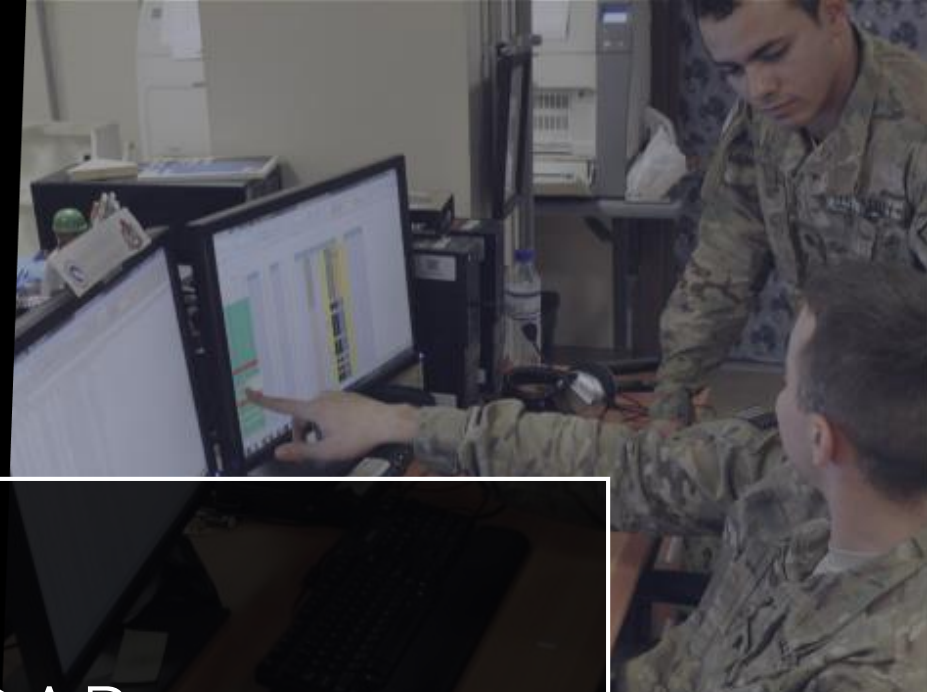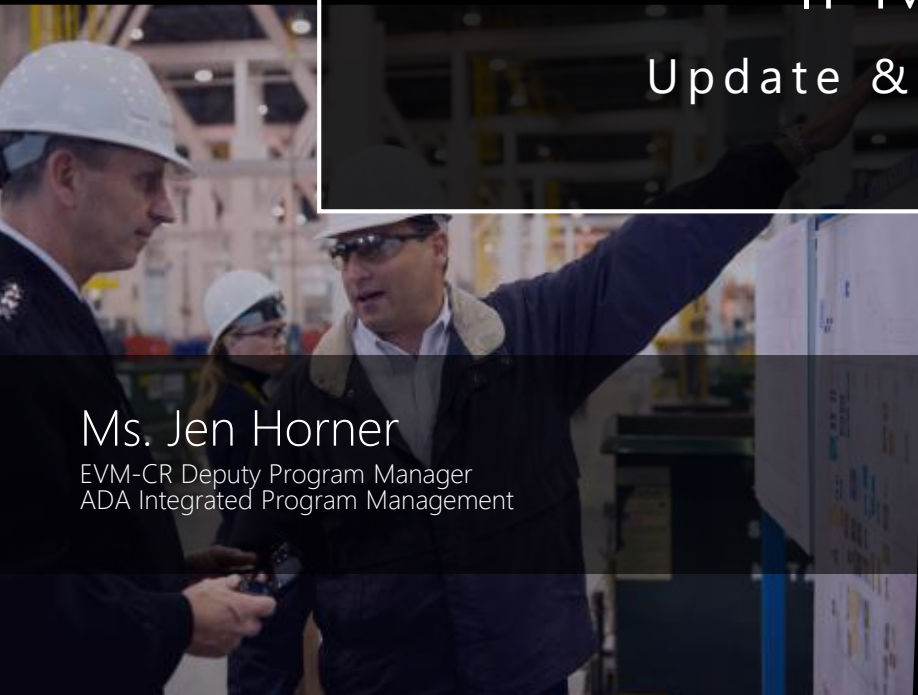# IPMDAR

Update & Capabilities

Ms. Jen Horner
EVM-CR Deputy Program Manager
ADA Integrated Program Management

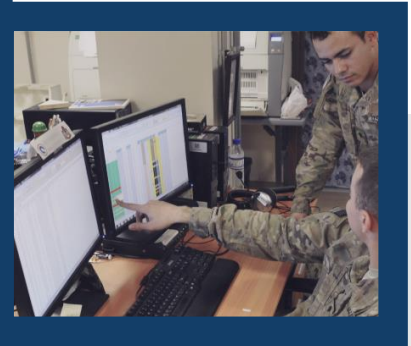NDIA Spring Meeting
April 14, 2022

IPMDAR Update

- Reporting Requirements
- CDRL Tailoring
- Resources/Tools
- EVM-CR Delivery

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Pre-PARCA: CPR & VARs DID/IMS DID

- Separate Disconnected Deliverables
- CPR (Formats 1-4) In a printable format (and EDI 839)
- IMS in a native format tool (or printed image of a GANTT)

PARCA (2012): IPMR DID Combines CPR, IMS and VARs

- Reporting requirements aligned to capture integrated Cost/Schedule Data
- Adopted UNCEFACT XML[1] Schema for all formats
  - Formats 1-4 mostly unchanged (EDI to UNCEFACT); plus printable reports
  - Introduced Format 6 (XML Snapshot of IMS); plus native
  - Introduced Format 7 (time-phased format 1)

DASD AE (2020): EVMS Data (Not Printable Reports)

- Corrects defects with Cost/Schedule integration
- JSON[2] encoding replaces XML
  - Format 6 content mostly unchanged (IPMDAR SPD)
  - Replace formats 1-4, 7 with data more closely aligned to contractors EVMS (no printable formats)
- Reframed VARs to facilitate a conversation (what is needed by Gov't)

(1) XML eXtensible Markup Language (2) JSON Java Script Object Notation

IPMDAR DID Reference

1.2 The IPMDAR consists of the following three components:

1.2.1 Contract Performance Dataset (CPD). Provides performance/execution data from the contractor's existing management systems.

1.2.2 Schedule (Comprised of both the Native Schedule File and the Schedule Performance Dataset (SPD)). Provides data from the contractor's Integrated Master Schedule (IMS).

1.2.3 Performance Narrative Report (Comprised of both the Executive Summary and the Detailed Analysis Report). Provides narrative analysis of data provided in the CPD and the Schedule.

IPMDAR	IPMR
CPD (Contract Performance Dataset) (JSON)	Formats 1-4, 7 XML (UNCEFACT)
SPD (Schedule Performance Dataset) (JSON)	Format 6 (UNCEFACT)
Native Schedule	Native Schedule
Performance Narrative • Executive Summary • Variance Analysis	Format 5
Not Required	Formats 1-4 (Human Readable)

IPMR

- All UNCLASSIFIED ACAT I Programs required to submit to the EVM-CR

IPMDAR

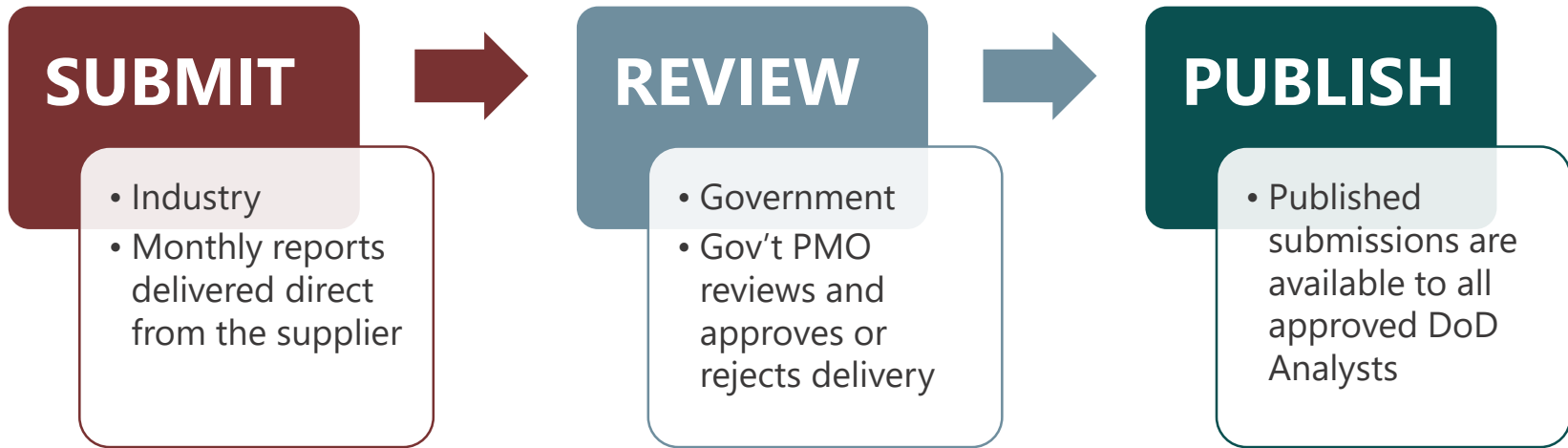- All UNCLASSIFIED Programs, regardless of ACAT level, required to submit to the EVM-CR

IPMDAR DID Reference

1.5 Data Repository. The Office of the Under Secretary of Defense (OUSD) Acquisition, Analytics and Policy (AAP) Earned Value Management (EVM) Division maintains a secure website, the Earned Value Management Central Repository (EVM-CR)[2], for all unclassified, proprietary and non-proprietary data from programs and contracts that have EVM reporting requirements, regardless of a program's Acquisition Category (ACAT) designation or a contract's value. The EVM-CR is housed on an unclassified computer system designed to control sensitive and proprietary contractor data. The system will accept only unclassified data including contracts with EVM data that are marked as For Official Use Only (FOUO), Business Sensitive, and/or Proprietary. No classified material shall be provided to the EVM-CR. Refer to DoD Manual 5200.01 Volume 4 for information regarding designation and marking of Controlled Unclassified Information (CUI).

What is the EVM-CR?

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- *The EVM-CR is a data repository managed by the IPM division of OUSD(A&S) ADA, the office of Acquisition Data and Analytics.*

- *The purpose of the EVM-CR is to establish a source of authoritative Earned Value Management (EVM) and Integrated Program Management (IPM) data for the Department and to provide prompt access for PMOs, Services, OSD, and DoD Components.*

SUBMIT ➡ **REVIEW** ➡ **PUBLISH**

- Industry
- Monthly reports delivered direct from the supplier

- Government
- Gov't PMO reviews and approves or rejects delivery

- Published submissions are available to all approved DoD Analysts

IPMDAR doesn't change this process

IPMDAR CDRL Tailoring Options

- Level of Reporting (Control Account, Work Package)
- Units (Dollars, Hours or Both)
- Frequency (Monthly, Quarterly, Annually, Incremental or Upon Request)
- Variance Analysis Options (Government Identified Variances, Government Specified Variance Thresholds, Specific Number of Variances)
- Tailoring out "formats" (e.g. Schedule only deliverable)
- Eliminate Performance Narrative Report and use Internally Generated Contractor Explanations or Performance Reviews
- Eliminate SPD and receive Native Format Schedule only.

Additional Tailoring Options discussed in the IPMDAR Implementation & Tailoring Guide available on the IPM Public website

IPMDAR DID Reference

1.8.1.1 Incremental Delivery. Reports may be provided incrementally, including preliminary data, with the number of days for delivery of each submittal tailored in the CDRL. Data delivered is not considered authoritative until the final submission and signature. The recommended incremental delivery process is the Schedule, followed by the CPD and the Executive Summary, Government review of submittals, Government directed Detailed Analysis, Contractor Detailed Analysis delivery and all final data.[5]

IPMDAR Implementation & Tailoring Guide: Example

For notional and guidance purposes the incremental delivery plan could be constructed as follows:

1. SPD – To be delivered with native file five (5) working days after the end of the contractor's accounting period (may be labeled preliminary)
2. CPD – To be delivered with the Executive Summary ten (10) working days after the end of the contractor's accounting period (may be labeled preliminary)
3. Contracting Office to select items for detailed analysis (variances) – to contractor thirteen (13) working days after the end of the contractor's accounting period
4. Performance Narrative Analysis – to be delivered NLT sixteen (16) working days after the end of the contractor's accounting period along with any other "final" versions of previously submitted files

Note: The notional incremental delivery plan above is not additive.

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OPTION 1: Government Identified Control Account Variance (Incremental Reporting Only)

- Based on Government Review of Interim submissions, government identified X number of variances for the contractor to report

OPTION 2: Government Specified Variance Analysis Thresholds

- Current cost variances exceeding +/- $XXK or +/- Y%
- Current schedule variances exceeding +/- $XXK or +/- Y%
- Cumulative cost variances exceeding +/- $XXK and +/- Y%
- Cumulative schedule variances exceeding +/- $XXK and +/- Y%
- Variances at completion exceeding +/- $XXXK and +/- Y%

OPTION 3: Specific Number of Control Account Variances

- Current cost variances: top X variances*
- Current schedule variances : top X variances*
- Cumulative cost variances : top X variances*
- Cumulative schedule variances exceeding : top X variances*
- Variances at completion exceeding : top X variances*

*by dollar value or %

ACQUISITION
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ADA · Integrated Program Management

EVM-CR | 🔒 Log In | Request Account | How to Register

Featured
Resources

📄 **EVM-CR Guides**

EVM-CR Submitter and Reviewer user guides newly updated (February 2022).
Submitter Guide
Reviewer Guide

📄 **IPMDAR Resources**

Sample CDRLs - January 2022
DID - August 2021
DID Memo - August 2021
DEI and FFS - March 2020
Implementation & Tailoring Guide - August 2021

Sample CDRLs
- Standard IPMDAR Requirement (no tailoring)
- Incremental Reporting
- Major Subcontractor
- Schedule Only

DID: DI-MGMT-81861
- Links to DID in ASSIST; all previous versions available
- Latest version is REV C (30 Aug 2022)

DEI (Data Exchange Instructions) and FFS (File Format Specification)
- CPD and SPD technical documents explaining requirements to create valid files

Implementation & Tailoring Guide
- Provides guidance on using the IPMDAR DID

Downloadable Tools

- **Validation Tools** – validate CPD & SPD files against the Data Exchange Instructions (DEI)

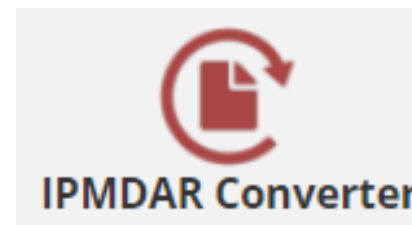- **Conversion Tools** – convert the CPD & SPD files into legacy IPMR formats

Where can I get these?

- Available for download from the IPM Public Website

NOTE: Government firewalls may block these tools from being downloaded.

Web Based Conversion Tool

- **CPD Conversion** – converts the CPD file to a legacy IPMR UN/CEFACT file

- **SPD Conversion** – converts the SPD file to a legacy IPMR Format 6 file

IPMDAR Converter

NOTE: Users must have an approved EVM-CR account to access the web based tools.

IPM Public Website:
https://www.acq.osd.mil/asda/ae/ada/ipm/

Machine Readable Files

- JSON and UN/CEFACT files (IPMDAR CPD, SPD and IPMR Formats 1-4, 6 and 7) are read by the system and the appropriate file type will be assigned.

Human Readable Files

- File type of PDF, Word, XLS, PPT, and Native Schedule files must be identified by submitter to receive credit for delivery

Upload File ✕

○ Native Schedule

○ Other/Human Readable
- ☐ Cost
- ☐ Format 5
- ☐ Executive Summary
- ☐ Variance Analysis
- ☐ Signature Page

Component

Add a comment

Submit

Review Data Quality Validation Report

- Display of all checks run on the file with an indication of pass/fail
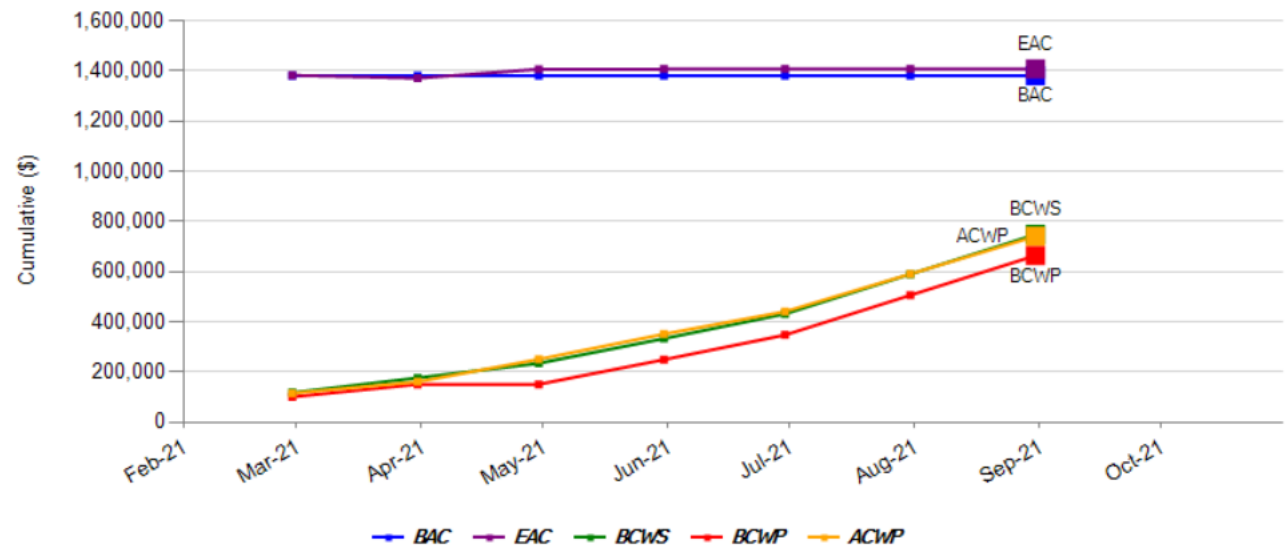
Review Performance Over Time Chart

- 5 Key EVM Metrics charted over the life of the effort. Includes indicator of where data in submitted file falls in relation to previous submissions.

Quick Links

🔍 Data Quality Validation
🔍 Performance Over Time

Spikes or dips could indicate a Data Quality Issue

Performance Over Time - PMB

Open

- Submission is in Submitter control, but Review team can access files and make comments

Pending

- Submitter has submitted required files, Review team has **5 days to review** (optionally can extend to a maximum of 10 days if needed)

Published

- Review team has completed their review and Lead Reviewer has Published the submission or review period has expired and submission has auto-published. All approved government Analysts now have access.

Rejected

- Review team has rejected submission. Submitters and Reviewers assigned to the contract will still have access to the submission. Government Analysts will not.

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XLS Export
- Provides a tabular view of JSON Tables and Data

CSV Export
- Provides JSON data export in a pivotable table

XML Export
- Generates an IPMR UN/CEFACT file from the provided JSON

Submission Files
Cost

	File Name				Report Type
	CPD Sample File.zip	XLS	CSV	XML	Electronic Cost

Reminders

- Do not require delivery of legacy IPMR or CPR Formats (UN/CEFACT, human readable formats 1 – 4* or legacy wInsight)

- Do not tailor out IPMR "Formats" (Format 1 – 4)

- Do not require a specific due date, such as delivery is required on the 25th of each month

Excludes Performance Narrative, which is in human-readable contractor format

Recommendations

- Discuss with contractor definition of "Business Days"
  - NLT 16 <u>GOVERNMENT</u> Business Days after the end of the contractors accounting period.

Any Questions?

Ms. Jennifer Horner

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