

cPet

User Manual

Version 2.4

*A Guide to the CSDR Planning
& Execution Tool*

November 2012



Table of Contents

1: Introduction	1
1.1 cPet Overview	1
1.2 What's New	3
1.3 Getting Started.....	7
2: Tutorials.....	9
2.1 Importing Existing Plans	9
2.1.1 Importing a Program Plan.....	9
2.1.2 Viewing the Basic Information.....	12
2.1.3 Viewing the WBS Editor	15
2.1.4 Viewing the Submission Events	17
2.1.5 Importing a Contract Plan.....	18
2.1.6 Importing a Subcontract Plan.....	24
2.1.7 Linking Documents.....	25
2.1.8 Converting Plans to 2011 Version	28
2.1.9 Importing Errors to Avoid	30
2.2 Creating Plans	36
2.2.1 Creating a Program Plan	36
2.2.1.1 Creating a Program Plan.....	36
2.2.1.2 Editing the Basic Information.....	38
2.2.1.3 Editing the WBS	40
2.2.1.4 Editing the Submission Events	44
2.2.1.5 Building the RDT	48
2.2.2 Creating a Contract Plan	51
2.2.2.1 Creating a Contract Plan.....	51
2.2.2.2 Basic Information of a Contract Plan	52
2.2.2.3 WBS Editor of a Contract Plan.....	54
2.2.2.4 Submission Events of a Contract Plan.....	58
2.2.3 Creating a Subcontract Plan.....	58

2.2.3.1	Creating a Subcontract Plan	58
2.2.4	Exporting Plans.....	59
2.3	Cost Reports	61
2.3.1	Importing a 1921	61
2.3.2	Importing a 1921-1	63
2.3.3	Importing a 1921-2	65
2.3.4	Importing a 1921-3	67
2.3.5	Creating a 1921	67
2.3.6	Creating a 1921-1.....	70
2.3.7	Importing/Exporting a Flat File	73
2.3.8	Comparing Cost Reports.....	76
2.3.9	Validating Cost Reports	77
2.3.10	Validation Rules.....	80
3:	Dialogs.....	103
3.1	1921 Basic Info Dialog	103
3.2	1921 Cost Data.....	109
3.3	1921 Cost Report Comparison	110
3.4	1921 Validation Results	112
3.5	1921-1 Basic Info Dialog	117
3.6	1921-1 Cost Data.....	123
3.7	1921-1 Cost Report Comparison.....	125
3.8	1921-1 Validation Results	127
3.9	1921-2 Basic Info Dialog	131
3.10	1921-2 Cost Data.....	136
3.11	1921-2 Validation Results	138
3.12	1921-3 Basic Info Dialog	141
3.13	1921-3 Cost Data.....	142
3.14	1921-3 Validation Results	143
3.15	Program and Contract Plan Basic Info Dialog	145
3.16	Contractor Maintenance Dialog	149

3.17	Contractor Selection Dialog	151
3.18	Conversion Results for Cost Reports	155
3.19	Conversion Results for Flat Files	157
3.20	Conversion Results for Plans	159
3.21	Create Contract Plan.....	164
3.22	Create Program Plan.....	165
3.23	Import Dialog	166
3.24	Export Dialog	166
3.25	Link Documents Dialog	167
3.26	New Contractor	168
3.27	Open Dialog	168
3.28	Options Dialog	168
3.29	RDT Dialog.....	171
3.30	Select a Contract Plan Dialog.....	173
3.30.1	Import Events from Contract Plan	173
3.31	Select a Contractor	175
3.32	Select a Cost Report Dialog	175
3.33	Select Document Version Dialog.....	175
3.34	Select Plan	175
3.35	Select Reports to Compare	176
3.36	Submission Events Dialog	176
3.37	Submission Validation	180
3.38	WBS Editor Dialog	183
3.39	WBS Naming Discrepancies	188
3.40	Validation Wizard Dialog	189
4:	References	193
5:	Glossary.....	194
6:	Index	199

1: INTRODUCTION

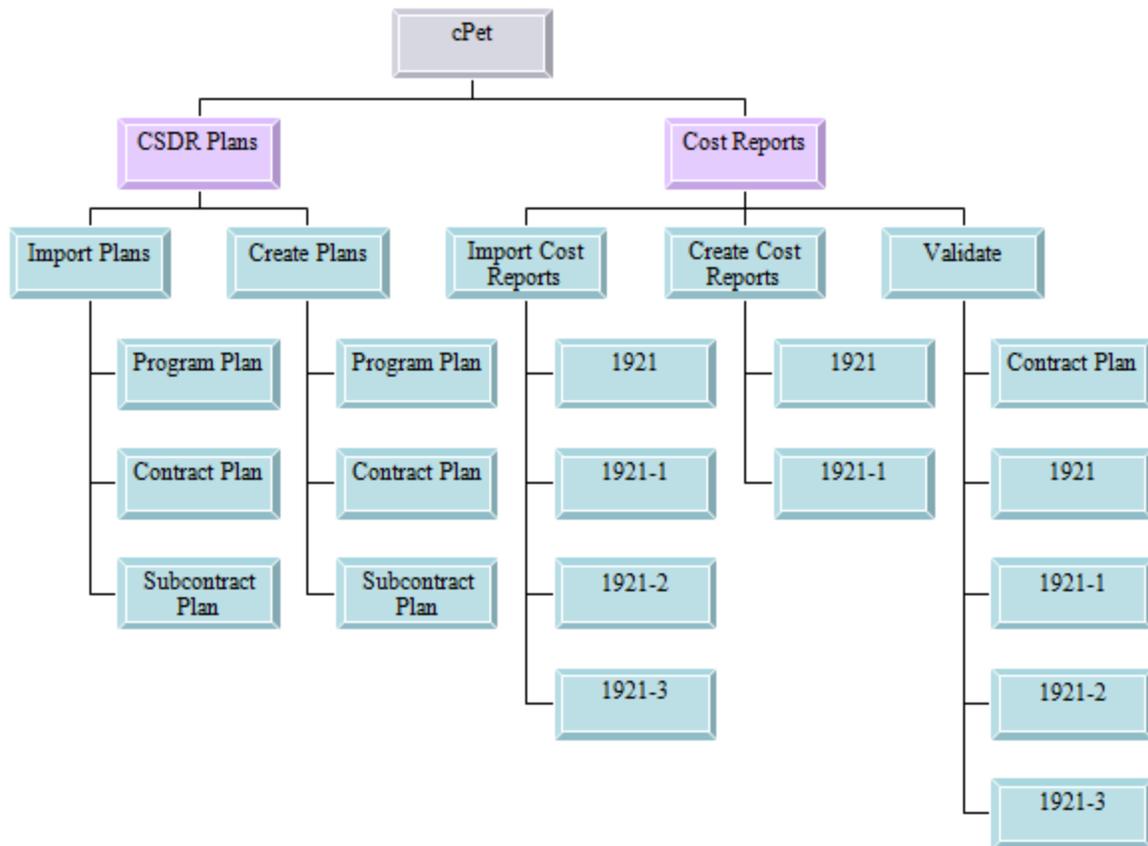
1.1 CPET OVERVIEW

cPet (CSDR Planning and Execution Tool) is designed to handle CSDR (Cost and Software Data Reporting) plans and cost reports. cPet deals with two main categories in viewing plans: importing and creating documents. Existing plans and cost reports can be imported into cPet and easily reviewed and edited. cPet provides warnings where data are missing or invalid. The importing process generates an XML version of the document. Furthermore, plans can be exported to PDF to resemble the DD Form 2794.

Plans can also be created from scratch using cPet's editing tools. Similar to the imported plans, cPet generates an XML version of the new plan, and the data can be viewed in a PDF or Excel replica of the DD Form 2794.

In addition to managing CSDR data, cPet provides an automated validation process for cost reports. An error log displays warnings pertaining to missing, incomplete, inconsistent, and numerically inaccurate data. Based on the validation results, the user can choose to accept or reject the report. The end product is a validation letter explaining the results.

The flowchart below shows how cPet is organized into importing and creating CSDR plans, as well as importing and validating cost reports.



Proceed to Getting Started to follow a series of tutorials relating to importing, creating, and validating documents.

1.2 WHAT'S NEW

October 31, 2012

cPet v. 2.4 Release

- Added support for 1921-3 validation
 - Added support for 1921-2, including the following:
 1. XML schema (i.e. file format)
 2. XML import/export
 3. Excel DD Form import/export
 4. Graphical User Interface for viewing/editing data in cPet
 5. 1921-2 flat file import/export
 6. 1921-2 Validation
 - 2011 plans exported as Excel DD 2794 now paginate correctly for better printing formats
 - “Number of Units” fields now import correctly from Excel for 2011 version 1921 and 1921-1, allowing them to be validated.
-

Updates for Version 2.3 Release, February 1, 2012

- * Added support for importing and creating new plans and cost reports of the 2011 DID version.
- * Contract plans can now be imported or created without the presence of a program plan open in cPet.
- * In previous versions of cPet, WBS elements on a contract plan’s WBS Editor were highlighted green (by default) if the elements also appeared on the program plan. This green highlighting no longer occurs.
- * The “Edit > Insert WBS from Existing Plan” command on a contract plan’s WBS Editor has slightly changed. In previous versions, this command would insert only those WBS

elements that were checked on the program plan's RDT. In Version 2.3, the entire program plan's WBS is inserted.

* There are a few options for creating a new plan: creating a plan from scratch and cloning an existing plan. For a new contract plan, there is also the option to create the plan based on a parent plan's RDT.

* It is not necessary to select a contractor before importing or creating a contract plan.

* There is a single menu item to import or create a contract plan or subcontract plan. For 2007 and 2011 documents, users can change the Plan Type to "Subcontract" in the Basic Info window to differentiate from the Prime Contract.

* The "Contract Information" tab is added to the Basic Info window for contract plans. This tab includes information such as the contract number, contractor name, organization, division, and (for the 2011 version) the appropriation and DD 1921-3 required report check box.

* Added support for importing a contractor's name, division, and location from the DD 2794 Excel file. Users do not have to select a contractor in cPet before importing a contract plan.

* When a new contract plan is created, the contractor name will appear as "TBD" until the user updates the name under View > Contractors.

* Provided the option to set the WBS System Type to MIL-HDBK-881A or MIL-STD-881C.

* Added support for importing 1921-3s.

* Added new validation rules for 1921s:

- The contract price must be a number, empty, or "N/A."

- The contract ceiling must be a number, empty, or "N/A."

- The summary element "Reporting Contractor FCCM" must have a non-zero Total At Completion cost.

- The Systems Engineering/Program Management WBS element must have a non-zero Total At Completion cost.

- If the Report Cycle on the 1921 Basic Info is marked as "Final," then the summary element "Reporting Contractor Undistributed Budget" Total At Completion cost must be zero.

- If the Report Cycle on the 1921 Basic Info is marked as "Final," then the summary element "Reporting Contractor Management Reserve" Total At Completion cost must be zero.

- If the Report Cycle on the 1921 Basic Info is marked as "Final," then the summary element "Total Price" Total To Date cost must be at least 95% of the Total At Completion cost.
- If the Report Cycle on the 1921 Basic Info is marked as "Final," then the root element (e.g. top level element) To Date cost must be at least 95% of the At Completion cost. This rule applies to Nonrecurring, Recurring, and Total costs.
- The Total Price at Completion should equal the Contract Price. However, if the Contract Ceiling is provided, then the Total Price should be between the Contract Price and Contract Ceiling. If neither of these scenarios is true, then Remarks should be reported.

* Added new validation rules for 1921-1s:

- If there are costs on Line 18 "Total Direct-Reporting Subcontractor Dollars," then an explanation should be provided in the Remarks section.
- If Line 20 "Other Costs Not Shown Elsewhere" is greater than or equal to x% of Line 21 "Total Cost," then an explanation should be provided in the Remarks section (the actual percentage depends on the document version).

* Added command to update 2007 cost reports to 2011 versions

* Updated validation memo

* Updated the Narrative Text default headings for contract plans to be:

- Non-Recurring/Recurring Definitions
- Cost Accounting Standards (CAS) Disclosure Statement Differences
- 1921-3 Contractor Business Data Report
- ** (if required) 1921-2 Progress Curve Report

* Treat WBS elements whose siblings are all N/A as single child elements. One validation condition is that an element should not be the single child of another element. The definition of "single child" is broadened to include any non-N/A element whose siblings are all N/A.

Updates for Version 2.2 Interim Release, January 7, 2011

* Added support for importing 2007 Excel files (xlsx).

* Removed warning from 1921 validation: "Non-required reporting element omitted from 1921."

* Added 1921 and 1921-1 validation warning that flags negative figures.

Updates for Version 2.2, Nov 2009

- * Added a new “Flat File” import/export feature. Data can now be imported from a standard flat file format into cPet. Also, data already read into cPet can be exported into the flat file format.
- * The Program Name for contract plans is now editable within cPet.
- * Added a new validation rule for 1921’s: cPet will report a warning if there is zero cost in the Total At Completion column for either the “Reporting Contractor G&A” summary element or the “Reporting Contractor Profit/Loss or Fee” summary element.
- * Updated 2003 DD 1921-1 quantity validation.
- * Removed document-level Remarks field from Basic Info of 1921-1. Added Remarks field for each WBS Element on the Cost Data of the 1921-1.

Updates for Version 2.1, Jun 2, 2009

- * Added functionality to export a 1921 and a 1921-1 to Excel
- * Added 1921 and 1921-1 Cost Report Comparison feature
- * Added import warnings for missing summary elements on plans
- * Added Cut/Copy/Paste commands in WBS Editor. WBS Elements can be pasted in Excel, and likewise, elements from Excel can be pasted in the WBS Editor
- * Added “Free Edit Mode” in WBS Editor. In Free Edit Mode, parent/child relationships among WBS elements are relaxed so that individual elements can be indented and moved without changing the indentation or position of other elements.

Updates for 2.0 Production Jan 13, 2009

- * Moved fields for Total Est. Contract Value and Software Contract Value from the Basic Info to the RDT. This change relates to both the program plan and the contract plan.
- * On DD 2794 plan exports, the N/A will now appear in the 1921 column (instead of the CWBS column) for WBS elements that do not require cost reports.
- * Added a warning for blank contract numbers in the Conversion Results when importing contract plans.
- * Added up/down toolbar buttons in the Narrative Text on the plan Basic Info windows.
- * Added Expand/Collapse All commands to the WBS Editor.
- * Modified the DD 2794 Excel export so that text in fields such as the Preparing Organization wrap.

Updates for 2.0 Beta Nov 5, 2008

* Fixed tools used to create a 1921/1921-1 Excel template. The user can now export the cost data from a 1921/1921-1 to an Excel template, which can readily be imported into cPet. See the updated help topics “Creating a 1921” and “Creating a 1921-1” for details (found under Tutorials>Cost Reports).

* Changed summary element validation for 2003 1921. If all the subcontractor summary elements are blank/zero, then [Root WBS Element] = Total Cost (Less Reporting Contractor G&A & Profit or Fee). See the help topic “Validation Rules” for more information.

* Changed 1921 validation results to include WBS element code for the error, “Child elements do not sum to parent element correctly.”

1.3 GETTING STARTED

Once cPet opens, the main screen is displayed:



There are a few recommendations to getting started:

- [Import](#) an Excel-based Program or Contract Plan by selecting File > Import

- [Create](#) a new Program or Contract Plan by selecting File > New
- Open an existing cPet document by selecting File > Open
- Drag and drop cPet files from Windows Explorer into this window
- Select Help to access the built-in Help System

Perhaps the best way to familiarize yourself with cPet is to first import plans, and then create new plans.

Proceed to [Importing a Program Plan](#) to start.

2: TUTORIALS

2.1 IMPORTING EXISTING PLANS

2.1.1 IMPORTING A PROGRAM PLAN

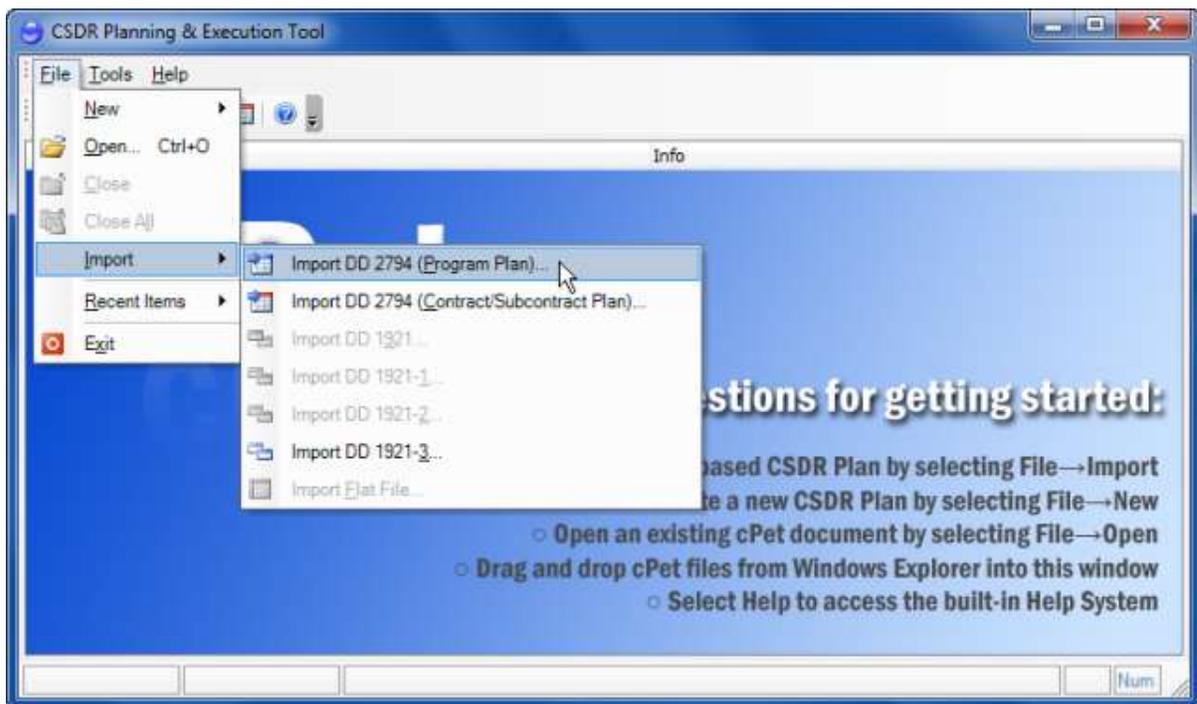
The Import Program Plan command is used to convert DD 2794 Excel files into XML files that can then be reviewed and edited in cPet. To import a program plan, start with this tutorial and then follow the successive tutorials as listed below:

[Viewing the Basic Information](#)

[Viewing the WBS Editor](#)

[Viewing the Submission Events](#)

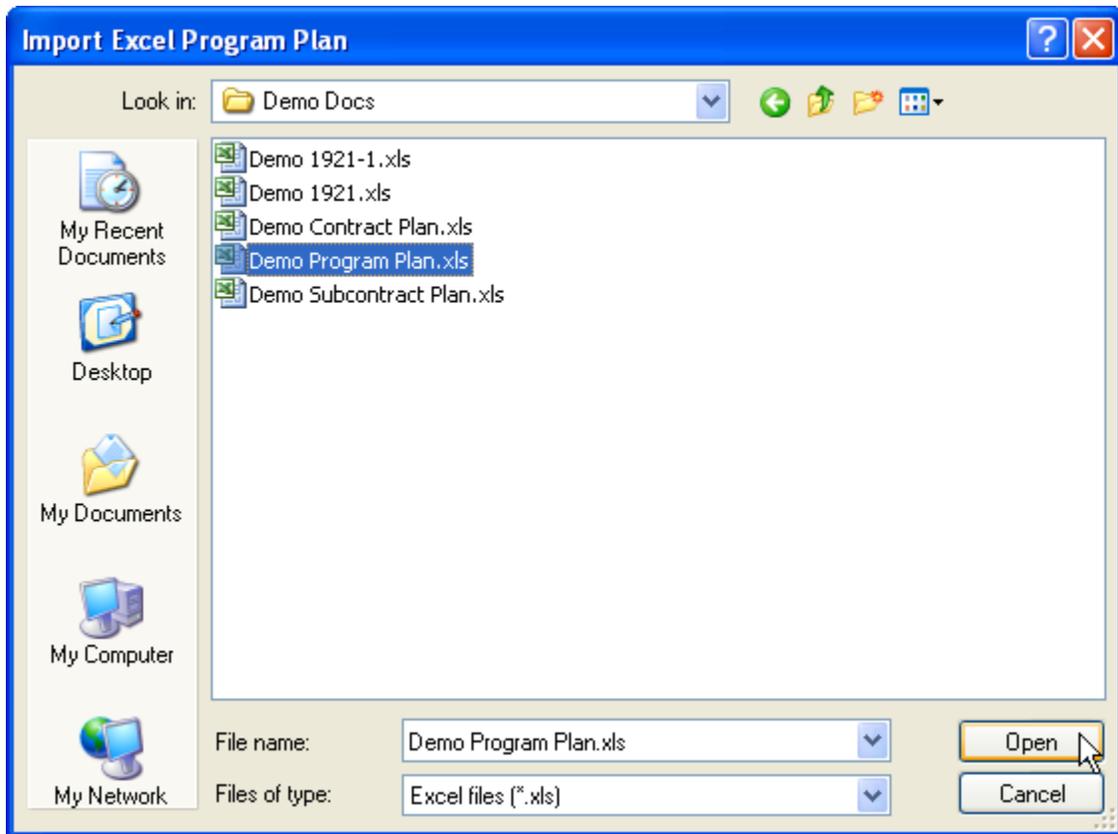
In the main window of cPet, click File > Import > Import DD 2794 (Program Plan).



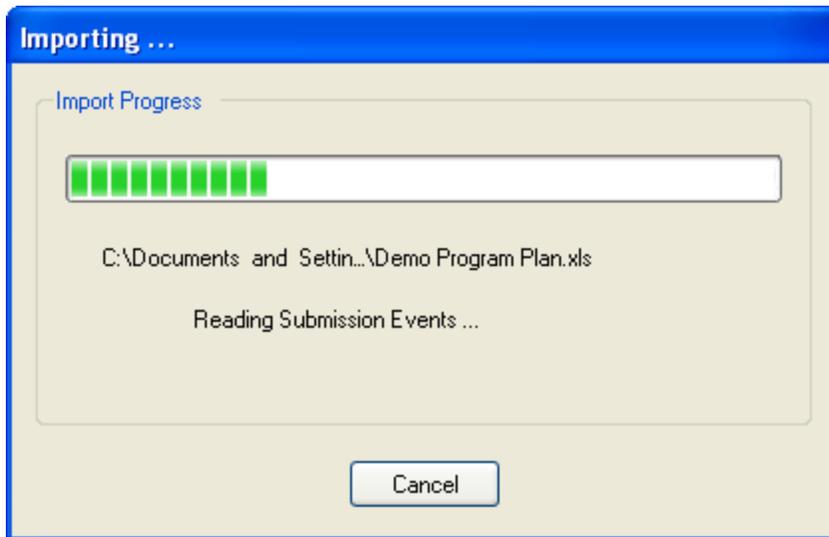
Select the file you want to import and click “Open.”

Tip: You can import files that use either Excel 2003 (with an .xls extension) or Excel 2007 (with an .xlsx extension).

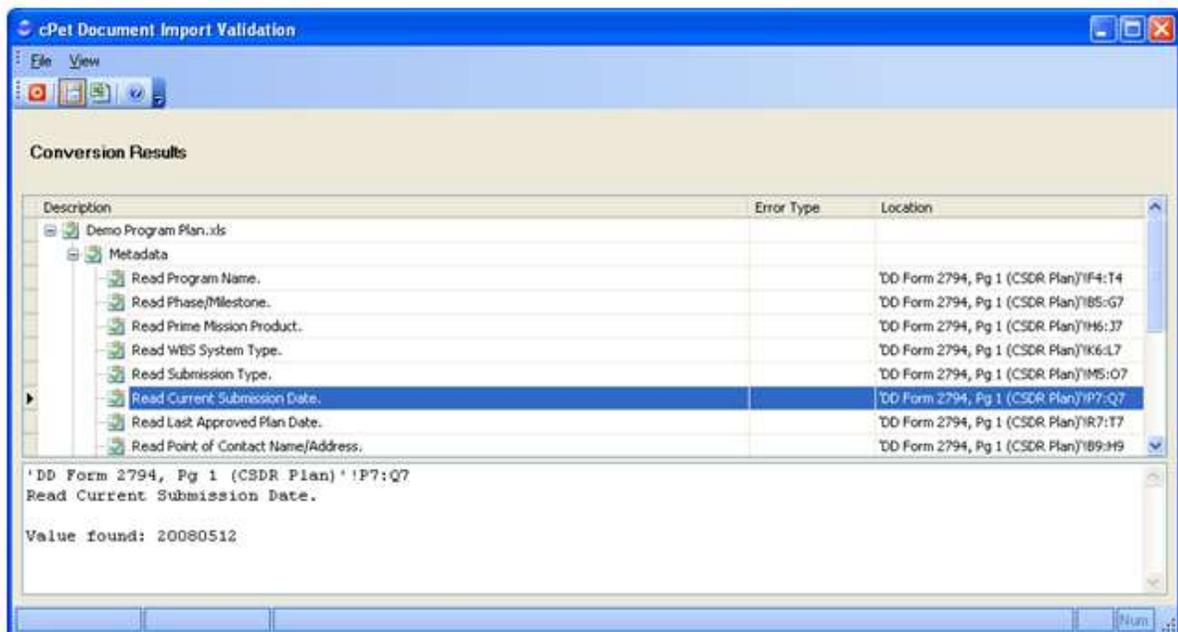
Tip: You must select a program plan that uses the 2003, 2007, or 2011 DD2794 format. The plan in this example uses the 2011 format.



Wait while the file imports.



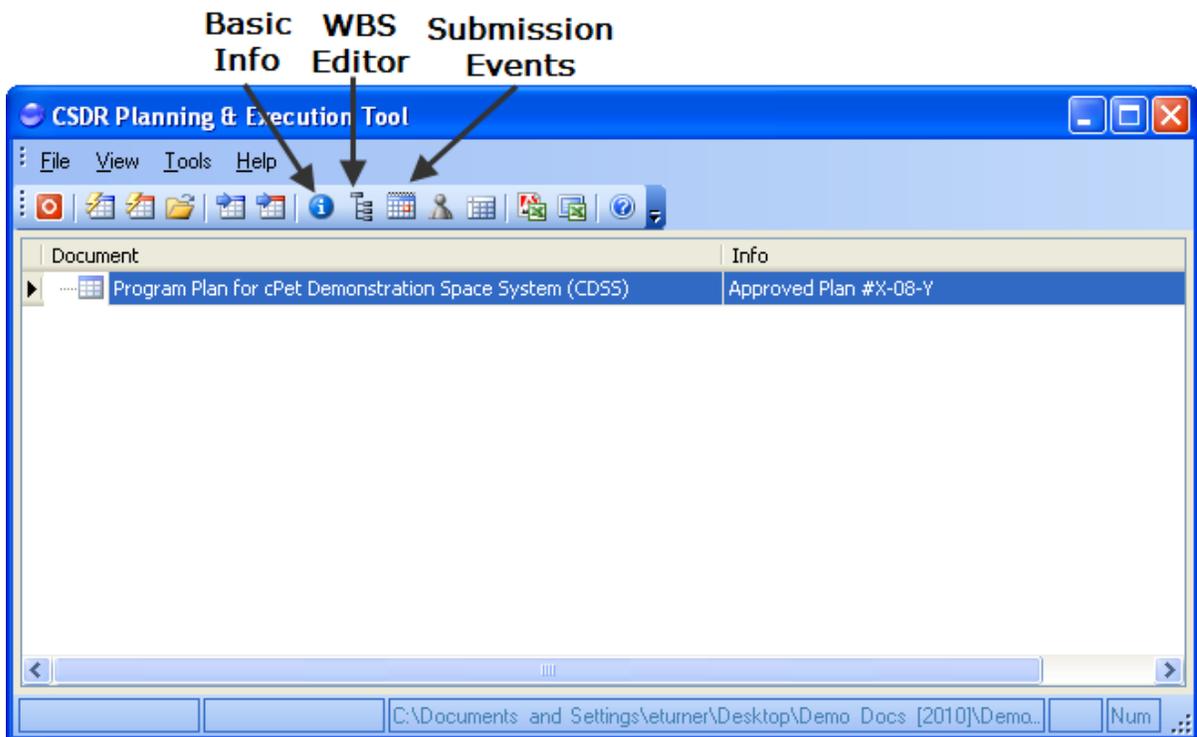
Once the file has finished importing, the Conversion Results window opens.



The green checks  indicate that the data imported correctly, and the yellow warnings  indicate errors. Review these [Conversion Results](#) to anticipate some of the problems that will be seen when comparing the Excel file to the data which imported into cPet.

The imported file now appears in the main screen of cPet.

There are three main components of viewing a plan: The Basic Info, WBS Editor, and Submission Events.



Proceed to [Viewing the Basic Information](#) to begin reviewing the program plan.

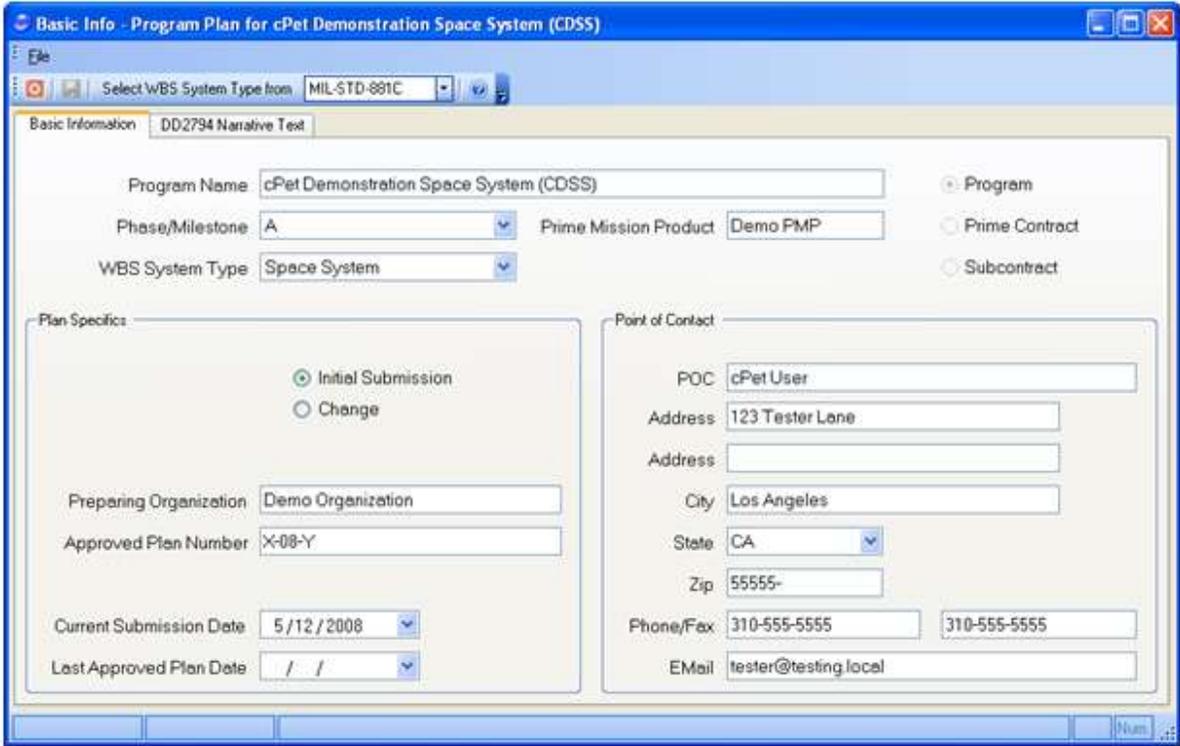
2.1.2 VIEWING THE BASIC INFORMATION

This tutorial is **step one** in the three-step process of importing a program plan:

- 1. View the Basic Information
2. View the WBS Editor
3. View the Submission Events

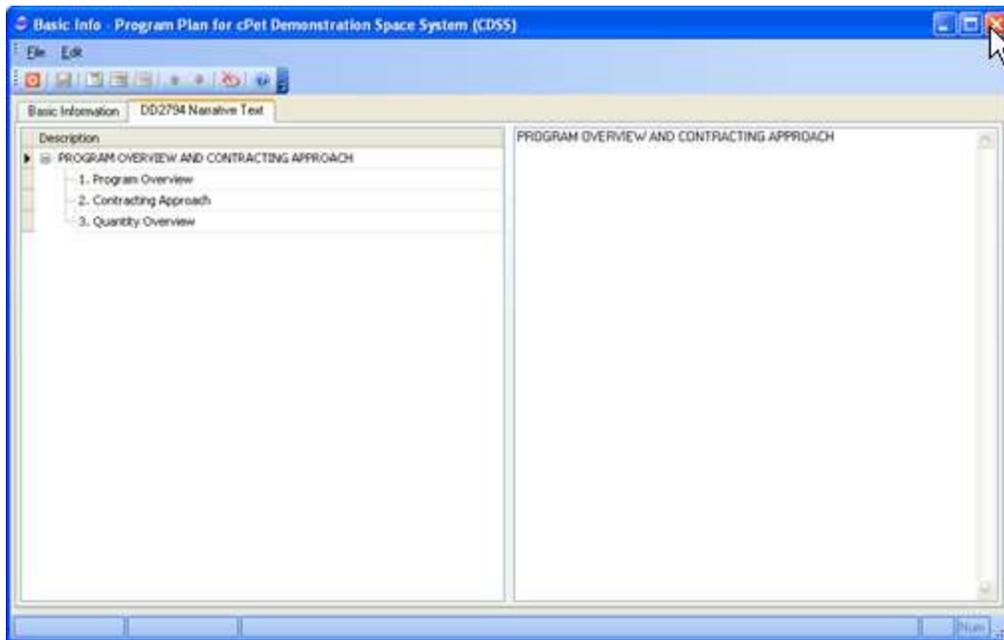
This tutorial will take you through the first of these steps – viewing the Basic Information.

Click the  icon to view the Basic Info.



Verify that all the header information imported correctly into cPet.

Click on the “DD2794 Narrative Text” tab of the Basic Info window.



Enter the text found in the remarks sections at the bottom of the DD 2794. This field will not import; the text must be entered manually or copied and pasted from the source.

Default headings are provided (“Program Overview,” “Contracting Approach,” and “Quantity Overview” for a program plan). However, headings can be added or modified using the following icons:

-  Add a new parent heading
-  Add a new sibling heading
-  Add a new child heading
-  Move entry up on the list
-  Move entry down on the list
-  Delete the heading

 *Tip: Images will not copy into the Narrative Text. This window is strictly text only.*

 *Tip: The "proper" way to organize the Narrative Text is to have a parent header, followed by a child header, followed by the actual descriptive text. For instance, the layout of the Narrative Text should be as follows:*

Parent Header

Child Header

Descriptive Text

Do not type information directly under the first two headers. If you do not follow the above layout, the text will not be properly formatted in the Remarks section when [exported](#) to PDF or Excel.

Save and close the Basic Info window.

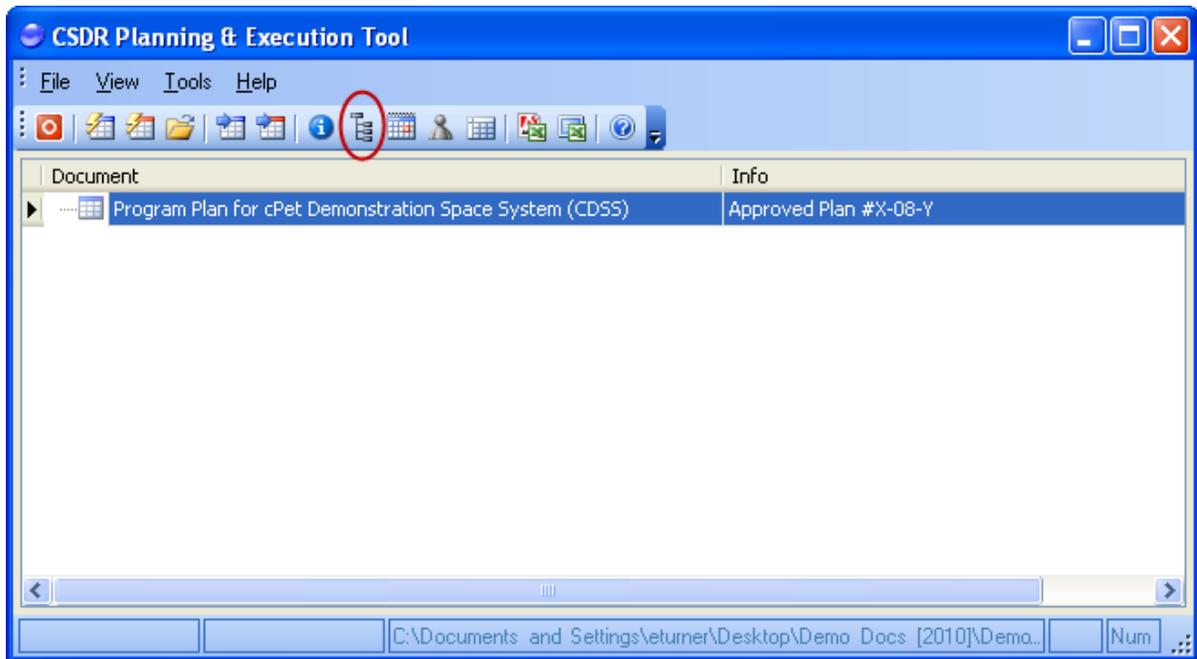
Proceed to [Viewing the WBS Editor](#).

2.1.3 VIEWING THE WBS EDITOR

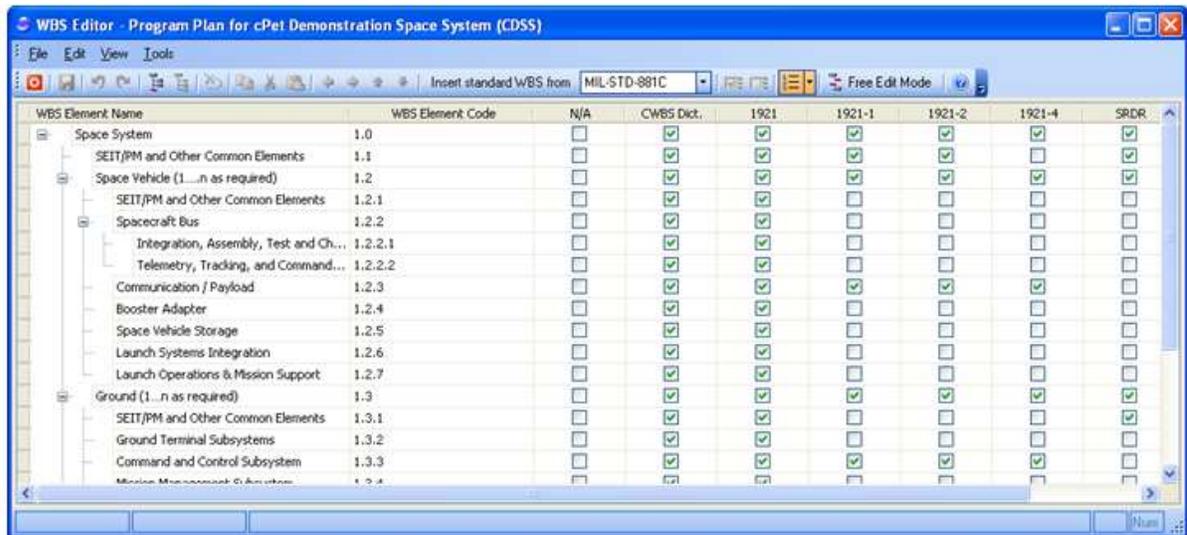
This tutorial is **step two** in the three-step process of importing a program plan:

1. View the Basic Information
- 2. View the WBS Editor
3. View the Submission Events

Click on the  icon in the main window of cPet to view the WBS Editor.



View the WBS Editor and verify that each WBS Element has the appropriate form checked.



Alterations to the WBS Editor (such as adding or moving a WBS element) are discussed in the tutorial [Editing the WBS Editor](#).

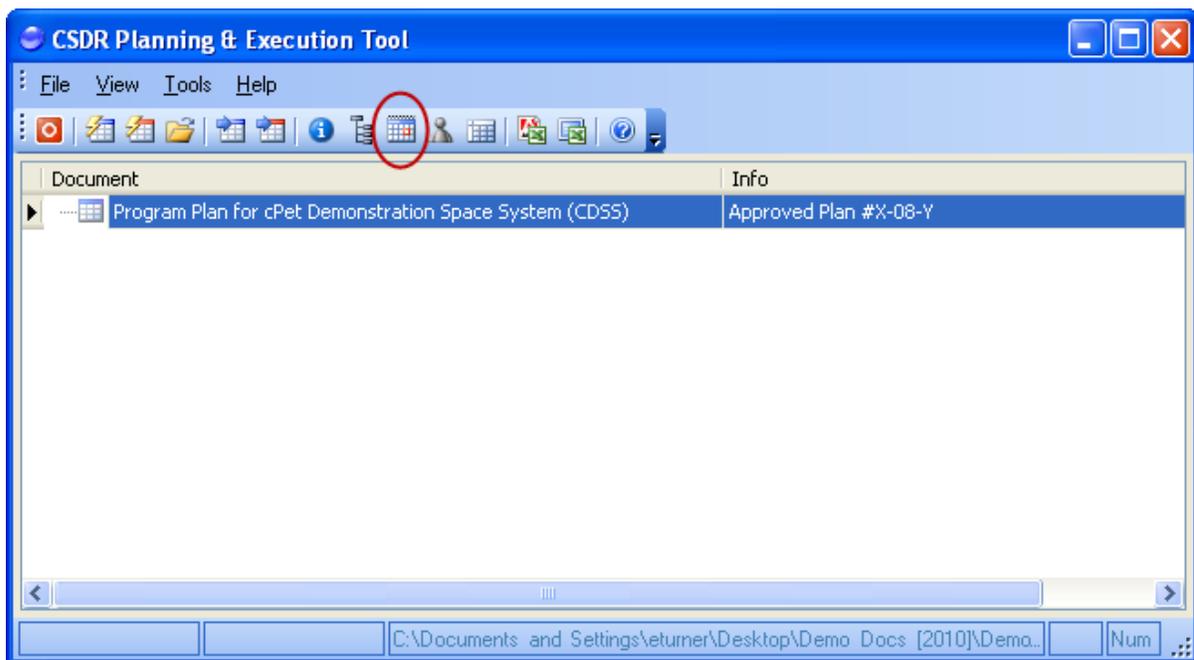
Continue reviewing the imported program plan by proceeding to [Viewing the Submission Events](#).

2.1.4 VIEWING THE SUBMISSION EVENTS

This tutorial is **step three** in the three-step process of importing a program plan:

1. View the Basic Information
2. View the WBS Editor
- 3. View the Submission Events

Click on the  icon to view the Submission Events.



View the Submission events and verify that the correct forms are checked and the dates have imported.

Event #	DwBS Dict.	1921	1921-1	1921-2	1921-4	SRDR Initial	SRDR Final	Event	As Of Date	Due Date
1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Initial Review	6/30/2006	6/31/2006
2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Preliminary Design Review (PDR)	10/31/2007	1/31/2008
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Critical Design Review (CDR)	10/31/2008	1/31/2009
4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Initial Operational Capability (IOC)	10/31/2009	1/31/2010
5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Final Review	1/31/2010	3/31/2010

Making changes to the Submission Events window is discussed in the tutorial [Editing the Submission Events](#).

You have now finished reviewing your imported plan. Continue to [Importing a Contract Plan](#) for the tutorial on how to import a contract plan.

2.1.5 IMPORTING A CONTRACT PLAN

In the main window of cPet, click File > Import > Import DD 2794 (Contract/Subcontract Plan).

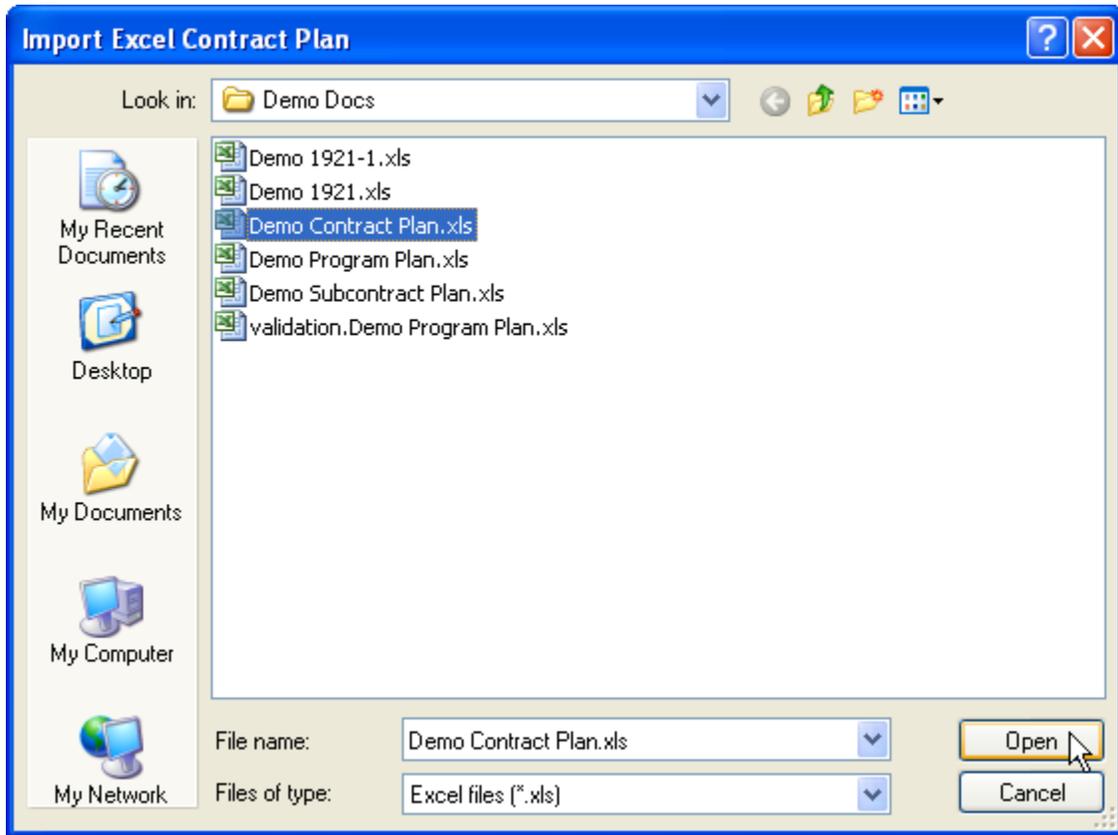
***T**ip: It is not necessary to have a program plan open in cPet before importing a contract plan. In this tutorial, however, we did already import a program plan.*



Select the contract plan to be imported and click “Open.”

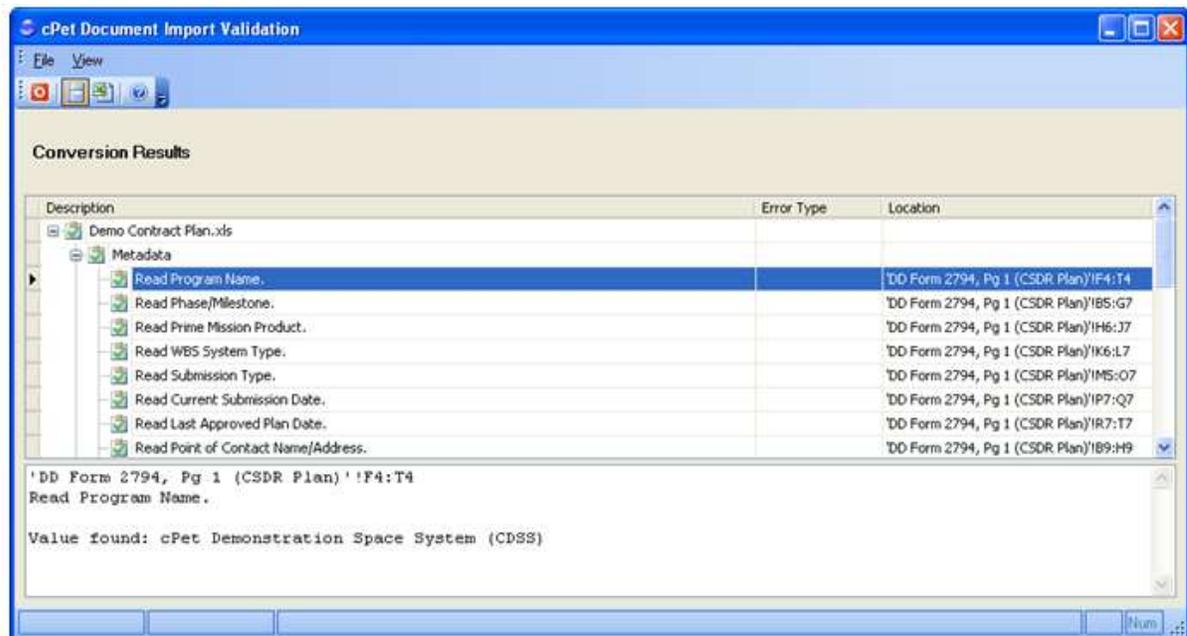
Tip: You can import files that use either Excel 2003 (with an xls extension) or Excel 2007 (with an xlsx extension).

Tip: You must select a contract plan that uses the 2003, 2007, or 2011 DD2794 format. The plan in this example uses the 2011 format.

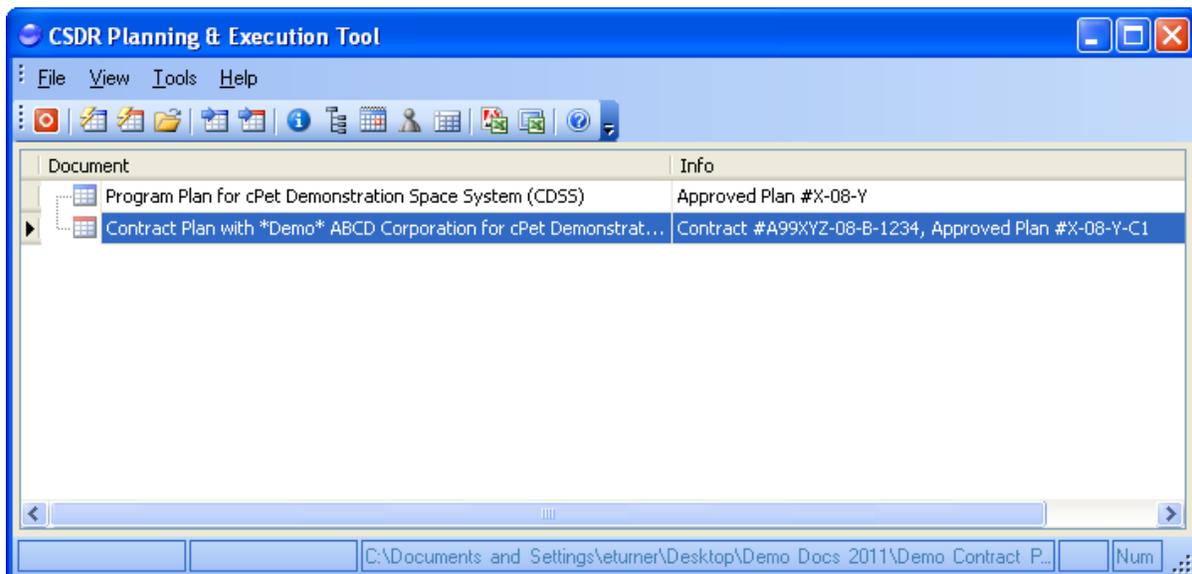


Wait for the file to import.

The [Conversion Results](#) are displayed. Review these results to be aware of importing problems.



The image below shows both the program plan and contract plan that have been imported into cPet. If you wish to indent the contract plan under the program plan, you can drag and drop the contract plan. This action will [link](#) the documents.



View the [Basic Information](#), [WBS Editor](#), and [Submission Events](#) of the contract plan as you did for the program plan.

Note that the plan type will be marked "Prime Contract" according to the DD 2794 Excel file.

The screenshot shows a software window titled "Basic Info - Contract Plan with Demo* ABCD Corporation for cPet Demonstration Space System (CDSS)". The window has three tabs: "Basic Information", "Contract Information", and "DD2794 Narrative Text". The "Basic Information" tab is selected. The form contains the following fields and options:

- Program Name: cPet Demonstration Space System (CDSS)
- Phase/Milestone: A
- WBS System Type: Space System
- Prime Mission Product: Demo PMP
- Plan Type: Prime Contract (circled in red), Program, Subcontract
- Plan Specifics: Initial Submission, Change
- Preparing Organization: Demo Organization
- Approved Plan Number: X-08-Y-C1
- Current Submission Date: 5/12/2008
- Last Approved Plan Date: / /
- Point of Contact: POC: cPet User, Address: 123 Tester Lane, City: Los Angeles, State: CA, Zip: 5555-, Phone/Fax: 310-555-5555, Email: tester@testing.local

Notice that compared to the program plan, the Contract Plan Basic Info has an additional tab - the **Contract Information**.

The Contract Information tab is shown below.

The Contractor Name, Division, and Location are imported if they are on separate lines in the Excel file. For 2011 contract plans, the Organization and the Division are broken out into separate fields.

9a. CONTRACTOR NAME/ADDRESS	
i. PERFORMING ORGANIZATION	ii. DIVISION
Demo ABCD Corporation	Special Research Division Santa Barbara, CA

For 2003 and 2007 contract plans, the contractor name, division, and location should appear as follows:

12a. CONTRACTOR NAME
Demo ABCD Corporation Special Research Division Santa Barbara, CA

You should also check that the contractor appears correctly in the [Contractor Selection Dialog](#).

Don't forget to write remarks in the Narrative Text tab of the Basic Info window. The default headings for contract plans are:

- Non-Recurring/Recurring Definitions
- Cost Accounting Standards (CAS) Disclosure Statement Differences
- 1921-3 Contractor Business Data Report
- ** (if required) 1921-2 Progress Curve Report

Importing a subcontract plan is nearly identical to importing a contract plan. Proceed to the [Importing a Subcontract Plan](#) tutorial to see the difference.

2.1.6 IMPORTING A SUBCONTRACT PLAN

Importing a subcontract plan is a lot like importing a contract plan.

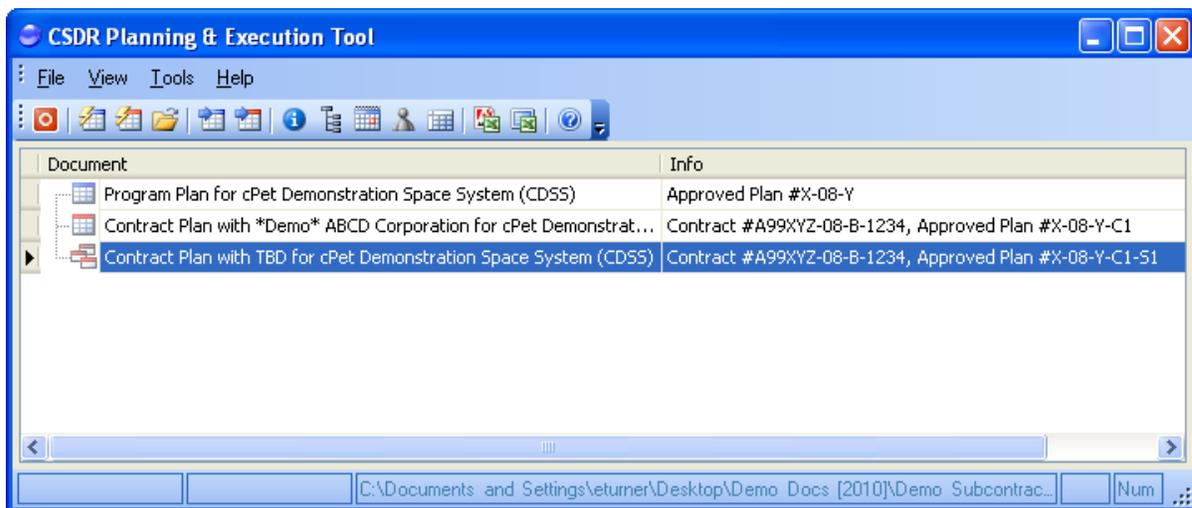
 *Tip: It is not necessary to have a program plan or prime contract plan open in cPet before importing a subcontract plan. In this tutorial, however, we did already import a program plan and prime contract plan.*

In the main window of cPet, click File > Import > Import DD 2794 (Contract/Subcontract Plan). Select the subcontract plan to import. Proceed as you did for the [Importing a Contract Plan](#) tutorial.

For 2007 and 2011 documents, cPet will recognize the Plan Type as subcontract according to the Excel File.

7. PLAN TYPE	
<input type="checkbox"/>	PROGRAM
<input type="checkbox"/>	CONTRACT (PRIME)
<input checked="" type="checkbox"/>	CONTRACT (SUB)

The subcontract plan will have a different icon than the contract plan in cPet's main window.



Once you are comfortable with importing plans, try building a plan from scratch using cPet's tools. Start with the [Creating a Program Plan](#) tutorial.

2.1.7 LINKING DOCUMENTS

The Linking Documents tool provides a way to link plans or cost reports together.

If plans have already been imported into cPet but a contract plan is not associated with a particular program plan, for example, then the linking tool is helpful.

In the main window of cPet, click **Tools > Link Documents**.

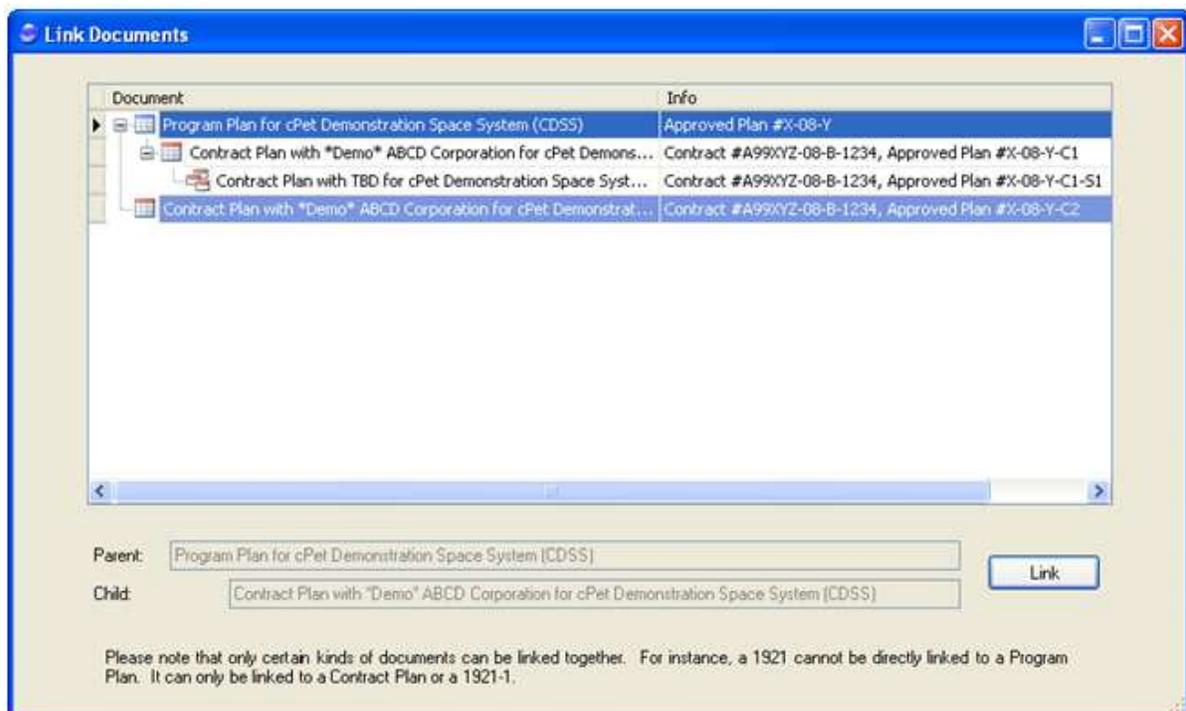
Click the desired program plan and contract plan to be linked.

Click **Link**.

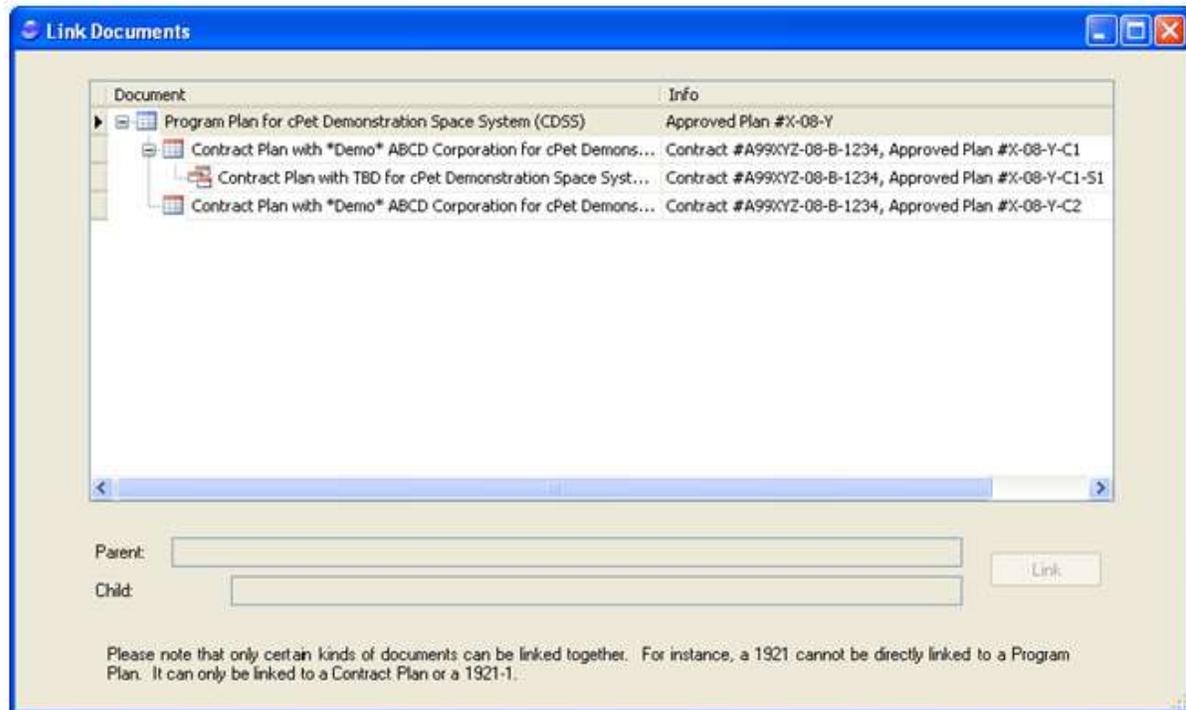
The contract plan is now associated with the program plan.

In the example below, the program plan and the last contract plan displayed are meant to be linked.

Before Linking:



After Linking:



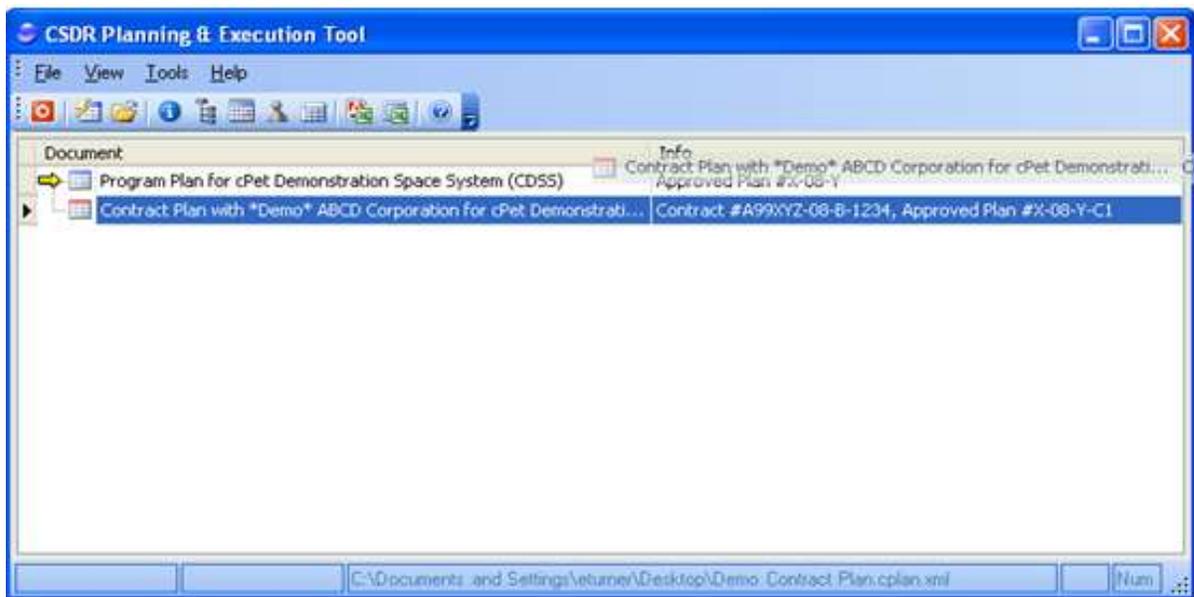
The second contract plan is now linked under the program plan.

i *Tip: Subcontract plans can also be linked to contract plans. Similarly, a 1921 can be linked to a contract plan, and a 1921-1 can be linked to a 1921.*

Situations where this tool might be useful are listed below:

- a) If a contract plan was imported under the wrong program plan, the linking tool allows the contract plan to be matched up with the correct program plan.
- b) If a program plan was re-imported since the original import, the contract plans will no longer be connected to the program plan. The linking tool allows for re-association.

i Tip: Contract plans can also be rearranged in the main window of cPet by dragging and dropping one plan onto another. In the example below, the contract plan is being moved under the program plan. The yellow arrow  points to the document under which the contract plan will be indented.



2.1.8 CONVERTING PLANS TO 2011 VERSION

If you have already imported a plan in the 2003 or 2007 version but would like to view it in the 2011 format, click **Tools > Convert to 2011 version** on cPet's main window. This command can also be accessed through the  icon.

To convert a plan to the 2011 version...

1. Select the plan (program, contract, or subcontract) in the main window of cPet.
2. Click Tools > Convert to 2011 version.
3. You will be asked where you want to save the XML version of the new plan. The plan will be saved with a default name of "[Plan name] -- 2011 Version."

4. Once you save the plan, *the plan displayed in cPet will be the 2011 version.*
5. If you would like to view the old version again, you must reopen it from its original saved location.

All the information will be copied over. However, you should note the following nuances:

When converting from 2003 to 2011:

- A few fields will be added to the Basic Info (such as the Prime Mission Product). Some fields (such as the Approved Plan Number/Review&Ref #) are renamed but contain the same information.
- The Contract Information tab of the Basic Info will have additional fields for the Appropriation and the Required Reports on the 2011 version.
- The 1921 and 1921-1 columns for the WBS Editor and the Submission events have slightly different names, but they basically correspond
- The 2630 column in the WBS Editor of the 2003 version is now called the SRDR column in the 2011 version
- The CWBS Dict. column is added to the WBS Editor for the 2011 version. The checkboxes in the column will be checked for all elements
- The 1921-4 column will be added to the WBS Editor and the Submission events of the 2011 version. The checkboxes in this column will be unchecked by default.
- In the Submission Events, the 2630-2 and 2630-3 columns are now called the SRDR Initial and SRDR Final columns, respectively, in the 2011 version
- The summary elements for contract plans are slightly different

When converting from 2007 to 2011:

- One column will be added to the WBS Editor and the Submission events of the 2011 version: 1921-4. The checkboxes in this column will be unchecked by default.
- The Contract Information tab of the Basic Info will have additional fields for the Appropriation and the Required Reports on the 2011 version.

 *Tip: Cost reports in the 2007 version can also be converted to the 2011 version.*

2.1.9 IMPORTING ERRORS TO AVOID

The following is a list of common errors that may occur when importing a plan. These errors most often occur because the DD 2794 was improperly formatted; a problem that can be resolved by following the sample DD 2794, or by editing the fields in cPet. Most of these errors are recorded in the [Conversion Results](#), while some are highlighted within cPet.

1. Weapon System Type must be a valid MIL-HDBK-881 specification (e.g. "Aircraft System").
2. cPet may not import Milestone or Submission Type formulas from the Excel file. For example, cPet may not recognize a formula such as "IF ('Main Sheet'!C4="B","X","")" that is used to identify Milestone B.
3. A WBS item will be highlighted if it is an only child (see below). The color of the warning depends on the Display Colors in the cPet [Options](#).

Common Support Equipment	1.7	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Support and Handling Equipment	1.7.2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Operational/Site Activation	1.8	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Contractor Technical Support	1.8.2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Site Construction	1.8.3	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Note that an element will also be flagged if it is the only item at that level that has reports checked. For example, in the image below, the Telemetry element is highlighted because it is the only element at its indenture level that has forms checked. The Integration element shows "N/A" and has no forms checked.

WBS Element Name	WBS Element Code	N/A	CWBS Dict.	1921	1921-1
SEIT/PM and Other Common Elements	1.2.1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Spacecraft Bus	1.2.2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Integration, Assembly, Test and Checkout	1.2.2.1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Telemetry, Tracking, and Command Subsystem	1.2.2.2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Communication / Payload	1.2.3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

4. A WBS item will be highlighted if it does not have any columns (not including the CWBS column) checked.

5. WBS element indenture level will be determined by the WBS indentation structure in the Excel file (as opposed to the WBS item numbers themselves). In the example below, "Complete Round" is mistakenly put at the same level as "Ordnance System." cPet will mimic this structure and ignore the actual WBS Item Numbers when displaying elements in the WBS Editor.

10. WBS ELEMENT CODE		11. WBS REPORTING ELEMENTS
a. PROGRAM	b. CONTRACT	
1.0		Ordnance System
1.1		Complete Round
1.1.1		Structure

WBS Item	WBS Item Number
Ordnance System	1.0
Complete Round	1.1
Structure	1.1.1

6. Submission event headers will be highlighted (see below). The color of the warning depends on the Display Colors in the cPet [Options](#).

Event #	CWBS Dict.	1921	1921-1	1921-2	SRDR Initial	SRDR Final	Event	As Of Date	Due Date
	<input type="checkbox"/>	Contract #X-08-Y-C1							
1	<input checked="" type="checkbox"/>	Initial Review	6/30/2006	8/31/2006					
2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Preliminary Design Review (PDR)	10/31/2007	1/31/2008
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Critical Design Review (CDR)	10/31/2008	1/31/2009
4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Initial Operational Capability (IOC)	10/31/2009	1/31/2010
5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Final Review	1/31/2010	3/31/2010

7. Submission event dates marked as N/A or dates that are invalid will be left blank in cPet and highlighted.

 *Tip: Invalid dates such as 4/31/2007 will not import (April has only 30 days).*

8. The Address must be on the correct line in the Excel file in order to import correctly. See below for incorrect and correct formatting. Note that cPet tolerates different 2007 address formats better than 2003 formats.

2003 Plans

Incorrect:

6. POINT OF CONTACT (POC) INFORMATION									
a. POC AND ADDRESS (Include ZIP Code)									
cPet User									
123 Tester Lane									
Los Angeles, CA 55555									

6. POINT OF CONTACT (POC) INFORMATION									
a. POC AND ADDRESS (Include ZIP Code)									
	cPet User								
	123 Tester Lane								
	Los Angeles, CA 55555								

Correct:

6. POINT OF CONTACT (POC) INFORMATION									
a. POC AND ADDRESS (Include ZIP Code)									
			cPet User						
			123 Tester Lane						
			Los Angeles, CA 55555						

6. POINT OF CONTACT (POC) INFORMATION	
a. POC AND ADDRESS (Include ZIP Code)	cPet User
	Attn: Fred Tester
	123 Tester Lane
	Los Angeles, CA 55555

6. POINT OF CONTACT (POC) INFORMATION	
a. POC AND ADDRESS (Include ZIP Code)	cPet User
	Attn: Fred Tester
	Bldg B
	123 Tester Lane
	Los Angeles, CA 55555

2007 and 2011 Plans

Incorrect:

6a. POINT OF CONTACT (POC) NAME AND ADDRESS (Include ZIP Code)
cPet User, 123 Tester Lane, Los Angeles, CA 55555

(as a merged cell)

Correct:

6a. POINT OF CONTACT (POC) NAME AND ADDRESS (Include ZIP Code)
cPet User 123 Tester Lane Los Angeles, CA 55555

(as a merged cell)

6a. POINT OF CONTACT (POC) NAME AND ADDRESS (Include ZIP Code)					
cPet User					
123 Tester Lane					
Los Angeles, CA 55555					

(if not merged)

9. In the Form field of the submission events, the text must be written in the correct format (see below).

2003 Plans

- The submission event form 2630 must have a part specified.

Incorrect: 2630

Correct: 2630-2, 2630-3

If "2630" is written on the Excel file, cPet will check both parts in the submission events.

2007 and 2011 Plans

- The CWBS Dictionary must be written as follows:

Incorrect: WBS Dictionary, WBS Index

Correct: CWBS Dictionary

- The submission event form 2630 is recognized as follows:

2630-2 is equivalent to SRDR Initial

2630-3 is equivalent to SRDR Final

Note: If "2630" is written on the Excel file, cPet will check both parts (SRDR Initial and SRDR Final) in the submission events.

- Cost reports may be formatted as follows:

1921-1, 1921-1 Part 1, 1921-1 Part I, 1921-2, 1921-1 Part 2, 1921-1 Part II, 1921-4

10. Excel formatting must resemble that of the original DD Form 2794. If the border around a cell(s) is missing, the file may not import at all, or part of the data may not import. In the example below, the borders are lacking on the CWBS Dictionary column. WBS elements corresponding to the unformatted rows will not import into cPet.

Incorrect:

13. REPORTS REQUIRED (X if applicable)				
a. CWBS DICTIONARY	b. DD 1921 (CDSR)	c. DD 1921-1 (FCHR)	d. DD 1921-2 (PCR)	e. SRDR FORMATS
X	X	X		X
X	X	X		X
X	X	X		X
X	X			
X	X			
X	X			
X	X			
X	X	X		
X	X			
X	X			
X	X			
X	X			

Correct:

13. REPORTS REQUIRED (X if applicable)				
a. CVBS DICTIONARY	b. DD 1921 (CDSR)	c. DD 1921-1 (FCHR)	d. DD 1921-2 (PCR)	e. SRDR FORMATS
X	X	X		X
X	X	X		X
X	X	X		X
X	X			
X	X			
X	X			
X	X			
X	X	X		
X	X			
X	X			
X	X			
X	X			

2.2 CREATING PLANS

2.2.1 CREATING A PROGRAM PLAN

2.2.1.1 Creating a Program Plan

The process of creating a program plan is similar to that of importing a program plan in that there are three main components: the Basic Information, WBS Editor, and Submission Events. However, whereas you could simply review these components when importing a plan, you must manually fill in information when creating a plan. The last tutorial in this section, [Building the RDT](#), will be useful later when the contract plan is created.

To start creating a program plan, complete this tutorial and then proceed to [Editing the Basic Information](#) and continue to follow the rest of the tutorials listed below.

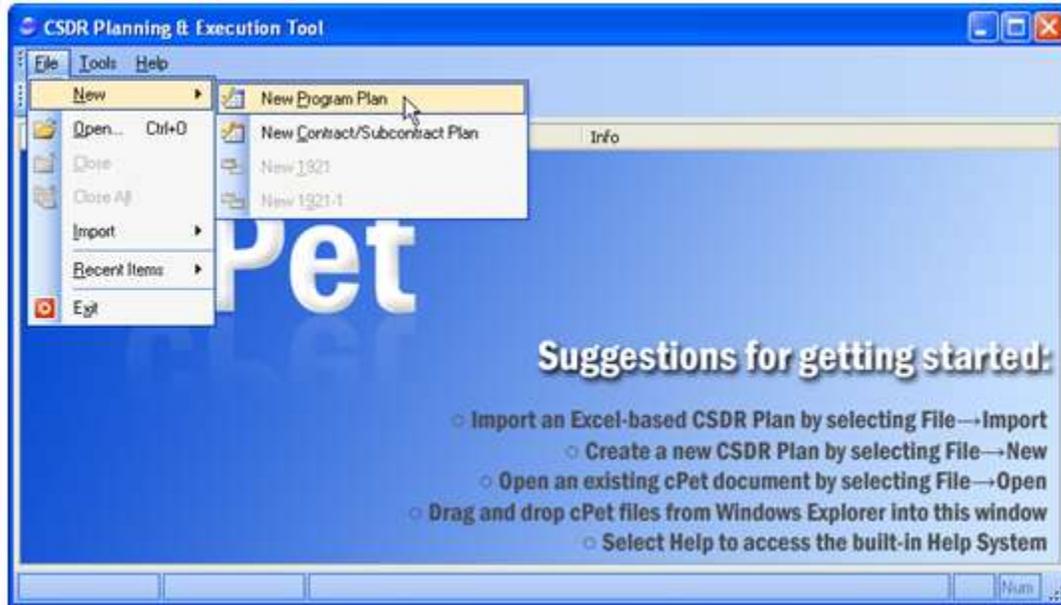
[Editing the Basic Information](#)

[Editing the WBS](#)

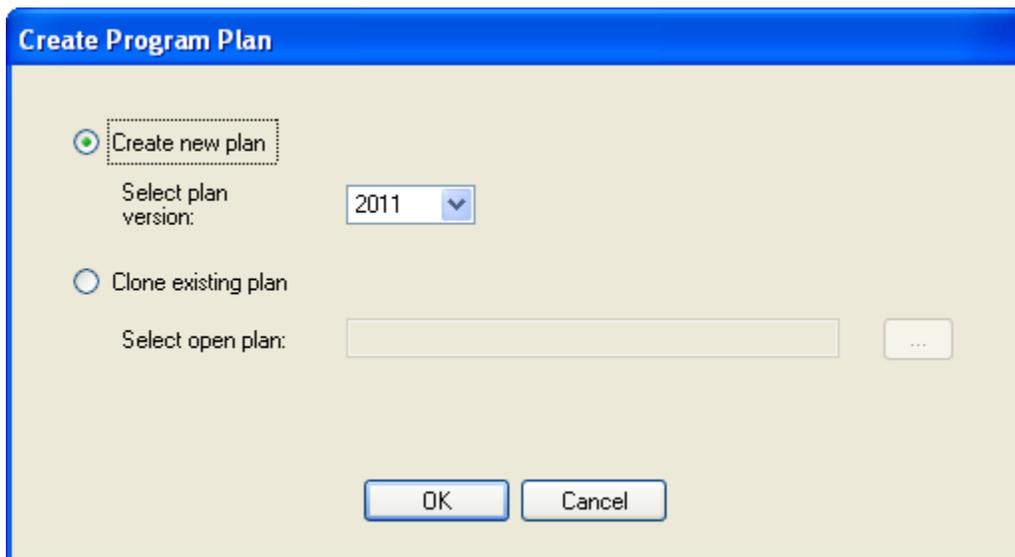
[Editing the Submission Events](#)

[Building the RDT](#)

In the main window of cPet, click File > New > New Program Plan, or just click  on the main toolbar.



The [Create Program Plan](#) dialog pops up. Choose whether you would like to create a new plan from scratch, or to copy an existing plan open in cPet.



In this tutorial, we will create a new plan and use the 2011 format, as new plans should typically be created using the most recent version.

The Basic Info dialog appears. Continue to [Editing the Basic Information](#) to fill in the program plan.

2.2.1.2 Editing the Basic Information

This tutorial is **step one** in the three-step process of creating a program plan:

- **1.** Edit the Basic Information
- 2.** Edit the WBS
- 3.** Edit the Submission Events

The Basic Information window appears after File > New > New Program Plan is clicked. Fill in this window with the appropriation information. Note that changing the WBS System Type from MIL-STD-881C to MIL-HDBK-881A affects the values in the **WBS System Type** dropdown.

 *Tip: See the [Basic Info Dialog](#) for more information on what the fields correspond to on the DD Form 2794.*

Fill in information in the DD2794 Narrative Text tab. Use the following icons to add headings:

-  Add a new parent heading
-  Add a new sibling heading
-  Add a new child heading
-  Move entry up on the list
-  Move entry down on the list
-  Delete the heading

Save and close the Basic Info window.

 *Tip: The "proper" way to organize the Narrative Text is to have a parent header, followed by a child header, followed by the actual descriptive text. For instance, the layout of the Narrative Text should be as follows:*

Parent Header

Child Header

Descriptive Text

Do not type information directly under the first two headers. If you do not follow the above layout, the text will not be properly formatted in the Remarks section when [exported](#) to PDF or Excel.

Move on to [Editing the WBS Editor](#) to continue creating the plan.

2.2.1.3 Editing the WBS

This tutorial is **step two** in the three-step process of creating a program plan:

1. Edit the Basic Information
- 2. Edit the WBS
3. Edit the Submission Events

In the main window of cPet, click  to view the WBS Editor.

Depending on whether or not "Prompt before providing WBS structure to plans with no WBS" is checked in the [Options](#), cPet may or may not automatically fill in the WBS Editor. If this option is *not* checked, then the WBS elements corresponding to the program plan's Weapon System Type will appear in the WBS Editor (in this

tutorial, these are the elements for a Space System). If this option is checked, you will be asked whether or not you want the WBS Editor to be filled in automatically.

i Tip: Setting the standard WBS type to MIL-HDBK-881A or MIL-STD-881C affects how the WBS elements are auto-populated.

Fill in the required forms next to each WBS element.

The screenshot shows the 'WBS Editor - Program Plan for Test Program' window. The table below represents the data visible in the interface. The 'N/A' column contains checkboxes, and the 'CWBS Dict.' column contains checkmarks. The rows for 'Space Vehicle Storage', 'Launch Operations & Mission Support', 'Command and Control Subsystem', and 'Mission Management Subsystem' are highlighted in pink.

WBS Element Name	WBS Element Code	N/A	CWBS Dict.	1921	1921-1	1921-2	1921-4	SRDR
Space System	1.0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SEIT/PM and Other Common Elements	1.1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Space Vehicle (1...n as required)	1.2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SEIT/PM and Other Common Elements	1.2.1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spacecraft Bus	1.2.2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication / Payload	1.2.3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Booster Adapter	1.2.4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Space Vehicle Storage	1.2.5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Launch Systems Integration	1.2.6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Launch Operations & Mission Support	1.2.7	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ground (1...n as required)	1.3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SEIT/PM and Other Common Elements	1.3.1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ground Terminal Subsystems	1.3.2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Command and Control Subsystem	1.3.3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mission Management Subsystem	1.3.4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Archive/Storage Subsystem	1.3.5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mission Data Processing Subsystem	1.3.6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

i Tip: The four rows which are highlighted pink in the example above indicate that there is an error. See [Errors to Avoid](#) for more details. In this particular example, they are pink because there must be at least one column checked (not including the CSWB Dict. column).

Use the following icons to check/uncheck items and to add, edit, or move elements:

 Undo

 Redo

 Add a sibling to the selected element

 Add a child to the selected element

 Delete an item

 Copy a WBS element

 Cut a WBS element

 Paste a WBS element (note that elements can be pasted into cPet or into Excel)

 Indent an item

 Unindent an item

 Move an item up in the list

 Move an item down in the list

 Provides the option of assigning a WBS number to each item, or clearing the item numbers

 Free Edit Mode - Turn on Free Edit mode to add, delete, or arrange WBS elements easily. See below for more details

 Expand All (Found under the View Menu)- All the elements in the WBS tree will be displayed

 Collapse All (Found under the View Menu)- All the elements in the WBS tree will be collapsed so that only the root element(s) is displayed

 Check (Found under the Edit Menu) - Use the shift or control key to select a few WBS items in a certain column. Then click this icon to check all the items in the selection

 Uncheck (Found under the Edit Menu) - Use the shift or control key to select a few WBS items in a certain column. Then click this icon to uncheck all the items in the selection

 Insert Standard WBS (Found under the Edit Menu). Provides the option to insert one of the standard WBS's according to either the MIL-HDBK-881A or MIL-STD-881C as specified.

To check/uncheck all the elements in a column, right click on the column header and select

 or  , respectively.

 *Tip: From the Edit menu, you can **Select All** or **Select Child Elements**. These commands can be particularly useful if you would like to delete groups of elements from a standardized WBS.*

 *Tip: Elements can be copied from the WBS Editor and pasted into Excel. Likewise, elements can be copied from Excel and pasted into the WBS Editor.*

 *Tip: Click **Edit>Insert WBS from Existing Plan** to add WBS elements from a [selected plan](#) already open in cPet.*

Free Edit Mode

The **Free Edit Mode** may be useful when creating new WBS elements or rearranging the indentation structure of the elements. Click the  icon on the toolbar to turn on the Free Edit Mode (the button will turn orange). In Free Edit Mode, parent/child relationships among WBS elements are relaxed so that individual elements can be indented and moved without changing the indentation or position of other elements. The WBS elements will still appear indented under each other, but the Expand () and Collapse () icons will no longer be present. The purpose of the Free Edit Mode is to visually organize the WBS with ease. Without this mode turned on, a newly added element may not appear where you would like it to be in the tree structure.

There are a few things to note when using the **Free Edit Mode**:

- After changing the WBS in Free Edit Mode, the WBS indenture structure will be maintained after the mode is turned off.
- WBS elements are indented by four spaces. However, if you indent an element by a single space, cPet will interpret this element as being indented by four spaces.
- If you indent an element by more than four spaces, cPet will ignore these extra spaces. If you close and reopen the WBS Editor, the element will appear indented by the normal four spaces.

Continue to [Editing the Submission Events](#) to create the next component of the plan.

2.2.1.4 Editing the Submission Events

This tutorial is **step three** in the three-step process of creating a program plan:

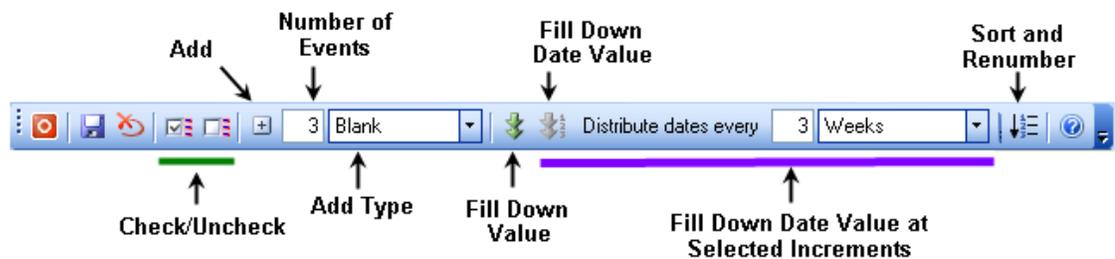
1. Edit the Basic Information
2. Edit the WBS

→ **3. Edit the Submission Events**



In the main window of cPet, click  to open the Submission Events:

Use the toolbar at the top of the window to add and edit submission events. A brief explanation of the toolbar is given below.



 Delete a submission event

 Use the shift or control key to select a few submission events in a certain column. Then click this icon to check all the items in the selection.

 Use the shift or control key to select a few submission events in a certain column. Then click this icon to uncheck all the items in the selection.

 Add submission event(s).

Add Type – Adds either “Blank” or “Like Current” events

“Blank” = Adds new rows

“Like Current” = Copies rows from selected row



Fill Down Value – When several rows are selected, clicking this icon checks/unchecks the boxes in the column according to the first row. This icon can also be used to copy dates down a column.



Fill Down Date Value – When multiple rows are selected, clicking this icon generates dates down the column. These dates are set apart from each other by a certain increment of time.



Insert a row before the selected event (found on Edit menu)



Insert a certain number of rows (quantity depends on numerical value in toolbar; found on Edit menu)



Add a row to the end of the submission events list (found on Edit menu)



Add a certain number of rows to the end of the submission events list (quantity depends on numerical value in toolbar; same as  icon; found on Edit menu)



Sort and Renumber – Arranges the submission events by As of Date and designates an Event Number for each.



Import Events from contract plan - Contract plan submission events can be imported into a program plan's submission events. See [Import Events from Contract Plan](#) for more information. Icon found under the Tools menu of a program plan.

To check/uncheck all the events in a column, right click on the column header and select  or , respectively.

 *Tip: From the Edit menu, you can **Select All**. This command can be particularly useful if you would like to either check/uncheck all the submission events, or delete them all.*

For practice, use the icons above to add events according to the image below.



Event #	CWBS Dict.	1921	1921-1	1921-2	1921-4	SRDR Initial	SRDR Final	Event	As Of Date	Due Date
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	First Event	10/9/2007	12/9/2007
2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Second Event	10/20/2007	12/20/2007
3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Third Event	10/23/2007	12/23/2007
4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fourth Event	10/26/2007	12/26/2007
5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fifth Event	10/29/2007	12/29/2007
6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sixth Event		

 *Tip: Notice that the dates for Events #2-5 are distributed every three days. Make use of the Fill Down Dates icon to easily complete this exercise.*

 *Tip: Use the multi-check icon to check CWBS Dict. for Events #1-3.*

 *Tip: Once an As Of Date is assigned to a submission event, cPet automatically generates a Due Date, but this date can easily be changed.*

Save and close the Submission Events.

You have now finished creating a program plan. Proceed to [Building the RDT](#) to understand how to create and export a plan's RDT in cPet.

2.2.1.5 Building the RDT

After a program plan is created, the next step is to build the Resource Distribution Table (RDT). It is not necessary to build an RDT in cPet, but an RDT typically accompanies a program plan. The RDT can be used to build new contract plans. See [WBS Editor of a Contract Plan](#) for more information.

In order to view the RDT, at least one contractor must first be chosen. Click on the Contractor Selection icon .

In this tutorial, we will select two contractors:

- 1) *Demo* ABCD Corporation
- 2) Sample Contractor

Find these contractors and click “Add.” You might try using the filter feature to search for a few key words. Note that if a contractor is absent from the Contractor Selection list, you can add it through the [Contractor Maintenance](#).

 *Tip: For a detailed description of how to add contractors, see the [Contractor Selection Dialog](#).*

After the contractors are chosen, select the parent plan and click the RDT icon  in the main window of cPet (or click View>RDT).

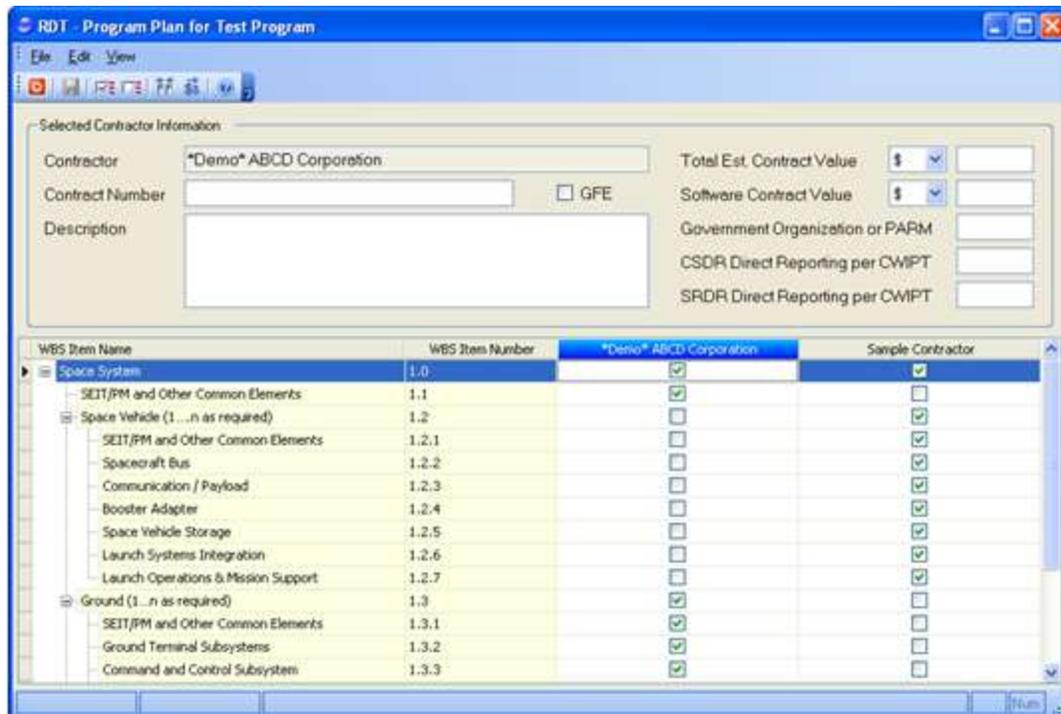
WBS Elements

The RDT is designed to allocate responsibility to each contractor for every WBS element.

Check which contractor is responsible for which WBS elements. In this tutorial, *Demo* ABCD Corporation is responsible for items “Space System” and “SEIT/PM and Other

Common Elements” as well as “Ground (1...n as required) through “Launch Vehicle” (the last WBS element is not shown in the image below).

The Sample Contractor is responsible for “Space System” and “Space Vehicle (1...n as required)” through “Launch Operations & Mission Support.”



Use the toolbar at the top of the RDT window to easily check or uncheck items.



Check Selection - Use the shift or control key to select a few WBS items in a certain column. Then click this icon to check all the items in the selection.



Uncheck Selection - Use the shift or control key to select a few WBS items in a certain column. Then click this icon to uncheck all the items in the selection.

A few other icons that may be useful are:



If the WBS item name is longer than the width of the column, clicking this button Resizes the Column so the entire name can be seen.



Arranges the contractor columns in order of their base year contract value, from largest to smallest.



Moves a contractor column adjacent to the WBS (icon found by right-clicking on a column header)

To check/uncheck all the elements in a column, right click on the column header and select



or



, respectively.

i *Tip: From the Edit menu, you can **Select All** or **Select Child Elements**. These commands can be particularly useful if you would like to check/uncheck groups of WBS elements.*

i *Tip: WBS elements must have item numbers in order for them to be edited in the RDT. Items that do not have numbers will be highlighted according to the [Options](#) Display color. You will be unable to check these elements under any contractor column until you assign them numbers in the WBS Editor.*

Header Information

You can also fill in information pertaining to each contractor. Click on a contractor column and complete the "Selected Contractor Information" section. This includes the contract number, description, contract value, etc. for that contractor. This information will appear on the RDT Export (see below).

 *Tip: The Total Est. Contract Value and the Software Contract Value fields for the prime contractor will also appear at the top of the Contract Plan's RDT.*

To **export** the RDT to Excel, select the plan and click the  icon on the main toolbar.

Now that you have learned how to create a program plan, proceed to [Creating a Contract Plan](#) to understand the process behind creating a contract plan.

2.2.2 CREATING A CONTRACT PLAN

2.2.2.1 Creating a Contract Plan

To create a contract plan, start with this tutorial and then follow the successive tutorials listed below:

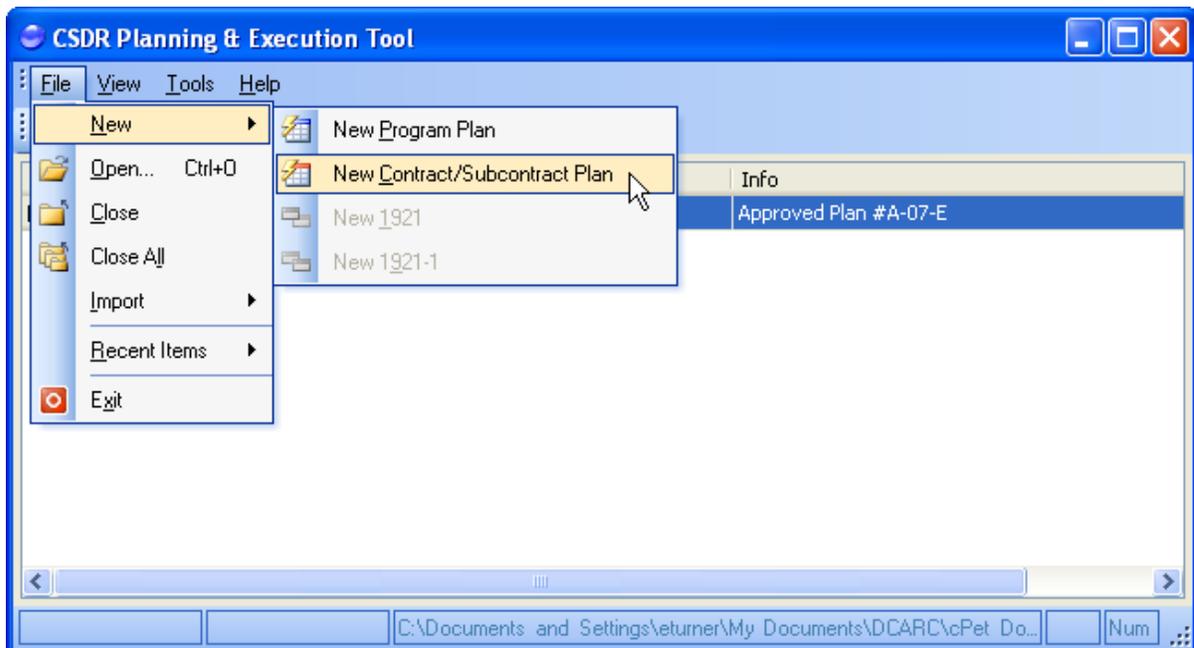
[Basic Information of a Contract Plan](#)

[WBS Editor of a Contract Plan](#)

[Submission Events of a Contract Plan](#)

 *Tip: It is not necessary to have a program plan open in cPet before creating a contract plan. In this tutorial, however, we did already create a program plan.*

To begin, click File > New > New Contract/Subcontract Plan.



The [Create Contract Plan](#) dialog pops up. Select whether you would like to create a new plan from scratch, copy an existing plan, or create a plan based on an existing plan's [RDT](#) (more information on this option is discussed in the [WBS Editor of a Contract Plan](#) tutorial).

In this tutorial, we will create a new plan and use the 2011 format, as new plans should typically be created using the most recent version.

The Basic Information window appears. Proceed to the next tutorial, [Basic Information of a Contract Plan](#) to continue.

2.2.2.2 Basic Information of a Contract Plan

This tutorial is step one in the three-step process of creating a contract plan:

- 1. Edit the Basic Information
2. Edit the WBS Editor

3. Edit the Submission Events

The Basic Information window appears after File > New > New Contract/Subcontract Plan is clicked. Make sure the "Prime Contract" radio button is selected.

Notice that the Basic Info window of a contract plan has a **Contract Information** tab, whereas this tab is absent for program plans.

When you create a contract plan, the contractor name will appear as "TBD" until you change it. You can change the contractor name either in the Basic Info window itself (as shown below), or you can change the contractor through the [Contractor Selection Dialog](#). The two fields will sync up, meaning that if you change the contractor in one location, then the new contractor name will appear in the other location as well.

The screenshot shows a software window titled "Basic Info - Contract Plan with Demo ABCD Corporation for Test Program". The window has a menu bar with "File" and a toolbar. Below the toolbar are three tabs: "Basic Information", "Contract Information", and "DD2794 Narrative Text". The "Basic Information" tab is selected and contains the following fields and controls:

- Contract**: A "Number" field with the value "XXXX99-00-XX399".
- Appropriation**: Three checkboxes: "RDT&E", "Procurement", and "OBM".
- Required Reports**: A checked checkbox for "DD 1921-3 (CBDR)".
- Performing Organization**: Fields for "Name" (containing "TBD"), "Address" (two fields), "City", "State" (dropdown menu), and "Zip".
- Division**: Fields for "Name", "Address" (two fields), "City", "State" (dropdown menu), and "Zip".

Remember to write any remarks in the Narrative Text tab. Refer to the [Basic Info Dialog](#) for how to add text headings.

Proceed to [WBS Editor of a Contract Plan](#) after you have filled in the information in the Basic Info window.

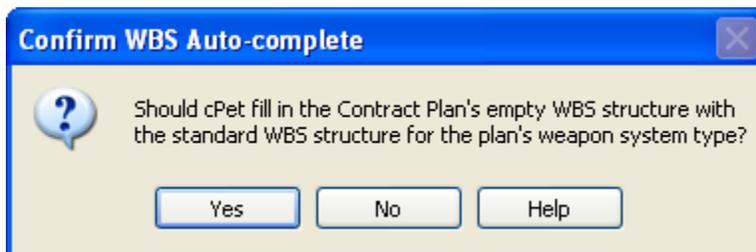
2.2.2.3 **WBS Editor of a Contract Plan**

This tutorial is step two in the three-step process of creating a contract plan:

1. Edit the Basic Information
- 2. Edit the WBS Editor
3. Edit the Submission Events

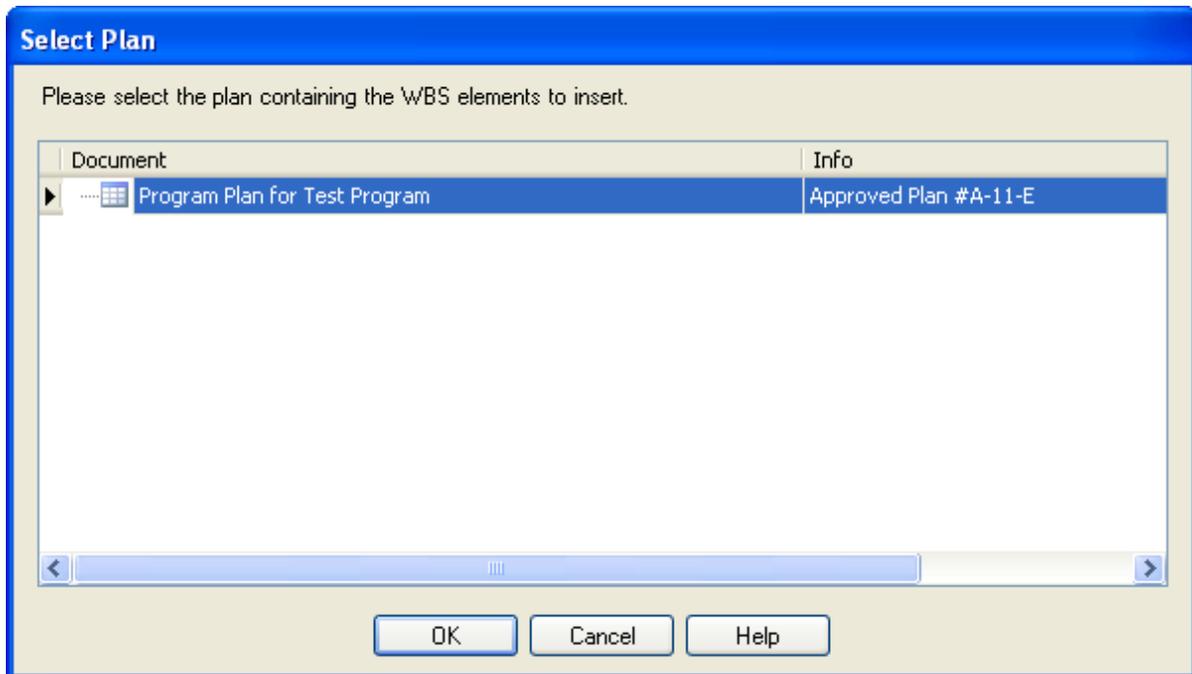
Click on the  icon to open the WBS Editor.

Depending on the selections in the cPet [Options](#) General tab, cPet may inquire if the contract plan's WBS elements should be filled in according to the WBS items specified on the program plan's RDT.



Clicking Yes will fill in the standard WBS structure elements according to the Weapon System selected in the contract plan's [Basic Info Dialog](#). Clicking No will generate a list only of the summary elements.

You can also insert WBS elements from the program plan. In the WBS Editor of the contract plan, click [Edit > Insert WBS from Existing Plan](#). You must then select from which plan to insert WBS elements. The entire WBS of the selected plan will be inserted under the selected row in the contract plan's WBS Editor.



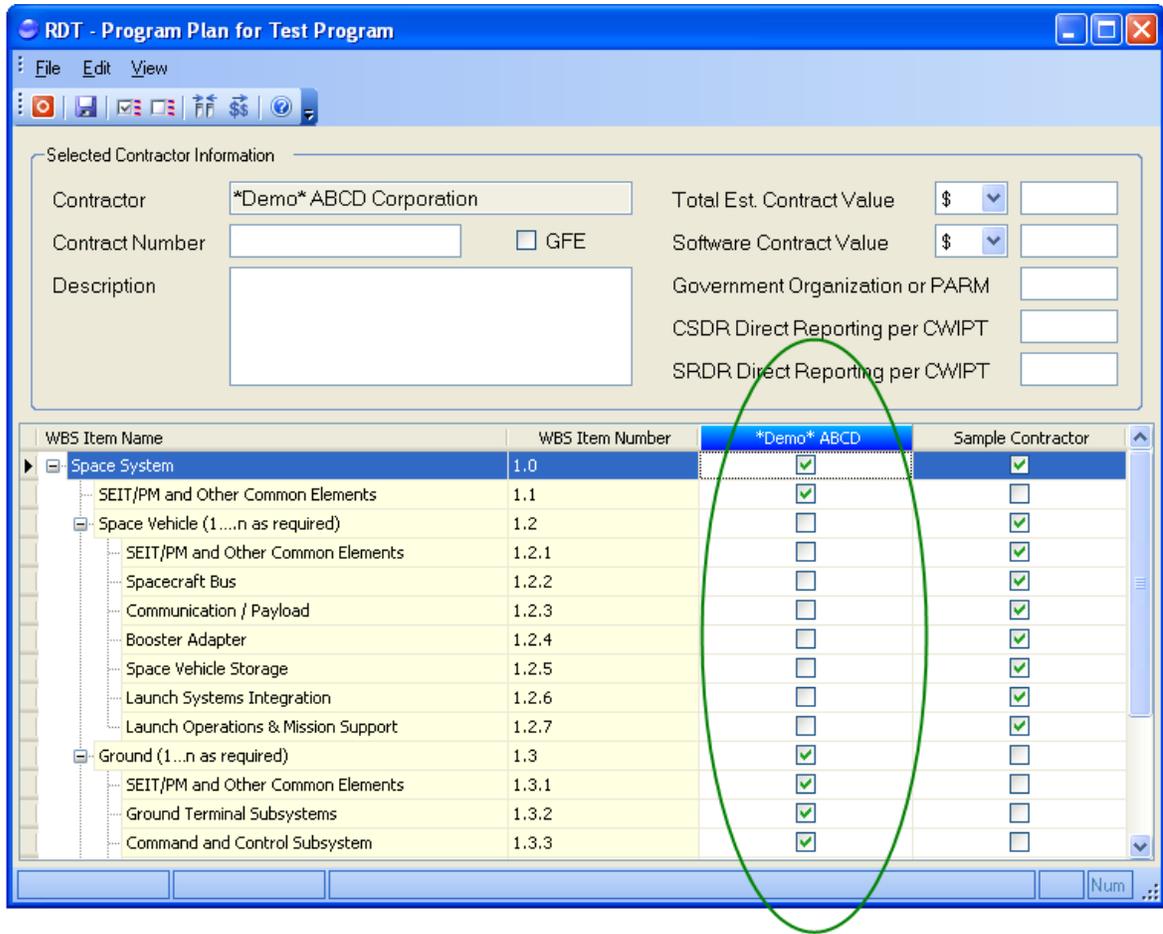
Using a parent plan's RDT to build a contract plan's WBS

In this tutorial, we chose to create a new contract plan from scratch. However, there was also the option to create a new contract plan based on a selected plan's [RDT](#). If we had chosen this option, then the contract plan's WBS would be auto-populated with selected WBS elements from the parent plan.

The images below illustrate the relationships between the program plan's RDT, the program plan's WBS Editor, and the contract plan's WBS Editor. The purple lines show how the elements "Space System" and "SEIT/PM and Other Common Elements" from the program plan also appear on the contract plan. cPet automatically checks the required forms in the

contract plan's WBS Editor according to the program plan. Similarly, the red lines show how the elements "Ground (1...n as required) through "Launch Vehicle" correlate between the plans.

Program Plan RDT



Program Plan WBS Editor

WBS Element Name	WBS Element Code	N/A	CWBS Dict.	1921	1921-1	1921-2	SRDR
Space System	1.0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SEIT/PM and Other Common Elements	1.1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Space Vehicle (1...n as required)	1.2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SEIT/PM and Other Common Elements	1.2.1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spacecraft Bus	1.2.2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication / Payload	1.2.3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Booster Adapter	1.2.4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Space Vehicle Storage	1.2.5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Launch Systems Integration	1.2.6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Launch Operations & Mission Support	1.2.7	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ground (1...n as required)	1.3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SEIT/PM and Other Common Elements	1.3.1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ground Terminal Subsystems	1.3.2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Command and Control Subsystem	1.3.3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Contract Plan WBS Editor (with *Demo* ABCD Corporation contractor)

WBS Element Name	Program WBS Element Code	WBS Element Code	N/A	CWBS Dict.	1921	1921-1	1921-2
Space System	1.0	1.0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SEIT/PM and Ot...	1.1	1.1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ground (1...n as...	1.2	1.2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SEIT/PM an...	1.3.1	1.2.1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ground Ter...	1.3.2	1.2.2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Command &...	1.3.3	1.2.3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mission Man...	1.3.4	1.2.4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Archiv...	1.3.5	1.2.5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mission Data...	1.3.6	1.2.6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mission Data...	1.3.7	1.2.7	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mission Infr...	1.3.8	1.2.8	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Collection M...	1.3.9	1.2.9	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Launch Vehicle	1.4	1.3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Subtotal Cost			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

For more information on creating the WBS structure, refer to the tutorial on [Editing the WBS](#).

Continue to [Submission Events of a Contract Plan](#) to complete the series of tutorials on creating a contract plan.

2.2.2.4 Submission Events of a Contract Plan

This tutorial is step three in the three-step process of creating a contract plan:

1. Edit the Basic Information
2. Edit the WBS Editor
- 3. Edit the Submission Events



Click on the  icon to open the Submission Events.

To edit the submission events, see [Editing the Submission Events](#).

Click Tools > Import Events from existing plan to insert program plan events under the selected event in the contract plan's submission events.

After you have created a contract plan, continue to the tutorial for [Creating a Subcontract Plan](#).

2.2.3 CREATING A SUBCONTRACT PLAN

2.2.3.1 Creating a Subcontract Plan

To begin, click File > New > New Contract/Subcontract Plan, just as you would as if you were creating a prime contract plan.

 *Tip: It is not necessary to have a program plan or prime contract plan open in cPet before creating a subcontract plan. In this tutorial, however, we did already create a program plan and contract plan.*

The [Create Contract Plan](#) dialog appears as usual. We will create a new plan using the 2011 version.

In the Basic Info dialog, set the Plan Type to "Subcontract."

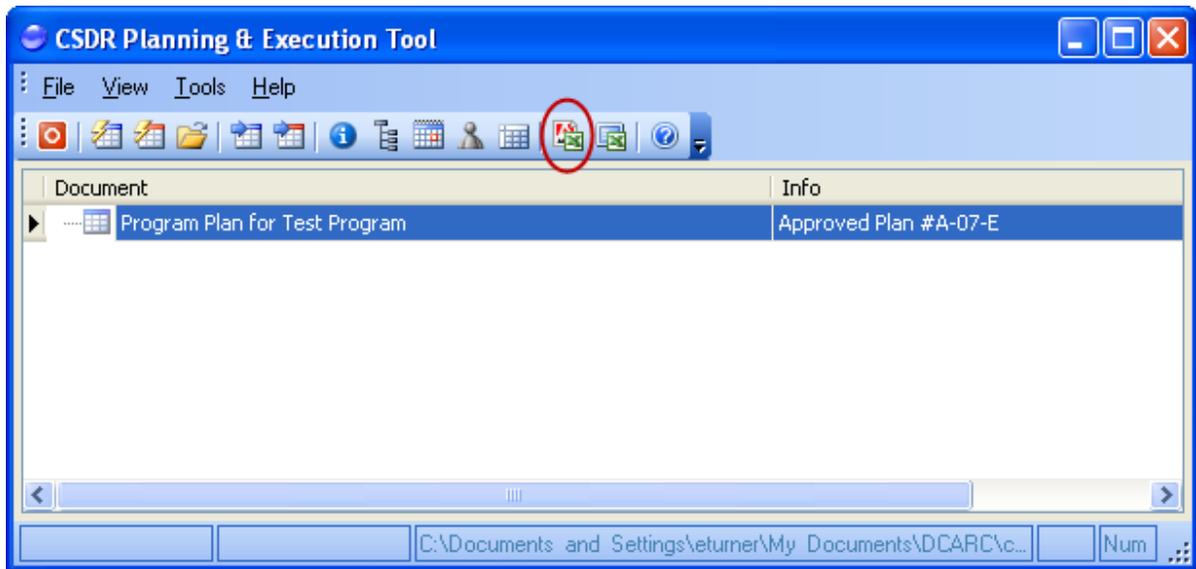
The screenshot shows a software dialog box titled "Basic Info - Contract Plan with TBD for". At the top, there is a menu bar with "File" and a dropdown menu for "Select WBS System Type from" set to "MIL-STD-881C". Below the menu bar are three tabs: "Basic Information", "Contract Information", and "DD2794 Narrative Text". The "Basic Information" tab is active. It contains several input fields: "Program Name", "Phase/Milestone" (dropdown), "WBS System Type" (dropdown), and "Prime Mission Product". On the right side, there are three radio buttons: "Program", "Prime Contract", and "Subcontract". The "Subcontract" radio button is selected and circled in red. Below these are two main sections: "Plan Specifics" and "Point of Contact". "Plan Specifics" includes radio buttons for "Initial Submission" and "Change", and text boxes for "Preparing Organization", "Approved Plan Number", "Current Submission Date" (dropdown), and "Last Approved Plan Date" (dropdown). "Point of Contact" includes text boxes for "POC", "Address" (two lines), "City", "State" (dropdown), "Zip" (with a "-" in the first box), "Phone/Fax" (two boxes), and "Email".

Fill in the [Basic Info](#), [WBS Editor](#), and [Submission Events](#) as you did for the prime contract plan.

2.2.4 EXPORTING PLANS

Plans can be exported to Excel or PDF via the Tools > Export DD 2794 command. This tool may be especially useful to users who have created plans in cPet and wish to view the information in an alternate form.

To access this option, select a plan in the main window of cPet and click Tools > Export DD2794 or click  on the toolbar.



Plans may either be exported to Excel or to PDF.



Export to Excel: View a replica of the DD Form 2794 in Excel. Plans that have been exported to Excel can also be imported back into cPet if necessary. Note that the submission

events and the remarks section will be located on a separate sheet in Excel (even for 2003 plans).

Export to PDF: View a PDF replica of the DD Form 2794.

Basically all fields on the export will contain information you specified in cPet. However, please note that the **Contractor Name** column is slightly unique. On program plans, the text "Refer to RDT" will always be listed in this column. For 2003 and 2007 contract plans, the contractor name, division, and location field will be listed on separate lines in the Contractor column. For 2011 plans, this information will appear in the Contractor Name/Address field.

2.3 COST REPORTS

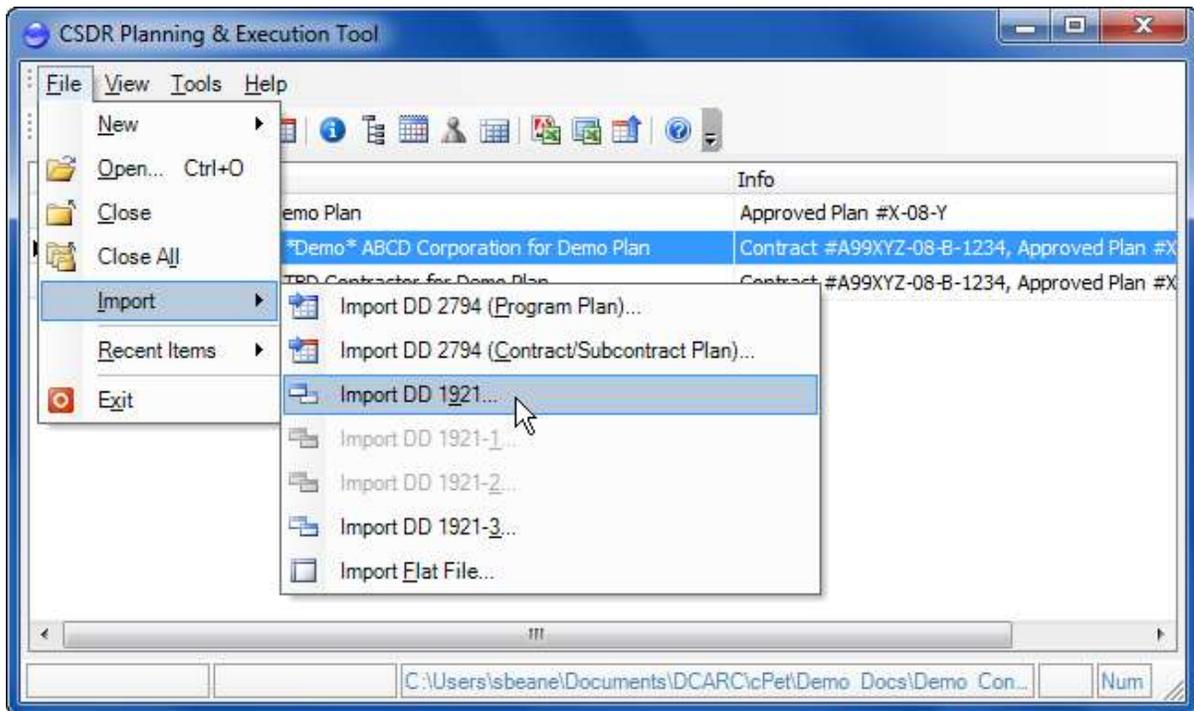
2.3.1 IMPORTING A 1921

The **Import DD 1921** command is used to convert DD 1921 Excel files to XML files that can then be reviewed and validated in cPet. A 1921 can be imported under a contract plan or a subcontract plan open in cPet.

In this tutorial, we will import cost reports for cPet Demonstration Space System (CDSS). These plans and cost reports all follow the 2011 DID. Specifically, we will import a 1921 under the contract plan X-08-Y-C1.

Follow [Importing a Contract Plan](#) before using this tutorial to import a 1921.

In the main window of cPet, select the contract plan X-08-Y-C1. Click File > Import > Import DD 1921.



Select the 1921 to be imported, click Open, and wait for the file to import.

View the [Conversion Results](#) to locate errors with the 1921.

The 1921 now appears indented under the contract plan in the main window of cPet. Click the [Basic Info](#) icon  to view the header fields.

Click the dollar icon  to view the [cost data](#).

 Tip: The WBS element names and codes are read-only. If you wish to revise these elements, you must do so in Excel and then re-import the 1921.

The summary elements found will be marked with a flag  in the Cost Data. Only data in the To Date Total and At Completion Total columns will be imported for summary elements.

Note that misspelled summary elements will be imported and validated as if they were regular WBS items.

After reviewing the data to make sure it follows the [validation rules](#), the next step is to [import a 1921-1](#) or to skip to [validation](#) if a 1921-1 is not required.

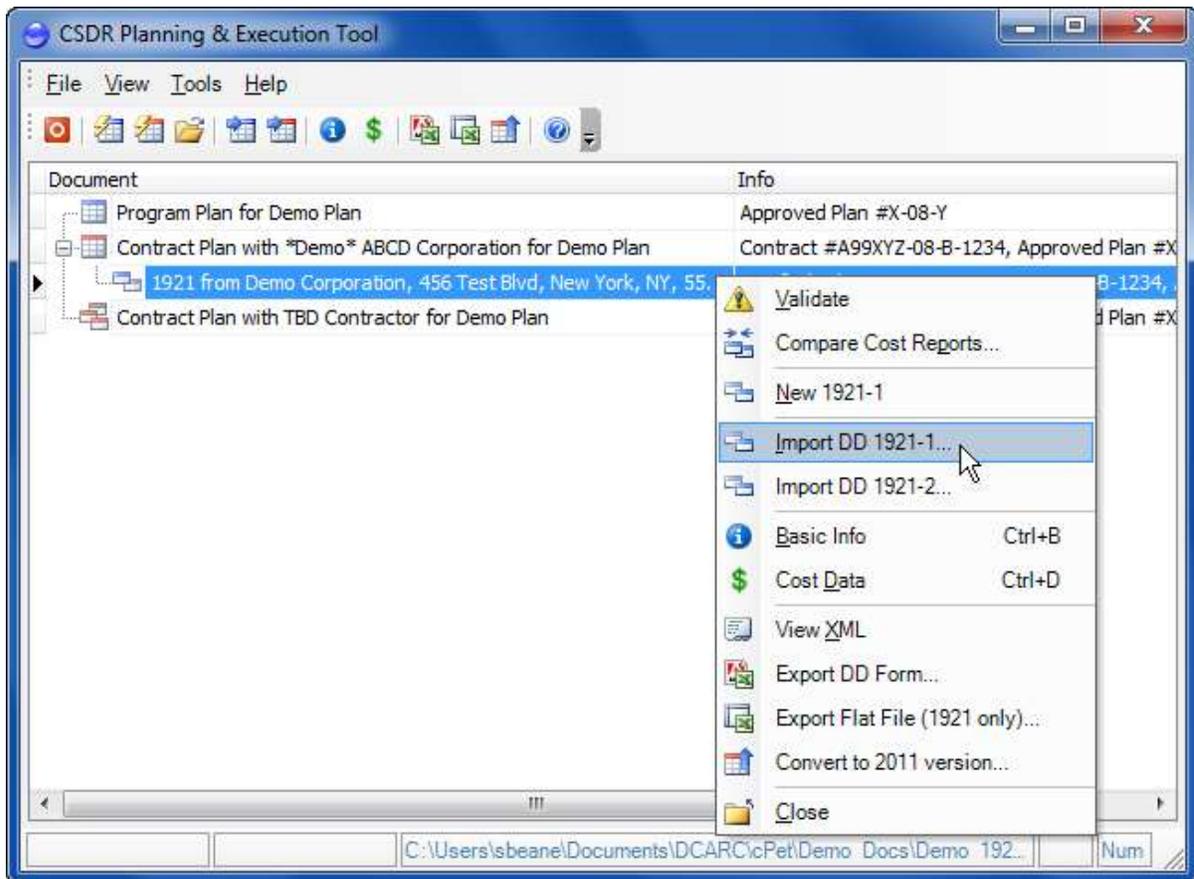
 *Tip: If you have made changes to the 1921 within cPet, you can export it back to Excel.*

Select the 1921 in the main window of cPet and click **Tools > Export DD Form** (or click  on the toolbar).

2.3.2 IMPORTING A 1921-1

The **Import DD 1921-1** command is used to convert DD 1921-1 Excel files into XML files that can then be reviewed and validated in cPet. A 1921-1 can be imported after a 1921 has been imported.

To import a 1921-1, select the associated 1921 and click File > Import > Import DD 1921-1 (or just right click on the 1921 and choose Import DD 1921-1). In this tutorial, we will import a 1921-1 under the 1921 for CDSS contract plan X-08-Y-C1. If you have not yet imported the 1921, see [Importing a 1921](#) before proceeding in this tutorial.



Select the 1921-1 to be imported, click Open, and wait for the file to import.

View the [Conversion Results](#) to locate errors with the 1921-1.

The 1921-1 now appears indented under the 1921 in the main window of cPet. Click the [Basic Info](#) icon  to view the header fields.

Click the dollar icon  to view the [cost data](#).

 *Tip: The WBS element names and codes are read-only. If you wish to revise these elements, you must do so in Excel and then re-import the 1921-1.*

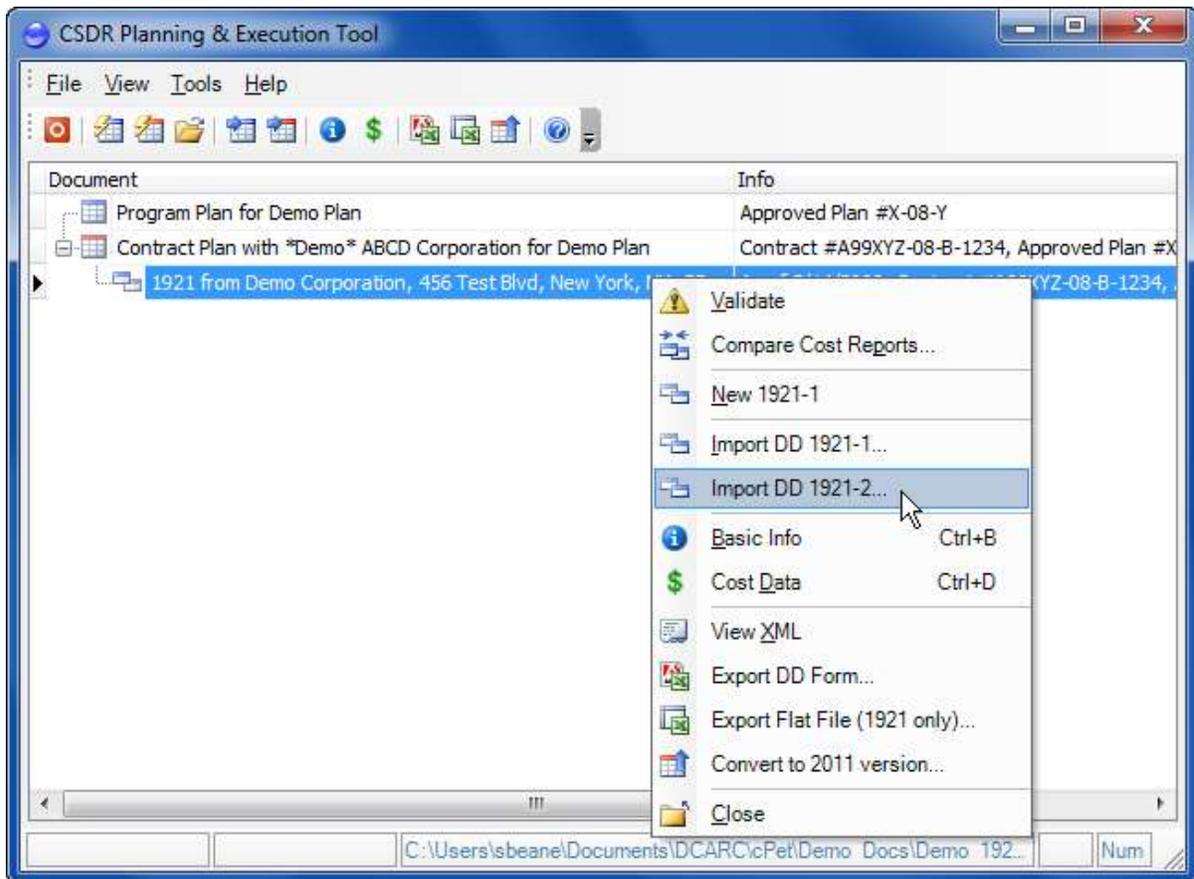
After reviewing the data to make sure it follows the [validation rules](#), the next step is to [validate the cost report\(s\)](#).

 *Tip: If you have made changes to the 1921-1 within cPet, you can export it back to Excel. Select the 1921-1 in the main window of cPet and click **Tools > Export DD Form** (or click  on the toolbar).*

2.3.3 IMPORTING A 1921-2

The **Import DD 1921-2** command is used to convert DD 1921-2 Excel files into XML files that can then be reviewed and validated in cPet. A 1921-2 can be imported after a 1921 has been imported.

To import a 1921-2, select the associated 1921 and click File > Import > Import DD 1921-2 (or just right click on the 1921 and choose Import DD 1921-2). If you have not yet imported the 1921, see [Importing a 1921](#) before proceeding in this tutorial.



Select the 1921-2 to be imported, click Open, and wait for the file to import.

View the [Conversion Results](#) to locate errors with the 1921-2.

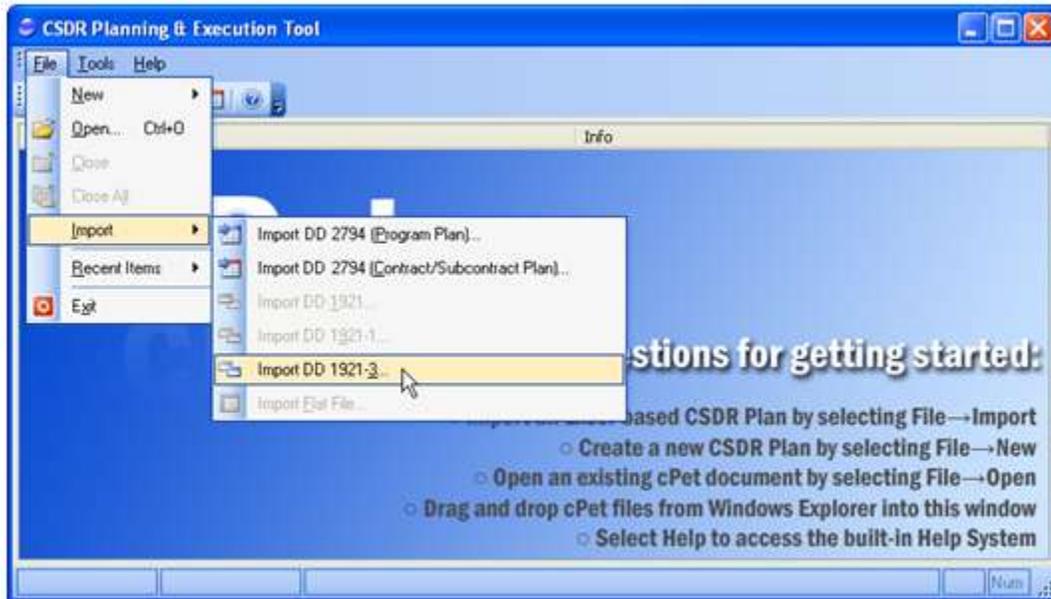
The 1921-2 now appears in the main window of cPet. Click the Basic Info icon  to view the header fields.

Click the dollar icon  to view the cost data.

 *Tip: If you have made changes to the 1921-2 within cPet, you can export it back to Excel. Select the 1921-2 in the main window of cPet and click **Tools > Export DD Form** (or click  on the toolbar).*

2.3.4 IMPORTING A 1921-3

The **Import DD 1921-3** command is used to convert DD 1921-3 Excel files into XML files that can then be reviewed in cPet. To import a 1921-3, click File > Import > Import DD 1921-3.



Select the 1921-3 to be imported, click Open, and wait for the file to import.

View the [Conversion Results](#) to locate errors with the 1921-3.

The 1921-3 now appears in the main window of cPet. Click the [Basic Info](#) icon  to view the header fields.

Click the dollar icon  to view the [cost data](#).

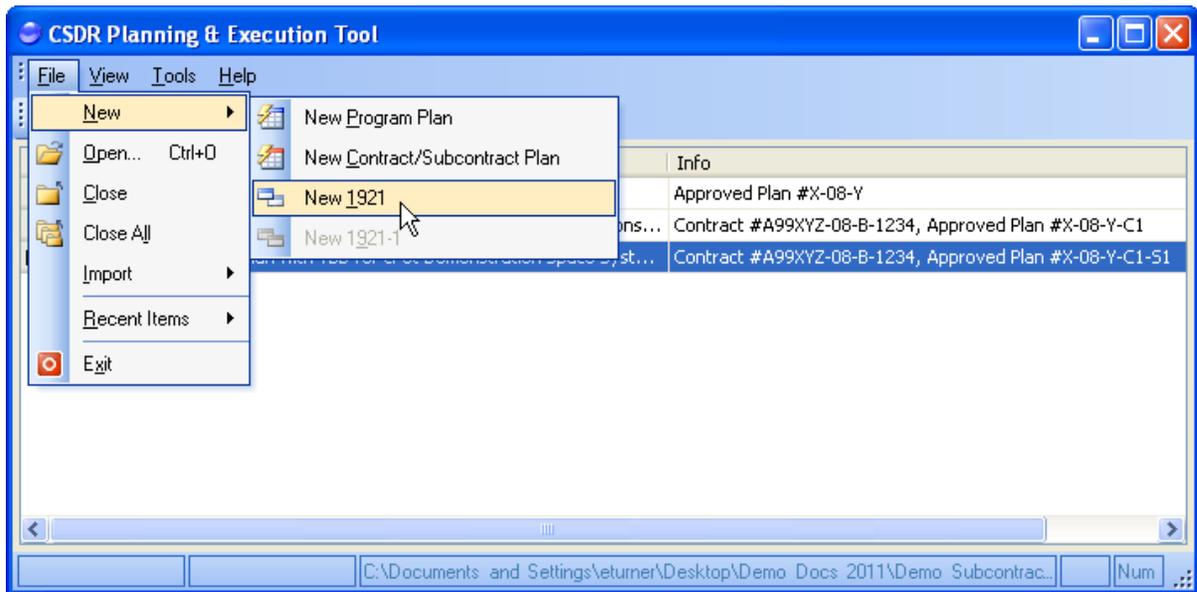
Tip: If you have made changes to the 1921-3 within cPet, you can export it back to Excel. Select the 1921-3 in the main window of cPet and click **Tools > Export DD Form** (or click  on the toolbar).

2.3.5 CREATING A 1921

Although cPet provides the functionality to create new cost reports, it is recommended that the user import the cost reports from the Excel version.

In this tutorial, we will create a 2011 DD Form 1921 under the cPet Demonstration Space System (CDSS) contract plan X-08-Y-C1. Before proceeding, make sure you have [imported](#) or [created](#) a contract plan in cPet.

In the main window of cPet, select the contract plan X-08-Y-C1. Click File > New > New 1921.



Select the document [version](#). Note that new documents should be created using the 2011 format.

Fill in information in the [Basic Info](#) window. Click save, choose the file location, and close the window.

The 1921 now appears indented under the contract plan in the main window of cPet.

Click the dollar icon  to view the [cost data](#). Note that all the WBS elements that appeared on the contract plan or subcontract plan now appear on the 1921. If you wish to revise a WBS element name or code, you must do so on the contract/subcontract plan and then

recreate the 1921. Similarly, the WBS element code corresponds to the WBS item number on the contract/subcontract plan.

Note that the summary elements will be listed at the bottom and marked with a flag . Only data in the To Date Total and At Completion Total columns for the summary elements can be edited.

To fill in the cost data...

You can manually fill in the cost data, or you can use the exporting/importing features to complete this section (as described below; *Note that these options are only available for 2003 and 2007 cost reports*):



Create an Excel template file based on the WBS elements and the cost columns (e.g. Nonrecurring To Date)



Export the cost data to the template file that was created using the icon above



Import cost data into cPet from a template file

To use these features to fill in the cost data, you would first need to create an Excel template (). Then you could fill in the data in Excel. Perhaps you have an automated method of populating the data in Excel. The final step would be to import the data back into cPet (). There are a few things to note when using these options:

 *Tip: When data is imported into cPet, the current data in cPet is overwritten. The cost data in cPet is made to resemble the data in the Excel file.*

 *Tip: It is not possible to use the import feature  to import data from a template file belonging to a different program. The number of WBS items must be the same between the Excel template file and the cost data in cPet.*

 *Tip: You can also export the entire cost report (including the Basic Info) to Excel using the **Export** tool on the cPet main window. Select the 1921 and click Tools > Export DD Form (or click  on the toolbar).*

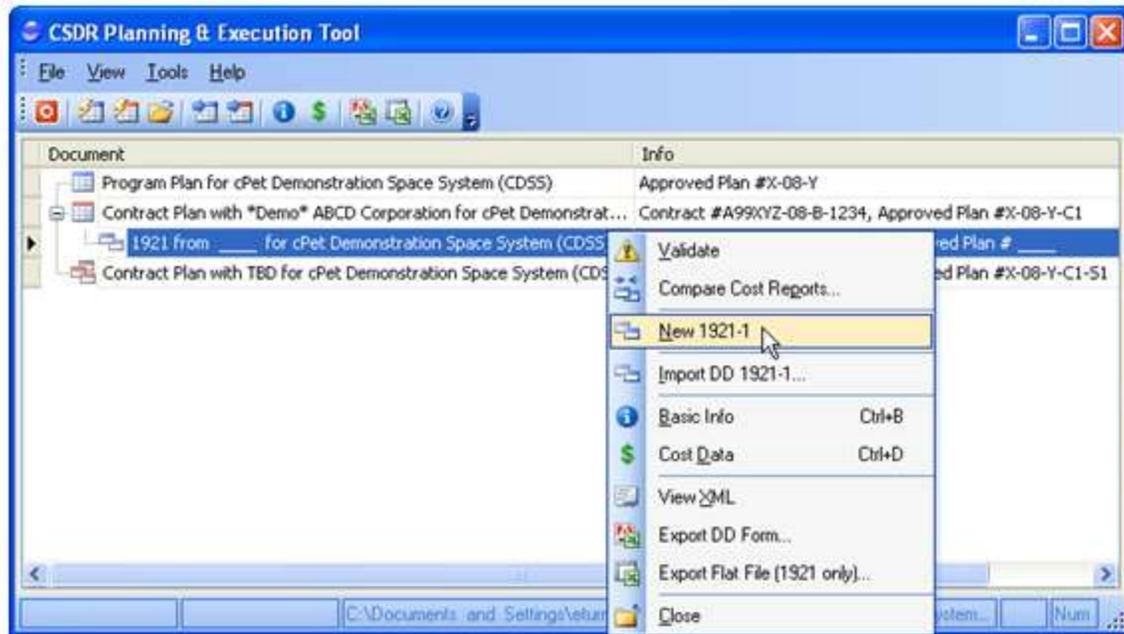
After reviewing the data to make sure it follows the [validation rules](#), the next step is to [create a 1921-1](#) or to skip to [validation](#) if a 1921-1 is not required.

2.3.6 CREATING A 1921-1

Although cPet provides the functionality to create new cost reports, it is recommended that the user import the cost reports from the Excel version.

In this tutorial, we will create a 2011 DD Form 1921-1 under the cPet Demonstration Space System (CDSS) 1921. Before proceeding, make sure you have [created a 1921](#).

In the main window of cPet, select the 1921 and click File > New > New 1921-1 (or right-click on the 1921 and select New 1921-1).



Select the document version. *Note that new documents should be created using the 2011 format.*

Fill in the [Basic Info](#) window. Click save, choose the file location, and close the window.

Click the dollar icon  to view the [cost data](#). Note that all the WBS elements that appeared on the 1921 now appear on the 1921-1. If you wish to revise these element names or codes, you must first do so in the parent contract plan or subcontract plan, then recreate the 1921, and finally recreate the 1921-1. However, if you imported the 1921 instead of creating it in cPet, you can revise the elements in the Excel file, import the 1921, and then create the 1921-1.

To fill in the cost data...

You can manually fill in the cost data, or you can use the exporting/importing features to complete this section (as described below; *Note that these options are only available for 2003 and 2007 cost reports*):

 Create an Excel template file based on the WBS elements, cost categories (e.g. Engineering), and cost types (e.g. NonRecurring Reporting Contractor To Date)

 Export the cost data to the template file that was created using the icon above

 Import cost data into cPet from a template file

To use these features to fill in the cost data, you would first need to create an Excel template (). Then you could fill in the data in Excel. Perhaps you have an automated method of populating the data in Excel. The final step would be to import the data back into cPet (). There are a few things to note when using these options:

 *Tip: When data is imported into cPet, the current data in cPet is overwritten. The cost data in cPet is made to resemble the data in the Excel file.*

 *Tip: It is not possible to use the import feature  to import data from a template file belonging to a different program. The number of WBS items must be the same between the Excel template file and the cost data in cPet.*

 *Tip: You can also export the entire cost report (including the Basic Info) to Excel using the **Export** tool on the cPet main window. Select the 1921-1 and click Tools > Export DD Form (or click  on the toolbar).*

After reviewing the data to make sure it follows the [validation rules](#), the next step is to [validate the cost report\(s\)](#).

2.3.7 IMPORTING/EXPORTING A FLAT FILE

A **Flat File** displays cost report information in an Excel spreadsheet. This file does not replace the DD Form 1921, 1921-1 or 1921-2. Rather, it provides an alternative way to organize and edit data. A Flat File can be imported into cPet. Similarly, cost reports that are open in cPet can be exported to a Flat File.

 *Tip: Flat Files apply only to cost reports of the 2007 or 2011 version (not 2003).*

This tutorial includes the following three topics:

- [Editing a Flat File](#)
- [Importing a Flat File](#)
- [Exporting Cost Reports to a Flat File](#)

Editing a Flat File

A Flat File template can be obtained on the cPet page of the DCARC website. The user can edit this file and import it into cPet (discussed in next section).

The Flat File can be divided into four sections: Metadata, Summary Elements, Cost Data, and Remarks. Note that the **WBS Reporting Level** currently acts as a placeholder and is not used in this version of cPet.

Metadata

The first and second column contain the Metadata associated with the cost reports. Assuming that both the 1921 and its associated 1921-1 were open in cPet at the time of the Flat File export, data in the second column is taken from the 1921 alone. This is because the header fields are assumed to be the same between the two cost reports. The only time metadata from the 1921-1 will appear in this column is if the 1921-1 was open in cPet without a parent 1921.

There are comments in some of the cells in the first column that provide an indication of the type of data expected in the second column. For example, the comment in the image below indicates that the Contractor Type must be either Prime/Associate or Direct-Reporting Subcontractor.

	1	2
1	Data Type	1921/1921-1 Input
2	Data Version	2010
3	Security Classification	Unclassified
4	1a Program MDAP	cPet Demonstration Space System
5	1b Program Phase/Milestone	B
6	2 Prime Mission Product	D
7	3 Reporting Organization Type	Pr
8	4a Organization Name	D
9	4a Organization Address Line 1	45

Select one:

- Prime/Associate Contractor
- Direct-Reporting Subcontractor
- Government

Summary Elements

The summary element costs are listed in the second column towards the bottom. These costs correspond to the Total To Date (**TD**) and Total At Completion (**AC**) summary costs on the 1921. If one of these cells is blank, cPet will provide a warning when the Flat File is imported.

Cost Data

The 1921 cost data is displayed in the fourth through eleventh columns. To understand what the column names mean, see the Definitions sheet on the Flat File. The 1921-1 cost data is located after the 1921 data (although the WBS Code, WBS Reporting Elements, and Units do correspond to the 1921-1 data in addition to the 1921 data). Notice that the cost data is stretched horizontally across the sheet. If there happen to be any WBS elements that appear on the 1921-1 but not on the 1921, they will be added to the bottom of the list of elements.

Note that the total columns do not appear; only the Nonrecurring and Recurring columns are listed. Upon importing the Flat File, cPet automatically sums the data in the two columns (NR and Rec) to obtain the costs in the Total columns. Similarly, the data in the Total columns is *not* exported to the Flat File.

Remarks

The 1921 Remarks are displayed in the second column, last row of the Flat File. These are "document level" remarks. That is, the Remarks pertain to the entire 1921. Alternatively, the Remarks for the 1921-1 are displayed on a row-by-row basis

in the column to the right of all the cost data. These remarks correspond to each WBS element.

For information on entering/editing data for the 1921-2, see Progress Curve Reports (DD Forms 1921-2) Flat File.

Importing a Flat File

Once you have created a Flat File and made any necessary edits in Excel, you can import it into cPet.

 *Tip: cPet identifies an Excel file as a Flat File by two characteristics: (1) The Data Type in cell B1 must be "1921/1921-1 Input," and the Data Version in cell B2 must be "2007" or "2011." If these requirements are not satisfied, the Flat File will not import.*

Select the contract plan in the cPet main window and click **File > Import Flat File**. Browse for the Flat File and click Open. (Note: The Excel file must be closed before you attempt to import it).

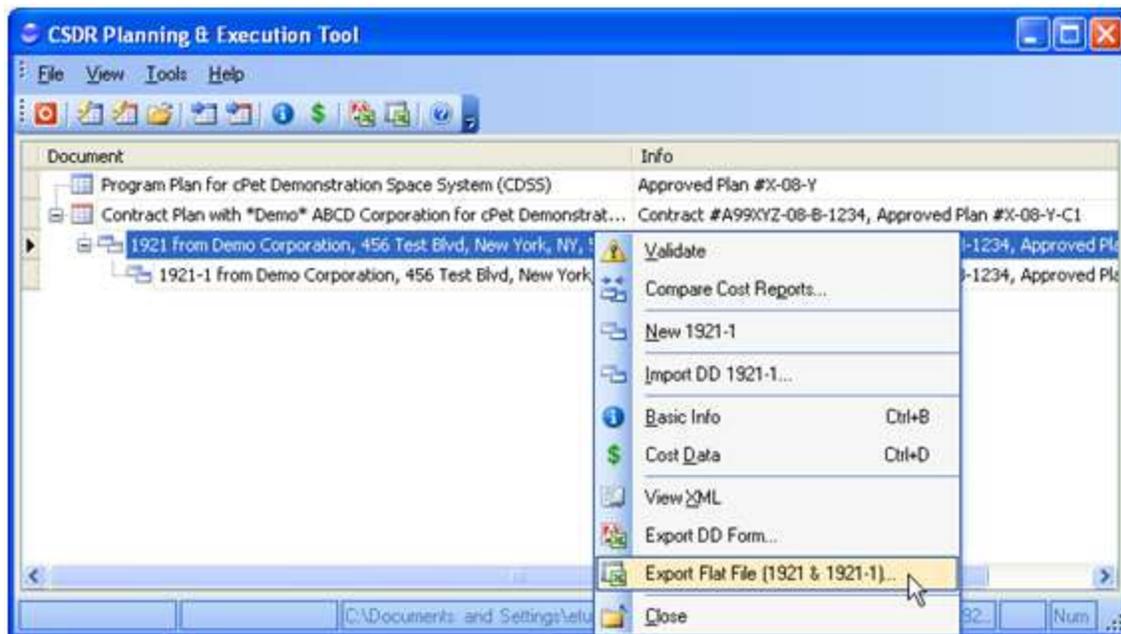
The Conversion Results for Flat Files dialog will pop up. Review these warnings to understand what information was left blank in the Flat File.

The cost report(s) will open in cPet. Whether a 1921 *and* a 1921-1 are open in cPet depends on if there is information in the both the 1921 and the 1921-1 cost data section of the Excel file).

Exporting Cost Reports to a Flat File

Once a cost report is open in cPet, you can export it to a Flat File. Select the 1921, 1921-1 or 1921-2 in the cPet main window and click **Tools > Export Flat File**. Alternatively, right click on the cost report and click **Export Flat File**.

 *Tip: Data from both the 1921 and the associated 1921-1 and/or 1921-2 will be exported to the Flat File assuming that both are open and linked together in cPet. The **Export Flat File** command will indicate in parentheses whether the 1921, 1921-1 and or the 1921-2 are being exported.*



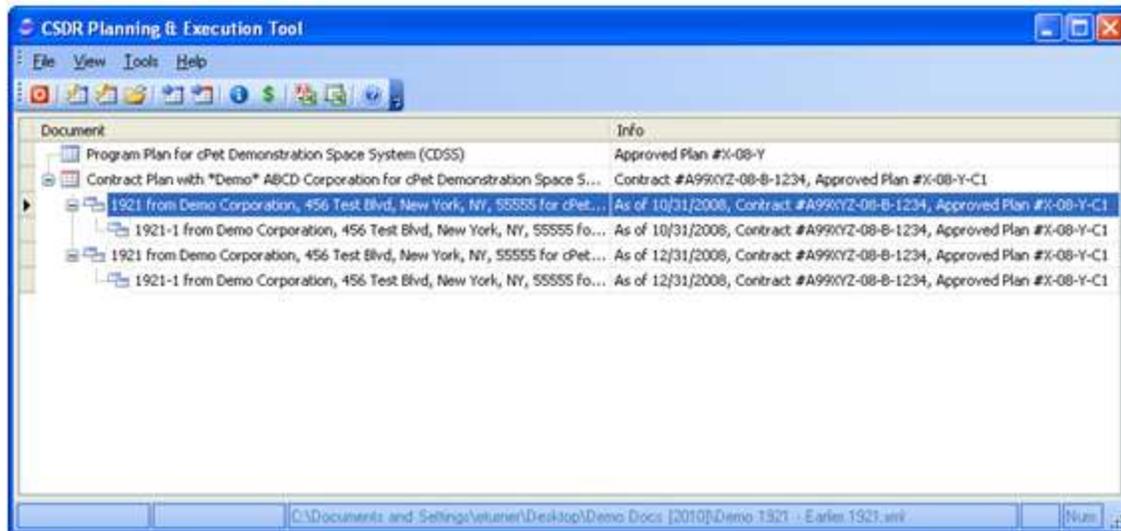
Choose a location to save the document. The file will open in Excel.

If you make changes in the Flat File, you can re-import it into cPet through the File > Import Flat File command.

2.3.8 COMPARING COST REPORTS

The purpose of the Cost Report Comparison tool is to perform a side-by-side comparison of like cost documents. This is particularly useful when comparing chronologically related reports. The user can view the WBS of each report to visually see discrepancies between the documents.

To use this tool, open a contract plan and two like reports in cPet. The reports should have different As Of Dates. cPet differentiates these reports by referring to them as "Earlier Reports" or "Later Reports." The example below has an Earlier and Later 1921, as well as an Earlier and Later 1921-1.



Click **Tools > Compare Cost Reports**. The [Select Reports to Compare](#) dialog will open. Select the "Earlier Report" and the "Later Report." Also choose the contract plan against which to compare the reports and click OK. You must choose either two 1921's or two 1921-1's.

i *Tip: You can select 1921's of either document version (2003, 2007, or 2011). However, 1921-1's must both be of the 2007 or 2011 version. Any 1921-1's of the 2003 version will have check boxes that are disabled in the Select Reports to Compare dialog.*

Once you click OK on the Select Reports to Compare dialog, the [1921 Cost Report Comparison](#) window or the [1921-1 Cost Report Comparison](#) window will appear. The reports will be compared against each other and against the "Reference" (the contract plan) WBS.

2.3.9 VALIDATING COST REPORTS

There are a few different approaches to validating cost reports.

1) Select a 1921 or 1921-1 and click **Tools > Validate Individual Document**. The Validation Results will appear immediately as long as "Skip Validation Wizard when validating an individual document" is checked in the [Options](#). Equivalently, you can right-click on the cost report and select "Validate" to view the validation results for the [1921](#) or [1921-1](#).

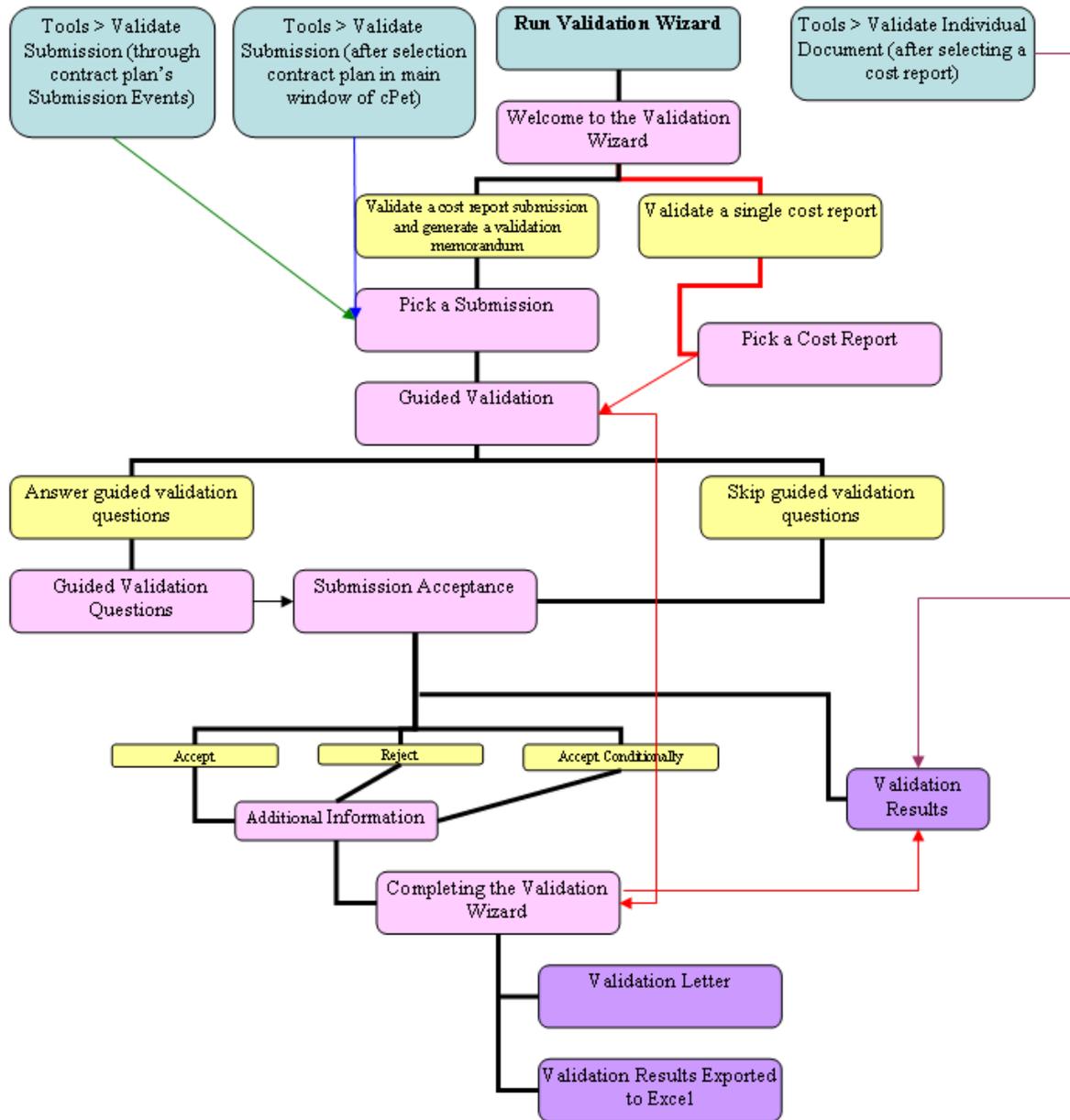
2) Click **Tools > Run Validation Wizard**. See the [Validation Wizard dialog](#) for information pertaining to each of the screens.

3) Validate a cost report through the contract plan's submission events. Open the Submission Events for the contract plan or subcontract plan. Select a specific submission event. Click **Tools > Validate Submission**. The Validation Wizard opens midway to the "Pick a Submission" screen. The submission event is selected, and the cost reports with the closest As Of Date are listed at the bottom. Click Next to proceed with the wizard. See the [Validation Wizard Dialog](#) for more information.

 *Tip: The "Pick a Submission" screen can also be accessed directly from the main window of cPet. Select a contract plan and click **Tools > Validate Submission**. The Validation Wizard opens to the "Pick a Submission" screen with the contract plan's first submission event selected by default.*

The chart below shows the steps involved in different validation methods as well as the end result of each. Follow the black line to see how the Validation Wizard runs from start to finish. Both Validating a Submission methods start in the middle of the Validation Wizard with the "Pick a Submission" screen, but they eventually lead to the validation results and letter. The Validating an Individual Document leads directly to the validation results without generating a letter. The Validating a single cost report option (following the red line) also leads to the validation results without the memo files.

See key below for the color scheme.



Key

- Validation Method
- Dialogs
- Radio Buttons
- End Result

2.3.10 VALIDATION RULES

The following is a list of checks that cPet performs when validating a cost report. The list is organized into requirements for a 1921, 1921-1 and 1921-2. Click on a link to see the details associated with each validation check.

 *Tip: In several of the validation descriptions below, tables are used to explain how rows or columns are summed. The blue fields sum to the green fields.*



 *Tip: Numeric validation checks are based on a 0.2 digit tolerance (disregarding units).*

For a particular WBS Element, the following must be true:

1921

- ▶ [Each WBS Element must have a Code](#)
- ▶ [The Program Name on the 1921 must match the Program Name on the Contract Plan](#)
- ▶ [The Approved Plan Number on the 1921 must match the Approved Plan Number on the Contract Plan](#)
- ▶ [The WBS on the 1921 should match the WBS on the Contract Plan](#)
- ▶ [The WBS Element names must match](#)
- ▶ [Child elements must sum to the parent element](#)
- ▶ [The NonRecurring/Recurring/Total figures must sum correctly](#)
- ▶ [Summary elements must sum correctly](#)
- ▶ [The Reporting Contractor G&A must be nonzero at completion](#)
- ▶ [The Reporting Contractor Profit/Loss or Fee must be nonzero at completion](#)
- ▶ [The To Date figures must be less than or equal to the At Completion figures](#)
- ▶ [All figures must be positive](#)
- ▶ [The Reporting Contractor FCCM must be nonzero at completion](#)

- ▶ Final report Undistributed Budget must have zero cost at completion
- ▶ Final report Management Reserve must have zero cost at completion
- ▶ Final report Total Price To Date cost must be at least 95% of the At Completion cost
- ▶ Final report root element To Date cost must be at least 95% of the At Completion cost
- ▶ The contract price must be numeric
- ▶ The contract ceiling must be numeric
- ▶ SE/PM must be non-zero at completion
- ▶ Remarks required for contract price overrun or underrun

1921-1

- ▶ Each WBS Element must have a Code
- ▶ Duplicate data should not be provided
- ▶ The Program Name on the 1921-1 must match the Program Name on the Contract Plan
- ▶ The Approved Plan Number on the 1921-1 must match the Approved Plan Number on the Contract Plan
- ▶ The WBS Element names must match
- ▶ All WBS Elements found on the 1921-1 must also be on the 1921 and the Contract Plan
- ▶ The 1921-1 must include required elements whose costs match those on the 1921
- ▶ The Quantity field must match
- ▶ The NonRecurring/Recurring/Total figures must sum correctly
- ▶ The Group within the data column must sum correctly
- ▶ The Data columns must sum correctly
- ▶ The Contractor/Subcontractor/Total figures must sum correctly
- ▶ Data in the Direct Labor Hours row, the Direct Labor Dollars row, and the Overhead row must agree
- ▶ The To Date figures must be less than or equal to the At Completion figures
- ▶ All figures must be positive
- ▶ Remarks required for reports with Total Direct-Reporting Subcontractor data

▶ Remarks required if Other Costs Not Shown Elsewhere are greater than or equal to x% of Total Costs

1921-2

▶ Program Name on 1921-2 must match Program Name on Contract Plan

▶ Approved Plan on 1921-2 must match Approved Plan on Contract Plan

▶ WBS Element Code must not be blank

▶ Duplicate WBS Element Codes are not allowed

▶ WBS Element Code must be on the Contract Plan

▶ All Required Reporting Elements on the Contract Plan must be included in the 1921-2 file

▶ WBS Element Name must match WBS Element Name on Contract Plan

▶ WBS Element Code must be on 1921 report

▶ Total Direct Recurring Costs reported To Date on the 1921-2 must match corresponding Recurring Costs To Date reported on the 1921-1 Report

▶ Negative values are not permitted on the 1921-2 report

▶ Sum of reported costs and hours for Completed Units/Lots (Column(s) A) and Work in Process (Column B) must equal Total Direct Costs and Hours To Date (Column C)

▶ Sum of costs reported for 1921-2 functional categories must equal Total Cost of functional category

▶ Sum of costs reported for 1921-2 functional categories and Other Direct Costs must equal Total Direct Cost (Line 22)

▶ Direct Dollars reported for a 1921-2 functional category, must have Direct Hours and vice versa

▶ Comments must be included if costs are reported on the 1921-2 for Total Direct Reporting Subcontractors

▶ Other Direct Costs Not Shown Elsewhere should be less than 10% of total cost (2011 Version) or 15% (2007 Version)

View 1921-3 validation errors and explanations.

1921

▶ *Each WBS Element must have a Code*

Every element must be assigned a unique WBS Element Code. There cannot be several different WBS element names that all share the same code.

▶ *The Program Name on the 1921 must match the Program Name on the Contract Plan*

The 1921 and the contract plan must have the same program name.

▶ *The Approved Plan Number on the 1921 must match the Approved Plan Number on the Contract Plan*

The 1921 and the contract plan must have the same Approved Plan Number.

▶ *The WBS on the 1921 should match the WBS on the Contract Plan*

All WBS elements on the contract plan should appear on the 1921. Even if they are not required according to the contract plan's WBS Editor, they should still be included on the 1921 with zero costs.

Depending on whether a WBS Element is required or not and if the 1921 reports data for that element, cPet may or may not issue a warning. Please see the chart below for areas where cPet will provide a validation error.

For 1921 reporting elements:

Required on contract plan	Reported	Costs blank/zero	Result	cPet Description
required	missing	--	error	Required reporting element omitted from 1921
required	reported	blank/zero ¹	warning	Required reporting element from 1921 reports zero cost for Total At Completion
required	reported	non-zero ¹	OK	--
not required	reported	blank/zero ²	OK	--
not required	reported	non-zero ²	warning	Non-required reporting element from 1921 reports non-zero costs

1 Refers to the value in the Total At Completion column.

2 Refers to all values being blank/zero vs. at least one value being non-zero.

► *The WBS Element names must match*

For a particular element code, the element name must be the same on the 1921 as it is on the contract plan.

► *Child elements must sum to the parent element*

The cost of a parent element must equal the total cost of all its children elements. This must be true for each column (i.e. To Date and At Completion values for Nonrecurring, Recurring, and Total costs columns). In the table below, the two blue fields must sum to the green field.

WBS Element Code	# of Units	To Date			At Completion			
		Nonrecurring	Recurring	Total	# of Units	Nonrecurring	Recurring	Total
1.0								
1.1								
1.1.1								
1.1.2								

► *The NonRecurring/Recurring/Total figures must sum correctly*

The Nonrecurring and Recurring costs must sum to the Total cost for each element. This must be true for both the To Date data and the At Completion data.

WBS Element Code	To Date			At Completion				
	# of Units	Nonrecurring	Recurring	Total	# of Units	Nonrecurring	Recurring	Total
1.0								
1.1								
1.1.1								
1.1.2								

► *Summary elements must sum correctly*

Certain summary elements must sum to other elements. These rules are different for 2003 reports than 2007/2011. See below for specific details.

* Note: Each rule applies to both Total To Date and Total At Completion costs.

* Note: The Root Element is the top-most parent element of the WBS structure.

2003 Reports

Rule 1*

[Root WBS Element]
Subcontractor G&A
Other Subcontractor Miscellaneous
Subcontractor Undistributed Budget
Subcontractor Management Reserve
+ Subcontractor FCCM

Total Cost (Less Subcontractor Profit or Fee)

Rule 2*

Total Cost (Less Subcontractor Profit or Fee)
+ Subcontractor Profit or Fee

Total Cost (Less Reporting Contractor G&A & Profit or Fee)

Rule 3

Total Cost (Less Reporting Contractor G&A & Profit or Fee)
Reporting Contractor G&A
Other Reporting Contractor Miscellaneous
Reporting Contractor Undistributed Budget
Reporting Contractor Management Reserve
+ Reporting Contractor FCCM

Total Cost (Less Reporting Contractor Profit or Fee)

Rule 4

Total Cost (Less Reporting Contractor Profit or Fee)
+ Reporting Contractor Profit or Fee

Total Cost (Through Reporting Contractor G&A & Profit or Fee)

** Note: Rule 1 and Rule 2 apply only if at least one subcontractor summary element is non-zero. If however no subcontractor summary elements are reported, then the following rule applies:*

[Root WBS Element] = Total Cost (Less Reporting Contractor G&A & Profit or Fee)

2007 and 2011 Reports

Rule 1.

[Root WBS Element] = Subtotal Cost

Rule 2.

Subtotal Cost
Reporting Contractor G&A
Reporting Contractor Undistributed Budget
Reporting Contractor Management Reserve
+ Reporting Contractor FCCM
<hr/>
Total Cost

Rule 3.

Total Cost
+ Reporting Contractor Profit/Loss or Fee
<hr/>
Total Price

► *The Reporting Contractor G&A must be nonzero at completion*

There should be a cost in the Total At Completion column for the summary element "Reporting Contractor G&A."

► *The Reporting Contractor Profit/Loss or Fee must be nonzero at completion*

There should be a cost in the Total At Completion column for the summary element "Reporting Contractor Profit/Loss or Fee." For 2003 1921's, this element is referred to as "Reporting Contractor's Profit or Fee."

► *The To Date figures must be less than or equal to the At Completion figures*

For each Nonrecurring, Recurring, or Total cost, the To Date value must be less than or equal to the At Completion value.

WBS Element Code	To Date			At Completion				
	# of Units	Nonrecurring	Recurring	Total	# of Units	Nonrecurring	Recurring	Total
1.0								
1.1								
1.1.1		Less				More		
1.1.2								

► *All figures must be positive*

All cost and non-cost items must have positive values.

► *The Reporting Contractor FCCM must be nonzero at completion*

The summary element "Reporting Contractor FCCM" must have a non-zero Total At Completion cost.

► *Final report Undistributed Budget must have zero cost at completion*

If the Report Cycle on the 1921 Basic Info is marked as "Final," then the summary element "Reporting Contractor Undistributed Budget" Total At Completion cost must be zero. Does not apply to 2003 1921's.

► *Final report Management Reserve must have zero cost at completion*

If the Report Cycle on the 1921 Basic Info is marked as "Final," then the summary element "Reporting Contractor Management Reserve" Total At Completion cost must be zero. Does not apply to 2003 1921's.

► *Final report Total Price To Date cost must be at least 95% of the At Completion cost*

If the Report Cycle on the 1921 Basic Info is marked as "Final," then the summary element "Total Price" Total To Date cost must be at least 95% of the Total At Completion cost. Does not apply to 2003 1921's.

► *Final report root element To Date cost must be at least 95% of the At Completion cost*

If the Report Cycle on the 1921 Basic Info is marked as "Final," then the root element (e.g. top level element) To Date cost must be at least 95% of the At Completion cost. This rule applies to Nonrecurring, Recurring, and Total costs. Does not apply to 2003 1921's.

► *The contract price must be numeric*

The contract price on the Basic Info of a 1921 must be a number, empty, or "N/A."

► *The contract ceiling must be numeric*

The contract ceiling on the Basic Info of a 1921 must be a number, empty, or "N/A."

► *SE/PM must be non-zero at completion*

The Systems Engineering/Program Management WBS element must have a non-zero Total At Completion cost.

► *Remarks required for contract price overrun or underrun*

The contractor should report a total price at completion that is equal to the contract price, or for incentive contracts, is between the contract price and the contract ceiling. If the contract price represents an underrun or an overrun, an explanation must be provided in the Remarks section. Note that cPet does not check whether or not there is text in the Remarks section; rather, cPet is merely providing a warning that remarks should be provided for this situation. Also note that for 2003 1921's, the "Total Price" is considered equivalent to the "Total Cost (Through Reporting Contractor's G&A & Profit or Fee)" summary element.

The following table outlines different scenarios that cPet uses to validate this rule, where TP = Total Price, CP = Contract Price, and CC = Contract Ceiling.

Condition	Result	cPet Error Description
TP < CP and CC = 0	Warning	Total price at completion is less than contract price. Remarks required.

TP > CP and CC = 0	Warning	Total price at completion is greater than contract price. Remarks required.
TP = CP and CC = 0	OK	--
CC > TP > CP	OK	--
CC < TP < CP	Warning	Total Price at completion is less than contract price. Remarks required.

1921-1

► *Each WBS Element must have a Code*

Every element must be assigned a unique WBS Element Code.

► *Duplicate data should not be provided*

For 2003 cost reports, there should be only one page per element. For example, an element cannot have two recurring pages. For 2007 and 2011 reports, this rule extends to the more general requirement that an element should not appear on the 1921-1 more than once.

► *The Program Name on the 1921-1 must match the Program Name on the Contract Plan*

The 1921-1 and the contract plan must have the same program name.

► *The Approved Plan Number on the 1921-1 must match the Approved Plan Number on the Contract Plan*

The 1921-1 and the contract plan must have the same Approved Plan Number.

► *The WBS Element names must match*

For a particular element code, the element name must be the same on the 1921-1 as it is on the contract plan.

► *All WBS Elements found on the 1921-1 must also be on the 1921 and the Contract Plan*

All elements on the 1921-1 must appear on the parent 1921. In addition, all elements on the 1921-1 must be on the contract plan.

► *The 1921-1 must include required elements whose costs match those on the 1921*

If the contract plan requires a WBS Element, the 1921-1 must include that element. An exception to the rule is if the parent 1921 has zero costs. In this case, a 1921-1 need not be provided. However, if a 1921-1 is provided, the costs between the 1921 and 1921-1 must match (see table below).

Depending on whether a WBS Element is required or not and if the 1921-1 reports data for that element, cPet may or may not issue a warning. Please see the chart below for areas where cPet will provide a validation error.

For 1921-1 reporting elements:

Required on contract plan	Reported	1921 blank/zero	Matches 1921	Result	cPet Description
required	missing	blank/zero ¹	--	OK	--
required	missing	non-zero ¹	--	error	Required reporting element omitted from 1921-1 submission
required	reported	--	matches	OK	--
required	reported	--	does not match	error	Corresponding costs on 1921-1 and 1921 do not match
not required	missing	--	--	OK	--
not required	reported	--	matches	OK	--
not required	reported	--	does not match	error	Corresponding costs on 1921-1 and 1921 do not match

¹ Refers to the value in the Total At Completion column

Another important validation rule that cPet uses for 2003 reports is the **95/5 Rule**. If either the Nonrecurring cost or the Recurring cost is greater than 95% of the Total cost of the 1921

(in the At Completion columns), then the 1921-1 can report zero NonRecurring and Recurring costs. Even if the corresponding costs on the 1921 are non-zero, the NonRecurring and Recurring costs may be zero on the 1921-1. However, if the costs for either of these categories is nonzero on the 1921-1, cPet must still verify that the costs match between the 1921 and the 1921-1.

► *The Quantity field must match*

The Number of Units/Quantity fields must match between the 1921 and the 1921-1. When validating this rule for 2003 documents, cPet looks at the value on the Total page alone (i.e. the NonRecurring and Recurring pages are not validated).

Furthermore, a validation check is performed for the quantity field across pages of a 2003 1921-1. The rules are summarized below:

- If the 1921 is not present, do not validate the quantities.
- If the 1921 is present, and the 95/5 does not apply, ensure the quantities are consistent.
- If the 1921 is present, and the 95/5 rule does apply, raise a warning only if the Nonrecurring quantity (and/or the Recurring quantity) is not blank and is not consistent with the Total quantity.

The table below outlines some of the possible cases:

1921 Present?	95/5 Rule Applies?	Quantities Match between Pages?	Blank NR and Rec Qty?	Result	cPet Error Description
No	--	--	--	OK	--
Yes	No	Yes	--	OK	--
Yes	No	No	Yes	Warning	Nonrecurring/Recurring/Total quantities do not match
Yes	No	No	No	Warning	Nonrecurring/Recurring/Total quantities do not match
Yes	Yes	Yes	--	OK	--
Yes	Yes	No	Yes	OK	--
Yes	Yes	No	No	Warning	Nonrecurring/Recurring/Total quantities do not match

Quantity Validation across pages of a 2003 1921-1

► *The NonRecurring/Recurring/Total figures must sum correctly*

The figure in the NonRecurring column and the figure in the Recurring column must sum to the figure in the Total column for each cost category. Note: This validation rule applies to 2007 and 2011 documents only.

	To Date			At Completion		
	Nonrecurring	Recurring	Total	Nonrecurring	Recurring	Total
Engineering						
(1) Direct Engineering Labor Hours						
(2) Direct Engineering Labor Dollars						
(3) Engineering Overhead Dollars						
(4) Total Engineering Dollars						

► *The Group within the data column must sum correctly*

The cost data in a column must sum to the total figure for each cost category (e.g. Total Engineering Dollars).

	To Date		
	Nonrecurring	Recurring	Total
Engineering			
(1) Direct Engineering Labor Hours			
(2) Direct Engineering Labor Dollars			
(3) Engineering Overhead Dollars			
(4) Total Engineering Dollars			

► *The Data columns must sum correctly*

The sum of the total figures of each cost category (e.g. Total Engineering Dollars + Total Manufacturing Dollars +...) must equal the Summary Total Cost for each column.

	To Date			At Completion		
	Nonrecurring	Recurring	Total	Nonrecurring	Recurring	Total
Engineering						
(1) Direct Engineering Labor Hours						
(2) Direct Engineering Labor Dollars						
(3) Engineering Overhead Dollars						
(4) Total Engineering Dollars						
Manufacturing						
(5) Direct Tooling Labor Hours						
(6) Direct Tooling Labor Dollars						
(7) Direct Tooling & Equipment Dollars						
(8) Direct Quality Control Labor Hours						
(9) Direct Quality Control Labor Dollars						
(10) Direct Manufacturing Labor Hours						
(11) Direct Manufacturing Labor Dollars						
(12) Manufacturing Operations Overhead Dollars						
(13) Total Manufacturing Dollars						
Materials						
(14) Raw Material Dollars						
(15) Purchased Parts Dollars						
(16) Purchased Equipment Dollars						
(17) Material Handling/Overhead Dollars						
(18) Total Direct-Reporting Subcontractor Dollars						
(19) Total Material Dollars						
Other Costs						
(20) Other Costs Not Shown Elsewhere						
Summary						
(21) Total Cost						

► *The Contractor/Subcontractor/Total figures must sum correctly*

This validation rule applies to 2003 1921-1's only. For any given row, the To Date figure for the Reporting Contractor and the Subcontractor must sum to the To Date figure in the Total column. The same must be true for the At Completion values.

Non-Recurring Costs	Reporting Contractor		Subcontractor		Total	
	To Date	At Completion	To Date	At Completion	To Date	At Completion
Engineering						
1. Direct Labor Hours						
2. Direct Labor Dollars						
3. Overhead						
4. Material						
5. Other Direct Charges (Specify)						
6. Total Engineering Dollars						

► *Data in the Direct Labor Hours row, the Direct Labor Dollars row, and the Overhead row must agree*

For each cost category (e.g. Engineering, Manufacturing, etc.) and each column, the following must be true:

- 1) If there is data in the "Direct Labor Hours" category for a WBS Element, then there must be data in the "Direct Labor Dollars" category for that element (or vice versa).
- 2) If there is data in the "Direct Labor Dollars" category for a WBS Element, then there must be data in the "Overhead" category for that element (or vice versa).

For 2007 and 2011 documents, these rules apply to all direct labor categories. For example, if there is a value in the Direct Manufacturing Labor Dollars category, then there must also be a value in the Direct Manufacturing Labor Hours category as well as the Manufacturing Operations Overhead Dollars category.

► *The To Date figures must be less than or equal to the At Completion figures*

For a particular cost row, the To Date figure must be less than or equal to the At Completion value for the Reporting Contractor columns, the Subcontractor columns, and the Total columns.

	To Date			At Completion		
	Nonrecurring	Recurring	Total	Nonrecurring	Recurring	Total
Engineering						
(1) Direct Engineering Labor Hours						
(2) Direct Engineering Labor Dollars	Less			More		
(3) Engineering Overhead Dollars						
(4) Total Engineering Dollars						

► *All figures must be positive*

All cost and non-cost items must have positive values.

► *Remarks required for reports with Total Direct-Reporting Subcontractor data*

If there are costs on Line 18 "Total Direct-Reporting Subcontractor Dollars," then an explanation should be provided in the Remarks section. These remarks should include the subcontractor name, city, state, and the corresponding subcontract prices for each direct reporting subcontractor. Note that cPet does not validate whether or not there is text in the Remarks section; rather, cPet is merely providing a warning that remarks should be provided for this situation. Does not apply to 2003 1921-1's.

► *Remarks required if Other Costs Not Shown Elsewhere are greater than or equal to x% of Total Costs*

For 2003 and 2007 reports, if the costs in Line 20 ("Other Costs Not Shown Elsewhere") are greater than or equal to 15% of the Total Cost in Line 21, then an explanation should be provided in the Remarks section. For 2011 reports, remarks should be provided if Line 20 costs are greater than or equal to 10% of Line 21 costs. These remarks should include information regarding the cost composition and should identify each of the costs comprising Line 20 as direct or overhead. Note that cPet does not validate whether or not there is text in the Remarks section; rather, cPet is merely providing a warning that remarks should be provided for this situation.

1921-2

▶ *Program Name on 1921-2 does not match Program Name on Contract Plan*

The Program Name on the 1921-2 must match the Contract Plan.

▶ *Approved Plan on 1921-2 does not match Approved Plan on Contract Plan*

The Approved Plan Number on the 1921-2 must match the Contract Plan.

▶ *Blank WBS Element Code found for reporting elements on 1921-2*

One or more WBS elements are missing a WBS element code on the 1921-2 form. View the Reading Pane to see the corresponding element names.

▶ *Duplicate WBS Element Code found for reporting elements on 1921-2*

Duplicate WBS element codes were found to be listed more than once on the 1921-2 file. This error may also be triggered if two different WBS elements share a single code.

▶ *WBS Element Code not found on Contract Plan*

There is WBS Element Code on the 1921-2 form that is not found on the Contract Plan.

▶ *Required Reporting Element omitted from 1921-2 file*

A WBS element that has a requirement for 1921-2 reporting in Column 13d (1921-2) on the Contract Plan.

▶ *WBS Element Name does not match WBS Element Name on Contract Plan*

The WBS Element Name reported on the 1921-2 does not match the Element Name on the Contract Plan. The issue is, most likely, due to misspelling or slight modifications to the Element Name.

▶ *WBS Element Code from 1921-2 report not found on 1921 report*

There is WBS Element Code on the 1921-2 form that is not found on the 1921 report.

▶ *Total Direct Recurring Costs reported To Date on the 1921-2 do not match corresponding Recurring Costs To Date reported on the 1921-1 Report*

Total Direct Recurring Costs and Hours To Date (Column C) reported on the 1921-2 report does not match the Total Recurring Costs and Hours To Date (Column B) reported on the 1921-1 report for the following corresponding fields: Direct Engineering Labor Hours & Dollars, Direct Tooling Labor Hours & Dollars, Direct Quality Control Hours & Dollars, Direct Manufacturing Hours & Dollars, Raw Materials Dollars, Purchased Parts Dollars, Purchased Equipment Dollars, Total Direct Reporting Subcontract Dollars, Other Direct Costs Not Shown Elsewhere.

▶ *Negative costs found on 1921-2 report*

Negative values are not permitted on the 1921-2 report unless accompanied by a comment in the Remarks section.

▶ *Sum of reported costs and hours for Completed Units/Lots (Column(s) A) and Work in Process (Column B) does not equal Total Direct Costs and Hours To Date (Column C)*

For each row on the 1921-2 report, Columns A plus B, must equal C for both costs and hours.

▶ *Sum of costs reported for 1921-2 functional categories does not equal Total Cost of functional category*

Line 15 (Total Direct Manufacturing Operations Dollars) must equal the sum of Lines 9, 10, 12, and 14). Line 20 (Total Direct Material Dollars) must equal the sum of Lines 16, 17, 18, and 19.

▶ *Sum of costs reported for 1921-2 functional categories and Other Direct Costs does not equal Total Direct Cost (Line 22)*

Line 22 (Total Direct Cost) must be equal to the sum of Lines 7, 15, 20, and 21.

▶ *Direct Dollars reported for a 1921-2 functional category, without Direct Hours and vice versa*

For each functional category on the 1921-2 (Engineering, Tooling, Quality Control, and Manufacturing), if hours are reported, dollars must also be reported, and vice versa.

▶ *Cost reported on the 1921-2 for Total Direct Reporting Subcontractors*

If costs are reported in Line 19 (Total Direct-Reporting Subcontractor Dollars), then a comment must be included in the Remarks section with information on the subcontractor's name and total dollar value of the contract.

▶ *Other Direct Costs Not Shown Elsewhere are greater than 10% of total cost (2011 Version) or 15% (2007 Version)*

If costs reported in Line 21 (Other Direct Costs Not Shown Elsewhere) pass the threshold, then a comment is required in the Remarks section of the 1921-2 report.

1921-3 Validation Errors and Explanations

▶ *Duplicate Sections A & B provided for Fiscal Year*

The prior, current and future years must all be submitted on separate worksheets in one Excel file. Each 1921-3 submission must contain the following: Sections A and B (Page 1) must be completed for the Prior Year, Current Year, and at least three future years. Sections C – F (Page 2) must only be completed once for each submission.

▶ *Sections A & B not provided for Prior Year, Current Year, and/or Previous Fiscal Year*

Sections A and B (Page 1) must be completed for the Prior Year, Current Year, and at least three future years.

▶ *Reported figure is negative*

All costs and hours must be reported in thousands, rounded to the nearest tenth. If costs or hours are negative, there must be an explanation in the Remarks section.

▶ *Costs for other efforts are greater than or equal to 15% of Total Cost*

Lines 11 (Other DoD Effort), 12 (Other Government Effort), or 13 (Commercial Effort) that equal 15% or more of the total dollars or hours in Line 14 (Total Direct Costs and Hours Base), details of the composition of these lines must be provided in the Remarks section.

▶ *Line 14 (Total Direct Costs and Hours Base) does not equal the sum of Lines 1-13*

Line 14 must be the sum of all costs or hours reported for that column in Lines 1 – 13. This must be provided in Line 14 in Columns f, g, i, j, k, m, and n.

▶ *Line 14a (Total Direct Workers) not reported*

Line 14a must be the average number of employees in the FPR unit for each year reporting. The average is the sum of the employees at the end of each month divided by the number of months being reported. The total direct workers must include all direct workers in the FPR unit and may not equal the sum of the rows.

▶ *Costs reported for Other functional category*

If the contractor reports cost, hours or manpower for an additional functional category in Columns l, m, or n, the other functional cost categories must be identified in the Remarks section.

▶ *Costs reported for Other Miscellaneous are greater than or equal to 15% of Total Cost*

If reported costs or hours in Line 25 (Other Miscellaneous) in Columns p, q, s, t, u, w, x, y, or z are more than 15% of the hour or dollar totals provided in Lines 27 or 28, details on the composition of Line 25 (Other Miscellaneous) must be provided in the Remarks section.

▶ *Total Indirect Costs and Hours do not equal the sum of costs or hours reported*

Line 27 (Total Indirect Costs and Hours) must equal the sum of all costs or hours reported for that column in Lines 15 – 26. This must be provided in Line 27 in Columns p, q, s, t, u, w, and x. cPet should classify this as an error.

▶ *Total G&A Costs and Hours do not equal the sum of costs or hours reported*

Line 28 (Total G&A Costs and Hours) must equal the sum of lines 15 – 26 in Columns y and z.

▶ *Indirect/Direct Cost Rate does not match calculated cost rate*

Line 29 is calculated by dividing the indirect costs in Line 27 (Total Indirect Cost and Hours) by the direct costs in Line 14 (Total Direct Cost and Hours). If the calculated number is different from the contractor calculated rate, which may have applied another methodology for calculating indirect rates, then cPet will provide a “warning” and the contractor must provide the methodology used and calculations in the Remarks section.

▶ *G&A Rate/Direct + Indirect does not match calculated cost rate*

Line 30 is calculated in Column Y by dividing the G&A costs in Line 28 in Column y by the total direct (Line 14, Columns f, I, k, and m) and indirect costs (Line 27, Columns p, s, u, and w). The contractor is permitted to calculate G&A using a different methodology, if they provide the method and calculation in the Remarks section.

▶ *Total FPR Unit Revenue not reported*

Section E (Total FPR Unit Revenue Sales) should exceed costs--if applicable, for a certain fiscal year. By taking the sum of all direct (Section A, Line 14, Columns f, I, k, and m) and indirect (Section B, Line 27, Columns p, s, u, and w, Line 28, Column Y) costs from the page 1 for the prior or current year, and checking that the sum of all costs on page 1 does not exceed FPR Unit Revenue for the prior or current year. Thus, if a large loss is reported, the contractor could be asked to ensure this is correct and to provide an explanation in the Remarks section.

▶ *Dollars reported without associated Hours, Hours reported without associated Dollars*

If labor dollars are reported, then labor hours must also be reported. If labor hours are reported, then labor hours must also be reported.

▶ *Hours reported without associated Workers, Workers reported without associated Hours*

If workers are reported, then labor hours must also be reported. If labor hours are reported, then workers must also be reported.

▶ *Reported hours per worker are greater than 2,500*

If the number of workers is divided by the number of hours, and the number of hours per employee is greater than 2500 per year, cPet will generate a warning. An explanation in the Remarks section should be included.

▶ *Reported Dollars per Hour are greater than 1,000*

If the calculated labor rate exceeds \$1,000/hour, cPet will generate a warning. If the rate is correct, the contractor should include an explanation in the Remarks section.

▶ *Reported Hours per Worker are greater than 10,000*

If the calculated hours per worker exceed 10,000 hours, cPet will generate a warning. If the figure is correct, the contractor should include a comment in the Remarks section.

▶ *Labor rates from Section D do not match labor costs from Sections A*

The labor rates reported in Section D (Direct Labor Rates) should be the same as labor costs reported in Section A (Direct Cost Categories). If not, cPet will generate a warning and the contractor should include an explanation in the Remarks section.

3: DIALOGS

3.1 1921 BASIC INFO DIALOG

The DD Form 1921, "Cost Data Summary Report," provides cost data from contractors for both recurring and nonrecurring costs. The Basic Info window displays the information relevant to the contractor and the associated contract plan. Four pages outline the header information found on the DD 1921, and a brief description of each is provided below. Please click a link below to view information pertaining to the appropriate version of the document and the desired page number.

2003 DID

[Page 1](#)

[Page 2](#)

[Page 3](#)

[Page 4](#)

2007 DID

[Page 1](#)

[Page 2](#)

[Page 3](#)

[Page 4](#)

2011 DID

[Page 1](#)

[Page 2](#)

[Page 3](#)

[Page 4](#)

2003 DID

Page 1

The DD 1921 shares the same **Program Name** (Item 1a) as the program plan and contract plan.

The **Approved Plan Number** (Item 1b) is the number assigned to the contract plan or subcontract plan for which the data are reported.

The **Dollars In** field (Item 2) represents the units of the cost data. The Dollars In is typically in thousands of dollars.

The **Type Action** (Item 3) is either **Contract**, **RFP**, or **Program Estimate**. Choosing one of these radio buttons causes different fields to be displayed.

If the Type Action is **Contract**, enter the **Contract Number** and the **Latest Amendment Number** of the contract plan for which the data are reported.

Page 2

The **Appropriation** (Item 4) refers to the contract funding: either **RDT&E** (Research, Development, Test, and Evaluation) or **Procurement**. If the funding is neither RDT&E nor Procurement, click "Other" and type details of the funding in the text field to the right.

Click **Multi-Year Contract** if the contract is funded for several fiscal years.

The **Report As Of** (Item 5) is the date of the submission event for which the data are reported. This date follows the MM/DD/YY format.

The **Contract Price Estimate** (Item 9) is the cost of the contract through the Report Date.

Enter the **Contract Ceiling** (Item 10) for the contract.

The **Contractor Type** (Item 11a) is either Prime or Associate, or Subcontractor depending on the contract plan associated with the 1921.

Page 3

The **Contractor Name** and **Address** (Item 11b) is the contact information for the (prime or sub) contractor.

The **Customer Name** (Item 12) is the name of the prime contractor responsible for the subcontractor. Leave blank if the report is submitted by the prime contractor.

The **Point of Contact** Information, i.e. the **POC Name** (Item 14a), **Department** (Item 14b), **E-mail** (Item 14d), and **Phone/Fax** (Items 14c and 14e), is the contact information for the individual who prepared the report.

Page 4

The **Remarks** (Item 13) section provides an area for any other information that might be relevant to the data or the report in general.

2007 DID

Page 1

The DD 1921 shares the same **Program Name** as the program plan and contract plan. The name corresponds to Item 1a "MDAP" of the DD Form 1921.

The **Phase** (Item 1b) is one of the following four:

- A (Technology development)
- B (System Development and Demonstration)
- LRIP (Low-rate Initial Production)
- Production (Full-rate Production)

The **Prime Mission Product** (Item 2) is the military designation or the type of product.

The **Contractor Type** (Item 3) is either Prime/Associate, or Subcontractor depending on the contract plan associated with the 1921.

The **Contractor Name** and **Address** (Item 4) is the contact information for the (prime or sub) contractor.

The **Customer Name** (Item 6) is the name of the prime contractor responsible for the subcontractor. Leave blank if the report is prepared by the prime contractor.

Page 2

The **Contract Type** (Item 7) must be one of the following nineteen:

- CS - Cost Sharing
- CPAF - Cost Plus Award Fee
- CPFF - Cost Plus Fixed Fee
- CPIF - Cost Plus Incentive Fee
- CPIF(PI) - Cost Plus Incentive Fee (With Performance Incentives)
- FFP - Firm Fixed Price
- FPIF - Fixed Price Incentive, Firm Target
- FPIST - Fixed Price Incentive, Successive Targets
- FPIST(PI) - Fixed Price Incentive, Successive Targets (With Performance Incentive)
- FPIFT(PI) - Fixed Price Incentive, Firm Target (With Performance Incentive)
- FPAF - Fixed Price Award Fee
- FP/EPA - Fixed Price with Economic Price Adjustment
- FP/PPR - Fixed Price with Prospective Price Redetermination
- FP/RPR - Fixed Ceiling Price with Retroactive Price Redetermination
- FFP/LOET - Firm Fixed Price, Level of Effort Term
- LC - Letter Contract and Undefined Contractual Action (UCA)
- OC - Other Contracts
- MC - Contracts with multiple Contract Types by Contract Line Item Numbers (CLINS)
- NA - Not Applicable

The **Contract Price** (Item 8) is the cost of the contract through the Report Date.

Enter the **Contract Ceiling** (Item 9) for the contract.

The **Type Action** block corresponds to Item 10 on the DD 1921. The **Contract Number** (Item 10a) is that of the associated contract plan. The **Latest Modification** (Item 10b) is the number of the most recent contract modification. The **Solicitation Number** (Item 10c) is used for data relating to a solicitation according to the Defense Federal Acquisition Regulation Supplement (DFARS) 215.403-5. The **Name** (Item 10d) corresponds to that of the associated contract plan.

The **Appropriation** (Item 12) is either RDT&E (Research, Development, Test and Evaluation), Procurement, or O&M (Operating and Maintenance). The Appropriation represents the contract funding. If the funding comes from multiple sources, check the appropriate boxes and note the percentage breakdown in the remarks section of Page 4.

The **Start Date** (Item 11a) and **End Date** (Item 11b) correspond to the time frame of the **Period of Performance**. The dates must be entered in YYYYMMDD format in order to import correctly into cPet.

Page 3

The **Report Cycle** (Item 13) is either Initial, Interim, or Final. The Initial Report represents the groundwork for the 1921 and serves the purpose of presenting the data in accordance with the Data Item Description. The Interim Report is any report submitted between the Initial and Final stages. The Final Report represents the complete 1921 report.

The **Approved Plan Number** (Item 5) is the number assigned to the contract plan or subcontract plan.

The **Submission Number** (Item 14) is the submission event number for which the data are reported.

The **Resubmission Number** (Item 15) represents the number of times the DD 1921 has been submitted. The original submission is marked by "0," and the first resubmission by "2."

The **Report As Of** (Item 16) is the date of the submission event for which the data are reported. The date must be entered in YYYYMMDD format in order to import correctly into cPet.

The **Point of Contact** Information, i.e. the **Name** (Item 17), **Department** (Item 18), **E-mail** (Item 20), and **Phone** (Item 19), is the contact information for the individual who prepared the report. The **Date Prepared** (Item 21) is the date corresponding to the 1921. The date must be entered in YYYYMMDD format in order to import correctly into cPet.

Page 4

The **Remarks** (Item 22) section provides an area for any other information that might be relevant to the data or the report in general.

2011 DID

Page 1

The DD 1921 shares the same Program Name as the program plan and contract plan. The name corresponds to Item 1a "Major Program" of the DD Form 1921.

The **Phase** (Item 1b) is one of the following four:

- Pre-A (Material Solution Analysis)
- A (Technology development)
- B (Engineering and Manufacturing Development)
- C-LRIP (Low-Rate Initial Production)
- C-FRP (Production and Deployment - Full-rate Production)
- O&S (Operations and Support)

The **Approved Plan Number** (Item 5) is the number assigned to the contract plan or subcontract plan.

The **Submission Number** (Item 14) is the submission event number for which the data are reported.

The **Resubmission Number** (Item 15) represents the number of times the DD 1921 has been submitted. The original submission is marked by "0," and the first resubmission by "2."

The **Report As Of** (Item 16) is the date of the submission event for which the data are reported. The date must be entered in YYYYMMDD format in order to import correctly into cPet.

The **Report Cycle** (Item 13) is either Initial, Interim, or Final. The Initial Report represents the groundwork for the 1921 and serves the purpose of presenting the data in accordance with the Data Item Description. The Interim Report is any report submitted between the Initial and Final stages. The Final Report represents the complete 1921 report.

The **Point of Contact** Information, i.e. the **Name** (Item 17), **Department** (Item 18), **E-mail** (Item 20), and **Phone** (Item 19), is the contact information for the individual who prepared the report. The **Date Prepared** (Item 21) is the date corresponding to the 1921. The date must be entered in YYYYMMDD format in order to import correctly into cPet.

Page 2

The **Reporting Organization Type** (Item 3) is either Prime/Associate Contractor, or Direct-Reporting Subcontractor, or Government depending on the contract plan associated with the 1921.

The **Performing Organization Name and Address** (Item 4a) is the contact information for the (prime or sub) contractor.

The **Division Name and Address** (Item 4b) displays the name of the contractor division and location.

The **Customer Name** (Item 6) is the name of the prime contractor responsible for the subcontractor. Leave blank if the report is prepared by the prime contractor.

Page 3

The **Contract Type** (Item 7) must be one of the following nineteen:

- CS - Cost Sharing
- CPAF - Cost Plus Award Fee
- CPFF - Cost Plus Fixed Fee
- CPIF - Cost Plus Incentive Fee
- CPIF(PI) - Cost Plus Incentive Fee (With Performance Incentives)
- FFP - Firm Fixed Price
- FPIF - Fixed Price Incentive, Firm Target
- FPIST - Fixed Price Incentive, Successive Targets
- FPIST(PI) - Fixed Price Incentive, Successive Targets (With Performance Incentive)
- FPIFT(PI) - Fixed Price Incentive, Firm Target (With Performance Incentive)
- FPAF - Fixed Price Award Fee
- FP/EPA - Fixed Price with Economic Price Adjustment
- FP/PPR - Fixed Price with Prospective Price Redetermination
- FP/RPR - Fixed Ceiling Price with Retroactive Price Redetermination
- FFP/LOET - Firm Fixed Price, Level of Effort Term
- LC - Letter Contract and Undefined Contractual Action (UCA)
- TM - Time and Materials
- OC - Other Contracts
- MC - Contracts with multiple Contract Types by Contract Line Item Numbers (CLINS)
- NA - Not Applicable

The **Contract Price** (Item 8) is the cost of the contract through the Report Date.

Enter the **Contract Ceiling** (Item 9) for the contract.

The **Type Action** block corresponds to Item 10 on the DD 1921. The **Contract Number** (Item 10a) is that of the associated contract plan. The **Latest Modification** (Item 10b) is the number of the most recent contract modification. The **Solicitation Number** (Item 10c) is

used for data relating to a solicitation according to the Defense Federal Acquisition Regulation Supplement (DFARS) 215.403-5. The **Name** (Item 10d) corresponds to that of the associated contract plan. The **Order/Lot Number** (Item 10e) field contains (if applicable) the task order (TO), delivery order (DO), or Lot Number (Lot), followed by the number.

The **Appropriation** (Item 12) is either RDT&E (Research, Development, Test and Evaluation), Procurement, or O&M (Operating and Maintenance). The Appropriation represents the contract funding. If the funding comes from multiple sources, check the appropriate boxes and note the percentage breakdown in the remarks section of Page 4.

The **Start Date** (Item 11a) and **End Date** (Item 11b) correspond to the time frame of the **Period of Performance**. The dates must be entered in YYYYMMDD format in Excel in order to import correctly into cPet.

Page 4

The **Remarks** (Item 22) section provides an area for any other information that might be relevant to the data or the report in general.

For a more detailed explanation of the header fields, see the following Data Item Descriptions:

[2007 DD Form 1921-2 Data Item Description](#)

[2011 DD Form 1921-2 Data Item Description](#)

3.2 1921 COST DATA

The Cost Data dialog can be reached by selecting the 1921 and clicking the  icon.

The **Contract Line Item** (found only on 2003 1921s) corresponds to a particular WBS Element.

The **Reporting Elements** correspond to the WBS Elements on the 1921. These elements should match the affiliated contract plan's WBS elements where a 1921 is required.

The **WBS Element Code** corresponds to the code of that element on the contract plan.

The **Number of Units To Date/At Completion** represents the total units. On 2003 1921s, the units are formatted as xx/xx, where the first number is the units produced and given to the government. The second number is the units that the contractor will use when carrying out the contract. For 2007 1921s, see the [2007 DID](#) for calculating the number of units.

The **Costs Incurred** To Date and At Completion are subdivided into three categories: Nonrecurring costs, Recurring costs, and Total costs. For each WBS element, the Nonrecurring and Recurring figures must sum to the Total figure. Furthermore, the costs for children elements must sum correctly to the cost of the parent element. The cost To Date must be less than or equal to the cost At Completion. For a complete list of requirements pertaining to the cost data, see [Validation Rules](#).

 *Tip: For more information, see the [2007 DID](#) and [2011 DID](#).*

Use the following icons when importing or exporting cost data (Note: This feature is useful when creating a [new 1921](#)). This feature is only available for 2003 and 2007 1921's.



Create an Excel template file based on the WBS elements and the cost columns (e.g. Nonrecurring To Date)



Export the cost data to the template file that was created using the icon above



Import cost data into cPet from a template file

3.3 1921 COST REPORT COMPARISON

This dialog appears after an "Earlier" 1921 and a "Later" 1921 have been chosen through the [Select Reports to Compare](#) dialog.

The Comparison Options are displayed at the top, followed by the cost data.

The **WBS Tracking** legend indicates which WBS elements appear on the Earlier report, the Later report, and the contract plan (the "Reference"). If the triangle icon (◀ or ▶) is shaded, then the WBS element appears on the report (Earlier or Later, respectively). For example, the symbol "◀▶" indicates that the WBS item is found on the Earlier report but not the Later. The shaded rectangle in the center indicates that the element appears on the contract plan. If the triangle/rectangle is *not* shaded, then the WBS element is not present on that report/plan. In the example above, the right arrow is not shaded. Thus the WBS element does not appear on the Later report.

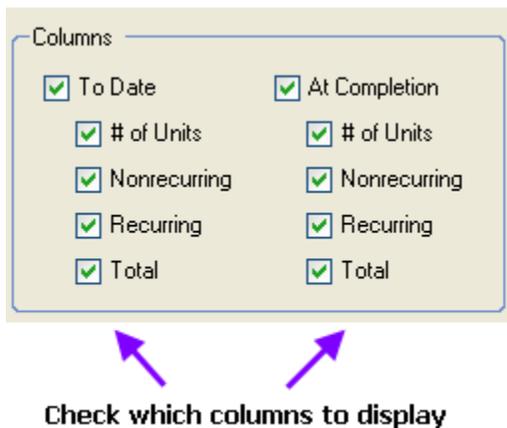
The gray areas in the cost data () reinforce the WBS Tracking symbols; the WBS element may not appear on one or more report.

i *Tip: It may be easier to see where data is missing from a report if you choose **Group** for the Arrangement under the Column Options (see below).*

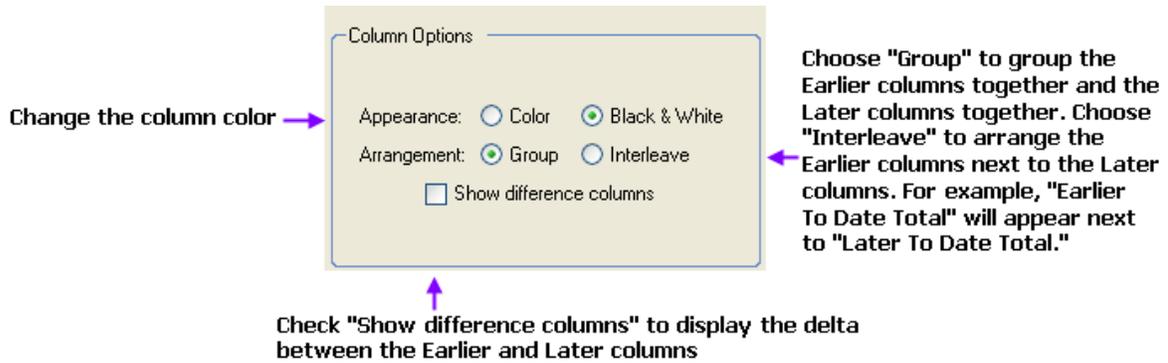
Uncheck **Show Reference WBS** if you do not wish to see elements appearing on either report, only the contract plan.

A WBS element with a **hyperlink** indicates that there is a mismatch between the element names. Click on the hyperlink to understand this mismatch in the [WBS Naming Discrepancies](#) dialog. The element name may be different between the contract plan, the Earlier Report, and/or the Later Report.

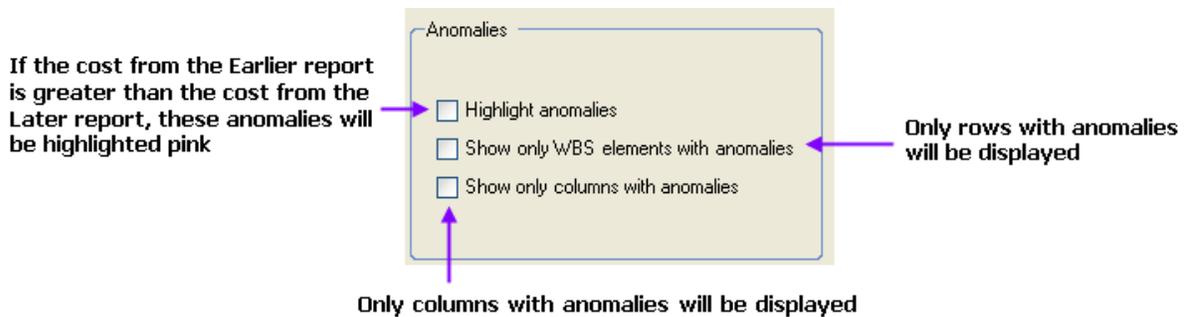
Different columns/rows of data will be displayed depending on specified options. For instance, you can check which **columns** to show (# of Units, Nonrecurring, Recurring, and Total for both To Date and At Completion).



The **Columns Options** allows you to change the column colors and group the columns in different arrangements.



You can select how **Anomalies** are displayed. cPet will indicate an anomaly if the cost from the Earlier report is greater than the cost from the Later Report. For instance, if the Earlier To Date Recurring is \$2,000 and the Later To Date Recurring is \$1,000 for a particular WBS element, then those costs will be highlighted pink as long as "Highlight anomalies" is checked.



3.4 1921 VALIDATION RESULTS

The Validation Results dialog appears immediately after validating an individual document or after running the Validation Wizard. The data is grouped in two categories: **1921 vs Contract Plan** and **1921 Internal**. The first category contains a list of problems with the cost data on the 1921 as compared to the contract plan's WBS Editor. The second category contains numeric checks on the 1921 itself.

The dialog is laid out in three columns: The Location, Description, and Error Magnitude:

The **Location** column displays the validated item. Each item is marked with either a Warning () or an error () depending on the severity. The categories which contain no problems are marked by .

The **Description** column lists the type of error found. Click on an error to view the associated details in the **Reading Pane** at the bottom of the window. You can hide this Reading Pane by clicking the  icon at the top of the dialog.

The **Error Magnitude** represents the difference between related costs.

 *Tip: For these numeric validations, only the error with the greatest magnitude will be reported for each WBS Element. In fixing the major error, many smaller errors will most likely be fixed as well.*

Click the Filter icon  to sort the validation results by Location or by Error Magnitude. Results are listed by Location by default, which means that within each category (1921 vs Contract Plan and 1921 Internal), the errors appear in the order of the elements on the Excel file. If you choose to sort by Error Magnitude, then the numeric errors will be listed with the error of largest magnitude first. Click **Hide Warnings** to hide the warnings () and only display the errors (.

The information found in the Validation Results can be exported to Excel by clicking .

The following table lists some possible errors that may occur when validating a 1921.

Validation Results for DD Form 1921	
Error	Description
<i>1921 vs Contract Plan</i>	
 Blank WBS Element Code found for reporting elements from 1921	One or more WBS elements do not have an element code on the 1921. View the Reading Pane to see the corresponding element names. This error may occur because a summary element (which does not have a code) was misspelled, causing cPet to not recognize the element as a summary item. Check the 1921 Basic Info to see if cPet tagged the item with a flag (indicating summary element status).
 Redundant data provided for reporting element from 1921	There is excessive data for a particular WBS Element. This error may occur because an element is listed on more than one sheet of the Excel file. This error may also be triggered because two different WBS Element names share a single code.
 Required reporting element omitted from 1921	A WBS Element that is required by the contract plan is not found on the 1921.
 Program Name on 1921 does not match Program Name on Contract Plan.	The Program Name should be the same on the 1921 as on the parent contract plan.
 Approved Plan Number on 1921 does not match Approved Plan Number on Contract Plan.	The Approved Plan Number should be the same on the 1921 as on the parent contract plan.
 Required reporting element from 1921 reports zero cost for Total At Completion	A WBS Element that is required by the contract plan reports no costs in the Total At Completion column of the 1921. All required elements must have costs.
 Non-required reporting element from 1921	A WBS Element that is <i>not</i> required by the contract plan reports non-zero costs on the 1921.

<p>reports non-zero costs</p>	<p>Although the WBS of the 1921 should match that of the contract plan, the costs should be zero for non-required elements.</p>
<p> Reporting element from 1921 not found on Contract Plan</p>	<p>There is an element on the 1921 that is not found on the contract plan's WBS Editor. cPet bases this validation check on the element code (as opposed to the element name).</p>
<p> WBS Element Name on 1921 does not match WBS Element Name on Contract Plan</p>	<p>The WBS element name on the contract plan is not the same as that on the 1921 for a particular WBS element code. This problem is most likely due to misspelling or slight modifications to the name.</p>
<p><i>1921 Internal</i></p>	
<p> Child elements do not sum to parent element correctly</p>	<p>The cost of a parent element must equal the sum of the cost of all the children elements for each cost column (i.e. To Date Non-Recurring). The Reading Pane lists the relevant cost column as well as the calculate value, reported value, and the difference between the two. The reported value is the figure listed on the 1921. The calculated value is the sum of the children elements, which is a sum among all the worksheets of the 1921. Differences within 0.2 digits (disregarding the units) are not considered errors. See Validation Rules for more information.</p>
<p> NonRecurring/Recurring/Total figures do not sum correctly</p>	<p>The Total must equal the sum of the Non-Recurring and Recurring figures for a particular WBS element. The error details show whether the problem occurs in the To Date or At Completion column. The calculated value, the reported value,</p>

	and the difference between the two are also listed. See Validation Rules for more information.
 Systems Engineering/Program Management reports zero cost at completion	The Systems Engineering/Program Management WBS element must have a non-zero Total At Completion cost.
 Summary elements do not sum correctly	Certain rules must be followed when summing summary elements. Please see Validation Rules for a detailed list of which elements are supposed to sum.
 Reporting Contractor G&A reports zero cost at completion	There should be a cost in the Total At Completion column for the summary element "Reporting Contractor G&A."
 Reporting Contractor Profit/Loss or Fee reports zero cost at completion	There should be a cost in the Total At Completion column for the summary element "Reporting Contractor Profit/Loss or Fee."
 Reporting Contractor FCCM reports zero cost at completion	The summary element "Reporting Contractor FCCM" must have a non-zero Total At Completion cost.
 Report marked Final, but Reporting Contractor Undistributed Budget does not report zero cost at completion (<i>does not apply to 2003 1921's</i>)	If the Report Cycle on the 1921 Basic Info is marked as "Final," then the summary element "Reporting Contractor Undistributed Budget" Total At Completion cost must be zero.
 Report marked Final, but Reporting Contractor Management Reserve does not report zero cost at completion (<i>does not apply to 2003 1921's</i>)	If the Report Cycle on the 1921 Basic Info is marked as "Final," then the summary element "Reporting Contractor Management Reserve" Total At Completion cost must be zero.
 Report marked Final, but total price to date is less than 95% of total price at completion (<i>does not apply to 2003 1921's</i>)	If the Report Cycle on the 1921 Basic Info is marked as "Final," then the summary element "Total Price" Total To Date cost must be at least

	95% of the Total At Completion cost.
 Report marked Final, but root element cost to date is less than 95% of cost at completion (<i>does not apply to 2003 1921's</i>)	If the Report Cycle on the 1921 Basic Info is marked as "Final," then the root element (e.g. top level element) To Date cost must be at least 95% of the At Completion cost. This rule applies to Nonrecurring, Recurring, and Total costs.
 Could not interpret contract price	The contract price is a field in the Basic Info of the 1921. The contract price must be a number, empty, or "N/A."
 Could not interpret contract ceiling	The contract ceiling is a field in the Basic Info of the 1921. The contract ceiling must be a number, empty, or "N/A."
 Reported figure is negative	All figures must have positive values.
 To Date figure is greater than At Completion figure	The To Date cost must be less than or equal to the At Completion cost for a given element and column (Non-Recurring, Recurring, or Total). See Validation Rules for more information.
 Total price at completion is less/greater than contract price. Remarks required	The Total Price at Completion should equal the Contract Price. However, if the Contract Ceiling is provided, then the Total Price should be between the Contract Price and Contract Ceiling. If neither of these scenarios is true, then Remarks should be reported.

3.5 1921-1 BASIC INFO DIALOG

The DD Form 1921-1, "Functional Cost-Hour Report," provides cost data on both recurring and nonrecurring costs organized by functional category. The Basic Information window displays the metadata pertaining to the contractor and the report. Several pages outline the header information found on the DD 1921-1, and a brief description of each is provided

below. Please click a link below to view information pertaining to the appropriate version of the document and the desired page number.

[2003 DID](#)

[Page 1](#)

[Page 2](#)

[2007 DID](#)

[Page 1](#)

[Page 2](#)

[Page 3](#)

[2011 DID](#)

[Page 1](#)

[Page 2](#)

[Page 3](#)

2003 DID

Page 1

The DD 1921-1 shares the same **Program Name** (Item 1a) as the program plan and contract plan. This is also the same name as on the parent 1921.

The **Approved Plan Number** (Item 1b) is the number assigned to the contract plan or subcontract plan for which the data are reported.

The **Report As Of** (Item 2) is the date of the submission event for which the data are reported. This date follows the MM/DD/YY format.

The **FY Funded** field (Item 3) corresponds to the fiscal year of the data.

The **Dollars In** field (Item 5) represents the units of the cost data. The Dollars In is typically in thousands of dollars.

The **Hours In** field (Item 6) represents the units of the labor hours of the cost data. The Hours In is typically in thousands of hours.

The **Reporting Contractor** information (Item 4b) pertains to the POC name and address of the contractor reporting the data.

The **Type Action** (Item 10) is either **Contract**, **RFP**, or **Program Estimate**. Choosing one of these radio buttons causes different fields to be displayed.

If the data are reported based on a contract estimate, the Type Action is **Contract**. Enter the **Contract Number** and the **Latest Amendment Number** of the contract plan for which the data are reported.

If the data are reported based on a Request for Proposal, the Type Action is **RFP**. Enter the **RFP Number**.

If the data are reported based on a program estimate, the Type Action is **Program Estimate**. Enter the **Estimate**.

The **Appropriation** (Item 16) refers to the contract funding: either **RDT&E** (Research, Development, Test, and Evaluation) or **Procurement**.

Page 2

The **Contractor Type** (Item 4a) is either Prime or Associate, Subcontractor, or Subcontract (By Reporting Contractor) depending on the contract plan associated with the 1921-1. The Subcontract option is for a prime contractor who is preparing data in place of nonreporting subcontractors. Different fields appear depending on which contractor type is selected.

For **Prime or Associate** contractors, there are no additional fields.

For **Subcontractors**, enter the name of the **Prime Contractor** (i.e. the Customer; Item 7a) and the **Contract Number** of the prime contract plan.

For the **Subcontract (By Reporting Contractor)** type, enter the **Subcontractor Name** (Item 7b) and **Address** (Item 4b). Enter the **Number of Reporting Subcontractors** (Item 9) if there are subcontractors with CCDR reporting requirements. Enter the **Subcontract Number** (Item 8) for any subcontract plans that have CCDR requirements. Click Add to enter the subcontract number, and click Delete to remove the entry.

Click **Multi-Year Contract** (Item 11) if the contract is funded from several fiscal years. For such contracts, enter all the fiscal years and click Add for each. Click Delete to remove any entries. If, on the other hand, the funding is from just one fiscal year, do not check Multi-Year Contract. In this case, enter the single fiscal year and click Add.

2007 DID

Page 1

The DD 1921-1 shares the same **Program Name** as the program plan and contract plan for which the form is imported against. This is also the same name as the parent 1921. The program name corresponds to Item 1a "MDAP" of the DD Form 1921-1.

The **Phase** (Item 1b) is one of the following four:

- A (Technology development)
- B (System Development and Demonstration)
- LRIP (Low-rate Initial Production)
- Production (Full-rate Production)

The **Prime Mission Product** (Item 2) is the military designation or the type of product.

The **Contractor Type** (Item 3) is either Prime or Associate, or Subcontractor depending on the contract plan associated with the 1921-1.

The **Contractor Name** and **Address** (Item 4) is the contact information for the (prime or sub) contractor.

The **Customer Name** (Item 6) is the name of the prime contractor responsible for the subcontractor. Leave blank if the report is prepared by the prime contractor.

Page 2

The **Type Action** block corresponds to Item 7 on the DD 1921. The **Contract Number** (Item 7a) is that of the prime contract plan. The **Latest Modification** (Item 7b) is the number of the most recent contract modification. The **Solicitation Number** (Item 7c) is used for data relating to a solicitation according to the Defense Federal Acquisition Regulation Supplement (DFARS) 215.403-5. The **Name** (Item 7d) corresponds to that of the prime contract plan.

The **Appropriation** (Item 21) is either RDT&E (Research, Development, Test and Evaluation), Procurement, or O&M (Operating and Maintenance). The Appropriation represents the funding of the WBS element. If the funding comes from multiple sources, check the appropriate boxes.

The **Start Date** (Item 8a) and **End Date** (Item 8b) correspond to the time frame of the **Period of Performance**. The dates must be entered in YYYYMMDD format in Excel in order to import correctly into cPet.

Page 3

The **Report Cycle** (Item 9) is either Initial, Interim, or Final. The Initial Report represents the groundwork for the 1921-1 and serves the purpose of presenting the data in accordance with the Data Item Description. The Interim Report is any report submitted between the Initial and Final stages. The Final Report represents the complete 1921-1 report.

The **Approved Plan Number** (Item 5) is the number assigned to the contract plan or subcontract plan.

The **Submission Number** (Item 10) is the submission event number for which the data are reported.

The **Resubmission Number** (Item 11) represents the number of times the DD 1921-1 has been submitted. The original submission is marked by "0," and the first resubmission by "2."

The **Report As Of** (Item 12) is the date of the submission event for which the data are reported. The date must be entered in YYYYMMDD format in order to import correctly into cPet.

The Point of Contact Information, i.e. the **Name** (Item 13), **Department** (Item 14), **E-mail** (Item 16), and **Phone** (Item 15), is the contact information for the individual who prepared the report. The **Date Prepared** (Item 17) is the date corresponding to the 1921-1. The date must be entered in YYYYMMDD format in Excel in order to import correctly into cPet.

2011 DID

Page 1

The DD 1921-1 shares the same **Program Name** as the program plan and contract plan for which the form is imported against. This is also the same name as the parent 1921. The program name corresponds to Item 1a "MDAP" of the DD Form 1921-1.

The **Phase** (Item 1b) is one of the following four:
Pre-A (Material Solution Analysis)

- A (Technology development)
- B (Engineering and Manufacturing Development)
- C-LRIP (Low-Rate Initial Production)
- C-FRP (Production and Deployment - Full-rate Production)
- O&S (Operations and Support)

The **Prime Mission Product** (Item 2) is the military designation or the type of product.

The **Approved Plan Number** (Item 5) is the number assigned to the contract plan or subcontract plan.

The **Submission Number** (Item 10) is the submission event number for which the data are reported.

The **Resubmission Number** (Item 11) represents the number of times the DD 1921-1 has been submitted. The original submission is marked by "0," and the first resubmission by "2."

The **Report As Of** (Item 12) is the date of the submission event for which the data are reported. The date must be entered in YYYYMMDD format in Excel in order to import correctly into cPet.

The **Report Cycle** (Item 9) is either Initial, Interim, or Final. The Initial Report represents the groundwork for the 1921-1 and serves the purpose of presenting the data in accordance with the Data Item Description. The Interim Report is any report submitted between the Initial and Final stages. The Final Report represents the complete 1921-1 report.

The Point of Contact Information, i.e. the **Name** (Item 13), **Department** (Item 14), **E-mail** (Item 16), and **Phone** (Item 15), is the contact information for the individual who prepared the report. The **Date Prepared** (Item 17) is the date corresponding to the 1921-1. The date must be entered in YYYYMMDD format in Excel in order to import correctly into cPet.

Page 2

The **Reporting Organization Type** (Item 3) is either Prime/Associate Contractor, or Direct-Reporting Subcontractor, or Government depending on the contract plan associated with the 1921-1.

The **Performing Organization Name and Address** (Item 4a) is the contact information for the (prime or sub) contractor.

The **Division Name and Address** (Item 4b) displays the name of the contractor division and location.

The **Customer Name** (Item 6) is the name of the prime contractor responsible for the subcontractor. Leave blank if the report is prepared by the prime contractor.

Page 3

The **Type Action** block corresponds to Item 7 on the DD 1921-1. The **Contract Number** (Item 7a) is that of the associated contract plan. The **Latest Modification** (Item 7b) is the number of the most recent contract modification. The **Solicitation Number** (Item 7c) is used for data relating to a solicitation according to the Defense Federal Acquisition Regulation Supplement (DFARS) 215.403-5. The **Name** (Item 7d) corresponds to that of the associated contract plan. The **Order/Lot Number** (Item 7e) field contains (if applicable) the task order (TO), delivery order (DO), or Lot Number (Lot), followed by the number.

The **Appropriation** (Item 21) is either RDT&E (Research, Development, Test and Evaluation), Procurement, or O&M (Operating and Maintenance). The Appropriation represents the contract funding. If the funding comes from multiple sources, check the appropriate boxes.

The **Start Date** (Item 8a) and **End Date** (Item 8b) correspond to the time frame of the **Period of Performance**. The dates must be entered in YYYYMMDD format in Excel in order to import correctly into cPet.

For a more detailed explanation of the header fields, see the following Data Item Descriptions:

[2007 DD Form 1921-2 Data Item Description](#)

[2011 DD Form 1921-2 Data Item Description](#)

3.6 1921-1 COST DATA

The Cost Data dialog can be reached by selecting the 1921-1 and clicking the  icon.

The **WBS Element** names and item numbers correspond to those on the 1921-1. These elements should match the affiliated contract plan's WBS elements where a 1921-1 is required.

The 1921-1 cost data for the 2003 version is presented in a slightly different format than for the 2007 and 2011 version. However, for both, there is a separate sheet of data for each WBS Element.

For the 2003 version, click on a Cost Type (**NonRecurring**, **Recurring**, or **Total**) radio button to view the data for each. The cost categories (Engineering through Total Cost) are listed in the shaded area. The columns are arranged by **Reporting Contractor**, **Subcontractor**, and the **Total** of the two, including both **To Date** figures and **At Completion** figures.

For the 2007 and 2011 version, all the data for a particular element is listed on a single sheet. The cost categories are again listed in the shaded area. However, the columns are arranged by **To Date** figures and **At Completion** figures, each including the **Nonrecurring**, **Recurring**, and **Total** values.

Note that the **Quantity** field is at the top of each page for the 2003 version. Equivalently, the **Number of Units** field is at the top of the 2007 and 2011 versions.

 *Tip: For more information on what the fields signify, see the [2007 DID](#) and [2011 DID](#).*

 *Tip: For information on the requirements that the data figures must satisfy, see the [Validation Rules](#).*

Use the following icons when importing or exporting cost data (Note: This feature is useful when creating a [new 1921-1](#)). This feature is only available for the 2003 and 2007 versions.

 Create an Excel template file based on the WBS elements, cost categories (e.g. Engineering), and cost types (e.g. NonRecurring Reporting Contractor To Date)

 Export the cost data to the template file that was created using the icon above

 Import cost data into cPet from a template file

3.7 1921-1 COST REPORT COMPARISON

This dialog appears after an "Earlier" 1921-1 and a "Later" 1921-1 have been chosen through the [Select Reports to Compare](#) dialog.

The Comparison Options are displayed at the top, followed by the cost data.

The **WBS Tracking** legend indicates which WBS elements appear on the Earlier report, the Later report, and the contract plan (the "Reference"). If the triangle icon (◀ or ▶) is shaded, then the WBS element appears on the report (Earlier or Later, respectively). For example, the symbol "◀▶" indicates that the WBS item is found on the Earlier report but not the Later. The shaded rectangle in the center indicates that the element appears on the contract plan. If the triangle/rectangle is *not* shaded, then the WBS element is not present on that report/plan. In the example above, the right arrow is not shaded. Thus the WBS element does not appear on the Later report.

The gray areas in the cost data () reinforce the WBS Tracking symbols; the cost data may not appear on one or more report.

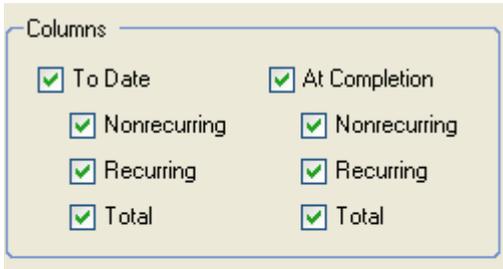
 *Tip: It may be easier to see where data is missing from a report if you choose **Group** for the Arrangement under the Column Options (see below).*

Uncheck **Show Reference WBS** if you do not wish to see elements appearing on either report, only the contract plan.

A WBS element with a **hyperlink** indicates that there is a mismatch between the element names. Click on the hyperlink to understand this mismatch in the [WBS Naming](#)

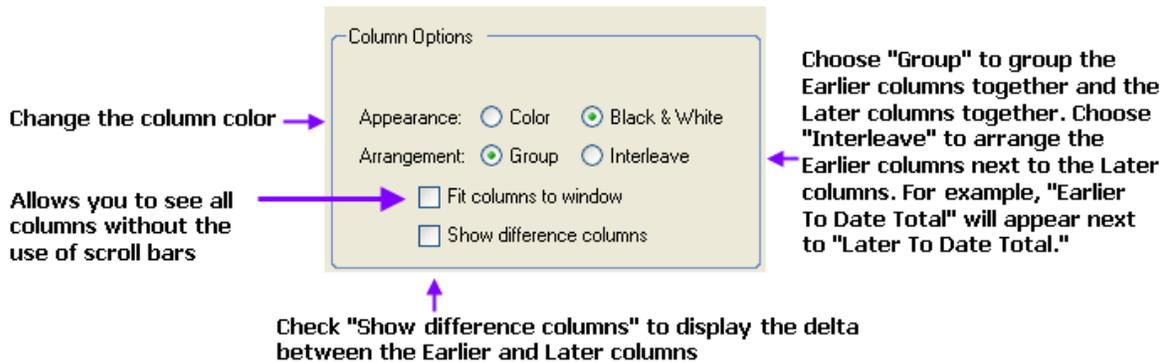
[Discrepancies](#) dialog. The element name may be different between the contract plan, the Earlier Report, and/or the Later Report.

Different columns/rows of data will be displayed depending on specified options. For instance, you can check which **columns** to show (Nonrecurring, Recurring, and Total for both To Date and At Completion).

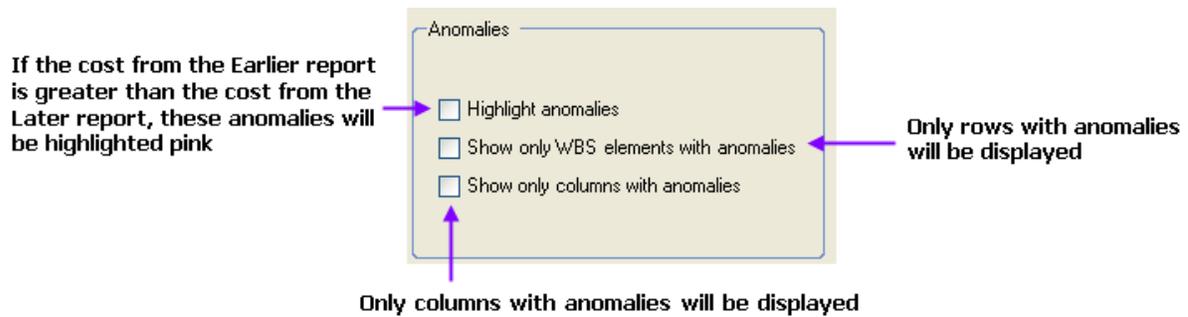


Check which columns to display

The **Columns Options** allows you to change the column colors and group the columns in different arrangements.



You can select how **Anomalies** are displayed. cPet will indicate an anomaly if the cost from the Earlier report is greater than the cost from the Later Report. For instance, if the Earlier To Date Recurring is \$2,000 and the Later To Date Recurring is \$1,000 for a particular row, then those costs will be highlighted pink as long as "Highlight anomalies" is checked.



3.8 1921-1 VALIDATION RESULTS

The Validation Results dialog appears immediately after validating an individual document or after running the Validation Wizard. The data is grouped in three categories: **1921-1 vs Contract Plan**, **1921-1 vs 1921**, and **1921-1 Internal**. The first category contains a list of problems with the cost data on the 1921-1 as compared to the contract plan's WBS Editor. The second category validates the data on the 1921-1 in relation to the data on the 1921. The third contains numeric checks on the 1921-1 itself.

The dialog is laid out in three columns: The Location, Description, and Error Magnitude:

The **Location** column displays the validated item. Each item is marked with either a Warning () or an error () depending on the severity. The categories which contain no problems are marked by  .

The **Description** column lists the type of error found. Click on an error to view the associated details in the **Reading Pane** at the bottom of the window. You can hide this Reading Pane by clicking the  icon at the top of the dialog.

The **Error Magnitude** represents the difference between related costs.

 *Tip: For these numeric validations, only the error with the greatest magnitude will be reported for each WBS Element (and for each page, if relevant). In fixing the major error, many smaller errors will most likely be fixed as well.*

Click the Filter icon  to sort the validation results by Location or by Error Magnitude. Results are listed by Location by default, which means that within each category, the errors appear in the order of the elements on the Excel file. If you choose to sort by Error Magnitude, then the numeric errors will be listed with the error of largest magnitude first. Click **Hide Warnings** to hide the warnings () and only display the errors ()

The information found in the Validation Results can be exported to Excel by clicking .

The following table lists some possible errors that may occur when validating a 1921-1.

Validation Results for DD Form 1921-1	
Error	Description
<i>1921-1 vs Contract Plan</i>	
 Blank WBS Element Code found for reporting elements from 1921-1	One or more WBS elements do not have an element code on the 1921-1. View the Reading Pane to see the corresponding element names.
 Required reporting element omitted from 1921-1 submission	A WBS Element that is required by the Contract Plan is missing from the 1921-1 report. Note: This error does not occur if the value in the Total At Completion column of the parent 1921 is zero.
 Redundant data provided for reporting element from 1921-1	A WBS Element is repeated on the 1921-1. This may be an error because the "Total," "Recurring," or "Nonrecurring" pages were marked incorrectly.
 Program Name on 1921-1 does not match Program Name on Contract Plan	The Program Name should be the same on the 1921-1 as on the parent contract plan.
 Approved Plan Number on 1921-1 does not match Approved Plan Number on Contract Plan	The Approved Plan Number should be the same on the 1921-1 as on the parent contract plan.

<p> WBS Element Name on 1921-1 does not match WBS Element Name on Contract Plan</p>	<p>The WBS element name on the contract plan is not the same as that on the 1921-1 for a particular WBS element code. This problem is most likely due to misspelling or slight modifications to the name.</p>
<p> Reporting element from 1921-1 not found on Contract Plan</p>	<p>All elements that are on the 1921-1 should also be listed in the contract plan's WBS Editor.</p>
<p><i>1921-1 vs 1921</i></p>	
<p> Corresponding costs on 1921-1 and 1921 do not match</p>	<p>This error occurs when the cost data for an element on the 1921 is not the same as the data on the "Total Cost (Direct and Overhead)" row on the 1921-1 for each cost type.</p>
<p> Corresponding quantities on 1921-1 and 1921 do not match</p>	<p>The Number of Units field on the 1921 must match the Quantity field on the Total page of the 1921-1 (for both To Date and At Completion figures).</p>
<p> Reporting element from 1921-1 not found on 1921</p>	<p>All WBS Elements that are on the 1921-1 should also be on the parent 1921. cPet bases this validation check on the element code, not the element name.</p>
<p><i>1921-1 Internal</i></p>	
<p> NonRecurring/Recurring/Total figures do not sum correctly (<i>does not apply to 2003 1921-1's</i>)</p>	<p>The data in the Non-Recurring and Recurring pages must sum to the Total page for each element, column (e.g. Reporting Contractor), and row (e.g. Engineering Direct Labor Hours).</p>
<p> Group within data column does not sum correctly</p>	<p>The cost data in each column must sum to the total for that cost category (e.g. Total Engineering Dollars). See Validation Rules for more information.</p>

 Data column does not sum correctly	<p>The sum of the total figures of each cost category (e.g. Total Engineering Dollars + Total Manufacturing Dollars +...) must equal the Summary Total Cost for each column. See Validation Rules for more information.</p>
 Contractor/Subcontractor/Total figures do not sum correctly (<i>applies only to 2003 1921-1's</i>)	<p>For any given WBS element, the sum of the Reporting Contractor data and the Subcontractor data in the To Date columns must equal that in the Total column for each row. The same must be true for the At Completion values. See Validation Rules for more information.</p>
 Reported figure is negative	<p>All figures must have positive values.</p>
 Nonrecurring/Recurring/Total quantities do not match (<i>applies only to 2003 1921-1's</i>)	<p>The quantity fields must have the same value across all pages. That is, Nonrecurring = Recurring = Total Quantity</p>
 Data reported for Direct Labor Dollars but not for Direct Labor Hours	<p>If there is data in the Direct Labor Dollars field for a particular element, cost type, and column, then there must be data in the Direct Labor Hours field.</p>
 Data reported for Overhead but not for Direct Labor	<p>If there is data in the Overhead field for a particular element, cost type, and column, then there must be data in the Direct Labor fields. The Direct Labor fields include Labor Hours and Labor Dollars for 2003 reports, and Tooling, Quality, Manufacturing, etc for 2007 reports.</p>
 Data reported for Direct Labor Hours but not for Direct Labor Dollars	<p>If there is data in the Direct Labor Hours field for a particular element, cost type, and column, then there must be data in the Direct Labor Dollars field.</p>
 Data reported for Direct Labor but not for	<p>If there is data in any of the Direct Labor fields for</p>

Overhead	a particular element, cost type, and column, then there must be data in the Overhead field.
 To Date figure is greater than At Completion figure	For every cost category, the To Date figure must be less than or equal to the At Completion value for all sets of columns (Reporting Contractor, Subcontractor, and Total columns).
 Data reported for Total Direct-Reporting Subcontractor. Remarks required (<i>does not apply to 2003 1921-1's</i>)	If there are costs on Line 18 "Total Direct-Reporting Subcontractor Dollars," then an explanation should be provided in the Remarks section.
 Other Costs Not Shown Elsewhere are greater than or equal to x% of total cost. Remarks required	For 2003 and 2007 reports, if the costs in Line 20 ("Other Costs Not Shown Elsewhere") are greater than or equal to 15% of the Total Cost in Line 21, then an explanation should be provided in the Remarks section. For 2011 reports, remarks should be provided if Line 20 costs are greater than or equal to 10% of Line 21 costs.

3.9 1921-2 BASIC INFO DIALOG

The 1921-2 form is the Progress Curve Report. It captures all direct, recurring costs incurred to date, by unit or lot. It breaks the costs per unit/lot into Completed, Work in Process, and Total Costs Incurred To Date. The form provides characteristics, as required by the government Program Office. It also breaks costs and hours into functional categories, including engineering, manufacturing, tooling, quality control, raw materials and purchased parts.

[2007 DID](#)

[Page 1](#)

[Page 2](#)

[2011 DID](#)

[Page 1](#)

[Page 2](#)

2007 DID

Page 1

The DD 1921-2 shares the same **Program Name** as the program plan and contract plan for which the form is imported against. This is also the same name as the parent 1921. The program name corresponds to Item 1 "Major Program" of the DD Form 1921-2.

The **Phase** (Item 1b) is one of the following:

- Pre-A (Material Solution Analysis)
- A (Technology development)
- B (Engineering and Manufacturing Development)
- C-LRIP (Low-Rate Initial Production)
- C-FRP (Production and Deployment - Full-rate Production)
- O&S (Operations and Support)

The **Prime Mission Product** (Item 2) is the military designation or the type of product.

The **Contractor Type** (Item 3) is either Prime or Associate, or Subcontractor depending on the contract plan associated with the 1921-2.

The **Contractor Name and Address** (Item 4) is the contact information for the (prime or sub) contractor.

The **Approved Plan Number** (Item 5) is the number assigned to the contract plan or subcontract plan.

The **Customer Name** (Item 6) is the name of the prime contractor responsible for the subcontractor. Leave blank if the report is prepared by the prime contractor.

Page 2

The **Type Action** block corresponds to Item 7 on the DD 1921. The Contract Number (Item 7a) is that of the prime contract plan. The Latest Modification (Item 7b) is the number of the most recent contract modification. The Solicitation Number (Item 7c) is used for data relating to a solicitation according to the Defense Federal Acquisition Regulation Supplement (DFARS) 215.403-5. The Name (Item 7d) corresponds to that of the prime contract plan.

The **Appropriation** (Item 21) is either RDT&E (Research, Development, Test and Evaluation), Procurement, or O&M (Operating and Maintenance). The Appropriation represents the funding of the WBS element. If the funding comes from multiple sources, check the appropriate boxes.

The **Start Date** (Item 8a) and **End Date** (Item 8b) correspond to the time frame of the Period of Performance. The dates must be entered in YYYYMMDD format in Excel in order to import correctly into cPet.

Page 3

The **Report Cycle** (Item 9) is either Initial, Interim, or Final. The Initial Report represents the groundwork for the 1921-2 and serves the purpose of presenting the data in accordance with the Data Item Description. The Interim Report is any report submitted between the Initial and Final stages. The Final Report represents the complete 1921-2 report.

The **Approved Plan Number** (Item 5) is the number assigned to the contract plan or subcontract plan.

The **Submission Number** (Item 10) is the submission event number for which the data are reported.

The **Resubmission Number** (Item 11) represents the number of times the DD 1921-2 has been submitted. The original submission is marked by "0," and the first resubmission by "2."

The **Report As Of** (Item 12) is the date of the submission event for which the data are reported. The date must be entered in YYYYMMDD format in order to import correctly into cPet.

The **Point of Contact Information**, i.e. the Name (Item 13), Department (Item 14), E-mail (Item 16), and Phone (Item 15), is the contact information for the individual who prepared the report. The Date Prepared (Item 17) is the date corresponding to the 1921-2. The date must be entered in YYYYMMDD format in Excel in order to import correctly into cPet.

2011 DID

Page 1

The DD 1921-2 shares the same **Program Name** as the program plan and contract plan for which the form is imported against. This is also the same name as the parent 1921. The program name corresponds to Item 1a "Major Program" of the DD Form 1921-2.

The **Phase** (Item 1b) is one of the following:

- Pre-A (Material Solution Analysis)
- A (Technology development)
- B (Engineering and Manufacturing Development)
- C-LRIP (Low-Rate Initial Production)
- C-FRP (Production and Deployment - Full-rate Production)
- O&S (Operations and Support)

The **Prime Mission Product** (Item 2) is the military designation or the type of product.

The **Approved Plan Number** (Item 5) is the number assigned to the contract plan or subcontract plan.

The **Submission Number** (Item 10) is the submission event number for which the data are reported.

The **Resubmission Number** (Item 11) represents the number of times the DD 1921-2 has been submitted. The original submission is marked by "0," and the first resubmission by "2."

The **Report As Of** (Item 12) is the date of the submission event for which the data are reported. The date must be entered in YYYYMMDD format in Excel in order to import correctly into cPet.

The **Report Cycle** (Item 9) is either Initial, Interim, or Final. The Initial Report represents the groundwork for the 1921-2 and serves the purpose of presenting the data in accordance with the Data Item Description. The Interim Report is any report submitted between the Initial and Final stages. The Final Report represents the complete 1921-2 report.

The **Point of Contact Information**, i.e. the Name (Item 13), Department (Item 14), E-mail (Item 16), and Phone (Item 15), is the contact information for the individual who prepared the report. The Date Prepared (Item 17) is the date corresponding to the 1921-2. The date must be entered in YYYYMMDD format in Excel in order to import correctly into cPet.

Page 2

The **Reporting Organization Type** (Item 3) is either Prime/Associate Contractor, or Direct-Reporting Subcontractor, or Government depending on the contract plan associated with the 1921-2.

The **Performing Organization Name and Address** (Item 4a) is the contact information for the (prime or sub) contractor.

The **Division Name and Address** (Item 4b) displays the name of the contractor division and location.

The **Customer Name** (Item 6) is the name of the prime contractor responsible for the

subcontractor. Leave blank if the report is prepared by the prime contractor.

Page 3

The **Type Action** block corresponds to Item 7 on the DD 1921-2. The Contract Number (Item 7a) is that of the associated contract plan. The Latest Modification (Item 7b) is the number of the most recent contract modification. The Solicitation Number (Item 7c) is used for data relating to a solicitation according to the Defense Federal Acquisition Regulation Supplement (DFARS) 215.403-5. The Name (Item 7d) corresponds to that of the associated contract plan. The Order/Lot Number (Item 7e) field contains (if applicable) the task order (TO), delivery order (DO), or Lot Number (Lot), followed by the number.

The **Appropriation** (Item 21) is either RDT&E (Research, Development, Test and Evaluation), Procurement, or O&M (Operating and Maintenance). The Appropriation represents the contract funding. If the funding comes from multiple sources, check the appropriate boxes.

The **Start Date** (Item 8a) and **End Date** (Item 8b) correspond to the time frame of the Period of Performance. The dates must be entered in YYYYMMDD format in Excel in order to import correctly into cPet.

For a more detailed explanation of the header fields, see the following Data Item Descriptions:

[2007 DD Form 1921-2 Data Item Description](#)

[2011 DD Form 1921-2 Data Item Description](#)

3.10 1921-2 COST DATA

The Cost Data dialog can be reached by selecting the 1921-2 and clicking the  icon. Note that the fields are described based on the May 2011 version of the DD Form 1921-2. The form is primarily used for viewing the data. WBS elements cannot be edited on this form, but Unit/Lot data can be modified.

WBS Elements

The **WBS Element** names and item numbers correspond to those on the 1921-2. These elements should match the affiliated contract plan's WBS elements where a 1921-2 is required.

Units/Lots

As specified by the user's approved contract plan (DD Form 2794), the Units/Lots Completed drop-down will display either "Unit Total" or "Lot Total". This classification may be different for each WBS element.

Data Element Information

The data element information is displayed for each Completed Unit/Lot, Work in Progress, and Total Direct Costs and Hours Incurred to Date.

The **Models** element corresponds to Line 1 (Model and Series). The user can enter the model or series number associated with the individual WBS element. The form allows the user to enter different model and series information for different WBS elements. If a lot includes more than one series of a model, identify the number and series designation of each in Item 22 (Remarks).

The **First Unit** element corresponds to Line 2 (First Unit) on the 1921-2 report. This should be a numerical entry. This number should be equal to one plus the sum of all prior units (if any) since the inception of a program/model, regardless of the number of contracts under which the model has been procured.

The **Last Unit** element corresponds to Line 3 (Last Unit) on the 1921-2 report. This should also be a numerical entry. This represents the unit number of the last unit of the lot or the applicable unit number

The **Concurrent Units/Lots** element corresponds to Line 4 (Concurrent Units/Lots) on the 1921-2 report. Concurrent Units/Lots are items that are produced at the same time as the

units that apply to the contract being reported. Included in this category are items for commercial (domestic or foreign) delivery or delivery to the other DoD Components or programs (e.g. Military Assistance Program) which are acquired under separate contractual efforts.

Characteristics

The next section contains technical characteristics for a given WBS element. For example, Line 5a (Weight), 5b (Speed), and 5c (Power). Values for these characteristics can be alpha-numeric.

Labor Hours and Cost Data

The associated 1921-2 cost and hour data is reported in the next section. Note only Recurring data is displayed.

Remarks

Any associated comments for a given WBS element are shown in the “Remarks” field.

3.11 1921-2 VALIDATION RESULTS

The Validation Results dialog appears immediately after validating an individual document or after running the Validation Wizard. The data is grouped in three categories: **1921-2 vs Contract Plan**, **1921-2 vs 1921**, **1921-2 vs 1921-1**, and **1921-2 Internal**. The first category contains a list of problems with the cost data on the 1921-2 as compared to the contract plan's WBS Editor. The second category validates the data on the 1921-2 in relation to the data on the 1921. The third category validates the data on the 1921-2 in relation to the data on the 1921-1. The fourth contains numeric checks on the 1921-2 itself.

The dialog is laid out in three columns: The Location, Description, and Error Magnitude:

The **Location** column displays the validated item. Each item is marked with either a Warning () or an error () depending on the severity. The categories which contain no problems are marked by .

The **Description** column lists the type of error found. Click on an error to view the associated details in the **Reading Pane** at the bottom of the window. You can hide this Reading Pane by clicking the  icon at the top of the dialog.

The **Error Magnitude** represents the difference between related costs.

 *Tip: For these numeric validations, only the error with the greatest magnitude will be reported for each WBS Element (and for each page, if relevant). In fixing the major error, many smaller errors will most likely be fixed as well.*

Click the Filter icon  to sort the validation results by Location or by Error Magnitude. Results are listed by Location by default, which means that within each category, the errors appear in the order of the elements on the Excel file. If you choose to sort by Error Magnitude, then the numeric errors will be listed with the error of largest magnitude first. Click **Hide Warnings** to hide the warnings () and only display the errors ().

The information found in the Validation Results can be exported to Excel by clicking .

The following table lists some possible errors that may occur when validating a 1921-2.

Validation Results for DD Form 1921-2	
Warning/Error	Description
<i>1921-2 vs Contract Plan</i>	
 Blank WBS Element Code found for reporting elements on 1921-2	One or more WBS elements are missing a WBS element code on the 1921-2 form. View the Reading Pane to see the corresponding element names.

 Duplicate WBS Element Code found for reporting elements on 1921-2	Duplicate WBS element codes were found to be listed more than once on the 1921-2 file. This error may also be triggered if two different WBS elements share a single code.
 Required Reporting Element omitted from 1921-2 file	A WBS element that has a requirement for 1921-2 reporting in Column 13d (1921-2) on the Contract Plan.
 Program Name on 1921-2 does not match Program Name on Contract Plan	The Program Name on the 1921-2 must match the Contract Plan.
 Approved Plan on 1921-2 does not match Approved Plan on Contract Plan	The Approved Plan Number on the 1921-2 must match the Contract Plan.
 WBS Element Code not found on Contract Plan	There is WBS Element Code on the 1921-2 form that is not found on the Contract Plan.
 WBS Element Name does not match WBS Element Name on Contract Plan	The WBS Element Name reported on the 1921-2 does not match the Element Name on the Contract Plan. The issue is, most likely, due to misspelling or slight modifications to the Element Name.
<i>1921-2 vs 1921</i>	
 WBS Element Code from 1921-2 report not found on 1921 report	There is WBS Element Code on the 1921-2 form that is not found on the 1921 report.
<i>1921-2 vs 1921-1</i>	
 Total Direct Recurring Costs reported To Date on the 1921-2 do not match corresponding Recurring Costs To Date reported on the 1921-1 Report	Total Direct Recurring Costs and Hours To Date (Column C) reported on the 1921-2 report does not match the Total Recurring Costs and Hours To Date (Column B) reported on the 1921-1 report for the following corresponding fields: Direct Engineering Labor Hours & Dollars, Direct Tooling Labor Hours & Dollars, Direct Quality Control Hours & Dollars, Direct Manufacturing Hours & Dollars, Raw Materials Dollars, Purchased Parts Dollars, Purchased Equipment Dollars, Total Direct Reporting Subcontract Dollars, Other Direct Costs Not Shown Elsewhere.
<i>1921-2 Internal</i>	
 Sum of reported costs and hours for Completed Units/Lots (Column A) and Work in	For each row on the 1921-2 report, Columns A plus B, must equal C for both costs and hours.

Process (Column B) does not equal Total Direct Costs and Hours To Date (Column C)	
 Sum of costs reported for 1921-2 functional categories does not equal Total Cost of functional category	Line 15 (Total Direct Manufacturing Operations Dollars) must equal the sum of Lines 9, 10, 12, and 14). Line 20 (Total Direct Material Dollars) must equal the sum of Lines 16, 17, 18, and 19.
 Sum of costs reported for 1921-2 functional categories and Other Direct Costs does not equal Total Direct Cost (Line 22)	Line 22 (Total Direct Cost) must be equal to the sum of Lines 7, 15, 20, and 21.
 Negative costs found on 1921-2 report	Negative values are not permitted on the 1921-2 report unless accompanied by a comment in the Remarks section.
 Direct Dollars reported for a 1921-2 functional category, without Direct Hours and vice versa	For each functional category on the 1921-2 (Engineering, Tooling, Quality Control, and Manufacturing), if hours are reported, dollars must also be reported, and vice versa.
 Cost reported on the 1921-2 for Total Direct Reporting Subcontractors	If costs are reported in Line 19 (Total Direct-Reporting Subcontractor Dollars), then a comment must be included in the Remarks section with information on the subcontractor's name and total dollar value of the contract.
 Other Direct Costs Not Shown Elsewhere are greater than 10% of total cost (2011 Version) or 15% (2007 Version)	If costs reported in Line 21 (Other Direct Costs Not Shown Elsewhere) pass the threshold, then a comment is required in the Remarks section of the 1921-2 report.

3.12 1921-3 BASIC INFO DIALOG

The DD Form 1921-3, "Contractor Business Data Report," provides direct and indirect cost data across various contracts. The Basic Information window (View > Basic Info) displays the metadata pertaining to the contractor and the report. A couple tabs outline the header information found on the DD 1921-3, and a brief description of each is provided below. Click a link below to view information

pertaining to the desired tab. Note that the fields are described based on the May 2011 version of the DD Form 1921-3.

[Report Info](#)

[Remarks](#)

Report Info

The **Contractor Name/Address** (Item 1) includes the reporting contractor's name and address.

The **FPR Unit** (Item 2) shows the Forward Pricing Rate (FPR) unit (e.g. plant, site, business unit) of the report.

The **Implementing Contract Number** (Item 3) refers to the number of the contract which has the 1921-3 reporting requirement.

The **Point of Contact** section contains the report preparer's **name** (Item 7), **department** (Item 8), **e-mail** (Item 10), **phone** (Item 9), and the **date prepared** (Item 11).

Remarks

The **Remarks** tab corresponds to the Remarks section on Page 2 of the 1921-3. Note that any remarks found on the DD 1921-3 will not import into cPet; the text must be manually copied into cPet. However, any text copied or written into the Remarks section of cPet will be exported to Excel (Tools > Export DD Form).

3.13 1921-3 COST DATA

The Cost Data dialog can be reached by selecting the 1921-3 and clicking the  icon. Click a link below to view information pertaining to the desired page. Note that the fields are described based on the May 2011 version of the DD Form 1921-3.

[Page 1](#)

[Page 2](#)

Page 1

The "Page 1" tab in cPet contains information from various worksheets marked as "Page 1" in the DD 1921-3 Excel file. Each worksheet in the Excel file corresponds to a **Report** on the left side of the dialog in cPet. Click on a Report to view the applicable costs.

The **Data Period** (Item 4) identifies how the year of reported costs (Prior Year, Current Year, or Future Year).

The **Fiscal Year** (Item 5) displays the year of the reported costs.

The **Start Date** and **End Date** (Item 6) refer to the dates reported in the fiscal year.

The data is separated by **direct costs** by program, and **indirect costs** by category. Refer to the Data Item Description found on the DCARC website for a complete description of all the fields and column headers.

Page 2

The "Page 2" tab in cPet contains information for the "Page 2" worksheet in the DD 1921-3 Excel file. The direct labor rates by functional category are listed. Refer to the Data Item Description for a description of all the fields on this form.

3.14 1921-3 VALIDATION RESULTS

The Validation Results dialog appears immediately after validating an individual document or after running the Validation Wizard.

The dialog is laid out in three columns: The Location, Description, and Error Magnitude:

The **Location** column displays the validated item. Each item is marked with either a Warning () or an error () depending on the severity. The categories which contain no problems are marked by  .

The **Description** column lists the type of error found. Click on an error to view the associated details in the **Reading Pane** at the bottom of the window. You can hide this Reading Pane by clicking the  icon at the top of the dialog.

The **Error Magnitude** represents the difference between related costs.

 *Tip: For these numeric validations, only the error with the greatest magnitude will be reported for each WBS Element (and for each page, if relevant). In fixing the major error, many smaller errors will most likely be fixed as well.*

Click the Filter icon  to sort the validation results by Location or by Error Magnitude. Results are listed by Location by default, which means that within each category, the errors appear in the order of the elements on the Excel file. If you choose to sort by Error Magnitude, then the numeric errors will be listed with the error of largest magnitude first. Click **Hide Warnings** to hide the warnings () and only display the errors ()

The information found in the Validation Results can be exported to Excel by clicking .

The following table lists some possible errors that may occur when validating a 1921-3.

Validation Results for DD Form 1921-3	
Error	Description
 Reported column total does not match calculated total	This error may occur for a variety of reasons. Line 14 (Page 1) must be a sum of Lines 1-13 for each column of costs/hours. Similarly, Line 27 (Page 1) must be a sum of Lines 15-26 for each column of costs/hours. Line 28 (Page 1) must be a sum of Lines 15-26 in Columns Y and Z.
 Sections A & B (Page 1) provided for fewer than three Future Years	Sections A and B (Page 1) must be completed for the Prior Year, Current Year, and at least three future years.
 Reported figure is negative	Costs and hours should be positive figures (other than Line 26, Credits)

<p>⚠ Ratio of hours to workers implies relative scale may be incorrect</p>	
<p>⚠ Costs for other efforts are greater than or equal to 15% of total cost. Remarks required</p>	
<p>⚠ Hours were reported but workers were not</p>	
<p>⚠ Costs for Other Miscellaneous is greater than or equal to 15% of total cost. Remarks required</p>	
<p>⚠ Hours per worker exceeds 2500 hours per year. Remarks required</p>	<p>The ratio of hours per worker should be fewer than 2500 for Sections A, B, and D. Note that all hours on the 1921-3 should be reported in thousands.</p>
<p>⚠ Costs reported for Other functional category. Remarks required</p>	
<p>⚠ Labor rates from Section D do not match labor costs from Sections A. Remarks may be required.</p>	
<p>⚠ Combined costs exceed Total FPR Unit Revenue. Remarks may be required.</p>	<p>Remarks required if the Total FPR Unit Revenue (Section E) is greater than the sum of all direct (Section A, Line 14, Columns F, I, K, M) and indirect (Section B, Line 27, Columns P, S, U, W and Line 28 Column Y) costs from Page 1 of the Prior or Current year.</p>

3.15 PROGRAM AND CONTRACT PLAN BASIC INFO DIALOG

Basic Information Tab

The Basic Info includes all the header information of a DD 2794 form. View and edit the program name, address, contract information, report date, etc.

The **Plan Type** shows whether the plan is a program plan, contract plan, or subcontract plan. The plan type is determined based on the selection to import/create a program plan or contract plan from the File menu in cPet. For imported contract plans, cPet reads the Excel file to determine if the plan is a prime contract or a subcontract. For new contract plans, the default plan type is "Prime Contract." If you are creating a new subcontract plan, you must mark the "subcontract" radio button in the Basic Info.

 *Tip: For 2003 plans, the Plan Type will be marked as Program or Contract (subcontract plans will be marked as "contract" as well).*

The **Program Name** is the name of the program plan/contract plan.

Choose the **Phase/Milestone** of the plan. Note that the name of the phase varies slightly across different versions of the plan.

Pre-A (Material Solution Analysis; Found only on 2011 plans)

A (Technology development)

B (Engineering and Manufacturing Development)

C-LRIP (Low-Rate Initial Production)

C-FRP (Production and Deployment - Full-rate Production)

O&S (Operations and Support; Found only on 2011 plans)

The **Prime Mission Product** (only found on 2007 and 2011 plans) is the military designation or the type of product.

Choose a **WBS System Type**, outlined by either the **MIL-HDBK-881** or **MIL-STD-881C** specifications (dependent on the selection at the top of the Basic Info dialog). For new plans, the WBS System chosen will affect how the WBS elements are auto-populated assuming the [option](#) to "Prompt before providing WBS structure to plans with no WBS" is turned on.

Check **Initial Submission** if this is the first version of the plan. Check **Change** if there are other revisions of the plan approved by the CAPE.

The **Preparing Organization** is the organization responsible for the plan.

The **Review and Reference Number/Approved Plan Number** is the plan number provided by the Defense Cost and Resource Center (DCARC).

The **As of Date/Current Submission Date** is the date when the plan was submitted by the reporting organization.

The **Report Date/Last Approved Plan Date** is the date of the most recent revision of the plan.

Enter the **Point of Contact** information (name, address, phone/fax, and E-mail).

Contract Information Tab

Contract plans will have an additional tab in the Basic Info window to store the contract information.

The contractor name, division, and location is listed, as well as the contract number. See [Importing a Contract Plan](#) for the proper way to format the contractor information in the Excel file so that it will import into the proper fields in cPet's Basic Info.

 *Tip: If you edit the contractor name, division, or location in the Basic Info, then the [Contractor Selection Dialog](#) will update accordingly.*

For 2011 plans, there are a few additional fields on the Contract Information Tab for the appropriation and the DD 1921-3 requirement.

DD 2794 Narrative Text Tab

The Narrative Text tab is designed to accommodate the **Remarks** found at the bottom of the DD 2794. This field will not be imported; the text must be entered manually or copied and pasted from the source.

Default headings are provided for your convenience. For program plans, these are “Program Overview,” “Contracting Approach,” and “Quantity Overview.” For contract plans, these are “Non-Recurring/Recurring Definitions,” “Cost Accounting Standards (CAS) Disclosure Statement Differences,” “1921-3 Contractor Business Data Report,” and “** (if required) 1921-2 Progress Curve Report.”

Headings can be added or modified using the following icons:

-  Add a new parent heading
-  Add a new sibling heading
-  Add a new child heading
-  Move entry up on the list
-  Move entry down on the list
-  Delete the heading

 *Tip: Images will not copy into the Narrative Text. This window is strictly text only.*

 *Tip: The "proper" way to organize the Narrative Text is to have a parent header, followed by a child header, followed by the actual descriptive text. For instance, the layout of the Narrative Text should be as follows:*

Parent Header

Child Header

Descriptive Text

Do not type information directly under the first two headers. If you do not follow the above layout, the text will not be properly formatted in the Remarks section when [exported](#) to PDF or Excel.

3.16 CONTRACTOR MAINTENANCE DIALOG

The Contractor Maintenance allows you to add, edit, or delete contractors on the [Contractor Selection](#) list. However, changes to the contractor list will only be reflected in your own copy of cPet. The Contractor Maintenance feature exists for the convenience of the user.

Use the toolbar icons to manage the contractor list:

 Delete a contractor, division, or location. Notice that you can only delete entries that you created.

 Expand the list – View all of the divisions and locations under each contractor

 Collapse the list – Display just the contractor names

 Display the filter feature – Search for a contractor by typing in keywords

 Add a contractor – Add a new contractor to the list

 Add a division – Add a new division under the selected contractor

 Add a location – Add a new location under the selected division

The **Legend** shows that the  icon represents a contractor's name, the  icon represents the contractor's division, and the  icon represents the contractor's location.

The **Contractors** column displays all the contractors currently available in the user's [Contractor Selection](#) list.

The **Contractor Details** displays the information relevant to the selected contractor. When adding a new contractor, you may choose to fill in the **DUNS Code**, the **Effective Date**, the **Obsolete Date**, and the **Notes**.

Use the **Filter** to search for contractors within the list (click  to display the filter). The filtered contractors are highlighted in the color specified by the cPet Display [Options](#). The following icons may be helpful:

 Clear filter field

 Move to the previous entry in the filtered list

 Move to the next entry down in the filtered list

 *Tip: New contractors appear green* 

The user has the option to export the contractor list. Click **File > Export User-Defined Data** to save an XML copy of the contractor list (including user-added contractors). If you later install a different version of cPet, you may wish to import this data to retain information

regarding contractors, divisions, and locations you may have added. Click **File > Import User-Defined Data** to import the contractor list that was previously exported.

3.17 CONTRACTOR SELECTION DIALOG

Contractors for a contract plan or subcontract plan can be added, renamed, or deleted through the Contractor Selection Dialog.

The **Legend** shows that the  icon represents a contractor's name, the  icon represents the contractor's division, and the  icon represents the contractor's location.

To select a contractor, search the **Available Contractors** list for the desired contractor, division, and location. If the contractor you want is not on the list, refer to the [Contractor Maintenance Dialog](#) to add that contractor.

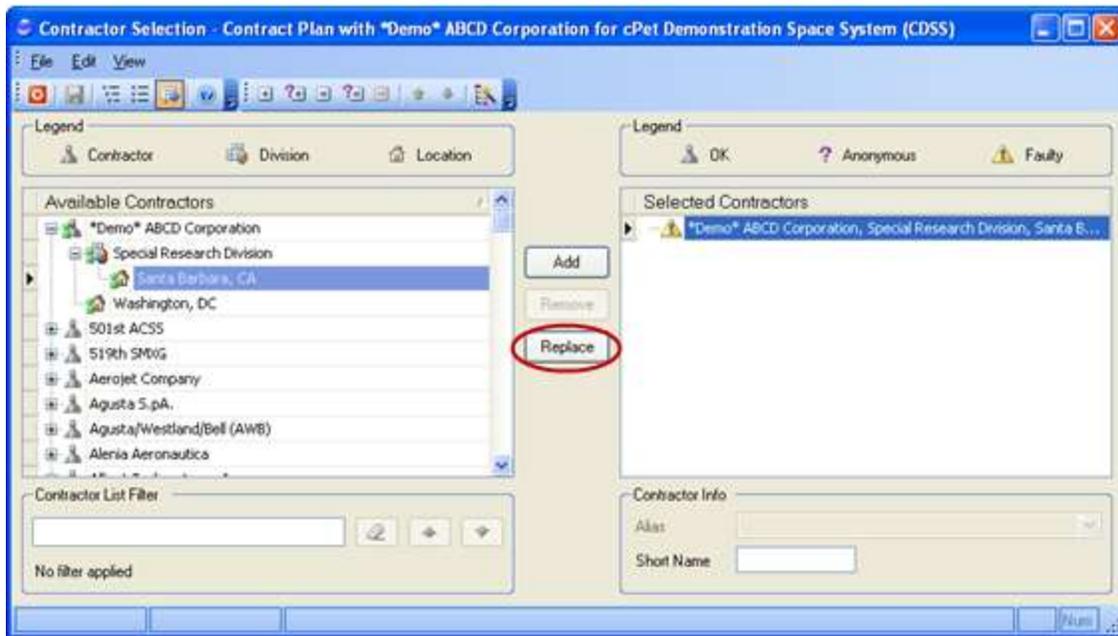
Click **Add** to assign a contractor. If you are viewing the Contractor Selection Dialog of a contract plan, then clicking the Add button will add a subcontractor, which will appear indented under the contractor for the plan.

Click **Remove** to remove the contractor from the Selected Contractors list.

Click **Replace** to replace the contractor on the Selected Contractors list with the chosen contractor on the Available Contractors list.

 *Tip: If you change the chosen contractor in the Contractor Selection Dialog, then the contractor information will update accordingly in the [Basic Information](#) as well, and vice versa. The two dialogs will remain in sync.*

When you import a contract plan, the contractor will show a warning icon  in the Contractor Selection Dialog. Search for the corresponding contractor in the Available Contractors list and click **Replace** to update the contractor name, division, and location to match one of cPet's contractors.



When you create a new contract plan, "TBD" will appear in the contractor field. Go to the Contractor Selection dialog to search for the appropriate contractor in the Available Contractors list. Click Replace to update the TBD contractor with the actual contractor.

You can define a **Short Name** for each contractor. This abbreviated name will appear in the Contractor column on a PDF export (does not apply to 2011 DD 2794 version). See [Exporting Plans](#) for more details.

Use the **Contractor List Filter** to quickly find the desired contractor by typing in a few keyword and using the icons below. The filtered contractors are highlighted in the color specified by the cPet Display [Options](#).

 Clear filter field

 Move to the previous entry in the filtered list of contractors

 Move to the next entry in the filtered list of contractors

The following icons may be useful in managing the contractor list:

 Expand the list – View all of the divisions and locations under each contractor

 Collapse the list – Display just the contractor names

 Display the filter and additional contractor info

 Add a contractor to the selection list (same as clicking **Add**)

 Add a Contractor TBD - Use this feature if you are unsure of which contractor to select. Use Replace to substitute the Contractor TBD with a known contractor

 Replace a contractor on the Selected Contractors list with a contractor on the Available Contractors list (same as clicking **Replace**)

 Replace a contractor on the Selected Contractors list with a Contractor TBD

 Remove a contractor from the Selected Contractors list (same as clicking **Remove**)

 Move the selected contractor up in the list

 Move the selected contractor down in the list

 Attempts to repair faulty contractors (i.e. those contractors marked by a yellow warning )

The **Legend** on the upper right-hand side of the window shows the type of contractor in the Selected Contractors list.

 Displays contractors from the Available Contractors list

 Displays Anonymous contractors (i.e. Contractor TBD) that the user added with the icons  or 

 Displays Faulty contractors (i.e. contractors that are not on the Available Contractors list). These faulty contractors may be the result of removing a contractor through [Contractor Maintenance](#), so the contractor in question does not appear on the Available Contractors list anymore. Use the  icon to attempt to repair faulty contractors. In addition, contractors of imported plans will have the warning sign until you map them to cPet defined contractors.

Contractors added by the user through Contractor Maintenance will appear green 

The ***Demo* ABCD Corporation**  can be used as a temporary contractor if you are unsure which contractor to use. This contractor's function is the same as that of an anonymous contractor .

3.18 CONVERSION RESULTS FOR COST REPORTS

The Conversion Results dialog appears immediately after importing a document. The window contains a checklist of fields that were or were not successfully imported into cPet. The green checks  indicate that the data imported correctly, and the yellow warnings  indicate errors. Review this validation window to anticipate some of the problems that will be seen when comparing the Excel file to the data which imported into cPet.

The **Description** column contains a list of all the fields cPet reviewed to ensure that the information imported.

For fields that did not import or fields that were left blank in the Excel file, the **Error Type** is marked as a warning.

The **Location** references the problematic area on the Excel file. The sheet name is listed in quotations, followed by the column and row numbers.

The bottom portion of the window is dedicated to the error log description. For each field (whether it is marked with a green check or a yellow warning), cPet displays details pertaining to the selected field. The value found on the Excel file is listed. You can hide this **Reading Pane** by clicking the  icon at the top of the window.

The information found in the Conversion Results can be exported to Excel by clicking .

cPet checks whether or not the summary elements imported correctly. All the recognized summary elements will be marked with a green check .

The table below lists possible errors that may occur when importing a 1921 or 1921-1.

For errors in the header fields, see the [1921 Basic Info Dialog](#) or the [1921-1 Basic Info Dialog](#) to understand what information belongs in those fields.

Conversion Results for Cost Reports	
Error	Description
 Reporting Element has a blank WBS Element Code	The WBS Element is missing an element code. On a 1921, this error often occurs because a summary element is misspelled and is thus not recognized as a summary element. Since summary elements do not have codes, the fix to this error would be to correct the spelling of the element name.
 Reporting Element has a blank WBS Element Name	For each row on the 1921 that has an Element Code, there should be a corresponding WBS Element Name. Similarly, each page on the 1921-1 must have an Element Code.
 Reporting Element is redundant	This error occurs when an element is repeated in an Excel file. The element might be on different sheets of the workbook. If so, the sheet and location will be listed in the error details under "Address of Prior Element."
 To Date/At Completion cost contains one or more cells with a formula that could not be evaluated properly	This warning may occur when there is an error with a formula in the Excel file. Review the file to correct this error, and then re-import the cost report.
 To Date/At Completion Cost does not contain a valid decimal number	This error occurs when there is text in the cost field instead of a number. For example, "Not Available" will trigger this error.
 Cost Hour Report for Reporting Element has a	Either Recurring, Non-Recurring, or Total must be

blank Cost Type (<i>applies only to 2003 1921-1's</i>)	checked in the Cost Type field of the 2003 1921-1. Go back to the Excel file, check the appropriate cost type, and re-import the 1921-1.
 Cost Type for Cost Hour Report for Reporting Element contains one or more cells with a formula that could not be evaluated properly (<i>applies only to 2003 1921-1's</i>)	This warning may occur when there is an error with a formula in the Cost Type section of the Excel file. Review the file to correct this error, and then re-import the cost report.
 Cost Type for Cost Hour Report for Reporting Element contains multiple check marks (<i>applies only to 2003 1921-1's</i>)	This warning occurs when two or more Cost Types (such as Recurring, NonRecurring, or Total) are checked in Block 14 of the Excel file
 Summary Element Missing (<i>applies to 1921s</i>)	All summary elements must be accounted for on a 1921. If a summary element is misspelled, cPet will not recognize it as a summary element, and this warning will appear.

3.19 CONVERSION RESULTS FOR FLAT FILES

The Conversion Results dialog appears immediately after importing a document. The window contains a checklist of fields that were or were not successfully imported into cPet.

The green checks  indicate that the data imported correctly, and the yellow warnings  indicate errors. Review this validation window to anticipate some of the problems that will be seen when comparing the Excel file to the data which imported into cPet.

The **Description** column contains a list of all the fields cPet reviewed to ensure that the information imported.

For fields that did not import or fields that were left blank in the Excel file, the **Error Type** is marked as a warning.

The **Location** references the problematic area on the Excel file. The sheet name is listed in quotations, followed by the column and row numbers.

The bottom portion of the window is dedicated to the error log description. For each field (whether it is marked with a green check or a yellow warning), cPet displays details pertaining to the selected field. The value found on the Excel file is listed. You can hide this **Reading Pane** by clicking the  icon at the top of the window.

The information found in the Conversion Results can be exported to Excel by clicking . Refer to the [Flat File Tutorial](#) for detailed information on Flat Files.

The table below lists possible errors that may occur when importing a 1921 or 1921-1.

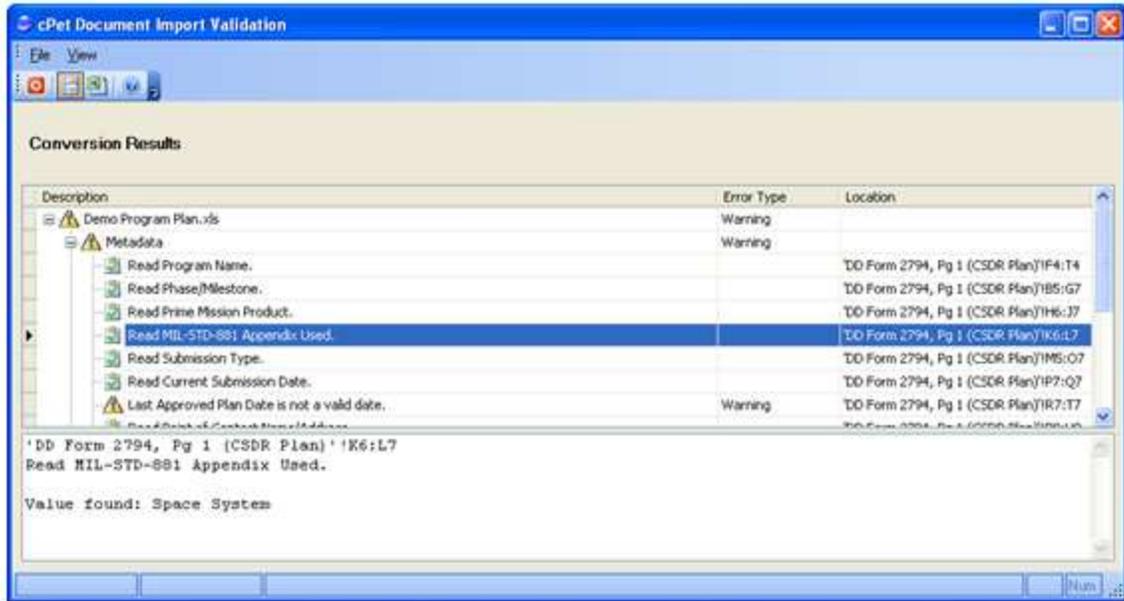
 *Tip: cPet identifies an Excel file as a Flat File through two characteristics: (1) The Data Type in cell B1 must be "1921/1921-1 Input," and the Data Version in cell B2 must be either "2007" or "2011." If these requirements are not satisfied, the Flat File will not import.*

Conversion Results for Flat Files	
Error	Description
<i>Metadata Fields</i>	Rows 4-34 must be filled in properly on the Flat File. This means that Column B must contain text that is nonblank, a valid decimal number, and a valid formula (if applicable). Dates must be in the format YYYYMMDD. In addition, any 1921 Remarks associated with the cost report should be placed in cell next to "DD 1921 Remarks" at the bottom left of the page. 1921-1 Remarks should be placed in under the "Remarks" section at the far right of the data (you must scroll over in the Excel sheet to see this section).
<i>Reporting Elements</i>	
 Reporting Element has a blank WBS element code	Every WBS Element must have a code. Fill in the column "WBS Code" for each element on the Flat File.
 WBS Code has a formula that could not	This warning occurs when there is an invalid

be evaluated properly	formula in Column D of the Excel file.
 Reporting Element has no name	Fill in the column "WBS Reporting Elements" for every row that has a WBS Code on the Flat File.
 Reporting element name has a formula that could not be evaluated properly	This warning occurs when there is an invalid formula in Column E of the Excel file.
 Quantity has a formula that could not be evaluated properly	The Units TD or AC column has a formula containing an error.
 Cost has a formula that could not be evaluated properly	The 1921 or 1921-1 cost data contains a formula with an error.
 Cost is not a valid decimal number	This error may occur when there is text in the cost field instead of a number
<i>Summary Costs</i>	cPet looks in the cells near the bottom left of the page for the summary costs. The Conversion Results provides a warning when one or more of these fields is left blank.

3.20 **CONVERSION RESULTS FOR PLANS**

The Conversion Results dialog appears immediately after importing a document. The window contains a checklist of fields that were or were not successfully imported into cPet. The green checks  indicate that the data imported correctly, and the yellow warnings  indicate errors. Review this validation window to anticipate some of the problems that will be seen when comparing the Excel file to the data which imported into cPet.



The **Description** column contains a list of all the fields cPet reviewed to ensure that the information imported.

For fields that did not import or fields that were left blank in the Excel file, the **Error Type** is marked as a warning.

The **Location** references the problematic area on the Excel file. The sheet name is listed in quotations, followed by the column and row numbers.

The bottom portion of the window is dedicated to the error log description. For each field (whether it is marked with a green check or a yellow warning), cPet displays details pertaining to the selected field. The value found on the Excel file is listed. You can hide this **Reading Pane** by clicking the  icon at the top of the window.

The information found in the Conversion Results can be exported to Excel by clicking .

The following table lists possible errors that may occur when importing a 2003 or 2007 program or contract plan.

Conversion Results for DD Form 2794			
Error	Fix for 2003 Version	Fix for 2007 Version	Fix for 2011 Version
<i>Metadata</i>	An error occurred with one or more of the Basic Information fields (Items 1a through 9). See the error descriptions below.	An error occurred with one or more of the Basic Information fields (Items 1a through 9). See the error descriptions below.	An error occurred with one or more of the Basic Information fields (Items 1a through 10). See the error descriptions below.
Program Name left blank	Fill in Item 1a.	Fill in Item 1a.	Fill in Item 1a.
Prime Mission Product left blank	N/A	Fill in Item 1b.	Fill in Item 1c.
Milestone left blank	Fill in Item 1b.	Fill in Item 1c.	Fill in Item 1b.
Milestone/Submission Type contains one or more cells with a formula that could not be evaluated properly.	This error often occurs when there is a formula referencing another sheet in Excel. Delete the formula and mark the box with a "X" and re-import, or mark selection within cPet.	This error often occurs when there is a formula referencing another sheet in Excel. Delete the formula and mark box with a "X" and re-import, or mark selection within cPet.	This error often occurs when there is a formula referencing another sheet in Excel. Delete the formula and mark box with a "X" and re-import, or mark selection within cPet.
Milestone/Submission Type contains multiple check marks.	One or more box is checked in this field. Revise Excel document and re-import, or select correct item within cPet.	One or more box is checked in this field. Revise Excel document and re-import, or select correct item within cPet.	One or more box is checked in this field. Revise Excel document and re-import, or select correct item within cPet.
Weapon System Type (MIL_STD-881 Appendix Used) left blank	Fill in Item 2a.	Fill in Item 2.	Fill in Item 2.

Weapon System Type (MIL_STD-881 Appendix Used) does not appear to contain a valid MIL-HDBK-881 specification	The Weapon System Type must be one of the following nine items: Surface Vehicle System, Space System, Sea System, Ordnance System, Missile System, Electronic/Automated Software System, Aircraft System, UAV System, or System of Systems.	The Weapon System Type must be one of the following nine items: Surface Vehicle System, Space System, Sea System, Ordnance System, Missile System, Electronic/Automated Software System, Aircraft System, UAV System, or System of Systems.	The Weapon System Type must be one of the following nine items: Surface Vehicle System, Space System, Sea System, Ordnance System, Missile System, Electronic/Automated Software System, Aircraft System, UAV System, or System of Systems.
Submission Type left blank	Fill in Item 3.	Fill in Item 3.	Fill in Item 3.
Date As Of left blank	Fill in Item 4.	N/A	N/A
Report Date left blank	Fill in Item 5.	N/A	N/A
Date As Of/Report Date does not contain a valid date	Dates must be in the MM/DD/YYYY format. Dates cannot be left as N/A.	N/A	N/A
Current Submission Date left blank	N/A	Fill in Item 4.	Fill in Item 4.
Last Approved Plan Date left blank	N/A	Fill in Item 5.	Fill in Item 5.
Last Approved Plan Date does not contain a valid date	N/A	Dates must be in YYYYMMDD format. Dates cannot be left as N/A.	Dates must be in YYYYMMDD format. Dates cannot be left as N/A.
Name/Address does not appear to contain a valid combination of city, state, and zip code	Most likely cause for this error is incorrect format or placement of address on Excel file. See Importing Errors to Avoid for more information. Also note that states	Most likely cause for this error is incorrect format or placement of address on Excel file. See Importing Errors to Avoid for more information. Also note that states	Most likely cause for this error is incorrect format or placement of address on Excel file. See Importing Errors to Avoid for more information. Also note that states

	must be abbreviated (e.g. "California" must be written as "CA.")	must be abbreviated (e.g. "California" must be written as "CA.")	must be abbreviated (e.g. "California" must be written as "CA.")
Name/Address left blank	Fill in Item 6a.	Fill in Item 6a.	Fill in Item 6a.
Telephone Number left blank	Fill in Item 6b.	Fill in Item 6b.	Fill in Item 6b.
Fax Number left blank	Fill in Item 6c.	Fill in Item 6c.	Fill in Item 6c.
Email Address left blank	Fill in Item 6d.	Fill in Item 6d.	Fill in Item 6d.
Plan Type left blank	N/A	N/A	Fill in Item 7.
Preparing Organization left blank	Fill in Item 8.	Fill in Item 8.	Fill in Item 8.
Review and Reference Number left blank	Fill in Item 9.	N/A	N/A
Approved Plan Number left blank	N/A	Fill in Item 9.	Fill in Item 10.
Contract Number left blank	Fill in the Contract Number in column 13 on the row corresponding to the first WBS item.	Fill in the Contract Number in column 12b on the row corresponding to the first WBS item.	Fill in Item 9b.
WBS	There must be at least one element in Item 11.	There must be at least one element in Item 11.	There must be at least one element in Item 11.
Summary Element Missing	All summary elements must be accounted for. If a summary element is misspelled, cPet will not recognize it as a summary element, and this warning will appear.	All summary elements must be accounted for. If a summary element is misspelled, cPet will not recognize it as a summary element, and this warning will appear.	All summary elements must be accounted for. If a summary element is misspelled, cPet will not recognize it as a summary element, and this warning will appear.

WBS Element has a blank WBS Element Code	Fill in column 10a for program plans, and column 10b for contract plans	Fill in column 10a for program plans, and column 10b for contract plans	Fill in column 11a for program plans, and column 11b for contract plans
WBS Element has a blank WBS Element Name	Fill in column 11 for all WBS elements	Fill in column 11 for all WBS elements	Fill in column 12 for all WBS elements
Required Reports for WBS Element contains invalid text	Text in columns 14a-d should be "X" or "N/A"	Text in columns 13a-e should be "X" or "N/A"	Text in columns 13a-f should be "X" or "N/A"
<i>Submissions</i>	There must be at least one submission event in Item 15.	There must be at least one submission event in Item 14.	There must be at least one submission event in Item 14.
As Of Date/Due Date for Submission Event does not contain a valid date	Dates must be in the MM/DD/YYYY format to import correctly. Dates cannot be marked TBD. An example of an invalid date is 4/31/2005, where April has only 30 days.	Dates must be in the YYYYMMDD format to import correctly. Dates cannot be marked TBD. An example of an invalid date is 20050431, where April has only 30 days.	Dates must be in the YYYYMMDD format to import correctly. Dates cannot be marked TBD. An example of an invalid date is 20050431, where April has only 30 days.
Event Forms for Submission Event does not appear to contain any valid form names	Possible submission event forms (Item 15b) are 1921, 1921-1, 1921-2, 2630-2, and 2630-3.	Submission event forms (Item 14b) must be valid.	Submission event forms (Item 14b) must be valid.

3.21 **CREATE CONTRACT PLAN**

This dialog pops up when File>New>New Contract/Subcontract Plan is clicked. Three options are available:

Inherit from parent plan (using RDT)

Choose this option if you would like to create a new contract plan based on a program plan's RDT. Alternatively, you may wish to create a new subcontract plan based on a contract plan's RDT. See the [WBS Editor of a Contract Plan](#) tutorial for more information.

Click the "..." button next to the "Select open plan" field to pop up the [Select Plan](#) dialog. Choose a plan whose [RDT](#) you would like to use as a basis for creating the new contract plan. Note that prior to completing this step, you must first have edited the selected plan's RDT and assigned WBS elements to a particular contractor.

Click the "..." button next to the "Select contractor" field to pop up the [Select a Contractor](#) dialog. Choose a contractor whose WBS elements are checked in the parent plan's RDT. Prior to completing this step, you must have assigned a contractor to the chosen plan through the [Contractor Selection Dialog](#).

When you click OK on the "Create Contract Plan" dialog, a new plan will be created which contains the WBS elements as checked in the selected parent's plan's RDT for the selected contractor.

Create New Plan

Select this option to create a new contract plan from scratch. Choose which plan version (2003, 2007, or 2011) to use.

Close Existing Plan

Select this option to create a copy of an existing contract plan that is open in cPet. Click the "..." button to pop up the [Select Plan](#) dialog to choose the appropriate plan.

3.22 CREATE PROGRAM PLAN

This dialog pops up when File>New>New Program Plan is clicked. Two options are available:

Create New Plan

Select this option to create a new program plan from scratch. Choose which plan version (2003, 2007, or 2011) to use.

Clone Existing Plan

Select this option to create a copy of an existing program plan that is open in cPet. Click the "... " button to pop up the [Select Plan](#) dialog to choose the appropriate plan.

3.23 IMPORT DIALOG

The Import dialog allows you to select which plan or cost report you want to import. All documents must be in Excel format. An XML equivalent will be created upon importing the document.

3.24 EXPORT DIALOG

After creating a program plan or contract plan, the document can be exported to PDF or Excel. This feature generates a copy of all the information stored in cPet. The result is a duplicate of what the plan would look like using the DD2794 format.

Export to Excel to view the plan in an Excel format.

Export to PDF to view a PDF version of the plan.

Click **Immediately view exported file** if you want to view the document after the export has been generated.

 *Tip: Plans that were exported to Excel can also be imported back into cPet.*

3.25 **LINK DOCUMENTS DIALOG**

The Link Documents Dialog provides a method for rearranging plans or cost reports. The following type of documents can be linked together:

- ▶ Program plan and contract plan
- ▶ Contract plan and subcontract plan
- ▶ Contract plan and 1921
- ▶ 1921 and 1921-1

To link a contract plan to a program plan, click on each document in the Link Documents Dialog. The document names will be displayed at the bottom of the dialog. Click **Link** when you have selected the appropriate plans. The contract plan will now be indented under the program plan.

To link a subcontract plan to a contract plan, first click the prime contract plan and then click the subcontract plan. The document names are displayed at the bottom of the dialog under "Parent" and "Child." Click **Link**. The subcontract plan will now be indented under the prime contract plan.

 *Tip: The order that the plans are selected is important. If you first click on a subcontract plan and then click on the prime contract plan, the prime will be incorrectly indented under the sub.*

Follow a similar procedure to link a 1921 to a contract plan, or to link a 1921-1 to a 1921.

 *Tip: Documents can also be linked directly by dragging and dropping them within the main window of cPet. See [Linking Documents](#) for more information.*

3.26 NEW CONTRACTOR

This screen will appear after clicking the  icon in the Contract Maintenance window or after clicking Edit > Add Contractor.

Enter the name of the contractor and click OK.

New contractors will appear green  to represent a user-defined contractor. These added contractors will only appear in your copy of cPet. To export this list of contractors, click **File > Export User-Defined Data**. In another copy of cPet, you may then click **File > Import User-Defined Data** to import this list, including contractors that were previously user-defined.

3.27 OPEN DIALOG

The Open dialog allows you to select and open a plan or cost report that has previously been imported or created. The document must therefore be in XML format.

The Open dialog can be reached through File > Open, or by clicking on the  icon on the toolbar.

3.28 OPTIONS DIALOG

Click on one of the links below to view options for each of the tabs within the cPet Options dialog:

[General Options](#)

[Display Options](#)

[Validation Options](#)

[Import Options](#)

General Options

WBS System Type

Set the default WBS System Type (MIL-HDBK-881A or MIL-STD-881C). This option affects which WBS System Type is auto-selected when the [Basic Info](#) or the [WBS Editor](#) is opened.

Prompt before providing WBS structure to plans with no WBS

When a new plan is created and a Weapon System Type is selected, cPet will ask the following question upon opening the WBS Editor: "Should cPet fill in the Program/Contract Plan's empty WBS structure with the standard WBS structure for plan's weapon system type?" Clicking Yes will generate a list of elements according to the chosen Weapon System Type as specified in the [Basic Information](#). Clicking No will leave the WBS Editor blank.

Display Options

Filtered Contractors in Contractors List

Changes color of filtered contractors in the [Contractor Selection](#) list or in [Contractor Maintenance](#).

Invalid Rows

Changes color of invalid rows in the Submission Events, WBS Editor, and RDT.

Reset to Defaults

After changing one or more display colors, click this button to reset back to the default colors.

Validation Options

Skip Validation Wizard when validating an individual document

If this option is checked, the Validation Wizard is skipped when validating an individual document (select the cost report and click Tools > Validate Individual Document). All the

validation questions are skipped, and validation results window is displayed. No validation letter will be generated.

Allow multi-line validation data

This option changes the display of the validation results data that are exported to Excel. Checking this option allows the row width to expand in Excel to accommodate entries with large amounts of data. If this option is not checked, then the columns are made wider to display all the data on one line.

Import Options

Overwrite old cPet XML files

Replace XML files when a plan or cost report is imported more than once.

Generate validation XLS files

When a document is imported, a validation file is generated in Excel. This file is a replica of the plan or cost report, except with errors highlighted in orange, and successfully imported areas marked in green.

Overwrite old validation XLS files

Replace validation XLS files when a plan or cost report is imported more than once.

Expand integers to one decimal place when importing WBS Element Codes ("1" --> "1.0")

cPet expands the WBS Element Codes for program plans and contract plans to one decimal upon import. If "1," "2," or "3" are listed on the Excel file for instance, then these numbers will be displayed as "1.0," "2.0," "3.0" in the WBS Editor.

3.29 **RDT DIALOG**

The Resource Distribution Table (RDT) provides a way to organize WBS elements according to assigned contractors. The RDT may accompany a program plan or contract plan.

Before opening the RDT, at least one contractor must be chosen through the [Contractor Selection Dialog](#).

When viewing the program plan's RDT, all contractors assigned to the program plan will be listed in columns to the right of the window. To the left is a list of all the elements in the program plan's WBS Editor. Check which contractor is responsible for which WBS element. Use the toolbar at the top of the window to easily check or uncheck items. Useful icons and their functions are described below.



Check Selection - Use the shift or control key to select a few WBS items in a certain column. Then click this icon to check all the items in the selection.



Uncheck Selection - Use the shift or control key to select a few WBS items in a certain column. Then click this icon to uncheck all the items in the selection.

A few other icons that may be useful are:



If the WBS item name is longer than the width of the column, clicking this button **Resizes the Column** so the entire name can be seen.



Arranges the contractor columns in order of their contract value, from largest to smallest.



Moves a contractor column adjacent to the WBS (icon found by right-clicking on a column header)

To check/uncheck all the elements in a column, right click on the column header and select



or



, respectively.

 *Tip: From the Edit menu, you can **Select All** or **Select Child Elements**. These commands can be particularly useful if you would like to check/uncheck groups of WBS elements.*

Information relevant to each contractor is listed at the top of the window. Click on different contractor columns to view and edit the information for each contractor. Note that the RDT for program plans and contract plans is slightly different.

Program RDT

The Program RDT displays information for the prime contractor(s). The **Contractor** name for the selected contractor is listed at top. Fill in the **Contract Number** and **Description** for the prime contract plan. Also enter information for the **Total Est. Contract Value** and **Software Contract Value** (including units). Finally, fill in the fields for the **Government Organization or PARM**, **CSDR Direct Reporting per CWIPT**, and **SRDR Direct Reporting per CWIPT**.

Contract RDT

The Contract RDT displays information for both the prime contractor and the subcontractor(s). The "Contractor Information" at the top of the RDT pertains to the prime contractor. The Contractor name and number are read-only fields. They correspond to the information that was brought into cPet when the Excel version of the contract plan was imported. Or, for contract plans that were created within cPet, the Contract Number corresponds to the number that was specified in the Basic Info. If the **Total Est. Contract Value** and the **Software Contract Value** were filled in on the parent RDT, these fields will be brought over to the contract plan.

The "Selected Subcontractor Information" pertains to the contract plan's subcontractors. Click on a different subcontractor column to view the corresponding information.

To **export** the RDT to Excel, click the  icon on the main toolbar.

iTip: When the RDT of a program plan is exported, the header information under the Prime Contractor column(s) will be filled in. However, cPet will not export any information to the Program Office column.

iTip: When the RDT of a contract plan is exported, all the header information will be filled in. cPet will export data pertaining to the prime contractor and all the subcontractors.

iTip: WBS elements must have item numbers in order for them to be edited in the RDT. Items that do not have numbers will be highlighted according to the [Options](#) Display color. You will be unable to check these elements under any contractor column until you assign them numbers in the WBS Editor.

See [WBS Editor of a Contract Plan](#) to visually understand how the program plan's RDT relates to the WBS Editor of the program plan and the contract plan.

3.30 SELECT A CONTRACT PLAN DIALOG

3.30.1 IMPORT EVENTS FROM CONTRACT PLAN

This dialog can be accessed through a program plan's submission events, under **Tools > Import Events from Contract Plan**.

Submission events from a contract plan can be imported into a program plan's submission events. To do this, follow these steps:

- 1) Make sure a program plan and a contract plan are open in cPet.
- 2) Open the program plan's submission events.
- 3) Click Tools > Import Events from Contract Plan ().
- 4) In the Select a Contract Plan dialog, choose the contract plan containing the submission events you would like to import (Note: The contract plan must be open in cPet).
- 5) The contract plan's submission events will be listed under the program plan's. A header row will indicate which events are from the contract plan.



Event #	Civilis Dict	1921	1921-1	1921-2	1921-4	SRDR Initial	SRDR Final	Event	As Of Date	Due Date
Program Plan										
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	First Event	10/19/2007	12/19/2007
2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Second Event	10/20/2007	12/20/2007
3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Third Event	10/23/2007	12/23/2007
4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fourth Event	10/26/2007	12/26/2007
5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fifth Event	10/29/2007	12/29/2007
6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sixth Event		
Contract Plan - Approved Plan Number: A-07-G-CT, Contract Number: DAAB07-07-A-0205										
1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	First Event	9/19/2007	11/18/2007
2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Second Event	9/22/2007	11/21/2007
3	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Third Event	9/25/2007	11/24/2007

Note the following when importing events:

- The contract plan events will be kept in a separate category than the program plan's.
- The **Sort and Renumber** tool will be applied to *all* events. However, the contract plan and program plan events will not intermix.
- The multi-check tool  and the fill down tool  can be used across rows pertaining to both the program plan and the contract plan. Select the desired events and use any of the edit tools.
- New rows will be added to the program plan's events. New events cannot be inserted under the contract plan category.
- If all the events from the contract plan are deleted, then the contract plan and program plan headers will be deleted.
- You can import events from multiple contract plans - each will appear in its own category.

3.31 SELECT A CONTRACTOR

This dialog appears after browsing for a contractor on the [Create Contract Plan](#) dialog. Choose which contractor to use to create a new contract plan based on the specified plan's RDT. Prior to completing this step, you must have assigned a contractor to the chosen plan through the [Contractor Selection Dialog](#).

3.32 SELECT A COST REPORT DIALOG

Use this dialog to select a cost report for a particular submission event in the [Validation Wizard](#). You may browse for a cost report that is not currently open in cPet. Or you may choose to select a different cost report than is listed in the Validation Wizard.

3.33 SELECT DOCUMENT VERSION DIALOG

The Select Document Version dialog will pop up when you are creating a new cost report. Choose whether the document follows the 2003, 2007, or 2011 version.

3.34 SELECT PLAN

The "Select Plan" dialog may appear for one of two reasons:

- 1) While creating a [contract plan](#) or [program plan](#).
- 2) While inserting WBS elements or submission events. This dialog may appear after clicking **Edit > Insert WBS from existing plan** on a plan's **WBS Editor**. This feature inserts the selected plan's entire WBS under the selected element in the active plan's WBS Editor. Alternatively, this dialog may appear after clicking **Tools > Import events from existing plan** on a contract plan's **Submission Events**. This feature inserts the selected plan's entire submission events under the selected element in the contract plan's Submission Events.

All program plans and contract plans that are open in cPet are listed in the dialog. To use a plan that is not shown, close the dialogs, select File>Open, choose the desired plan, and then return to the Select Plan dialog.

3.35 SELECT REPORTS TO COMPARE

The Select Reports to Compare dialog appears after performing one of the following actions:

- 1) Click Tools > Compare Cost Reports.
- 2) Select a contract plan, 1921, or 1921-1 that is open in cPet, right-click, and choose Compare Cost Reports.

The plans and cost reports which are open in cPet are listed. Choose which contract plan will be used for comparison. Select the **Earlier Report** and **Later Report**. cPet will pre-select the Earlier/Later Report based on the Report As Of date. If you reverse this selection, cPet will highlight the check boxes in pink.

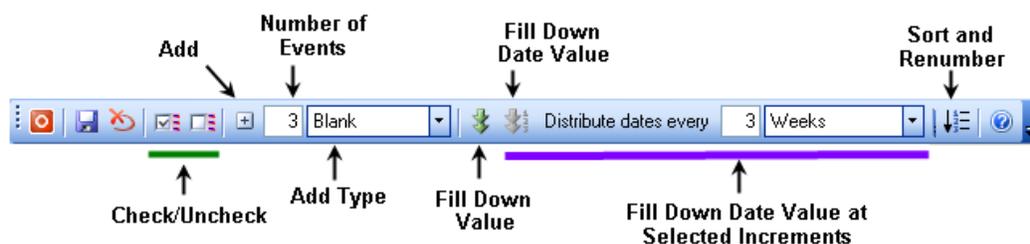
Click OK after you have decided which documents to compare. Depending on your selection, the [1921 Cost Report Comparison](#) window or the [1921-1 Cost Report Comparison](#) window will open.

 *Tip: You can select 1921's of either document version (2003, 2007, or 2011). However, 1921-1's must both be of the 2007 or 2011 version. Any 1921-1's of the 2003 version will have check boxes that are disabled in the Select Reports to Compare dialog.*

3.36 SUBMISSION EVENTS DIALOG

The Submission Events window displays the CSDR Submissions for the plan.

Use the toolbar at the top of the window to add and manage submission events. A brief explanation of the toolbar is given below.



 **Delete** a submission event

 **Check Selection** - Use the shift or control key to select a few submission events in a certain column. Then click this icon to check all the items in the selection.

 **Uncheck Selection** - Use the shift or control key to select a few submission events in a certain column. Then click this icon to uncheck all the items in the selection.

 **Add** submission event(s)

Add Type – Adds either “Blank” or “Like Current” events

“Blank” = Adds new rows

“Like Current” = Copies rows from selected row

 **Fill Down Value** – When several rows are selected, clicking this icon checks/unchecks the boxes in the column according to the first row. This icon can also be used to copy dates down a column.



Fill Down Date Value – When multiple rows are selected, clicking this icon generates dates down the column. These dates are set apart from each other by a certain increment of time.



Insert a row before the selected event



Insert a number of rows (quantity depends on numerical value in toolbar)



Add a row to the end of the submission events list



Add a number of rows to the end of the submission events list (quantity depends on numerical value in toolbar; same

as  icon)



Sort and Renumber – Arranges the submission events by As of Date and designates an Event Number for each.



Import Events from contract plan - (Found only on program plans); Contract plan events can be imported into a program plan's events. See [Import Events from Contract Plan](#) for more information. Icon found under the Tools menu.



Import Events from existing plan - (Found only on contract plans); Program plan events can be imported into a contract plan's events. See the icon found under the Tools menu.

To check/uncheck all the events in a column, right click on the column header and select 

or , respectively.

 *Tip: From the Edit menu, you can **Select All**. This command can be particularly useful if you would like to either check/uncheck all the submission events, or delete them all.*

A brief explanation of the fields in the submission events window is given below.

The **Event #** lists the number assigned to the event. For *imported plans*, this number is copied from the DD 2794 Excel version of the plan. If the events are not in order, the Sort and Renumber icon  can be used to numerically order these events. For *new plans*, the Sort and Renumber icon assigns a number to the events depending on their order in the submission events window.

For *imported plans*, the submission events and their dates and required reports will appear as they did on the DD 2794. However, invalid dates will not import and will be left blank. cPet provides a warning in the conversion results upon importing a plan. An example of an invalid date is 4/31/06 (April has only 30 days). Dates will also not import if they are in the incorrect format. The format for dates is as follows:

2003 Version DD/MM/YYYY

2007 Version YYYYMMDD

The table below compares the report names across different versions of the DD 2794. The naming conventions between the versions may be slightly different, and some versions may have columns for additional reports.

Required Reports

2003	2007	2011
	CWBS Dict.	CWBS Dict.
1921	1921	1921

1921-1P1	1921-1	1921-1
1921-1P2	1921-2	1921-2
2630-2	SRDR Initial	SRDR Initial
2630-3	SRDR Final	SRDR Final
		1921-4

For *imported plans*, the following information will already be listed in the submission events. However, for *newly created plans*, continue to fill in the information for the submission events of the CSDR plans.

Fill in the **Event** name associated with the CSDR submission.

Fill in the **As of Date** for the CSDR submission. This is the date that the data are reported.

Fill in the **Due Date** for the CSDR submission. This is the date that the report is due. The Due Date is generally 60 days after the As of Date. cPet automatically generates a Due Date once the As of Date is chosen.

Note: Incomplete events, header rows, or invalid dates will be marked pink, but this color can be changed in the cPet Display Options.

3.37 SUBMISSION VALIDATION

A submission can be validated in one of two ways:

- 1) In the main window of cPet, select a contract plan and click **Tools > Validate Submission**.

2) Click **Tools > Run the Validation Wizard** and select, "Validate a cost report submission, and generate a validation memorandum."

Either of these two methods results in a validation wizard dialog that displays validation results for the contract plan, the 1921, and the 1921-1.

The following icons indicate the severity for each validation:

 OK - No problems

 Warning - Moderately significant problems

 Error - Severe problems

The validation results may be grouped in the following six categories:

- Contract Plan (includes errors regarding blank codes or repeated elements on the contract plan's WBS Editor itself)
- 1921 vs Contract Plan (validates required/nonrequired and reported/missing elements)
- 1921 Internal (validates numeric data within the 1921)
- 1921-1 vs Contract Plan (validates required/nonrequired and reported/missing elements)
- 1921-1 vs 1921 (compares data in the 1921-1 against the 1921)
- 1921-1 Internal (validates numeric data within the 1921-1)

Note: If you run the Validation Wizard and choose any non-default answers to the validation questions, cPet will add one or both of the following categories to the Validation Results: **1921 Additional Validation Data** and **1921-1 Additional Validation Data**. These categories will list any comments you wrote in response to the validation questions.

Contract Plan

Possible validation errors for a contract plan are listed in the table below.

Contract Plan Validation Results	
Error	Description
 Blank WBS Element Code found for WBS element from Contract Plan	Every WBS Element must have a code. A numbering is made easy by clicking Tools > WBS Numbering within the contract plan's WBS Editor.
 Repeated WBS Element Code found for WBS elements from Contract Plan	Each WBS Element must have a unique code.

1921 vs Contract Plan & 1921 Internal

Please see [1921 Validation Results](#) for details.

1921-1 vs Contract Plan, 1921-1 vs 1921, & 1921-1 Internal

Please see [1921-1 Validation Results](#) for details.

The dialog is laid out in three columns: The Location, Description, and Error Magnitude:

The **Location** column displays the validated item.

The **Description** column lists the type of error found. Click on an error to view the associated details in the **Reading Pane** at the bottom of the window. You can hide this Reading Pane by clicking the  icon at the top of the dialog.

The **Error Magnitude** represents the difference between related costs.

 *Tip: For these numeric validations, only the error with the greatest magnitude will be reported for each WBS Element (and for each page, if relevant). In fixing the major error, many smaller errors will most likely be fixed as well.*

Click the Filter icon  to sort the validation results by Location or by Error Magnitude. Results are listed by Location by default, which means that within each category, the errors appear in order of their WBS Element Code. If you choose to sort by Error Magnitude, then the numeric errors will be listed with the error of largest magnitude first. Click **Hide Warnings** to hide the warnings  and only display the errors .

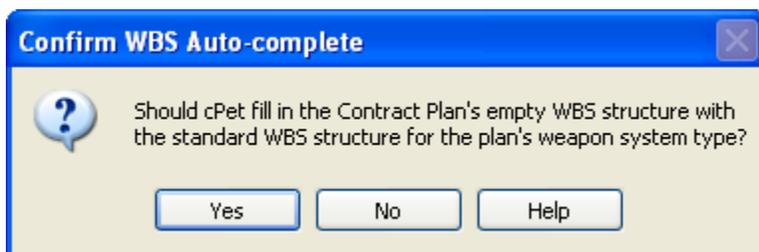
The information found in the Validation Results can be exported to Excel by clicking .

Once you are satisfied with the validation results, you may continue to accept or reject the submission in the [Validation Wizard](#) and generate a validation memorandum.

3.38 WBS EDITOR DIALOG

The WBS Editor displays the list of required reporting elements in a hierarchical fashion.

If creating a new program or contract plan, cPet may inquire if the WBS Editor should be filled in according to the Weapon System Type specified on the [Basic Info](#). Refer to the General tab of the cPet [Options](#) to turn on or off this warning.



Use the following icons to add, edit, and move WBS items:

 Undo

 Redo

 Add a sibling to the selected element

 Add a child to the selected element

 Delete an item

 Copy a WBS element

 Cut a WBS element

 Paste a WBS element (note that elements can be pasted into cPet or into Excel)

 Indent an item

 Unindent an item

 Move an item up in the list

 Move an item down in the list

 Provides the option of assigning a WBS number to each item, or clearing the item numbers

 Free Edit Mode - Turn on Free Edit mode to add, delete, or arrange WBS elements easily. See below for more details

 Expand All (Found under the View Menu)- All the elements in the WBS tree will be displayed

 Collapse All (Found under the View Menu)- All the elements in the WBS tree will be collapsed to that only the root element(s) is displayed

 Check (Found under the Edit Menu) - Use the shift or control key to select a few WBS items in a certain column. Then click this icon to check all the items in the selection

 Uncheck (Found under the Edit Menu) - Use the shift or control key to select a few WBS items in a certain column. Then click this icon to uncheck all the items in the selection

 Insert Standard WBS (Found under the Edit Menu). Provides the option to insert a standard WBS according to either MIL-HDBK-881A or MIL-STD-881C (as specified at the top of the WBS Editor).

From the Edit Menu of contract plans, you may also **Insert WBS From Existing Plan**. This function inserts all of the WBS elements found on the WBS Editor of the [selected parent plan](#).

 *Tip: From the Edit menu, you can **Select All** or **Select Child Elements**. These commands can be particularly useful if you would like to delete groups of elements from a standardized WBS.*

 *Tip: Elements can be copied from the WBS Editor and pasted into Excel. Likewise, elements can be copied from Excel and pasted into the WBS Editor.*

Free Edit Mode

The **Free Edit Mode** may be useful when creating new WBS elements or rearranging the indentation structure of the elements. Click the  icon on the toolbar to turn on the Free Edit Mode (the button will turn orange). In Free Edit Mode, parent/child relationships among WBS elements are relaxed so that individual elements can be indented and moved without changing the indentation or position of other elements. The WBS elements will still appear indented under each other, but the Expand () and Collapse () icons will no longer be present. The purpose of the Free Edit Mode is to visually organize the WBS with ease. Without this mode turned on, a newly added element may not appear where you would like it to be in the tree structure.

There are a few things to note when using the **Free Edit Mode**:

-  After changing the WBS in Free Edit Mode, the WBS indenture structure will be maintained after the mode is turned off.
-  WBS elements are indented by four spaces. However, if you indent an element by a single space, cPet will interpret this element as being indented by four spaces.
-  If you indent an element by more than four spaces, cPet will ignore these extra spaces. If you close and reopen the WBS Editor, the element will appear indented by the normal four spaces.

WBS Editor in Relation to the DD 2794

The **WBS Element Name** column is shown on the left of the WBS Editor. For contract and subcontract plans, the summary elements are listed at the end of the WBS Editor (i.e. "Subcontractor G&A" through "Total Cost [Through Reporting Contractor's G&A & Profit or Fee]" for 2003 plans, and "Subtotal Cost" through "Total Price" for 2007 and 2011 plans).

On *program plans*, the **WBS Element Code** column lists each item with an element code.

On *contract plans*, the **Program Plan WBS Element Code** corresponds to the code of the element found on the program plan. The **WBS Element Code** corresponds to number of the element on the contract plan.

For *imported plans*, the WBS Editor will import the appropriate checks in the Reports Required field of the DD 2794.

For *newly created plans*, click the required reports for each element.

Clicking the **N/A** box for a WBS element automatically erases all checks in that particular row.

 A WBS item will be highlighted if it is an only child (see below). The color of the warning depends on the Display Colors in the cPet [Options](#).

 *Tip:* A WBS item will be highlighted if it does not have any columns checked.

The table below compares the report names across different versions of the DD 2794. The naming conventions between the versions may be slightly different, and some versions may have columns for additional reports.

Required Reports

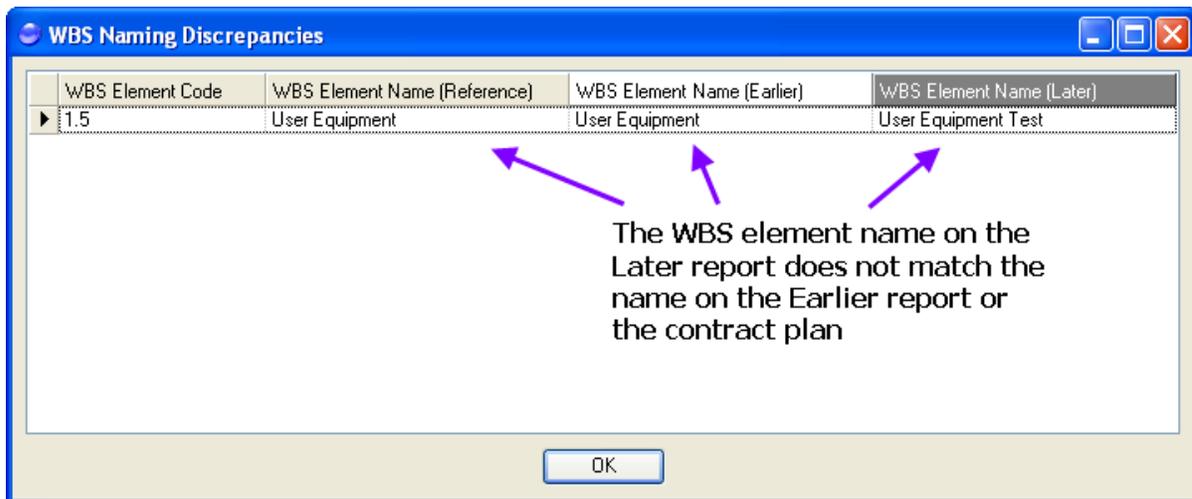
2003	2007	2011
	CWBS Dict.	CWBS Dict.
1921	1921	1921
1921-1P1	1921-1	1921-1
1921-1P2	1921-2	1921-2
2630	SRDR	SRDR
		1921-4

Refer to the *Cost and Software Data Reporting (CSDR) Manual (DoD 5000.04-M-1)* for more information on reports.

For a brief explanation of the fields on the DD 2794 form, refer to *Instructions for Completing DD Form 2794, Cost and Software Data Reporting (CSDR) Plan*.

3.39 WBS NAMING DISCREPANCIES

The WBS Naming Discrepancies dialog pops up after clicking on a WBS element hyperlink in the [1921 Cost Report Comparison](#) or [1921-1 Cost Report Comparison](#) window. The purpose of this dialog is to show how the WBS element name is not consistent across the contract plan, the Earlier report, and the Later report. See the example below.



3.40 VALIDATION WIZARD DIALOG

The Validation Wizard provides a guide to validating cost reports under a specific submission event. At the end of the Validation Wizard, a validation memo and the validation results will be generated. The Validation Wizard can be accessed directly by clicking **Tools > Run Validation Wizard**. The Validation Wizard is also used when you (1) select a contract plan and click **Tools > Validate Submission** or (2) click **Tools > Validate Submission** in the submission events window. See [Validating Cost Reports](#) for more information on different ways to access the Validation Wizard.

Welcome to the Validation Wizard

By clicking **Tools > Run Validation Wizard**, the **Welcome to the Validation Wizard** screen will appear.

There are two options: [Validate a cost report submission and generate a validation memorandum](#), or [Validate a single cost report](#).

Validate a Cost Report Submission

Pick a Submission Event

If you choose to Validate a cost report submission, the **Pick a Submission** screen will appear. The contract plans and their submission events are listed. Note that the contract plans are listed according to their order in the main window of cPet.

Select a submission event. cPet will list the 1921's and 1921-1's that most closely match the As of Date of the submission event.

Click  to open a cost report that is not listed in the Validation Wizard.

Click Next when you have selected a submission event and located the appropriate cost reports.

Guided Validation

cPet provides two options: **Answer guided validation questions** or **Skip guided validation questions**.

If you choose the first option, you are presented with a series of questions pertaining to the contract plan and the cost reports.

If you choose to skip the questions, you jump to the Submission Acceptance screen, and the validation results window appears. See [1921 Validation Results](#), [1921-1 Validation Results](#), [1921-2 Validation Results](#), and [1921-3 Validation Results](#) for information on each of the errors.

Submission Acceptance

You may **Accept**, **Accept Conditionally**, or **Reject** the submission based on the validation results. After clicking Next on the Submission Acceptance screen, the Additional Information screen appears.

Additional Information

Enter the **P.O. Name**, **Office Code**, **Date Received**, and **Resubmission** question to complete information used in the validation letter. Click Next to proceed to the Completing the Validation Wizard screen.

Completing the Validation Wizard

Choose the location to save the validation letter and validation results. If you would like to change the file name or file path where the documents will be saved, click **Browse**. Click **Reset to Default** to set the file name/location back to the original.

Click **Open files in their respective applications** if you want to immediately view the documents.

Click Finish to generate the memo files.

The **Validation Letter** will open in Microsoft Word. Any information that was not filled in on the Additional Information screen will be marked in red.

The **Validation Results** will open in Microsoft Excel. The validation errors are displayed as they were in the Validation Results dialog.

Validate a Single Cost Report

If you choose to Validate a single cost report, the Pick a Cost Report screen appears.

Pick a Cost Report

All the plans and cost reports appear as they do in the main window of cPet. Select a cost report to validate and click Next.

Guided Validation

cPet provides two options: **Answer guided validation questions** or **Skip guided validation questions**.

If you choose the first option, you are presented with a series of questions pertaining to the contract plan and the cost reports.

If you choose to skip the questions, you jump to the Completing the Validation Wizard screen.

Completing the Validation Wizard

The Validation Wizard will generate a validation letter and report. If you would like to change the file name or file path where the documents will be saved, click **Browse**.

Click Finish to view the validation results. See [1921 Validation Results](#), [1921-1 Validation Results](#), [1921-2 Validation Results](#), and [1921-3 Validation Results](#) for information on each of the errors.

 *Tip: The Validate a Single Cost Report option does not generate a validation letter. In addition, the validation results are not exported to Excel as they are when you select the [Validate a Cost Report Submission](#) option.*

4: REFERENCES

4.1 HELPFUL LINKS

General Links:

[Defense Cost and Resource Center \(DCARC\)](#)

[Cost and Software Data Reporting \(CSDR\) Manual \(DoD 5000.04-M-1\)](#)

[CSDR Overview and Policy](#)

DD 2794 Links:

[DD Form 2794 Instructions and Blank Template](#)

Cost Report Links:

[DD Form 1921, 1921-1, 1921-2 and 1921-3 Data Item Description and Blank Templates](#)

5: GLOSSARY

1

1921: The DD Form 1921 (known as "Cost Data Summary Report") provides both recurring and nonrecurring costs for certain WBS Elements on a contract plan. A 1921 can be imported under a contract plan or subcontract plan.

1921-1: The DD Form 1921-1 (known as "Functional Cost-Hour Report") provides recurring and nonrecurring costs. The 1921-1 data correlates with the 1921 data, except that the 1921-1 provides a more detailed breakdown of costs. A 1921-1 can be imported under a 1921.

B

Basic Information: Displays the header fields for a plan or cost report. Can be accessed by clicking View > Basic Info.

C

Child Element: Refers to a lower level item that is indented under a parent element. In the WBS Editor, an element that is an only child (i.e. an element that has no sibling elements) will be marked red.

Contract Plan: A contract plan includes the data reporting requirements for a particular contractor. Multiple contract plans can be imported under a single program plan. Alternatively, several subcontract plans can be imported under one prime contract plan.

Contractor Maintenance: Add, edit, or delete contractor names, divisions, or locations from the Contractor Selection list. Changes will be saved only in the user's copy of cPet.

Contractor Selection: Displays a list of available contractors. A contractor must be selected before a contract plan is imported under a program plan. Similarly, a contractor must be selected before a subcontract plan is imported under a prime contract plan.

Conversion Results: Displays a list of errors found upon importing a plan or cost report.

Cost Data: Cost data is presented on a recurring/nonrecurring basis on a 1921 or 1921-1.

The cost data can be viewed by clicking the \$ icon on the toolbar of cPet's main window.

Cost Report: Refers to a 1921 or 1921-1.

Cost Type: The Cost Type may be either Non-Recurring, Recurring, or Total.

E

Export: The user can export a plan to PDF or Excel. If the plan is exported to PDF, the document follows the DD 2794 format.

F

Flat File: Displays cost report information in an Excel file. Data from a cost report in cPet can be exported to a Flat File. The user can then edit this information in Excel and import back into cPet.

I

Import: Convert an Excel file to an XML file and view using cPet.

L

Link Documents: Associate one plan with another. For example, a contract plan can be linked to (or indented under) a particular program plan.

M

MIL-HDBK-881 Appendix: See Weapon System Type.

N

Narrative Text: Enter the information found at the bottom of the DD Form 2794 in the Narrative Text tab of the Basic Info window. Default headings for a program plan are Program Overview, Contracting Approach, and Quantity Overview. The default heading for contract plans is "Special Contractor Instructions." However, any of these headings can be modified or deleted, and additional headings can be added.

O

Open: The Open command allows you to open a previously imported file (in XML format).

P

Parent Element: Refers to the top element in a hierarchical structure. A parent element has children elements indented at lower levels.

Prime Contract Plan: The prime contract plan acts as the parent plan for one or more subcontract plans. The prime contract plan is imported directly under the program plan.

Prime Contractor: The prime contractor is equivalent to a parent contractor. Multiple prime contractors can be assigned to a program plan. A prime contract plan is imported or created under a prime contractor. See "Subcontractor" for comparison.

Program Plan: A program plan includes the data reporting requirements for the complete program. A program plan can have several contract plans and subcontract plans.

R

RDT: Displays the WBS Elements assigned to a particular contractor. Useful when creating a contract plan. If a program plan's RDT is filled in, the contract plan's WBS Editor can be auto-completed.

S

Sibling Element: Refers to an element that exists at the same level as another element in a hierarchical structure.

Subcontract Plan: A subcontract plan is indented under a prime contract plan. Multiple subcontract plans may be imported under one prime contract plan.

Subcontractor: A subcontractor is the child of a prime contractor. Add several subcontractors to a contract plan before importing or creating subcontract plans.

Submission Events: Displays the Submission Events, their dates, and the required forms for each.

Summary Elements: Refers to the items following the WBS elements on a contract plan. These items are not assigned a WBS element code. For 2003 plans, these are "Subcontractor G&A" through "Total Cost (Through Reporting Contractor's G&A & Profit or Fee)." For 2007 plans, these are "Subtotal Cost" through "Total Price."

V

Validation: Verifies that the cost reports present accurate data that is required by the contract plan's submission events. Cost reports are validated according to completeness, consistency, and numerical accuracy.

Validation Wizard: Displays all the submission events from the contract plans open in cPet. Allows the user to choose the submission event to be validated. The cost reports with the closest As of Date to the submission event are displayed. The Wizard guides the user through an optional series of questions relevant to the validation. At the end of the wizard, cPet automatically generates a validation letter (in Word) as well as the validation results (in Excel).

W

WBS Editor: Displays the WBS Elements, their item numbers, and the required forms for each.

Weapon System Type: The Weapon System Type provides a basis for the elements in the WBS Editor. The Weapon System Type must follow one of the nine MIL-HDBK-881 specifications: Surface Vehicle System, Space System, Sea System, Ordnance System, Missile System, Electrical/Automated Software System, Aircraft System, UAV System, or System of Systems.

6: INDEX

1	Approved Plan Number80, 103, 112, 117, 127
192125, 61, 67, 73, 76, 77, 80, 103, 109, 110, 112, 127, 155, 157, 167, 176, 180, 183, 188, 189, 193	As of Date 145, 176, 189
1921-125, 70, 73, 76, 77, 80, 117, 123, 125, 127, 155, 157, 167, 176, 180, 183, 188, 189, 193	Associate Contractor 117
1921-2 131, 138, 176, 183	At Completion Figure80, 109, 112, 123, 127
1921-2 Basic Info Dialog..... 131	Auto-Complete..... 54, 58, 168
1921-2 Cost Data 136	B
1921-3 67, 141, 142	Basic Information12, 18, 30, 38, 52, 103, 117, 131, 141, 142, 145
1921-3 Validation Results..... 143	C
2	Change 145
2003 DID 103, 117, 176, 183, 193	Check 171, 176, 183
2007 DID 103, 117, 176, 183, 193	Child Element 30, 80
2011 DID 103, 117, 176, 183, 193	Clone 164, 165
2630..... 30, 183	Color 168
2630-2 176	Compare Cost Reports76, 110, 125, 176, 188
2630-3 176	Contract..... 103, 117
2794..... 30, 193	Contract Ceiling..... 103
9	Contract Information..... 18, 52
95/5 Rule..... 80	Contract Line Item 109
A	Contract Number..... 103, 117, 145
AC..... 73	Contract Plan18, 25, 51, 52, 54, 58, 80, 112, 127, 164, 167, 173, 175, 180
Additional Validation Data 180	Contract Price..... 103
Address 30, 103	Contract Price Estimate..... 103
Anomaly..... 110, 125	Contract Type..... 103
Anonymous Contractor 151	Contractor 52, 149, 151, 168, 171, 175
Appropriation..... 103, 117	

Contractor Figures	127	E	
Contractor Maintenance.....	149, 151	Earlier Report.....	76, 110, 125, 176, 188
Contractor Name.....	59, 103	E-mail.....	30, 103
Contractor Selection.....	18, 24, 48, 52, 151	End Date.....	103, 117
Contractor Type	103, 117	Error	30, 112, 127, 155
Conversion Results	9, 30, 155, 157, 159	Error Magnitude.....	112, 127, 180
Convert.....	28	Event Number	176
Copy.....	40, 183	Excel	59, 166
Cost Data.....	67, 70, 109, 123, 141, 142	Export.....	48, 59, 61, 63, 67, 70, 73, 112, 127, 149, 166, 171
Cost Hour Report	155	F	
Cost Report.....	25, 61, 63, 73, 76, 77, 110, 112, 125, 157, 176, 180, 189	Faulty Contractor	151
Cost Type	123, 155	Fax.....	103
CSDR Direct Reporting per CWIPT....	171	Fill Down Date Value	176
CSDR Manual.....	193	Fill Down Value.....	176
Customer	117	Filter.....	149, 151, 168
Customer Name	103	Flat File	73, 157
Cut.....	40, 183	Free Edit Mode	40, 183
CWBS Dictionary	176, 183	FY Funded	117
D		G	
Date Prepared.....	103, 117	General Options	168
Dates	30	Government Organization or PARM...	171
Demo ABCD Corporation	151	H	
Department.....	103	Hours In	117
Direct Labor Dollars	80, 127	Hyperlink	110, 125
Direct Labor Hours	80, 127	I	
Display Options	168	Import.....	9, 12, 15, 17, 18, 24, 30, 61, 63, 65, 67, 149, 155, 159, 166, 168, 173
Dollars In	103, 117	Import Options.....	168
Due Date	176	Importing a 1921-2	65

Indent	183	Phase	103, 117, 145
Initial Submission	145	POC Name	103
Insert	176	Point of Contact	103, 145
Insert WBS.....	40, 175, 183	Preparing Organization	145
L		Prime Contract	18
Later Report	76, 110, 125, 176, 188	Prime Contractor.....	24, 117, 151
Latest Amendment Number	103, 117	Prime Mission Product.....	103, 117, 145
Latest Modification.....	103, 117	Procurement	103, 117
Legend.....	151	Program Estimate.....	103, 117
Link Documents.....	25, 167	Program Name 80, 103, 112, 117, 127, 145	
Links	193	Program Plan9, 25, 36, 38, 40, 44, 165, 167, 175	
M		Program Plan WBS Item.....	183
Milestone.....	30, 145	R	
Mismatch.....	80, 112, 127	RDT.....	48, 54, 164, 171
Multi-Year Contract.....	103, 117	RDT&E	103
N		Reading Pane	112, 127
N/A.....	183	Recurring Figures80, 109, 112, 123, 127, 155	
Name	103	Reference WBS.....	110, 125
Narrative Text	12, 30, 38, 145	Remarks	103, 117
Non-Recurring Figures80, 109, 112, 123, 127, 155		Report As Of	103, 117
O		Report Cycle	103, 117
Open	168	Report Date	145
Options	168	Reporting Subcontractor	117
Overhead	80, 127	Resubmission Number	103, 117
P		Review and Reference Number	145
Parent Element	80	RFP	103, 117
Paste	40, 183	S	
PDF	59, 166	Select Contract Plan.....	175
Period of Performance	103, 117		

Select Parent Plan 175

Select Plan..... 164, 175

Select Program Plan 175

Short Name 59, 151

Signature 103, 117

Software Contract Value..... 48, 171

Solicitation Number 103, 117

Sort and Renumber 173, 176

SRDR 183

SRDR Direct Reporting per CWIPT.... 171

SRDR Final..... 176

SRDR Initial..... 176

Start Date 103, 117

Subcontract Number 117

Subcontract Plan 24, 58, 167

Subcontractor 24, 117, 151

Subcontractor Figures 127

Submission Events17, 30, 44, 58, 77, 168,
173, 175, 176, 189

Submission Number..... 103, 117

Submission Type..... 30

Sub-Subcontract Plan..... 24, 58

T

TD 73

Template 67, 70

To Date Figure 80, 109, 112, 123, 127

Total Est. Contract Value..... 48, 171

Total Figures .. 80, 109, 112, 123, 127, 155

Type Action 103, 117

V

Validation77, 80, 112, 127, 138, 168, 180,
189

Validation Questions..... 180

Version..... 175

W

WBS Editor 15, 40, 54, 171, 183

WBS Element Code80, 109, 112, 155,
171, 183

WBS Elements30, 40, 80, 103, 109, 112,
123, 127, 155, 168, 171

WBS Naming Discrepancies 110, 125, 188

WBS Reporting Level..... 73

Weapon System Type 30, 38, 145