IDW Communiqué

I-MANAGE Data Warehouse: *Your link to DOE's Corporate Business Systems* **February 9, 2006**

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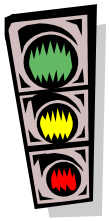
Successful Rollout of Release 1.4!

IDW release 1.4 was successfully rolled out on January 30! Both Plus and Viewer users were enthusiastic about the new functions release 1.4 had to offer. Users particularly liked the new saving and printing features with release 1.4. When saving the report, the layout, formatting, conditional and stoplight formats, sort priority, and page setup for printing are also saved. When printing, users can customize column widths, scale print size, page orientation, and margins, and select general options such as print current page items or all page item combinations. These features, along with other great features now available with release 1.4, allow users to utilize reports and the IDW more effectively.

Helpful Tips for Reporting in the IDW

This month's tip: Stoplight and Conditional Formatting



For an easy way to track your funding, use the stoplight and conditional formatting tools offered with release 1.4. Stoplight and conditional formatting can be very useful for offices to track such things as YTD obligations or training and travel budgets. Below are the steps for creating stoplight and conditional formats in Viewer.

Stoplight formatting allows you to choose thresholds for your data. For example, an office may create a stoplight to identify 'unacceptable,' 'acceptable,' and 'desirable' levels of ending uncosted balances. To create a stoplight, follow these five steps:

1. Click Stoplight.
2. Select an item from the drop-down list.
3. Enter the unacceptable value.
4. Enter the desirable value.
5. Click Go to create the stoplight.

Conditional formatting also allows you to choose thresholds for your data. You can highlight amounts for items that are greater than, less than or equal to a specified threshold, such as monthly obligations greater than $100,000. To create a conditional format, follow these eight steps:

1. Click Format.
2. Click Create Conditional Formats.
3. Enter a name for the condition.
4. Select an item from the drop-down list.
5. Select an operator for the condition.
6. Enter the value for condition.
7. Select the desired font and cell attributes.
8. Click Apply to create the conditional format.

Both stoplight and conditional formatting will help offices monitor their funding and allow management to make informed decisions about how they are doing and what steps to take next.

An IDW User in Action – Sheron Lee

This month's IDW user in action is Sheron Lee from the Strategic Petroleum Reserve Office (SPRO)!

The STARS and IDW teams were on site at SPRO from January 31 to February 2, 2006. Sheron shared her thoughts and experiences from the visit with us. "We got a lot done and were very pleased with the visit." SPRO had IDW training a while back; however, due to the interruption caused by Hurricane Katrina, they had not been able to become as familiar with the IDW as other offices. "After being displaced and coming back again, we were running reports but we were not doing them correctly. Lajos Grof-Tisza [the IDW Project Manager] provided a refresher course so it was valuable for us to have him go through it with us." Users at SPRO were happy to log into the IDW, move around, and get comfortable with some of the common features. They are now able to pull data and customize and run reports. "The IDW team was able to help us see how we could create a report and share it with others so they could run it under Viewer themselves."

The site visit was particularly helpful because non-finance SPRO staff, who do not have regular exposure to the IDW, were able to gain exposure to the system. "Now that they are more familiar with the system, users know what to ask for when they know they need something. They can then request it from the Plus user." Finally, Sheron encourages other offices to take advantage of the site visits and "share the wealth." "If they take advantage of the site visit [from the STARS and IDW Teams] they will benefit greatly. We will also begin sharing our reports, this way if another office is looking for something similar, they can use what we have already created. If everyone else shares the information they create themselves, we can be more productive."

Update on Performance Mapping Tool

The I-MANAGE Data Warehouse team is pleased to support the Department in its objective of focusing budget decisions on tangible results. The team has worked closely with the Office of Program Analysis and Evaluation (CF-20) to develop the I-MANAGE Performance Mapping Tool (PMT) which will be available to selected users through the I-MANAGE Portal. The PMT will enable program offices to map specific cost elements to program performance targets. Users will relate reporting-level programs (from STARS) to annual performance targets (from Joule). The PMT permits users to spread a program's dollars across multiple targets. It also provides mapping reports and "diagnostic" reports for identifying unmapped programs and targets. The goal of displaying performance results alongside costs will be realized through the I-MANAGE Portal Dashboard. The Dashboard is a separate component that is currently under development.

The Office of Program Analysis and Evaluation (CF-20) has overall responsibility for developing and implementing the cost-performance mapping process. Program office representatives should already have been identified to work with CF-20. Together, each program office representative and CF-20 will:

- Develop the program office cost-performance mapping methodology;
- Map cost to performance; and
- Review mapping results.

Currently, the National Nuclear Security Administration is helping to pilot the Performance Mapping Tool. It is expected that the pilot phase will last through the second quarter. In the third quarter, training will be provided by CF-20. Affected offices should look forward to mapping cost elements to program performance targets during the third quarter, also. Look for more details on the PMT, the Department's cost-performance mapping process, and the Dashboard in future issues of the Communiqué.

IDW Project Information

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