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Things to do <u>before</u> PTW Migration

Earlier this month, Region 6 reported a successful Project Tracker Website (PTW) Migration. For other regions preparing for this transition, here are a few quick tips from the team regarding data clean-up before migration:

Projects that are "closed" in PTW will not migrate. So if the project falls within the Small Projects Measure Criteria (NTP since 10/01/2010 and Substantial Completion within FY2011) and is in the "closed" state, make sure to change the project to "open" in PTW. Projects must have the following fields complete or they will fail the measure when the report is run from ePM:

- Contract Award Date
- Notice to Proceed Date
- Substantial Completion Baseline/Estimate
- Substantial Completion Actual

To prevent your project from being titled incorrectly, be sure

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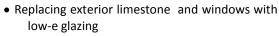
Small Projects in ePM....With the fast-paced schedules and abbreviated scopes of work, GSA's small projects are faced with their own unique challenges. The voluminous number of projects and the correspondingly short project delivery time lines require intensive tracking and monitoring of project manager's portfolio. To assist in this effort, ePM version 1.3 is configured to support the management, collaboration, and documentation of GSA's small projects. The positive results garnered from testing and pilot projects allowed GSA to start the roll out of ePM training for small project managers. Initial training sessions

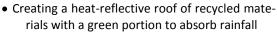
in four of the regions have been completed with the remainder scheduled through December of this year. The three hour training curriculum covers the minimum tools to successfully manage small projects and the use of ePM.

Case Study: Federal Office Building 8

Spanning almost an entire city block, Federal Office Building 8 (FOB 8) in Washington, DC will serve as the forerunner for innovation in the renovation of government facilities. GSA is

currently managing the \$73 million project to refurbish interior space, exterior façade and surrounding streetscape, while incorporating advanced upgrades throughout. Notable project features include:







- Incorporating a storm water retention system for landscape irrigation
- Providing the capability for electric vehicle charging station in lower parking garage level
- Converting the surface parking lot into a landscaped pedestrian-friendly plaza

foster critical, meaningful discussions that extend beyond the daily requirements.

The redevelopment of FOB 8 employs innovative design features which, like ePM, deliver new efficiencies and greater sophistication to the work environment. Mike Olson, Heery's Construction Manager (CM) is spearheading the project's ePM effort. He reported that from the beginning the FOB 8 project team was committed to learn and fully maximize the use ePM. Mike and the GSA Project Manager Tony Lopacki recognize the value ePM provides to regiment the secure flow of project information. Through automated ePM workflows the team was able to control RFIs, daily reports and project correspondence so that no informa-

tion bypassed the authorized paths and critical documents stayed internal to the system. Document tracking and control capabilities, particularly with RFIs, impressed Mike. He finds learning to use ePM is similar to other construction project management tools, but recommends careful planning and close collaboration with a system administrator to configure permissions.

As the FOB 8 team's knowledge and use of ePM advanced, they were able to share experiences with other teams. Justin Purcell, Heery's CM, from the 1800 F Street project team reached out to the FOB 8 project team for lessons learned. This soon evolved

the FOB 8 project team for lessons learned. This soon evolved into the two teams hosting several meetings and conference calls to share updates and advice about ePM, and to discuss other related topics in a true collaborative effort. As ePM adoption grows, the systematic procedures for capturing, sharing, and reviewing of data will

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"[Collaborating] acceler-

ated our learning curve.

....We were able to work

smarter by working to-

- Justin Purcell, Heery

gether."





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the following fields are filled out in PTW prior to the transfer:

- State
- City
- Building Number

Projects that currently exist in both ePM and PTW, will generate duplicate entries. If the duplicate project is in PTW, then the project manager should mark it "closed" (to prevent its migration). If the duplicate project is in ePM, the project manager should contact their ePM system administrator to delete the project from ePM.



ePM Quick Tip:

Want to know the secret to printing and exporting from ePM?

Hold down the control key! Whenever attempting to export a register view, or print a Custom Print Layout (CPL), continue to hold the Ctrl key down until the document opens. This will



also help avoid popup blockers when running Cognos reports as PDFs.

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It is this spirit of collaboration that ePM was designed to encourage and support.

From plans to production, FOB 8 is a GSA success because it capitalizes on technology to achieve implicit and explicit goals. The ePM system has assisted in shaping the dynamics of the project such as fostering communication and collaboration with other project teams. Upon completion, the project's advanced energy and environmental upgrades are expected to earn the project a LEED Gold certification. FOB 8 will stand as a benchmark for future public redevelopment projects, just as the open and collaborative management style adopted by the project team will serve as a lesson for future GSA projects.

The Evolution of Project Management Technology



Over the past three decades, GSA projects have met increasing complexity, greater public scrutiny and increased stakeholder demands. These forces have challenged GSA teams to incorporate added requirements without sacrificing quality or budget. Fortunately, new technologies have evolved to address the some of these challenges facing project teams today.

In the 1980's technology to manage construction

projects consisted of walkie-talkies and fax machines. Project data was often captured in reports and logs, which were hand-written on paper forms, and then circulated among the project participants. The advent of the cell phone seemed to improve project management as it accelerated data sharing, albeit verbally. Even with these rudimentary technologies the difference in enhanced levels of efficiency and effectiveness were noticed in managing projects.

Computer-based project management solutions started to take hold in the 1990's when organizations introduced computers on every desktop and encouraged use of new software programs like e-mail. It was around this time that GSA staff transitioned many paper-based routine tasks, such as logs and budget tracking to computer programs like Lotus 1-2-3. At the turn of the century, desktop applications began to transition to the Internet. GSA became an industry leader in exploring and successfully using a variety of these "ePM" tools including Active Project, Buzzsaw, Constructware, DrChecks, and Tririga. But the individual tools became unwieldy due to lack of consistency from one project to another, and across all of the Regions. Data entered into one tool could not always be imported or exported to another tool and there was no capability to rollup reports across the entire PBS project portfolio. With next generation of enterprise ePM tools, GSA saw an opportunity to standardize.

With the implementation of ePM, a web-based tool, GSA is closing gaps of past technology strategies. The unified, collaborative ePM solution allows staff and its project teams to plan, design, procure, and construct in a secure environment. Additionally, ePM can operate concurrently with other software systems like Cognos. As GSA moves onto other new innovative projects, its staff can rely on today's ePM to support the projects of tomorrow.

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

