resource Name

