ePM
Connection

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Cognos Corner

GSA released the "Ball in Court Report - Submittal Packages" report this month to assist project teams in managing submittals. This report aggregates the current status of every project submittal with a quick view about each item that requires action and the responsible party for that action. Users will also find package information that includes package ID, title, due date, and days late. Additionally, users can drill down to see detailed information, which is included in the Project Ball In Court- Submittal Details Report.

Cognos Training

Training was held recently at Central Office for regional Cognos Report Writers. The 4-day session, led by a Meridian Cognos expert, gave report writers the tools that they need to generate robust reports for regional users. Please contact your regional system administrator to ask if there is a report the report writers can build for you!

Since the launch of ePM, project teams have encountered obstacles, learned lessons, and celebrated successes over the past two years. Many ePM users have converted these difficulties into valuable experiences that can help other teams overcome these challenges. Here are a few ideas that may help your team:

1. Project Financial Management

Project teams in Region 11 established each project's funding and obligations with the correct cost account and budget assignments by coordinating with valuable finance and obligations focused team members. When setting up funding documents, meet with the budget analyst; when creating contract documents, meet with the contracting officer. This was especially helpful when backloading data for projects that were active in excess of five years and source documents were not easily accessible. Other lessons learned include:

Minimize number of cost accounts - The fewer the better. It is similar to opening multiple checking accounts at a bank. The funds placed in each account have to be managed independently.

Create a cost account for each tenant agency associated with RWA funds - It helps in tracking the obligation of funds associated with a particular tenant. At the start of the project, anticipate that a portion of funding can (and will) be re-purposed for supporting smaller projects. R11 encourages coordination with the division that manages BA80 funds in the region prior to obligating those funds for your capital project.

Use the Contracts OBA to upload contracts and mods - It is faster and easier to set up the Schedule of Values (SOVs) using the OBA because it enables the uploading of large amounts of data within the system.

Backload data in chronological order - Entering data out of sequence can cause problems. Load financial data in the order in which it occurred. Project teams who had not done this often found it more efficient to delete their data and start over from the beginning.

2. RFI Management

All project teams struggle to determine how to manage RFIs that require contractor support versus RFIs that need GSA involvement. Many General Contractors (GCs) and Construction Managers (CMs) often resort to maintaining a separate RFI log that contains questions that can be resolved without input from GSA. For example, the ePM auto-generated number may be #24, while the RFI is #32 in the contractor's log. Also, there may be pre-construction RFIs that the team does not want co-mingled with construction RFIs. Project teams in Region1 have been using the new editable number field on the RFI to crosswalk the RFI numbering system.
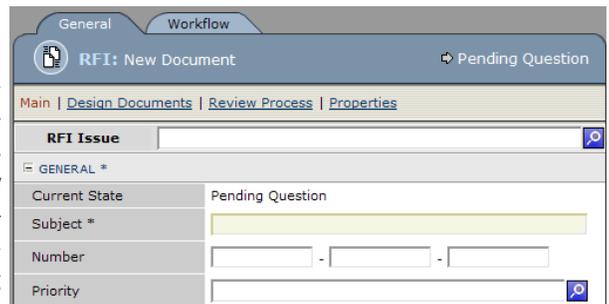
A lesson learned in using this field was to establish a naming convention for the RFIs to differentiate them. Subcontractor generated RFIs began with "SC" while those from the GC are tagged as "GC." Therefore, when viewing an RFI that is coded SC001 or GC001, the project team automatically knows the RFI type. Other project teams are adding prefixes and suf-

ePM Quick Tip:

Active Potential Change Orders (PCO's) can be pulled in as SOV line items on a modification. To enable this capability the modification must be in the Pending workflow state. In edit mode on the SOV page of the modification, just above the SOV columns, select Tools > PCO Line Items > Add/Remove to select an Active PCO.

ePM Access Waiver

This is a reminder that ePM Users can apply for a waiver to help expedite initial access to ePM. The user must have at least received an initial favorable letter (fingerprints cleared) to be given access into the ePM system.

ePM Resources:

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

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

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

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

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fixes to distinguish project phases or building zones. System administrators admit that this can be a tedious task to establish and categorize correctly, but it is a worthy investment in the beginning for saving time so that project teams can query and filter by a particular RFI type.

3. Submittal Register Creation

Creating the initial submittals register is viewed as a daunting task. Typically, a construction project processes hundreds of submittals. Project teams use the submittal register as a predicting tool to anticipate workload and establish progression. Region 3 established project processes by sending a "submittal template" to GCs as an excel document, then using the batch uploader with the template document. This allowed the team to efficiently create the individual submittals with the established due dates in a matter of minutes!

Also in R3, one innovative team is collaborating with subcontractors in ePM to enhance communication. They established a workflow that prompted a need for the mechanical, electrical and plumbing (MEP) subcontractors to gain access to ePM. This enabled the subcontractors to create RFIs and submittals directly in the project in ePM to submit to the GC, who then submits them to the CM to route the documents for review to the project team.

If there is an ePM lesson learned your team wants to share with the ePM Community, please contact epminfo@gsa.gov.

PORTFOLIO USERS

A new group of users will soon join the ePM community from the Portfolio (PT) community. These users are involved in the formative stages of a project and will be heavily involved in submitting documents to Central Office for the annual CILP Submission. There are Portfolio users in every region and they are typically consumers of information. Here are a few important notes on the upcoming rollout of ePM to the Portfolio community:

- Training for Portfolio users is planned to begin in June.
- Portfolio users will be able to access CILP documents migrated over from the PIP system.
- Portfolio users will have access to project data across a region and project permissions similar to that of GSA PM Staff users.

PIP Data and Documents Now in ePM

We recently migrated 700+ historical projects and over 38,000 documents from the PIP system to ePM. GSA staff users can locate the migrated PIP files in the Catalog Card area of ePM, using the new File Manager utility, or from within the Program Workspace. The migrated files have been titled with "PIP Import..." appended to the document name so that they can be easily identified. Please note that these historical projects are either Formative, Complete, or Archived; so make sure to change your register view (from the default Active list) to find these projects. Contact your ePM RSA if you need assistance. A final phase of PIP data migration, to include schedule and financial information, is targeted for completion in early June.