EVM Central Repository

User Guide: Reviewer
Introduction: Reviewer Role

Reviewers are responsible for reviewing and publishing reports once they have been delivered by the contractor to the EVM Central Repository (EVM-CR), as well as managing submitters and reviewers assigned to their contract. This role is appropriate for Program Office staff.

This guide provides instructions for EVM-CR actions done by Reviewers.

- Obtaining an ECA Certificate
- Creating a CADE Portal Account
- Assigning Reviewers / Submitters to Your Contract (Lead Reviewers only)
- Reviewing EVM Submissions
### Table of Contents

**Getting Started**
- Certificate Requirements
- Creating an Account
- Accessing EVM-CR

**Reviewing a Submission**
- Email Notification
- Navigation
- Submission Detail
- Submission IPMR
  - Data Quality Validation Report
  - Performance Over Time Chart
- Approval / Rejection
- Edit Requests
- Lead Reviewer Actions Menu

**Reviewer Home**
- Submissions
- Effort Submission Status
- Contracts
- Submission History
- Contract Request
- Contract Request Approval

**Contract Detail**
- Navigation
- Contract Summary
- Reviewers & Submitters
  - Manage Contract Reviewers
  - Manage Contract Submitters
- Received Submissions
- Contract Attachments
- Reporting Stream

**My Contracts**
- Overview
- Navigation

**New Contract Request**
- Start a Request
- Form Overview
- Summary
- Contractor
- Lead Reviewer
- Contract Effort
- Uploading CDRLs
- Submit Request

**Support**
- Help Desk
Getting Started

- Certificate Requirements
- Creating an Account
- Accessing EVM-CR
Getting Started: Certificate Requirements

All users are required to have a valid CAC (Common Access Card) or ECA (External Certificate Authority) Certificate in order to establish an account in the CADE Portal.

ECA Certificates

- Type required: Medium Token Assurance Identity Certificate
- To locate approved certificate vendors, visit the ECA PKO Program Website at http://iase.disa.mil/pki/eca/Pages/index.aspx
You will need: (1) an account in CADE Portal (2) with the EVM-CR Reviewer role.

1. CADE Portal Account
   • Visit the CADE public site at http://cade.osd.mil/ and select Request CADE Account.

2. EVM Reviewer role
   • If you are just now creating an account, request the EVM-CR Reviewer role.
   • If you already have a CADE Portal account and only require the EVM-CR Reviewer role added to your account, contact us at EVM-CRsupport@Tecolote.com.
Getting Started: Accessing EVM-CR

Once your system access is approved, log in to the CADE Portal and select the EVM-CR application.
Reviewing a Submission

- Email Notification
- Navigation
- Submission Detail
- Submission IPMR
  - Data Quality Validation Report
  - Performance Over Time Chart
- Approval / Rejection
- Edit Requests
- Lead Reviewer Actions Menu
Review a Submission: Email Notification

When a Submitter uploads a Submission to your assigned contract, all Reviewers and Submitters assigned to the contract will receive an email notification.*

* Sent to the email address set in your user profile

When an electronic file is contained in the submission, you will see any validation errors and warnings in the message.
Review a Submission: Navigation

When you receive an email notification of a submission ready to review, you will go to the Submission Detail page to review it. Navigate there in one of two ways:

1. Link in the notification email

2. In the top navigation of EVM-CR, go to My EVM > Reviewer Home. Select the desired submission ID from the list (filtered to pending submissions by default).
Review a Submission: Submission Detail

The Submission Detail page displays information about the submission: current status, report types, dates, etc.

Select View Submission IPMRs to see:
- Data extracts from the electronic files
- Performance Over Time Chart
- Data Quality Validation Report

Click to filename to download

Reviewers can upload relevant supplemental information or supporting documentation for their acceptance or rejection.
The Submission IPMR page shows data extracted from the electronic files.

- Click the Quick Links to open:
  - Data Quality Validation Report
  - Performance Over Time Chart
- Values flagged by the Data Quality test are highlighted in red
- Data Quality issues listed in red

Office of Performance Assessments and Root Cause Analyses (PARCA)
The Data Quality Validation Report lists all data quality checks done on the Electronic Cost file.

- Indication of Pass / Fail for each check
- Option to download to Excel

NOTE: This report is also available to Submitters during the submit process.
The Performance Over Time Chart displays Performance Measurement Baseline (PMB) values for all reports received on an effort.

- Values for the currently selected submission shown as **large squares**
- Hover over any data point to see its underlying value

**Submission Detail** > **Submission IPMR** > **Performance Over Time Chart**
Review a Submission: **Approval / Rejection**

Returning to the Submission **Detail** page, you can vote to approve or reject the submission on the **Reviewers** tab.

1. Select your vote in the status dropdown
2. Add a comment if desired
3. Select the save button

**NOTE:** Decisions made here do not change the status of the submission. The Lead Reviewer will need to reject or publish the submission from the **Lead Reviewer Actions Menu**.
Any Submitter on your assigned contract(s) has the ability to request a submission to be returned to Submitting status so they can correct / edit / add files within the existing submission.

When this type of request is submitted, the Lead Reviewer will receive an email notification.

SUBMISSION STATUS CHANGE REQUEST

CADE Support [osd.pentagon.cape.mbx.dcarc-web@mail.mil]
Sent: Fri 10/9/2015 6:28 AM
To: Augieburger, David E; TAC Tescato; Guerber, Eric; Tacoma Tescato; Horner, Jennifer; Tacoma Tescato

Jen Horner has requested that submission with id 52975 be returned to submitting status.

Program: Example
Contract ID: N0000-00-N-0000
EFFORT: Y-Wing
Submission ID: 52975

Please REVIEW this request.

Thank you;
DCARC Support.

Link to the submission in the EVM-CR
On the bottom right of the **Submission Detail** page, the **Lead Reviewer Actions Menu** provides options for the Lead Reviewer to change the status of the submission.

- **Set Status to Submitting** causes the submission to be reset to the Submitting status, where it can be edited again. The Submitter can then access it, add/remove files as needed, and resubmit or cancel.

- **Alert Managerial Oversight** sends a notification to Managerial Oversight Reviewers that the submission is ready for review. Unlike the other Reviewers on the contract, Managerial Oversight Reviewers will not receive a notification unless the Lead Reviewer specifically sends one.

- **Publish Submission** publishes the submission. The Submission will then be available for viewing by all approved Analysts.

- **Reject Submission** rejects the submission. The Submitter can then upload a replacement submission for the requirement. The rejected submission cannot be viewed by Analysts.

Number of days remaining before the system will automatically publish the submission and make data available to Analysts. Total time is 10 days.
Reviewer Home

- Submissions
- Effort Submission Status
- Contracts

- Submission History
- Contract Request
- Contract Request Approval
The **Reviewer Home** page, accessed through the **My EVM** menu, provides a centralized place for common Reviewer tasks: browse pending submissions, see delivery status of reporting for each effort, view assigned contracts, search past submissions, and request to be added to a new contract.
The Effort Submission Status tab on the Reviewer Home page displays delivery status of EVM reporting for all assigned Efforts.
The **Contracts** tab on the [Reviewer Home](#) page shows all contracts assigned to you and your role on each. If your contract is not listed, go to the [Contract Request](#) tab.

<table>
<thead>
<tr>
<th>Contract</th>
<th>Effort</th>
<th>Program Name</th>
<th>PM</th>
<th>Contractor</th>
<th>Contractor Division</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>N00001-00-0001</td>
<td>Multiple (5)🔗</td>
<td>Death Star Program</td>
<td>Darth Vadar</td>
<td>Rambo Systems</td>
<td>Awesome Weapon Development</td>
<td>Lead Reviewer</td>
</tr>
<tr>
<td>N0000-00-0002</td>
<td>Multiple (3)🔗</td>
<td>Death Star Program</td>
<td>Darth Vadar</td>
<td>Rambo Systems</td>
<td>Awesome Weapon Development</td>
<td>Lead Reviewer</td>
</tr>
<tr>
<td>N0000-00-0003</td>
<td>John's Deathstar</td>
<td>Death Star Program</td>
<td>Darth Vadar</td>
<td>Rambo Systems</td>
<td>Awesome Weapon Development</td>
<td>Lead Reviewer</td>
</tr>
<tr>
<td>N0000-00-0004</td>
<td>Epoch Test</td>
<td>Death Star Program</td>
<td>Darth Vadar</td>
<td>Rambo Systems</td>
<td>Awesome Weapon Development</td>
<td>Lead Reviewer</td>
</tr>
</tbody>
</table>

[Link to Contract Detail page](#)
Reviewer Home: Submission History

The Submission History tab on the Reviewer Home page allows you to search past submissions on your assigned contracts.
The **Contract Request** tab on the **Reviewer Home** page allows you to request access to a contract.

Enter the contract number, click Send Request, and the Lead Reviewer will receive an email alerting them to your request.

Need help? Contact EVM-CR support at [EVM-CRsupport@Tecolote.com](mailto:EVM-CRsupport@Tecolote.com).
Reviewer Home: **Contract Request Approval**

Lead Reviewers will receive an email notice when a Reviewer requests access to a contract.

<table>
<thead>
<tr>
<th>Reviewer Name</th>
<th>Organization</th>
<th>Role</th>
<th>Request</th>
<th>NDA Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kathy Gray</td>
<td>Tecolote Research</td>
<td>Lead Reviewer</td>
<td>Not Required</td>
<td></td>
</tr>
<tr>
<td>Eric Guerber</td>
<td>SPSG - Tecolote Research Inc.</td>
<td>Lead Reviewer</td>
<td>Not Required</td>
<td></td>
</tr>
<tr>
<td>Sam Land</td>
<td>Tecolote</td>
<td>Lead Reviewer</td>
<td>Not Required</td>
<td></td>
</tr>
<tr>
<td>Burt LeClercq</td>
<td>Tecolote</td>
<td>Lead Reviewer</td>
<td>Not Required</td>
<td></td>
</tr>
<tr>
<td>Super Cool User 1</td>
<td>test</td>
<td>Lead Reviewer</td>
<td>Not Required</td>
<td></td>
</tr>
<tr>
<td>Eric Baldighi</td>
<td>Tecolote Research Inc.</td>
<td>Reviewer</td>
<td>Not Required</td>
<td></td>
</tr>
<tr>
<td>David Craig</td>
<td>Tecolote.com</td>
<td>Reviewer</td>
<td>+ x</td>
<td>Not Required</td>
</tr>
<tr>
<td>Rebecca Fredericksen</td>
<td>Tecolote Research Inc.</td>
<td>Reviewer</td>
<td>Not Required</td>
<td></td>
</tr>
</tbody>
</table>

The user will be listed on the **Reviewers & Submitters** tab of the **Contract Detail** page. The Request column will be displayed.

- Click the ✅ to accept
- Click the ❌ to reject

**NOTE:** Submitters also have the option to request access via the site and the process for Lead Reviewer approval is the same.
Contract Detail

- Navigation
- Overview & Data Download
- Contract Summary
- Reviewers & Submitters
  - Manage Contract Reviewers
  - Manage Contract Submitters
- Received Submissions
- Contract Attachments
- Reporting Stream
Contract Detail: Navigation

The Contract Detail page can be accessed in three ways:

1. Under My EVM, select Search Contracts to filter through contracts. Select a contract number to reach its Contract Detail page.

2. If the contract is one of your assigned contracts, access its detail page from the Contracts tab on the Reviewer Home page.

3. Also if the contract is one of your assigned contracts, its detail page can be reached from My Contracts.
The Contract Detail page provides a centralized place to access a variety of information about the contract, including summary data, charts, reporting stream, etc.

Full Data Retrieval (FDR): To download all periods of IPMR cost data for a contract effort in one package (including Format 6, Format 7, and DAMIR Milestones), select Download IPMR Data Package from the Actions dropdown.
The Contract Summary tab displays high-level summary data about the contract.

List of contract efforts. Select the glasses icon next to an effort to update the page with data on that effort.

Cost Performance Index (CPI) and Schedule Performance Index (SPI) charts

Reporting Compliance scores for last 3 months
The **Reviewers & Submitters** tab shows all users assigned to the contract and their roles.

Users assigned as Lead Reviewer(s) will have the option to manage the reviewers and submitters for the contract.
Manage Contract Reviewers

Lead Reviewers can manage the Reviewers assigned to their contract by clicking the Manage Contract Reviewers link on the Reviewers & Submitters tab on the Contract Detail page.

To add a Reviewer to the contract, search for their name / email / username, choose the appropriate role, check the select box, and click Add Selected Reviewers.

Reviewer – Responsible for reviewing reports delivered by the contractor while they are in the pending status.

Lead Reviewer – Responsible for reviewing and approving reports, managing users assigned to the contract, and acting as point of contact for the contract.

Managerial Oversight – Will have access to pending submissions but will not receive email notifications of submission status changes unless specifically sent by Lead Reviewer.

NOTE: Lead Reviewer capability only
Lead Reviewers can manage the Submitters assigned to their contract by clicking the Manage Contract Submitters link on the Reviewers & Submitters tab on the Contract Detail page.

To add a Submitter to the contract, search for their name / email / username, check the select box for the desired user, and click Add Selected Submitters.

NOTE: Lead Reviewer capability only
Contract Detail: Received Submissions

The Received Submissions tab lists all published and pending submissions on the contract.

Select an ID# to see the Submission's Detail page, download files, and view data extracts.

Report categories:
- Electronic Cost
- Human Readable Cost
- CFSR
- Format 6
- Native Schedule
- Format 7
- History

Effort filter: shown only when the contract has multiple efforts.
Contract Detail: **Contract Attachments**

The **Contract Attachments** tab contains any files relevant to the contract and reporting requirements. Form DD-1423 CDRL documents are housed here.

<table>
<thead>
<tr>
<th>CDRL Attachment</th>
<th>Effort</th>
<th>File Comment</th>
<th>Cost</th>
<th>Schedule</th>
<th>CFSR</th>
<th>Upload Date</th>
<th>Upload By</th>
</tr>
</thead>
<tbody>
<tr>
<td>CDRL Y-Wing IPMR Cost.pdf</td>
<td>All</td>
<td>CPR CDRL</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>9/21/2009</td>
<td></td>
</tr>
</tbody>
</table>

**Other Attachment**

<table>
<thead>
<tr>
<th>File Name</th>
<th>File Comment</th>
<th>Upload Date</th>
<th>Upload By</th>
</tr>
</thead>
<tbody>
<tr>
<td>CDRL Y-Wing IPMR Schedule.pdf</td>
<td>Final</td>
<td>9/21/2009</td>
<td></td>
</tr>
</tbody>
</table>
The **Reporting Stream** tab shows the reporting requirements for each contract effort.

![Diagram of Reporting Stream](image)

List of contract efforts. Select the 🏎️ glasses icon next to an effort to view the reporting stream for that effort.
My Contracts

- Overview
- Navigation
The **My Contracts** page provides a comprehensive list of your contracts.

If needed, use the filters to find a particular contract.
My Contracts: Navigation

Each contract listing contains the following links and indicators:

**Received Submissions:** View a list of the contract’s submissions on a tab on Contract Detail

**IPMR Cost Data Report:** View electronic cost data extracts in a grid and chart

**IPMR Data Package:** Download a zip package of cost and schedule files and program milestones

**Compliance Scores:** Provides consolidated reporting compliance ratings for Cost, Schedule, and CFSR deliveries for the month displayed (based on Report Date, not the date of upload).
New Contract Request

- Start a Request
- Form Overview
- Summary
- Contractor

- Lead Reviewers
- Contract Effort
- Uploading CDRLs
- Submit Request
To establish a contract for reporting within the EVM-CR, a representative from the government program office will need to make a request via the CADE Portal.

To start a new request:

1. From the Portal Home, select **Contract Request**.
2. Click the **Create Request** link.
3. Click **Next** to start the process.
New Contract: Form Overview

The contract request form will ask for the following information.

Required sections:
   Summary, Contractor, Lead Reviewers, Contract Effort, and Contract CDRLs

<table>
<thead>
<tr>
<th>Section</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary</td>
<td>Not Started</td>
</tr>
<tr>
<td>Contractor</td>
<td>Not Started</td>
</tr>
<tr>
<td>Lead Reviewers</td>
<td>Not Started</td>
</tr>
<tr>
<td>Contract Reviewers</td>
<td>Optional</td>
</tr>
<tr>
<td>Contract Submitters</td>
<td>Optional</td>
</tr>
<tr>
<td>Contract Effort</td>
<td>Not Started</td>
</tr>
<tr>
<td>Contract Data Requirements Lists (CDRLs)</td>
<td>Not Started</td>
</tr>
</tbody>
</table>

Form DD-1423 or equivalent for IPMR / CFSR (any that are required)
All fields in the **Summary** section are required:

- Program Name
- Contract Number
- Weapon System Type
- Contract Type
- Mil-Standard
- Service
- Phase
- Program Manager

If this is a new effort on a contract that is already established for reporting to the EVM-CR, click the option to **Use existing contract reporting record**.
New Contract: Contractor

Provide the prime contractor’s name, division, and location.

In the rare case that subcontractor reporting is required for your contract, you will fill out a separate request which includes both prime and subcontractor information.
The Lead Reviewer is the individual in the government program office responsible for reviewing and approving submissions.

- One primary Lead Reviewer is required
- Alternate Lead Reviewers can be provided if desired

Optionally, contract Reviewers and Submitters can be assigned in the next two sections.
For each IPMR Reporting Requirement, provide:

- **Effort Name**
- **Effort Number**
  - This should be the same as the DAMIR Effort Number, in order to align EVM-CR data with DAMIR/DAES. If you don't know it, contact us at EVM-CRsupport@Tecolote.com
- **Start Date**
- **End Date**

*Start and end dates of EVM-CR reporting period*
New Contract: **Uploading CDRLs**

Click **Choose File** to upload all CDRL documents (DD-1423 or equivalent, which define IPMR or CFSR reporting requirements for your contract).
Once all required sections have been populated, the option to submit the request will be available. Click **Submit Request** to finalize.
Help Desk

Questions? Contact EVM-CR Support at EVM-CRsupport@Tecolote.com