

## Process Phase: Planning

### Setting Up Project Architecture and Resource Loading

Feature	Notes
Set up as many user defined fields as necessary to customize project codes and reports	If your business specific code or field does not exist in our system, create it! Custom or user defined fields automatically show up as parameters in reporting.
Import PMB (Performance Measurement Baseline) from BOEMax	If you are using BOEMax your estimating and pricing tool, you can simply import the plan directly into EVMax as the start of the PMB
Use BOEMax as a rolling wave planning function	Plan portions of the project in BOEMax to get the plan correct in a “sandbox” type environment and then merge into EVMax
Import from MS Excel	Companies often import from Excel to create rate and resource files during system configuration and setup
Integrate with MS Project and Primavera	Integrate the timephased budget baseline from either MS Project or Primavera, additionally use the mapping capability to map just a portion of the plan for rolling wave planning efforts
Security by Project	Users are set up and configured, and then associated with security roles. This determines which projects they have access to and what they can do within those projects.
Build WBS	Build WBS manually within the system, import from Excel or import from common scheduling tools like Primavera or MS Project
Import, Parse and Map Statement of Work Requirements	EVMax has the capability to parse a statement of work document into a code structure provided the document is smartly structured. Once these codes are parsed, they can then be mapped to the WBS to create proper estimating guidance.
Set up Workflow Forms and Routing Rules	ProjStream can assist you in creating your process framework, enabling electronic approvals and a data trail associated with workflow signoff. Common workflows include BCR (Budget Change Requests) and WAD (Work Authorization Document).
Create document templates	Create rich text templates to enable repeatable documentation structure for items like basis of estimate, risks and assumptions.
Cost and Price Modeling	Model Costs with direct costs, indirects and fees, add resource codes for cost pool reporting, add effective dates with escalation as necessary
Control Account Flag and Reporting Capability	Flag the Control Accounts in EVMax to define CA reporting levels, or map the CA data in from the schedule
Financial period calendars support weekly or monthly data collection	Reporting calendars can aggregate data over longer periods like quarters and years
ENS (Enterprise Nodal System)	Group Projects into Groupings to facilitate rollup enterprise program reporting

## Process Phase: Execution

Feature	Notes
Grid View Entry Allows Ease of Use	Allows Users to View the Entire Project and enter budget or forecast into any WBS from the same screen
Inputs are in Hours, Manpower or Dollars	Estimating in Hours will calculate the manpower or FTE numbers and dollars, Estimating in Manpower or FTE will calculate hours and dollars, etc.
Program Change Control Log	View changes by reference date of the change, by WBS, Work Package, and even down to the resource. Pivot format makes it easy to support your change control process and make sense of the data.
Rich Text Documentation and Reporting, Content Management and Document Management	Create Documents with or without rich text templates for repeatable use. This could include information such as basis of estimate, risk, assumptions, statement of work, etc.
Easy Progress or Earned updates, Easy Actuals /Estimated Actuals Importing	Map status in from MS Project or Primavera or import status from excel, or update status in the easy to use interface. Easy mapping tools or the API facilitate getting actuals or estimated actuals into the system.
Document Versioning	The superuser has the ability to turn on document versioning, this leverages the MS Word like capability to turn on change management and redlining, along with the author that made the changes
Workflow Queues and Management	Use workflow to manage process, work items show up in the users queue until they take the required action, then the item moves to the next responsible person. Common processes managed are BCR's (Budget Change Request) and WAD (Work Authorization Documents).
Full Pricing Capability	Build Cost Rules into your labor categories or resources so if you enter labor hours the output can be full labor cost and if you put in bill of material quantities or material dollars, the output is material or non-labor cost.
Many earned value techniques to choose from	% Complete, Level of Effort, Earned as Spent, Earning Rules, Milestones, 0-100, 100-0, 50-50, User Defined, Planning Package, etc.
Freeze period enforcement	Prevent changes within the current period, historical periods, define the freeze period
Replan Function	Automatically Set BCWS = BCWP, automatically set BCWS = BCWP = ACWP
Import Actuals	Import Actuals weekly or monthly
Support of Estimated Actuals	Generate Logs for Estimated Actuals and any classification of actuals for that matter
EV Metrics Calculated and Displayed in the system	Includes CV, SV, CPI, SPI, CV%, SV%, VAC, etc. EV Metrics rolled up from detail to summary levels
Variance Thresholds can be set at any level in EVMax	This setting can be used to drive IPMR Format 5 Variance Reporting

## Process Phase: Forecasting

Feature	Notes
Grid View Entry Allows Ease of Use for Manual Forecasting	Allows Users to View the Entire Project and enter budget or forecast into any WBS from the same screen
More than 10 standard independent EAC (iEAC) calculations	Automatically create forecasts like $PF=1$ , Retain EAC, $PF = 1/CPI$ , $PF=1/(a*CPI+b*SPI)$ , etc.
Forecasts imported from Schedule	Forecasts can be imported from MS Project or Primavera
Create infinite number of iEAC's	There is no limit to how many independent forecasts can be stored in the system

## Process Phase: Reporting

Feature	Notes
IPMR Report Formats 1-5 and 7	IPMR Format 1 – Work Breakdown Structure IPMR Format 2 – Organization IPMR Format 3 – Baseline Changes IPMR Format 4 – Staffing IPMR Format 5 – Variance Explanations and Problem Analysis IPMR Format 7 – typically an annual report, consists of historical timephased ACWP plus future timephased ETC for all reported WBS elements of format 1
UN/CEFACT xml Formats 1-4 and 7	PARCA/Tecelote validated xml file formats can be exported from EVMax
Standard EVM Data Structure Reports available	CAP (Control Account Plan) and RAM (Responsible Assignment Matrix)
Standard EVM Reports and Charts available	Cost/Schedule Performance Report, Performance History Reporting, Cost/Schedule Variance Trend Chart, CPI/SPI Trend Chart
Pivot Reporting (Ad Hoc)	Set up any report necessary to answer whatever question you need answered. These reports are easy to configure by the end user and once they are created they can be saved as templates so they are completely reusable.
Rate Reports	Create Labor category and subcontractor rate reports by period and show indirect rates as necessary
Project Data and Documentation Reports (Project Management Information System)	Show WBS Header Detail, Estimate data by labor category and period, documentation data to include basis of estimates, assumptions, statement of work, risks, etc. Format these reports exactly as you and your stakeholders need them.