Editing the Detailed Project Fact Sheet

The Detailed Project Fact Sheet should be edited through the daily activity on the project, and no less than on a monthly basis.

Area in ePM	Area on Fact Sheet	Report Keys
Project Properties	Project Name	
	Location	
	Scope	
	Region	
	Project Type	
	Building Type	
	Delivery Method	
	Program Area	
	Building ID	
	Gallery	Notes field must contain the word "picture". Main project photo must contain the words "key picture."
Daily Reports, Issues, and Logs	Executive Status	Full Description
	Detailed Status	Full Description
	Issues/Actions	Full Description
	Condition	Escalate/Promote to Fact Sheet
		Condition Picklist
		Action Summary
Scheduling	PM Schedule	Activity Code
Address Book	Contacts	Must add "Key Participant" project role

Who Will Use This?

- ✓ GSA Project Managers
- ✓ Construction Managers

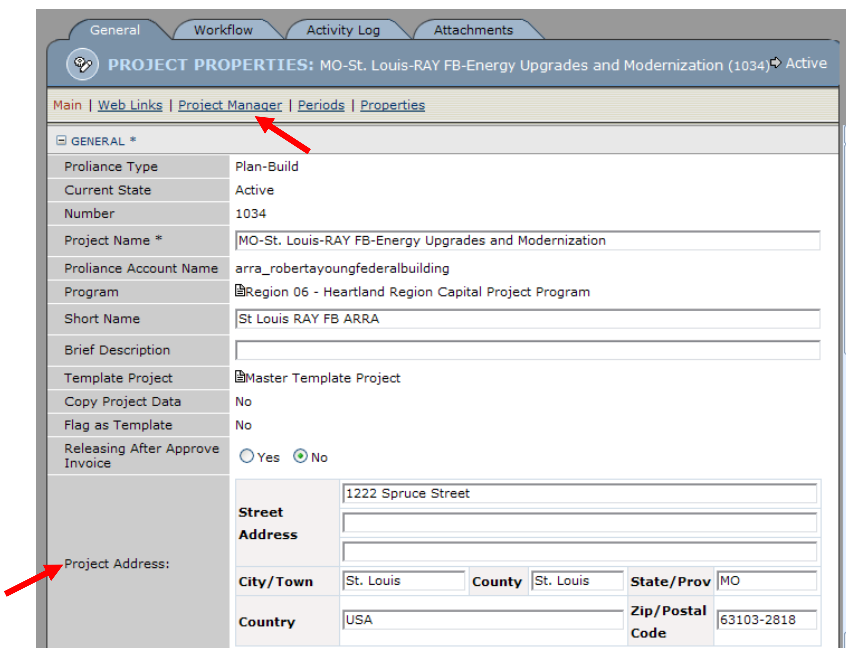
General Information = Project Properties

The Project Properties document is where much of the general information on the Detailed Project Fact Sheet is entered. This area contains data similar to the Project Basics in PIP. From the Project Properties document, users can update:

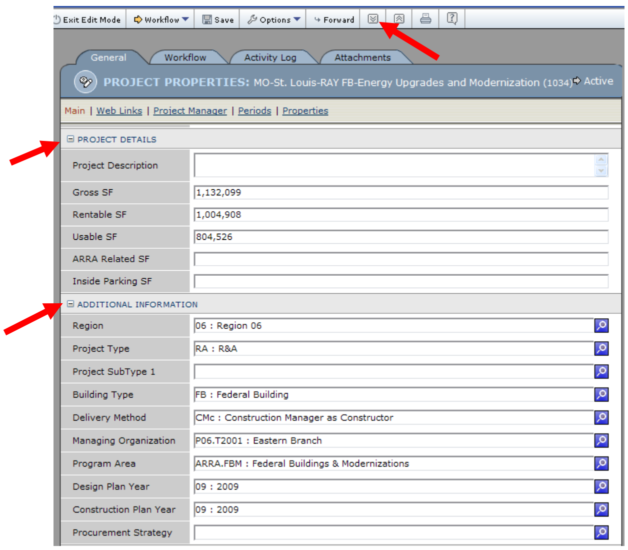
- Location
- Scope
- Region
- Project Type
- Building Type
- DeliveryMethod
- Program Area
- Building ID
- Gallery

1. Log in to ePM as a user with the GSA PM or CMa security category, then navigate to the appropriate project.

2. Navigate to Applications > Administration > Project Properties > Project Name > Edit



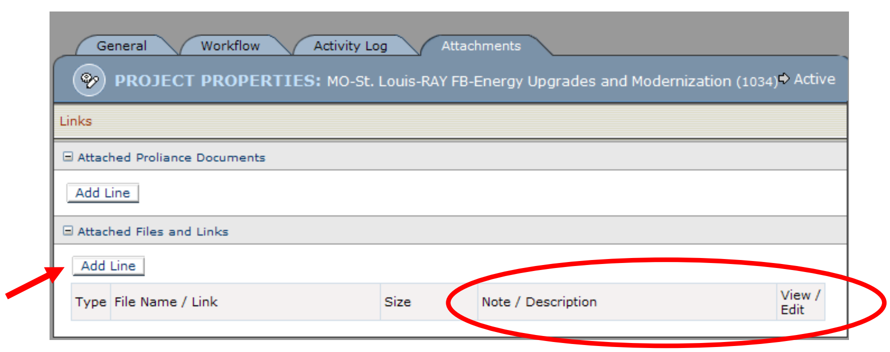
3. Click on the “Expand All” icon to expose all fields in the document.



Populate all fields under Project Details and Additional information except Project SubType 1 and Procurement Strategy.

Comment [JJ1]: There is nothing currently available for selection in the ‘Project SubType 1’ and ‘Procurement Strategy’ lookup lists so don’t say **all** fields here.

4. To update the Gallery, click on Attachments > “Add Line” under Attached Files and Links > Add Line.



5. Enter the word “**picture**” in the Note/Description field for each image that you want to display on the fact sheet in the gallery section. For example “North Façade Picture”.

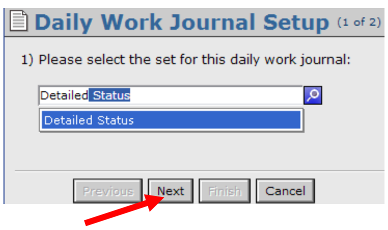
6. The front page image needs to have the word “Key” in the Notes/Description field. For example “North Façade **Key** Picture”.

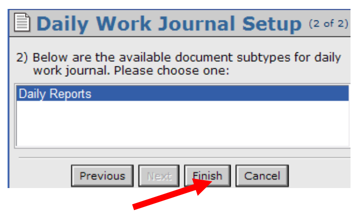
Daily Reports = Status

The Daily Reports Module within ePM is the place to enter information that was previously found in PIP under Status and Condition. The Executive Status, Detailed Status, Issues, and Actions are all entered and edited as a subset of Daily Reports. A new daily report should be created for each entry.

Comment [JJ2]: I know it is pretty clear below when you say to enter the date in the title, but I think saying that a new daily report is created for each entry would help if added here.

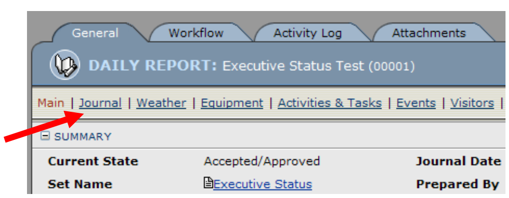
1. Navigate to Daily Reports, Issues, and Logs > Daily Report and select “New” from the menu bar. Enter either “Executive” or “Detailed” in the text field, then select the suggested set and click Next then Finish.



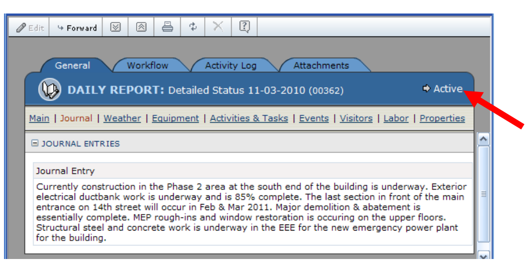


2. Title your status as Detailed or Executive Status with the date of entry. Ex: “Detailed Status 3-21-2011”.

3. Select the Journal link to enter/update the status

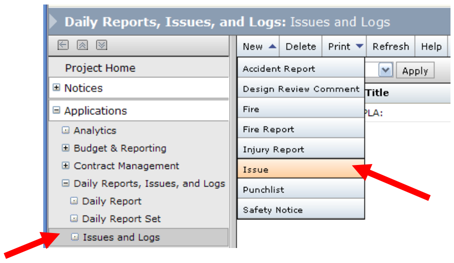


4. The journal entry must be saved then click on “Start” under the workflow which will put the document in the “Active” state in order to display on the Fact Sheet.

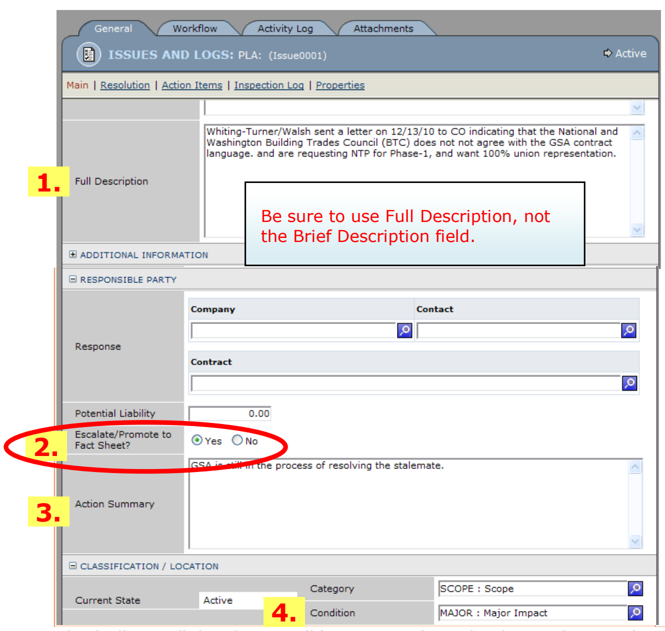


Issues = Condition

1. Navigate to Daily Reports, Issues, and Logs > Issues and Logs > New > Issue



2. There are 4 areas on the Issues and Logs document that correspond to the fact sheet: **1-** Full Description **2-** Escalate/Promote to Fact Sheet **3-** Action Summary**,** and **4-** Condition. "Yes" must be selected for the "Escalate/Promote to Fact Sheet" radial button in order for the issue to appear on the fact sheet report.



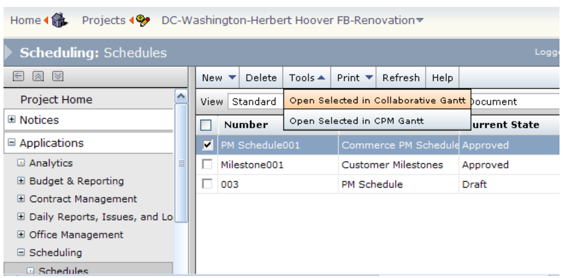
3. The indicator lights for Condition are set by selecting Major, Moderate, or Minor from the pick list.

Comment [JJ3]: Awesome job on this part very clear!

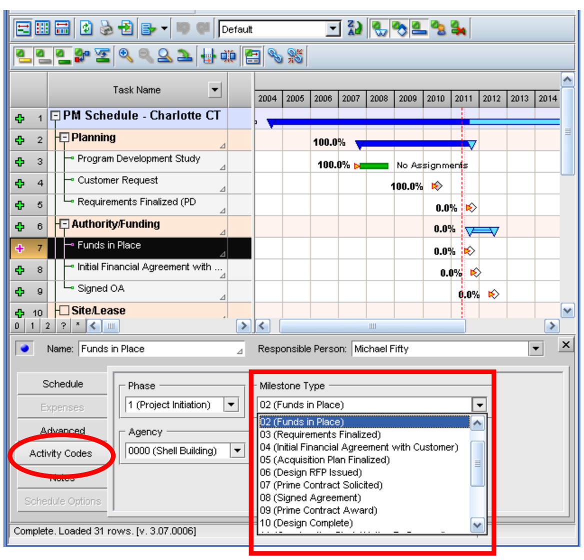
4. The issue must be approved/active via the workflow.

Schedule Updates

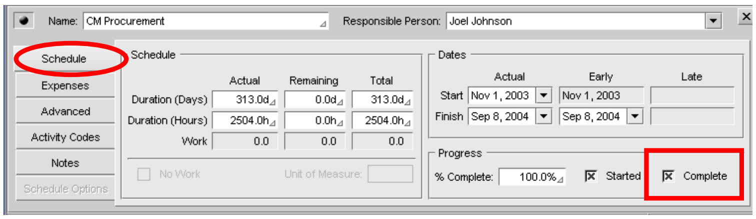
1. Navigate to Scheduling > Schedules > PM Schedule 001 and open in Collaborative Gantt under the Tools menu.

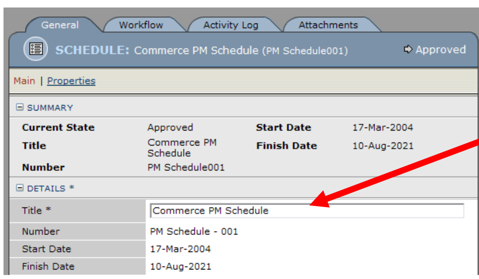


2. Be sure that each summary, task, or milestone is tagged with the appropriate activity code.



3. As each task is finished, mark it complete. This is equivalent to marking a date “actual” in PIP.



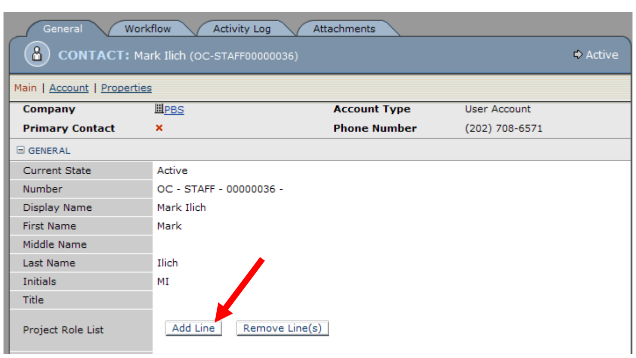


In the schedule document, indicate the project in the name of the schedule. For example: “Commerce PM Schedule”.

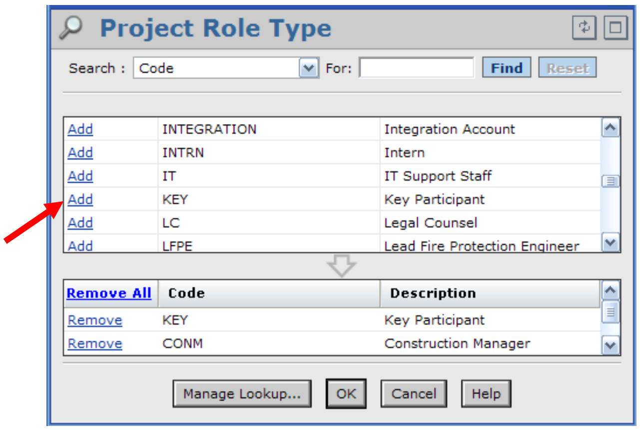
Team Members

Team Members are located under the address book within each project. This is where the PM name is pulled from for the Fact Sheet.

1. Navigate to Address Book > Contacts. Open a contact name from the register and click on “Add Line” beside Project Role List.



2. Add “Key Participant” along with the appropriate role (i.e. Project Manager) and click on OK.



3. Repeat this step for each person that is considered a key team member. Only indicate one person on the team as the Project Manager.

General Notes

1. Documents must be in a state other than “Draft” to appear on the report.
2. RFI’s, Submittals, Design Documents, and Budget related information are populated from data entered through the workflow management of those documents in ePM.
3. Appropriation and Authorization amounts are entered by Central Office.
4. Title Executive and Detailed Status Reports with date of update. For example: “Detailed Status 3-15-2011”.
5. Report data is refreshed daily. All newly saved (save and synchronize in Project Properties) information entered by midnight will appear on the report the following business day.