

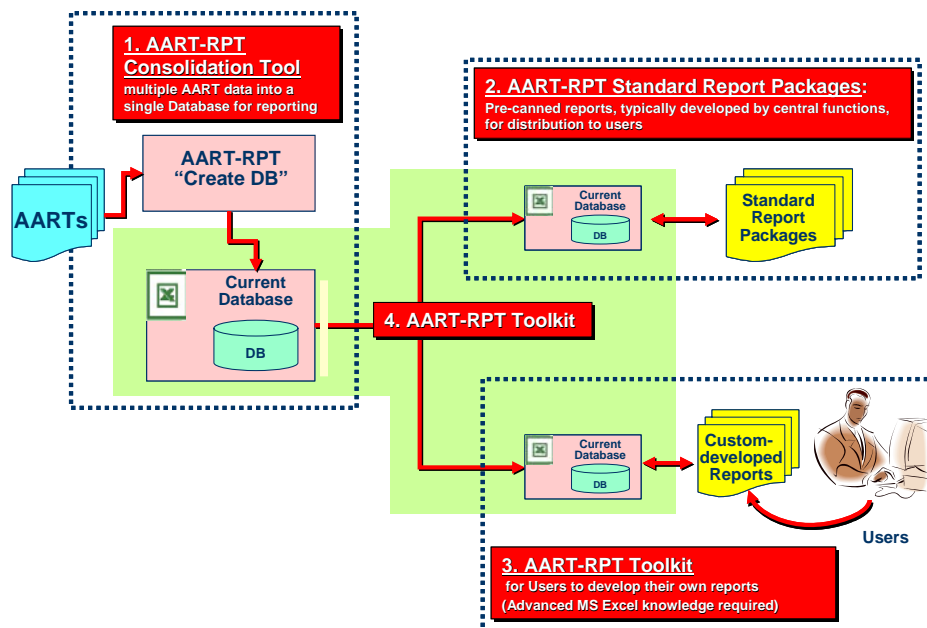
Department of Energy  
A-123 Reporting Suite



## AART-RPT Consolidation Tool

Version 1.0

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<http://www.cfo.doe.gov/progliaison/doeA123/index.htm>

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# AART-RPT Consolidation Tool Guide

## INTRODUCTION

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The AART Reporting Suite (AART-RPT) has been designed principally to meet the information needs of DOE A-123, Appendix A, implementors and financial managers, but its flexibility complemented by the availability of extensive data collected as part of the A-123 process makes the suite useful to managers and staff beyond A-123 implementors.

## THE AART REPORTING SUITE

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The AART Reporting Suite provides users with the ability to quickly and easily consolidate AART data from multiple AARTs into a Microsoft Excel database format and update both Standard Reporting Packages, released by the PMT, as well as update user developed reports through the ad-hoc reporting functionality using a REFRESH capability. To enable this functionality the Reporting suite is composed of three components – AART-RPT Consolidation Tool, AART-RPT Standard Report Packages and the AART-RPT Toolkit. Each component serves a specific purpose with the AART-RPT Consolidation Tool as the foundation of the Suite's functionality.

### **AART-RPT Consolidation Tool**

The AART-RPT Consolidation Tool creates a single database file from multiple AARTs through the click of a button. The AART-RPT Consolidation Tool generates the AART-RPT Toolkit which is the input file for the REFRESH capability of the Standard Report Packages, as well as, being the foundation for users to begin developing custom reports. When executed, AART-RPT Consolidation Tool consolidates the AART data, enhances the data and generates the new file (AART-RPT Toolkit).

The AART consolidation process extracts the data from each of the selected AARTs, merges the Assess and Test data into a single line item in the database, respectively appends the site code, cycle, cycle rating, and the process/area ratings to each line item and finally writes the extracted data to the database worksheet of the output file.

The follow on AART enhancement process enhances the data of each line item with the associated Field Office and LPSO codes, as well as, sum precalculated indicator fields which have been found to be useful for reporting.



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## **AART-RPT Standard Report Packages**

AART-RPT Standard Report Packages are pre-canned graphical and tabular reports and charts generally focusing on specific themes (i.e. progress reporting, quality assurance reporting, etc.). These Standard Report Packages are designed to provide anyone with a quick snapshot of their current local data and do not require users to be proficient in Microsoft Excel. Standard Report Packages are intended to reduce the amount of local custom development of reports and provide different locations with consistent metrics for easy comparison.

Each Standard Report Package will contain instructions explaining the algorithms used and the data being measured, as well as, instructions on how to REFRESH the packages with the most current data available. As mentioned earlier, the AART-RPT Toolkit is used as the input file for the database REFRESH for the Standard Reporting Packages.

## **AART-RPT Toolkit**

The AART-RPT Toolkit can be used, by users proficient in Microsoft Excel and Microsoft Excel Reporting, as a foundation to create their own reports. This toolkit includes features to facilitate end user custom reporting including, the REFRESH capability to update the database with the most current data, logging, a Field Catalog explaining the individual data elements and locations, and named ranges to facilitate dynamic reporting.


Specific jumpstart tutorials will be provided to assist those end users, proficient in advanced excel functionality, interested in developing their own custom developed reports.

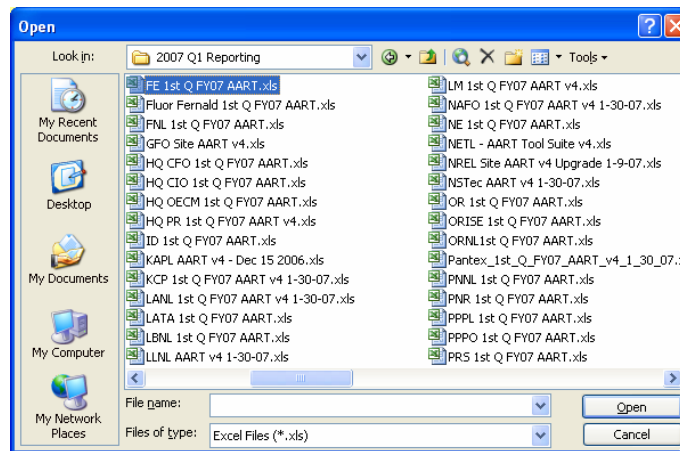
The functionality of the all the components of the AART-Reporting Suite provides you with powerful tools to manage A-123, manage your operational environment, leverage A-123 for business improvement and begin to streamline compliance activities utilizing the data collected in the A-123 execution. The following sections will focus on the detailed instructions for executing the consolidation process and describing the key features of the generated file (AART-RPT Toolkit).



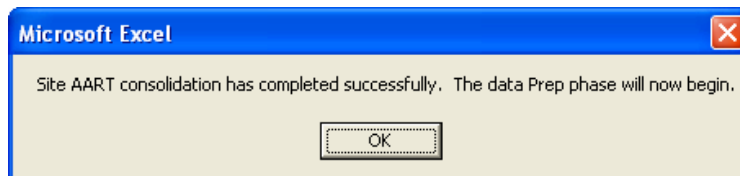
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## EXECUTING AART-RPT CONSOLIDATION PROCESS

1. Create a folder and save the specific AARTs you wish to include in the database into that folder.
2. Open the AART-REP Generation Tool and "Enable Macros".
3. Navigate to the Target Files Tab.
4. Click  .
5. The Windows Browser will be displayed, navigate to the folder containing the specific AARTs you want to consolidate.



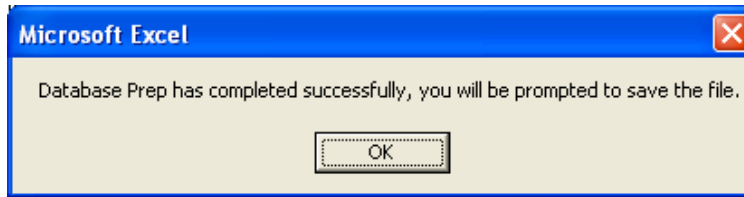
6. Double click on any file within that folder to begin the data consolidation process. All AART files within the folder will automatically be imported into the database.
7. The data consolidation will then be performed. The amount of time required to complete the data consolidation is dependent on the number of AARTs that are being consolidated and the amount of data within them.
8. A notification will be displayed upon completion of each phase of data consolidation.
9. Click OK to continue to execute the PREP phase.





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10. Click OK to save the generated database.



11. Navigate to the folder in which you wish to save the AART-RPT Toolkit and save the file with a new file name.

This newly generated file is the file for distribution to individuals who require current data for the Standard Report Packages and is the initial AART-RPT Toolkit for users with Advanced Excel Reporting expertise to develop their own reports.

Both the AART-REP Toolkit and Standard Report Packages both have the REFRESH capability imbedded. This allows users to easily refresh the database with current data for prepackaged or previously self-developed reports.



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## UNDERSTANDING THE AART-RPT TOOLKIT

The following discusses the features and structure of the AART-RPT Toolkit.

1. **Target Files Worksheet** provides a quick snapshot of which AARTs are included in the database. The included AARTs are highlighted in yellow and indicated by an "x" in the Imported column. The Target Files worksheet also shows the entire A-123 organizational hierarchy location codes to facilitate a quick identification of potentially missing AARTs within your organization.

Imports new data

Date and time the database was generated

Date and time of last database import in User Developed Reports and Report Packages

<b>Refresh</b>	<b>DATE &amp; TIME DB GENERATED</b>		<b>DATE &amp; TIME OF DB IMPORT</b>	
<b>Type</b>	<b>LPSO</b>	<b>FO</b>	<b>Site Code</b>	<b>Imported</b>
FO	NNSA	NAFO	NAFO	x
Site	NNSA	NAFO	KC	
Site	NNSA	NAFO	LLNL	x
Site	NNSA	NAFO	LANL	x
Site	NNSA	NAFO	NTS	
Site	NNSA	NAFO	PX	

Location Code: Yellow highlighting indicates that the AART data is included in the database.

The "x" indicates that the file was imported into the database.



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2. **Reporting Fields Worksheet** contains a list, description and location of the data elements included in the database. This is intended to clarify and describe the various fields used in standard reports as well as assisting end users during the development of custom reports.

- a. Data Source – AART source tab from which data is pulled
- b. Column - Column letter within the ecspcsdb
- c. Column Name - Column name within the ecspcsdb
- d. Field Description - Description of the type of field, whether calculated or raw data and/or a description of what the data in that field represents
- e. Computation Rule for Computed Fields - Formula logic for pre-calculated identifiers in the ecspcsdb
- f. Data Type - Type of data that can be found in the field (for example, H, M, L)

Data Source	Column	Column Name	Field Description	Computation Rule for Computed Fields	Data Type / Content
Assess	A	CNT Risk Area	Computed: An "x" in this field indicates that an entry has been made in the Sub-Process (PCS) or Sub-Category (ECS) field	If Sub-process/sub-category cell length is greater than 1 then insert "x".	"x"
Assess	B	CNT Risk Statement	Computed: An "x" in this field indicates that an entry has been made in the Risk Statement field	If Risk Statement cell length is greater than 1 then insert "x".	"x"
Assess	C	CNT Risk Assess	Computed: An "x" in this field indicates that a valid entry has been made in the Risk Assessment field	If Risk Assessment is H, M, L, then insert "x".	"x"
Assess	D	CNT Control Set	Computed: An "x" in this field indicates that an entry has been made in the Control Set field	If Control Set cell length is greater than 1, then insert "x".	"x"
Assess	E	CNT Control Mode	Computed: An "x" in this field indicates that a valid entry has been made in the Control Mode field	If Control Mode is P, P&D or D, then insert "x".	"x"
			Computed: An "x" in this field indicates that an entry has been made in at least one of	If any PERCV column identified, then	

3. **ECSPCSDB Worksheet** is the actual database containing all the consolidated and enhanced AART ECS/PCS Assess and Test data.

- a. Data – All AART Assess and Test data has been populated on a single row to facilitate reporting capabilities and reduce the complexity of formulas.
- b. Pre-calculated Fields – Columns A-R in the database are pre-calculated fields during the database generation to facilitate generating status reports and other desired reports.
- c. **[For advanced excel users]** Named Range – The entire ecspcsdb database range has been named **reportrange** to facilitate Pivot Table creation and formulas. The refresh button will ensure that all formulas and Pivot Tables created with the **reportrange** will be updated appropriately with the new data.



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4. **Log Worksheet** is a list of all excel (\*.xls) files within the selected folder that was used during the execution of the AART-RPT Consolidation Tool with key file attributes. This log contains the actual file names, time and date of the file (last modified), the location code, and results of the import. The Site Code and "Imported" status indicate that the AART file was successfully imported, the "Incorrect File Type" that the Excel file is not an AART file or not a valid version for import<sup>1</sup>.

Filename	File Date	Site Code	Imported
BPA 1st Q FY07 AART.xls	4/25/07 2:24 PM	BPA	imported
LANL 1st Q FY07 AART v4 1-30-07.xls	1/29/07 3:26 PM	LANL	imported
LLNL 4_1.xls	4/2/07 2:52 PM	LLNL	imported
NAFO 4_1.xls	3/20/07 9:17 PM	NAFO	imported
SRFO 1st Q FY07 AART (TEST DATA).xls	4/11/07 12:06 PM	SRFO	imported
Reporting DB test 15.xls	4/25/07 2:30 PM		Incorrect File Type
test aart v16.xls	4/25/07 4:04 PM		Incorrect File Type
test aartrep v17.xls	4/25/07 4:34 PM		Incorrect File Type

## DISTRIBUTION OF THE AART-RPT TOOLKIT

The output file of the AART-RPT Data Consolidation Tool, the AART-RPT Toolkit, serves two purposes.

1. Input file for the built-in REFRESH functionality providing source data for Standard Reports and User Developed Custom Reports. The Standard Report Packages have been developed so that any user can import current data easily with no Excel knowledge.
2. AART-RPT Toolkit which provides a framework and resources for users, proficient in Excel, to develop custom reports. This toolkit provides user with the ability to add worksheets, develop customized reports and pivot table queries and manipulate and utilize the "database" data as needed.

We recommend that there is an AART-REP Consolidation Tool administrator that collects and manages the AART submissions and that manages and distributes the AART-RPT Toolkit to users using the Standard Report Packages and AART-RPT Toolkit custom reporting functionality.

***NOTE: The REFRESH process is a complete refresh of all data in the Reporting file, therefore it does not support appending or replacing data with original AART files, you must consolidate the data into an updated database and import the new database.***

<sup>1</sup> AART-RPT Consolidation Tool is only compatible with AART version 4.x