|  |
| --- |
| DI-CP002 Advance the Cobra Project Calendar |
| **Process Description:** Each month the Cobra project calendar must be advanced. Prior to advancing the calendar, we need to capture a backup of the project and save the current BCWS, ACWP, ETC, and estimated actuals as separate “previous value” cost classes. |

| **Advance the Cobra Project Calendar Processing Steps** | | **Comments, Warnings and Errors, and Screen Captures** |
| --- | --- | --- |
|  | 1. Create a backup of the Cobra project. Place it in the current month processing folder in the folder **Cobra Backups**. Title it “***pgmid-01 before end-of-month processing begins”***  * Click **<File>, <Manage Files>, <Backup Files>** * Place a checkmark by the program **“pgmid”** * Ensure there is a check in the box to Include project ancillary files * Click the **Backup** button * Navigate to the current month **Cobra Backups** folder * *File name* is “***pgmid-01 before end-of-month processing begins”*** * Click **<Save>** |  |
|  | 1. Perform a freeze forecast to copy the F1 forecast to the FF class  * Click **<Project>, <Freeze Forecast>** * Select the correct project * Click **<Next>** * Select “Total Project” for the criteria * Click **<Next>** * Click the ellipses […] for Forecast Cost Set and select “EAC” * Ensure the “Included Forecast Classes” are Actuals, Estimated Actuals, and Forecast * Click the ellipses […] for Copy To and select “FF” * Click <Finish> * Answer <Yes> to the Continue to copy over existing Frozen Forecasts in class FF for the selected data question. |  |
|  | 1. Change the type of class for PF from frozen forecast to manual forecast (Retain ETC)  * Highlight the program * Click **<Project>, <Project Information>** * Click the **<Classes>”** tab * Select the Class **“PF”** * Change *Forecast Method*  to **“Manual Forecast (Retain ETC)”** * Click **<Apply>** |  |
|  | 1. Navigate to the API Scripts folder: Y:\Program Management\Cobra Processing\API Scripts. Double-click the shortcut for the **Reclass API** for your program. |  |
|  | 1. Navigate to the Cost Class Check Reports folder for your program. Open each and compare the values below. **Y:\Program Management\Cobra Processing\LCS13\0473** |  |
|  | 1. Compare ACWP and PREVACWP (should be the same) |  |
|  | 1. Compare BCWS and PREVBCWS (should be the same) |  |
|  | 1. Compare EAC and PREVEAC (should be the same) |  |
|  | 1. Compare ETC and PREVETC (should be the same) |  |
|  | 1. Compare EA and PREVEA (should be the same) |  |
|  | 1. Change the type of class for PF from manual forecast to frozen forecast  * Highlight the program * Click **<Project>, <Project Information>** * Click the **<Classes>”** tab * Select the Class **“PF”** * Change *Forecast Method*  to **“Frozen Forecast”** * Click **<Apply>** | ` |
|  | 1. Backup the program ***“pgmid-xx after cost class updates”***  * Click **<File>, <Manage Files>, <Backup Files>** * Place a checkmark by the program **“pgmid”** * Ensure there is a check in the box to Include project ancillary files * Click the **Backup** button * Navigate to the current month **Cobra Backups** folder * *File name* is “***pgmid-02 after cost class updates”*** * Click **<Save>** |  |
|  | 1. Advance the calendar  * Click **<Project>, <Advance Calendar>** * Select the correct program by placing a check in the box * Verify the *Advance calendar to* is the next reporting period you will be processing * Click **<Next>** * Do not check the box to Automatically change the status of LOE Work Packages * Click **<Finish>** * When the window appears confirming the project has the Scale/Retain EAC option, click **<Yes>** |  |
|  | 1. Update Required Set Calendar  * In COBRA from the Navigation Pane click Calendars * Double click on the calendar for the project * Select 18 Required Set * Move “PREVIOUS” & “TODATE” down 1 month and make sure there is an \* in the “18 Flag” Column * You will receive a message that Calendar Sets 18 and 19 do not have PREVIOUS, TODATE, and AT COMPLETE on the same periods. Do you want to align 19 with 18? **Click <Yes>.** |  |
|  | 1. Update Fiscal Calendar  * In COBRA from the Navigation Pane click Calendars * Double click on the calendar for the project * Select 19 Required Set * Add a label in the first blank month after TODATE and put a \* in the flag field. * Close |  |
|  | 1. Update 06 Horizon Calendar  * In COBRA from the Navigation Pane click Calendar * Double click on the calendar for the project * Select 06 Planning Horizon * Move TODATE to the prior processing month * Move THISMONTH to the current processing month * Move PLAN 1, PLAN 2 and PLAN 3 each down a month * Make sure each has an \* in the flag field |  |
|  | 1. Backup the program ***“pgmid-xx after calendar advance”***  * Click **<File>, <Manage Files>, <Backup Files>** * Place a checkmark by the program * Ensure there is a check in the box to Include project ancillary files * Click the **Backup** button * Navigate to the current month **Cobra Backups** folder * *File name* is “***pgmid-03 after calendar advance”*** * Click **<Save>** |  |
|  | 1. Make a copy of the program. **File>Save As.** Name it **“0465 after Calendar Adv”.** |  |