

Frequently Asked Questions

Project Plans

How detailed does project data/expenses need to be? When does the project plan need to be updated

For Major Investments, the following data should be updated bimonthly:

- Estimated start and completion dates for the entire project plan
- Actual start and completion dates as the tasks complete
- Estimated expenses for the project
- Actual expenses as they are accumulated
- % complete for all tasks that have begun but are not yet complete

For Major Investments, the following data should be updated by OCIO mandated dates:

- All Exhibit 300 data should be input into the Assessment engine for the FY2006 Exhibit 300. For information on the use of that, please see [Exhibit 300 assessment and Reporting in WorkLenz](#).
- All Life-cycle cost data should be input into the Life-cycle Cost Assessment in the Assessment engine. For information on the use of that, please see [Life Cycle Cost and Exhibit 53 Reporting in WorkLenz](#).

Licensing and Account Information

How do I get my account on production activated?

Contact Hien-Hoa Nguyen at Hien-Hoa.Nguyen@usda.gov or 202-720-5786. In order to be activated on the USDA WorkLenz Production site, the following information needs to be provided before activation:

- First and Last name
- Business Title
- Email address
- Agency and Investments currently being worked on
- Pay Grade or hourly rate: (Labor costs are tracked by hourly rate * hours worked)

Note: Training on WorkLenz is required unless exceptional circumstances exist. For information about training, contact Efren.Valerio@usda.gov or 202-720-8888.

What is a license?

A license represents a named resource in WorkLenz. Any name that appears in the dropdown list to add any kind of team member has a license. A person without a license cannot be added to this list. Licenses need to be purchased. Licenses cannot be shared by users; this is an infringement on copyright laws.

How do I purchase more licenses?

In order to purchase more licenses, contact John Rehberger with OCIO at John.Rehberger@usda.gov or 202-720-5223

Where do I find information on the WorkLenz Adoption Timeline?

For more information regarding WorkLenz, go to the OCIO USDA CPIC website at http://www.ocio.usda.gov/irm/cap_plan/worklenz_project.html. Or contact the WorkLenz project manager John Rehberger at John.Rehberger@usda.gov.

MS Project Import

How do I import my MS project plans? How do I update my MS Project plan?

For instructions on importing and updating the MS Project plan, please see the [WorkLenz Instruction Manual for Microsoft Project Import and Export](#). For the initial import, use only the Program or Portfolio Import process.

In order to update the MS Project plan,

- Export the project you would like to update. If this is not done, the plan that is imported will not update but create all new phases and tasks
- Update the project plan and save as an XML file
- Then, reimport the project plan.

Note: If you want to delete tasks in the project plan, you need to delete them in WorkLenz before you export the project plan. Deleting a task or phase in the MS Project file does not delete the corresponding task or phase in WorkLenz.

Earned Value

What data is necessary to capture Earned-Value in WorkLenz?

First, a complete project plan needs to be loaded. This includes phases and tasks, all estimated start and completion dates and all estimated expenses for those tasks. The project then needs to be baselined. Finally, actual start, completion and percent complete need to be loaded bimonthly along with actual expenses as they are realized. The OMB Earned-Value report can be viewed in the WorkLenz standard reporting engine.

Note: For information on entering data into phases tasks and/or expenses or to create tasks, phases and/or expenses, please refer to [WorkLenz v4.5 Instructional Guide](#). For information on earned value, please refer to the Earned Value Instruction Guide.

Exhibit 300

How do I find instructions on updating the Exhibit 300 assessment?

For step-by-step instructions on updating the Exhibit 300 assessment, please see the [Exhibit 300 information and reporting in WorkLenz](#).

I cannot see the changes that I just made to my Exhibit 300 answers in the results area.

Before the changes are loaded into the database used for results, the assessment must first be saved and then regraded. After this, the updated answers will appear in the results section.

Life-cycle Costs

How do I find instructions on updating the Life-cycle costs assessment?

For step-by-step instructions on using the Life-cycle costs assessment, please see the [Life Cycle Cost and Exhibit 53 Reporting in WorkLenz](#).

I am having trouble opening the Exhibit 53 report in WorkLenz.

The Exhibit 53 report is output in an Excel spreadsheet. First, ensure you have the Excel software program installed on your computer. If so, make sure that Excel is closed before you run the Exhibit 53 report. Finally, if the report is output in HTML code,

this means that Excel and Internet Explorer are not configured to run dependently. Save the HTML code to your desktop and then open that with Excel. Also, pop-up blockers must be disabled in the internet program being used. If you have any other problems, please contact the USDA PMO at 202-965-9500.

Not all the proper investments are appearing on my Exhibit 53 report.

The Life-cycle costs assessment has been updated to allow a manual entry of the Investment unique identifier, which comprises the last 4 digits of the UPI. Because the identifier must be unique if there are two or more investments with the same UPI, only one of the investments will appear on the Exhibit 300. Ensure all UPI's are unique.

When I show the results from the Life-cycle costs spreadsheet, a different set of data is reported than what I entered.

In the answers area of the assessment, there is a toggle that allows the report data to be pulled from the project plan or the life-cycle costs spreadsheet. Please ensure that the correct one is toggled. Following, save and regrade the assessment to view the changes in results.