Project Initiation OBA

With many Small Projects using ePM, there has been a demand to make basic project set-up entries clear and easy.

The Project Initiation and Update Office Business Application (OBA), a new tool, will soon be available to address this need. The PI and Update OBA allows ePM users to input project data in an MS Excel spreadsheet and then transfer it directly into ePM. This OBA presents the user with tabbed worksheets to enter pertinent Project Information and to create Project Team, Customers, and Funding Documents.

The OBA was designed for Small Projects, but it can be useful for Capital Projects as well, particularly for detailed project fact sheet updates. Users should be aware that the OBA requires software and permission settings from Regional System Administrators. Contact ePM Support with questions on installing the tool. If you would like to learn more about how to use the Project Initiation and Update OBA, you can review the Quick Reference Guide at the PBS ePM Portal under the link for Training and Support.
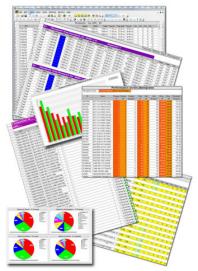
Let's Get Started!

Online Training Webinars….ePM trainers have hosted various webinar sessions that have generated a lot of interest. Online training is a convenient and effective format to gain experience with topics aimed to help a broad audience of users. Courses offered to date have included Small Projects (cost accounts, funding, and milestones overview), Budget and Obligations (navigation, ACR, Transfers), and Office Management (navigating ePM, correspondence, meeting minutes, submittals, RFIs), and more. REMINDER— Class space is limited, please notify the trainer if you cannot attend.

Classroom Online

Schedule of Values Provides Critical Data for GSA

An important means for GSA to categorize and track project outlays is through a Schedule of Values (SOV). Having a better knowledge of costs allows GSA to understand how public funds are spent and to put together better project budgets in the future. The GSA Office of Budget and Financial Management uses "function codes" that correspond to each line item to facilitate budget reporting internally and to the Office of Management and Budget. A well defined SOV is key in monitoring outlays, data mining , future estimating, and managing project costs.

An SOV allocates a dollar value for various parts of the scope of work. This allows both GSA and the contractor to understand the costs associated with different aspects of a project. Utilizing an established Work Breakdown Structure (WBS) helps to promote consistency in the bid process and allows for a one to one comparative analysis. After contract award, it also provides a means to establish agreed upon progress payment amounts based on the work completed on the project. It then becomes the basis for evaluating whether or not the progress of a project is consistent with the amount a contractor has been paid and verifies that GSA funds are being spent appropriately.

Two formats the AEC industry commonly uses as the basis for a WBS in identifying project scope items are the CSI Masterformat and Uniformat systems. Both are prevalent within the AEC community and widely used by various contractors and construction organizations. ePM is configured for the CSI Masterformat system. The Office of Design and Construction is working to develop a crosswalk between the two systems which will assist project teams in translating scope line items from Uniformat to Masterformat categories.

In ePM, the Contract Management module houses Contracts and Contract Modifications under Obligations. The SOV is accessed by a link within the Contract or Contract Modification document. Contracts awarded on Capital projects should enter the SOV in ePM for future invoicing. This feature is most powerful for construction contracts, which can have hundreds of line items useful for performance tracking and future estimating. Security permissions permit contractors access to their own contract on a project. Therefore, contractors have the ability to enter the SOV on their contracts, then the GSA PM can associate the correct GSA function codes via the cost accounts and approve the contract.

PTW Migration Coming Soon

Small Projects data is planning to be migrated from PTW into ePM. Development and testing has already begun and will continue over the next few weeks. Projects will be transferred Region by Region over the next several months. Regional training for Small Projects users will happen prior to each transfer taking place. Expect additional information from your ePM Regional Coordinator.

ePM Quick Tip:

Distribution lists can add efficiency to a workflow. To create a distribution list, while in the Execute Workflow dialog box, select the 🔍 icon >> choose Distribution Lists from the "Type" drop down menu >> and click New. Setting up a list will allow a faster way to send messages. Once a list is set up it is available for all document types.

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As ePM becomes more heavily relied on for reporting and invoicing, it will become increasingly important to have detailed SOVs for contracts in ePM. This is a tool that provides lasting benefits for GSA and Contractors.

Fact Sheet Reporting from Cognos

PBS has traditionally relied on Fact Sheets as a key instrument to report the status of Capital Projects to management and external stakeholders. Various templates have been developed throughout the years, but two formats have become the standard for PBS: the Detailed Project Fact Sheet and Executive Project Fact Sheet. Both fact sheets currently reside in the Project Information Portal (PIP) system, but these reports are now available within the ePM Cognos tool.

ePM Fact Sheet

The Detailed F.S. contains a description, status, scope, schedule, budget, key partners, team members and customers. Several regions utilize the Detailed F.S. report as a basis for monthly project review meetings. The Executive F.S. contains a summary of the project including status, scope, schedule, and budget. The Executive F.S. is typically no more than one page and is often used by Central Office on data calls from OMB or for Congressional inquiries. Various regions use the fact sheets in their monthly project review meetings, and to provide updates to their local Design and Construction Division Director.

PIP Fact Sheet

The ePM Team will be visiting each Region over the next couple of months to train Capital project PMs on how to update their Fact Sheets. This specialized training is anticipated to last several hours and focused on the specific areas within ePM that need to be maintained. Much of this data is already available within the Budget & Reporting and Office Management modules, so the training will predominantly focus on scheduling, status, and issues/actions. A Quick Reference Guide (QRG) on **Editing the Detailed Project Fact Sheet** has been developed that provides step-by-step instructions for PMs.

The Fact Sheet training will be coordinated with the ePM-to-PIP integration which was delivered in ePM version 1.2. Our expectation will be that once a PM has received Fact Sheet training, he/she will keep ePM updated, and reporting tools will be automatically updated via the PIP integration and with Cognos. Be on the lookout for Fact Sheet training to come to your region in the near future.

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ePM Resources:

ePM Login Site
https://epm.pbs.gsa.gov/proliance

ePM Support
epmsupport@gsa.gov
1 (866) 367-7878

GSA User Resources
http://insite.pbs.gsa.gov/epm

Training Videos and Quick Reference Guides
http://www.meridiansystems.com/epminfo

GSA