How To Create a GSA Project Template

What is a Project Template?

Template projects are created from the Organization workspace and exist within individual Programs. When creating a template project for your specific Program, you must select a Project Reference, which determines the default information that will populate your new template project.

Why would I create a project template for my region?

The GSA must maintain "Project Templates" within individual Programs. Upon completion of building a GSA Standard Project Template using this QRG, it will comprise of the following details:

- Project Properties basic requirements
- Cost & Internal Period settings by current Fiscal Year
- Cost Account grouping structure
- Activity Code Group for PM Schedule Template
- Daily Work Journal Sets

Who Will Use This?

√ System Administrators

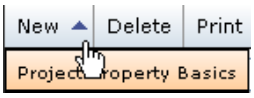
√ Trainer

Creating a Project Template per Program

1. Log into ePM as a user with the Project Properties security role and select the **Organization** workspace.

2. Navigate to **Portfolio > Projects**. The Project Properties register displays.

3. Click **New** button to create a new project using the "Project Property Basics", default template.



4. Enter the following required information:
   - **Project Name *:** Use the GSA Standard Naming Convention for Project Templates

     IMPORTANT:
     OLD VERSIONS OF PROJECT TEMPLATES MUST BE TRANSITIONED TO THE "CANCELLED" STATE AND DELETED IN THE SYSTEM AFTER A NEW PROJECT TEMPLATE IS CREATED.

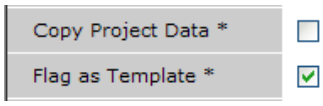
   - **Project Account Name *:** Enter the Project Name without any spaces or special characters. This name is used by integration accounts to access specific projects in ePM. The account name cannot be changed once the project leaves the Draft workflow state. The account name is required.
     (i.e. **Rxmasterprojecttemplate**) where "**x**" = region number such as R11
   - **Program:** Click the **Magnifying Glass** drop-down list to open the Programs dialog box and select the name of the live program to which you want to add the project. The dialog box contains both live and template programs in the Active workflow state, but by default are filtered to display only Live Programs.

     IMPORTANT: Ensure that you select the GSA live program as opposed to a template program. Proliance automatically flags any project created within a template program as a template project.
     EXAMPLES OF GSA LIVE PROGRAMS:
     Region 7 – Greater Southwest Region Capital Project Program
     Region 11 – National Capital Region Small Project Program

   - **Template Project *:** Click the **Magnifying Glass** drop-down list to open the Template dialog box and select the name of the template project. The dialog box contains both live and template projects in the Active workflow state, by default are filtered to display only Template projects.

     NOTE: The IRIS and FMIS integrations require the **ePM 1.3 Master Project Template**.

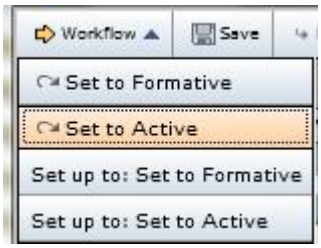
   - **Short Name:** Enter the Project Short Name (i.e. Region xx Project Template)
   - **Copy Project Data:** Leave this option blank.
   - **Flag as Template:** Select this option.



   - **PCN/Line Item*:** For the Project Template **ONLY** enter the word: TEMPLATE
   - **Project Time Zone *:** Select the appropriate Time Zone (Pacific, Mountain, Central, or Eastern).
   - **Daylight Saving Time *:** Select this option if Daylight Saving Time is applicable.

- **Content Management Sites:** Click **'Add Line'** and enter the following site information:
  - http://www.meridiansystems.com/epminfo (Description – ePM Reference Materials and User Tools)
  - https://epm.pbs.gsa.gov/ev/default.aspx (Description - ePM Earned Value Data Entry and Update Tool)
  - https://epm.pbs.gsa.gov/filemanager/default.aspx (Description – ePM File Manager)

5. Select **Save**.
6. Select the '**Workflow**' in the top tool bar and select '**Set to Active'** to transition the document to the 'Active' state.



Address Book – Staff Account Export

Please review the **'QRG.002 Address Book'** to learn how to "Export" contacts to projects. Proceed to export the **Regional System Administrator** and the accounts below to the Project Template.

DO NOT EXPORT OTHER CONTACTS OR STAFF TO THE PROJECT TEMPLATE!

Display Name	Security Category
BI Integration Account User	Administrator
GSA ASID ADAPTER	Administrator
GSA ASID USER	Administrator
GSA.INVOICEREPORT.ADAPTER	Administrator
GSA.INVOICEREPORT.USER	Administrator
Admin.Version.Controller	Administrator
CP Obligation Report Integration User Account -	Administrator

CP Obligation Report Integration Account	Administrator
IRIS Allowance Integration Account	Administrator
IRIS Appropriation Integration Account	Administrator
FMIS Invoice Integration Account	FMIS Invoice Integration
FMIS Obligation Integration Account	FMIS Obligation Integration
GSA.DEFICIENCY.ADAPTER	Deficiency Adapter Notification
GSA.SUBMITTAL.ADAPTER	Submittal Adapter Notification

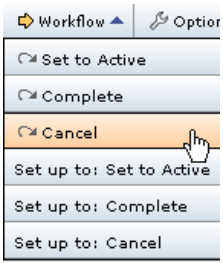
Cancelling / Deleting Project Templates

It is important and imperative to remove project templates that will no longer be required once you have created a new project template replacement. You cannot immediately delete project templates in the system once they reside in the **Active** state. Follow the steps below to delete a project template:

1. Log into ePM as a user with the Project Properties security role and select the Projects workspace to view the Projects Register.

2. Select "**Open Document**" for the Project Template to delete.

3. Select '**Workflow**' in the top tool bar and Select '**Cancel**' to transition the document to the '**Cancelled**' state.

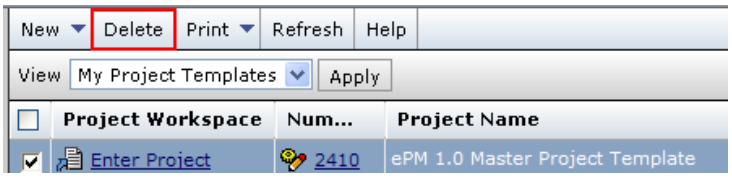


4. Select **Home** in upper-left navigation menu to browse to the workspaces page.

5. Select the **Organization** workspace.

6. Navigate to **Portfolio > Projects**. The Project Properties register displays.

7. Click in the option box for the template desired to delete in the '**Cancelled**' state.

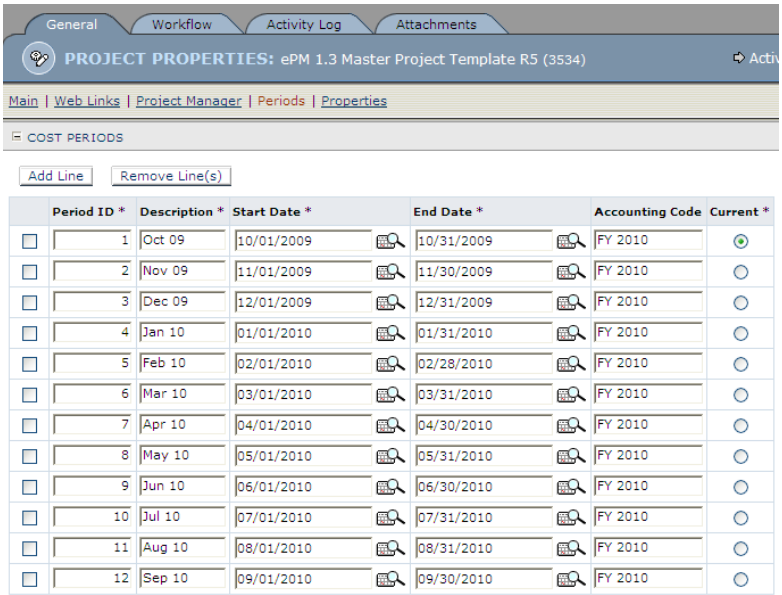


8. Select the **Delete** button.

Defining Periods In Your Project Template

Periods must be defined in the system to feed cost controlling documents. Instead of setting these periods in a Project Properties document **AFTER** each project is created, it is more efficient to enter them in your project template. There are two types of periods that will require data entry for project template setup. They include the following:

- **Cost Periods** must be setup to reflect 12 months of the Fiscal Year. Each line contains:
  Description - Month and Year (i.e.: Oct 12)
  Start date - the first day of the month (i.e: **10/01/2012)**
  End Date - the last day of the month (i.e.: **10/31/2012)**
  Accounting Code – FY Year (i.e.: FY2012)
  See screenshot below for more details.



Period ID *	Description *	Start Date *	End Date *	Accounting Code	Current *
1	Oct 09	10/01/2009	10/31/2009	FY 2010	
2	Nov 09	11/01/2009	11/30/2009	FY 2010	
3	Dec 09	12/01/2009	12/31/2009	FY 2010	
4	Jan 10	01/01/2010	01/31/2010	FY 2010	
5	Feb 10	02/01/2010	02/28/2010	FY 2010	
6	Mar 10	03/01/2010	03/31/2010	FY 2010	
7	Apr 10	04/01/2010	04/30/2010	FY 2010	
8	May 10	05/01/2010	05/31/2010	FY 2010	
9	Jun 10	06/01/2010	06/30/2010	FY 2010	
10	Jul 10	07/01/2010	07/31/2010	FY 2010	
11	Aug 10	08/01/2010	08/31/2010	FY 2010	
12	Sep 10	09/01/2010	09/30/2010	FY 2010	

- **Internal Periods (Planned Obligation Periods)** must be setup the same as the Cost Periods. There are dependencies such as the CP Obligation Report that requires the "Planned Obligation Period" to be monthly.

Setting Up Cost Settings

The GSA Work Breakdown Structure comprises of 5 main elements. These are setup with the Cost Settings document. It promotes efficiency and consistency to have these defined in the Project Template to relieve the burden on System Administrators to define them for each individual project. Below are the steps to successfully setup the Cost Settings in the Project Template:

1. Log into ePM as a user with the Administrator security role and select the Projects workspace to view the Projects Register.

2. Select "**Enter Project**" next to the Project Template you wish to launch in the Projects workspace.

3. Navigate to **Administration > Cost >Project Cost Settings**. The register displays.

4. Select '**Template**'. The Cost Settings Document displays containing all '**Grouping Code Settings'**.

5. Select the '**Edit**' button.

6. Check the '**Active**' option box and required '**Sequence**' as follows:

   Function Code: First

   Organization Code: Second

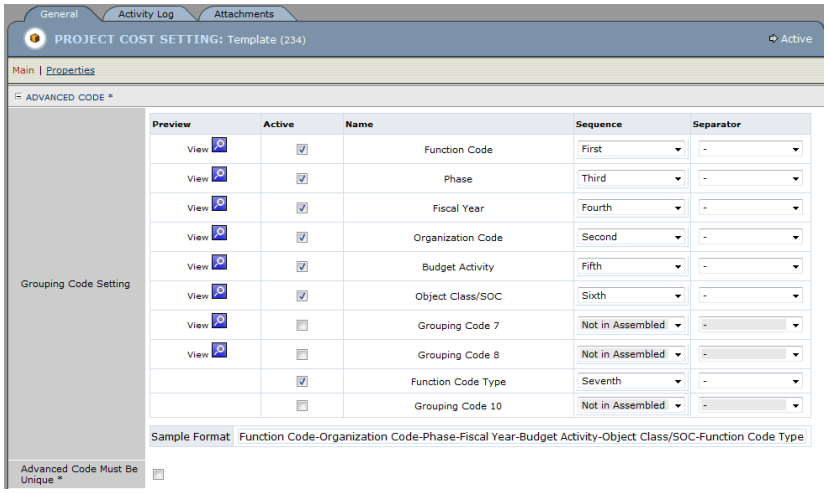
   Phase: Third

   Fiscal Year: Fourth

   Budget Activity: Fifth

   Object Class/SOC: Sixth

   Function Code Type: Seventh



7. Select **Save**.

8. Browse to **Cost Accounts** register

9. There is a "**Default**" Cost Account created by the system as a requirement. Workflow this document to "**Inactive**" state so that nobody selects this cost account on any project.

Project Specific Non-Shared Lookup Setup

There are a set of lookups which need to be non-shared in the project template so when a user goes to create a new project, they are non-sharable.

ePM Name	Proliance Name
Agency	ActivityCode04Type
Area/Zone	AreaZone
Building	Location1Type
Building ID	ReportingCode1Type
Contract Specification Section	ContractSpecificationSectionType

File Manager	DocUDFLookup2
Floor	Location2Type
Meeting Set	MeetingMinutesSetName
Phase	GroupingCode2Type
Room	Location3Type
Shell/TI	ReportingCode3Type
Work Area Type	WorkAreaType
Work Category	WorkCategoryType

1. Enter the Program Workspace and select a program.
2. Go to Administration > Project Config. (Managed) > Lookup Lists.
3. Select a lookup as noted above and open lookup.
4. Select Default List (may be named something different).
5. Uncheck Sharable and click Save and Close.
6. Go to Assigned Projects tab in the Lookup Version Manager > locate ePM 1.3 Master Project Template project. Validate the non-shared lookup is assigned to the project.

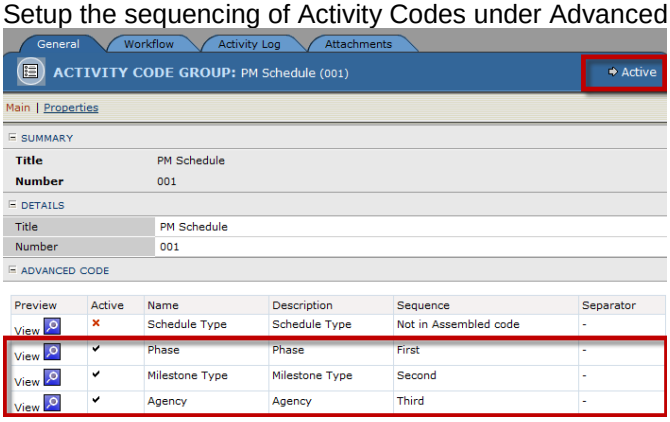
   Note: If an update is being made to the project template and projects already exist, you will need to go to Lookup Version Manager tab, click the New button, rename Lookup Version Title, uncheck Sharable box, and Save and Close button. Go to Assigned Projects tab, place a checkmark in the box next to ePM 1.3 Master Project Template. Click the Reassign to Existing Lookup button. Select the picklist New Lookup Version. Click the Add link to select the new lookup version created. Click OK and OK again. If projects exist, cleanup will need to be performed to each project. A new lookup version will need to be created for each project.

Setting “PM Schedule” Activity Code Group

PM Schedules require **Activity Code Groups** to be created and configured properly into the project template. The **Titles** and **sequencing** must be accurately entered into ePM to support Business Intelligence reporting. The following are steps to setup the “PM Schedule” Activity Code Group into the project template:

1. Login with Lookup administrative edit rights and select the Project workspace
2. Locate the region **project template** for the program of choice and select **Enter Project.**
3. From the Navigation pane, browse to Administration/Scheduling/Activity Code Groups.
4. Select ‘**New**’ from the toolbar to create a new Activity Code Group.
5. Enter “**PM Schedule**” for the Title. **IMPORTANT:** Do not enter any other title name than specified. The BI Reports specifically is coded to read the title as “**PM Schedule**”.

6. Setup the sequencing of Activity Codes under Advanced Code as follows:



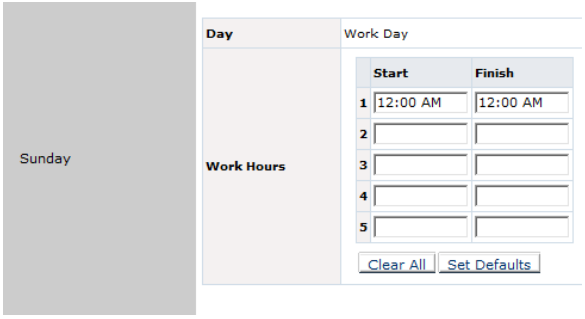
7. Select **Save** from the toolbar
8. Workflow document to the Active state. **IMPORTANT:** OBAs and utilities rely on the Activity Code Group to be in the Active state.
   NOTE: Please reference '**QRG79_Creating Schedules in ePM**' to learn more about creating the proper schedule for your Small or Capital projects.

Earned Value Setup: Calendar & Resource

A Calendar and Resource document is required to be setup within the project template to ensure the Gantt Spreadsheet view displays the associated Spend Plan cost.

Creating a New Calendar

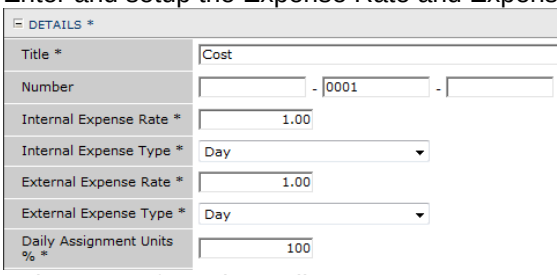
1. Login as Regional Administrator
2. In the Navigation Pane, browse to **Administration / Calendars**
3. Select the **New** button and select **Calendar** doc sub type
4. Enter **EV Mode1 Calendar** as the Title
5. Enter the **Start** and **Finish** work hours as follows for every day Sunday through Saturday:



6. Workflow the document to **Active** state and select **Save** from the toolbar

Creating a Resource document

1. In the Navigation Pane, browse to **Address Book / Resources**
2. Select the **New** button and select **Resource** doc sub type
3. Enter **Cost** as the Title
4. Enter and setup the Expense Rate and Expense Type as follows:

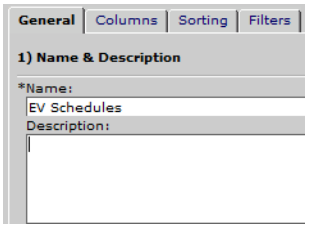


5. Select **Save** from the toolbar.
6. Workflow the document to the **Active** state

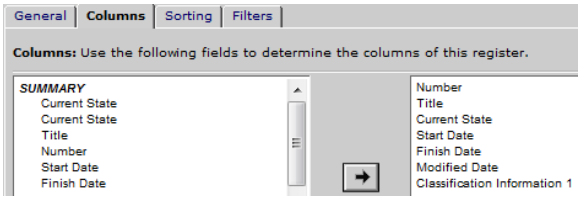
Earned Value Setup: 'EV Summary' Register View

The following Register View supports the overview of all activities performed with the EV Schedule document sub type

1. Enter Name of View

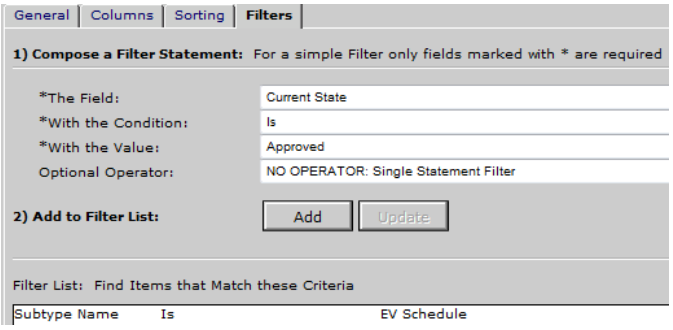


2. Add Columns



3. Set Sorting parameters

4. Set Filter

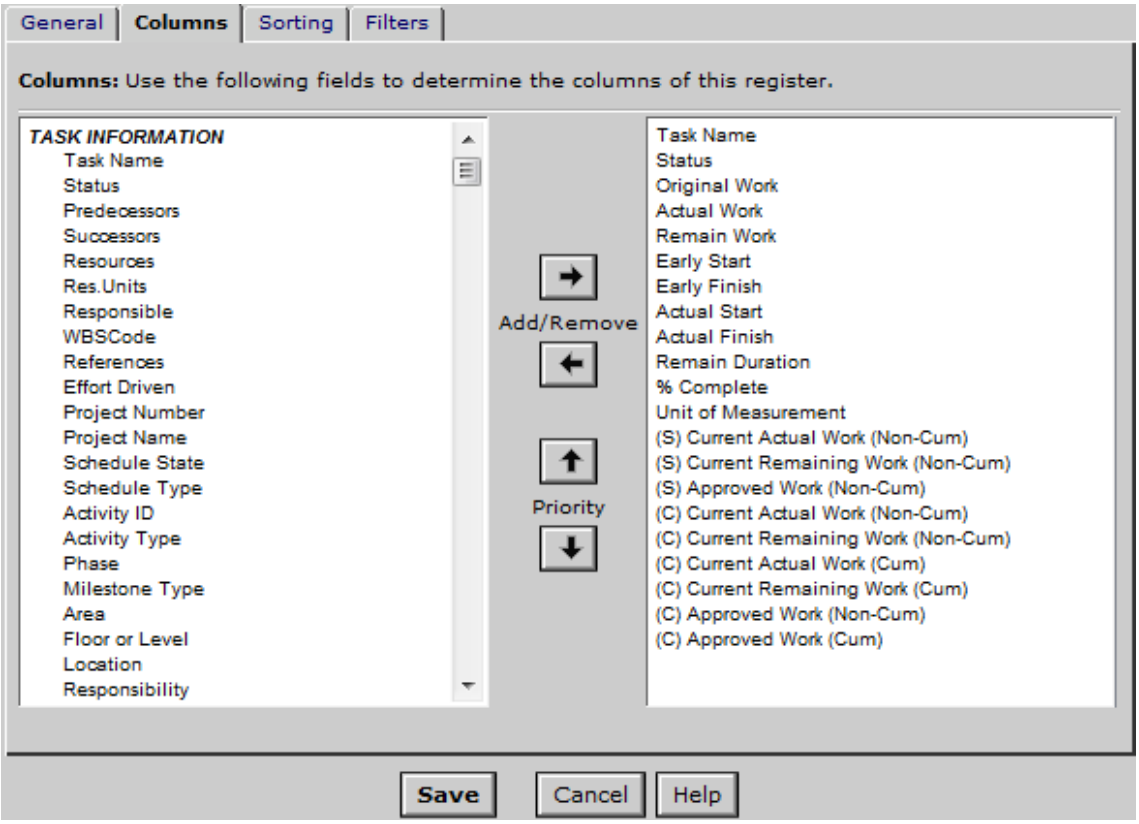


5. Save view

Earned Value Setup: 'EV Summary' Gantt View

GSA's Earned Value requirements involve the need for S-Curve illustrations within the Schedule Combined Gantt View. The following steps instruct how to setup the Gantt View to accommodate an S-Curve in the Combined Gantt View:

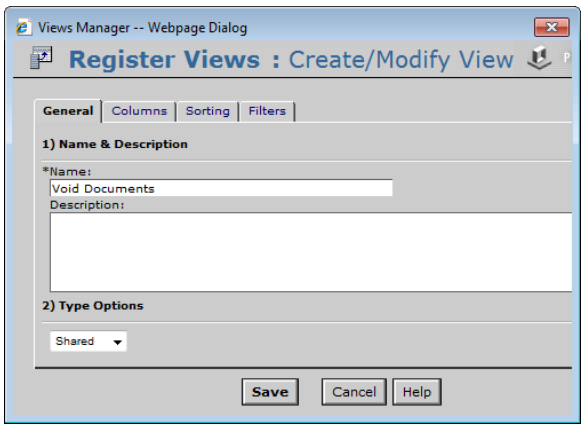
1. In the upper-right corner, select the Gantt View icon 
2. Select the **New** button to create a new view
3. On the General tab and for the **Name** field, enter "**EV Summary**"
4. On the **Columns** tab, add the following columns to the view and click on **Save**:


General
Columns
Sorting
Filters
Columns: Use the following fields to determine the columns of this register.
TASK INFORMATION
Task Name
Status
Predecessors
Successors
Resources
Res.Units
Responsible
WBSCode
References
Effort Driven
Project Number
Project Name
Schedule State
Schedule Type
Activity ID
Activity Type
Phase
Milestone Type
Area
Floor or Level
Location
Responsibility
Add/Remove
Priority
Task Name
Status
Original Work
Actual Work
Remain Work
Early Start
Early Finish
Actual Start
Actual Finish
Remain Duration
% Complete
Unit of Measurement
(S) Current Actual Work (Non-Cum)
(S) Current Remaining Work (Non-Cum)
(S) Approved Work (Non-Cum)
(C) Current Actual Work (Non-Cum)
(C) Current Remaining Work (Non-Cum)
(C) Current Actual Work (Cum)
(C) Current Remaining Work (Cum)
(C) Approved Work (Non-Cum)
(C) Approved Work (Cum)
Save
Cancel
Help

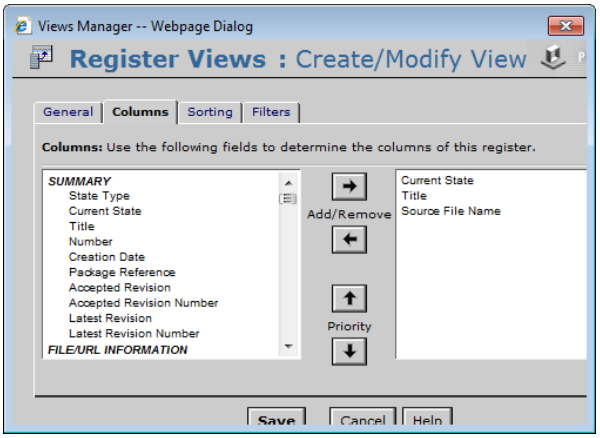
File Manager: 'Void Documents' Register View

The following Register View supports the overview of all voided documents pertaining to all Catalog Cards, Submittals and Design Document sub types.

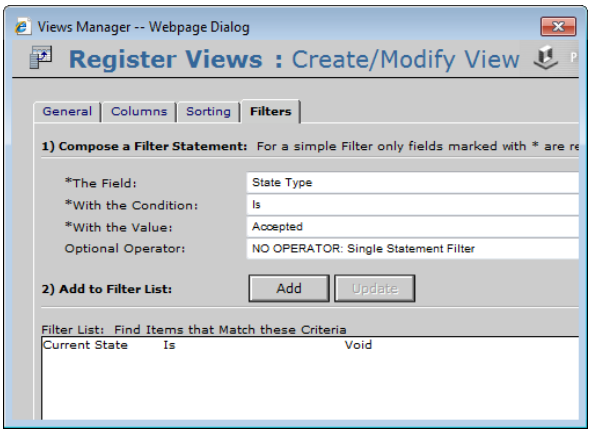
1. Enter Name of View



2. Add Columns



3. Set Filter



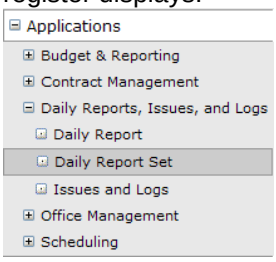
4. Save view

Setting up standard Daily Report Sets

There are (5) Daily Report Sets that must be created to support GSA "ePMxpress" and "Analytics" Cognos reports. Follow the instructions below to ensure these Daily Reports are created in the Project Template.

1. Log into ePM as a user with the **Field: Daily Work Journal Set- Editor** security role and select the Project Template.

2. Navigate to Applications/Daily Reports, Issues, and Logs/Daily Report Set. The Daily Report Set register displays.



3. Click the **New** button to create a new Daily Report Set. The Daily Report Set document opens.

4. Create (5) Daily Report Set documents containing the following “Title” for each.
   Title
   1. CO Status
   2. Daily Report
   3. Detailed Status
   4. Executive Status
   5. Obligation Variance Explanation

5. Be sure to remove your name as the “Prepared By” contact.

6. Select **Save** after creating each Daily Report Set document.

Setting Up Default Misc Contract Requirements

Each project will have a default Miscellaneous Contract setup with the appropriate Procuring Office party so Misc Invoices can immediately commence once a project is created and Funding is handed off for commitments.

1. Browse to **Applications | Contract Management | Obligations | Contracts**
2. Select **New** from the dropdown register tool bar and select **Expense Log**.
3. Expand the **Details** section and enter **Expense Log** for the **Title**.
4. Expand the **Parties** section. For the **Procuring Office Company, Vendor, and Manager:** Select the **Region** (for example, **R11**) you are creating the template for the company. Leave the contact field empty.
5. Select the **Workflow** dropdown from the toolbar and select **Set to Approve**
6. **Execute** the workflow and **Return to Register**