

Management System: [Project Management](#)

Subject Area: [Project Reporting](#)

Managing EM Monthly Reporting

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1.0 Applicability

This procedure applies to Office of Environmental Management (EM) Federal Project Directors (FPDs), Integrated Project Team (IPT) Members, and Program Managers responsible for the execution of all projects subject to the mandatory project management requirements in [U.S. Department of Energy \(DOE\) O 413.3B, Program and Project Management for the Acquisition of Capital Assets](#).

2.0 Required Procedure

The following steps are not necessarily performed sequentially.

Step 1	<p>Offline data collection: The FPD, with support from the IPT, will need to complete several off-line PowerPoint slides which contain data not collected in IPABS (e.g., risk, contractor, lessons learned, accomplishments, MR/contingency analysis etc.). Each site will receive sample PowerPoint slides, which they will populate with their latest monthly data to submit to HQs. Although there is only one template for each slide, each site may need to replicate slides for each project or contractor.</p> <p>The packages will be divided into a “Main Package” and a “Backup Package.” The purpose of this division is to focus the discussion during the presentations on the most pressing issues. Each slide type will either always go in the Main Package, always go in the Backup Package, or have its position determined by the data on the slide (generally, if the slide contains red or yellow data, it will go in the Main Package).</p> <p>Note: See “Guidance on Site Created Slides”</p>
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Step 2	On-line data collection: The Performance Metrics and Milestone Variance Narratives will be entered by the sites in IPABS, rather than offline. Sites are requested to fill out the attached " Financial Variance Narratives Template " explaining performance issues for the financial data. Variance narratives should be provided to address any red/yellow data that appears on these slides. The completed template for all financial variance narratives should be e-mailed to ipabssupport@tritonfsi.com by the date indicated in the monthly schedule correspondence. Variance Narratives for Performance Metrics and Milestones are due in IPABS by the same date, as well. HQ will then seed the completed narratives into the MPR slides prior to slide finalization.
Step 3	Milestone Approvals: There will NOT be a second round of milestones approvals between the draft and final MPR packages. As long as there are no changes made in IPABS, the milestones shown in your site's draft MPR package will not be altered for the final MPR package.
Step 4	Sites will continue to indicate Physically Complete Projects on the Gen Info screen in PEM. The default selection for this field is "No". If your project is physically complete, please change the selection to "Yes" and insert the completion date. This will ensure proper reporting in the MPRs.
Step 5	The slides in the existing presentation package will be separated by HQ into a Main Package and Backup Package. After final submission no additional site action is required. This helps focus discussion during the reviews on the most pressing issues. Details on which slides are in the Main Package and which are in the Backup Package are provided in the guidance document .
Step 6	Sites that wish to show 100% credit for completing a metric ahead of schedule for a reporting month should include that information in the site generated "Site Accomplishments" slide.

3.0 References

- [DOE O 413.3B](#), *Program and Project Management for the Acquisition of Capital Assets*
 - [Guidance on Site Created Slides](#)
 - [Financial Variance Narratives Template](#)
 - [IPABS Guidance](#)
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