



ePM Quick Tip:

When transferring money from an existing cost account into a new cost account, there is an important step you must complete. You must create a \$0 funding document and hand off the cost, which will create a cost line item in the account. Then the money will transfer into that line item, and the transfer document can be executed successfully.

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/>

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SPD is a unique division of GSA. As a part of PBS Central Office, they assist the customer agencies in managing and implementing their national programs across the GSA regions; fully reimbursed for their efforts and travel through the funds received via RWA's. To be able to decipher which documents belong to which project, the team developed a numbering system to organize the information and used it as the document title in ePM. The formula is below:

First part of each code is either OT3, PH, or OT3PH

- Second part identifies the Zone or Project Phase. We use Z0 to mean general, while Z1 means a project in Zone 1
- Third part of the code is site specific, so GEN would be general while SLU (CBP 3 digit code for LPOE) identifies the project site as San Luis 1, AZ.
- The last is the system generated number.

An example of the number system is OT3-Z2-SLU-00001. This indicates that this is an OT3 project, in Zone 2, at San Luis 1, AZ and is the first instance of this document type.



The Suite of Planning Tools (SOPT) application is coming online in October 2012, which will help you more efficiently plan your projects. The SOPT, replaces a lot of the functions formerly in PIP and automates project management templates via the web, which makes it easier to develop and revise project planning documents. Templates include the Project Charter, Project Management Plan, Risk Assessment Tool, Needs Assessment Interview, Housing Plan and Prospectus Builder. Features, such as, single sign on and work product cloning will allow you to get started quickly saving time.

The good news is that the SOPT and ePM teams are working closely to ensure both systems are integrated with each other. This means that you will not have to enter the same information into different places within the tools. Current integration will include shared project records and ePM project data pre-loaded into templates. Planned future integration includes automated transfer of completed templates into ePM card catalogs, as well as data transfer from the SOPT into ePM.

Look out for more information in the coming months on this exciting new application. Post questions to the Suite of Planning Tools page on Chatter.

The screenshot shows the 'Milestone Schedule' section of the project setup. It includes a table with columns for Milestone/Phase, Baseline Start, and Baseline Finish. The milestones listed are Site Selection, Initial Plans, Customer Request, Funds In Place, Requirements Finalized, and Initial Financial Agreement with Customer.

| Milestone/Phase | Baseline Start | Baseline Finish |
|---|----------------|-----------------|
| Remove Site Selection | 10/16/2012 | 11/30/2012 |
| Remove Initial Plans | 12/28/2012 | 1/29/2013 |
| Remove Customer Request | | |
| Remove Funds In Place | | |
| Remove Requirements Finalized | | |
| Remove Initial Financial Agreement with Customer (ex. Draft OA or Draft | | |