ePM Connection

1ST QUARTER FY20

ISSUE 65

In This Issue:

The Year in Numbers

Here's a look at some of the ePM statistics that stand out at the end of FY 2019:

Number of Users Trained:
- Online: 362
- Onsite: 136

Users:
- Average Licensed: 3,403
- Active: 1,523
- Logins: 20,155
- Logins/Licensed: 5.9
- Logins/Active: 13.2

Projects Created:
- Small: 5,635
- Capital: 155

Recertification:
- 8,513 projects
- 2,923 users

SUPPORT

ePM Resources:

ePM Support
epmsupport@gsa.gov
(866) 367-7878
M-F 7:30 AM - 7:00 PM ET

ePM Portal and User Resources
https://epm.pbs.gsa.gov/portal/

FY20 Small and Capital projects ePM /ePMXpress Requirements

FY20 ePM/ePMXpress guidance has been posted to PBS InSite. Areas of emphasis in FY20 continue to be data quality, complete project documentation uploaded as part of the project record, and enforcement of accurate substantial completion date reporting. New in FY20, more ePM capital project data will be made available in the ODC Capital Program Dashboard. For more information, please contact valerie.pierre@gsa.gov.

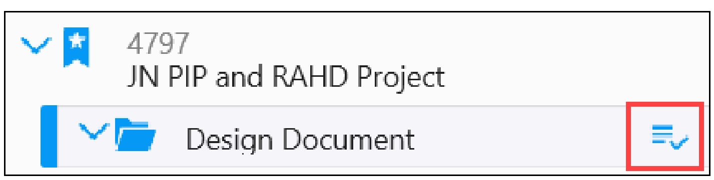
Transitioning of BI Customer Reports

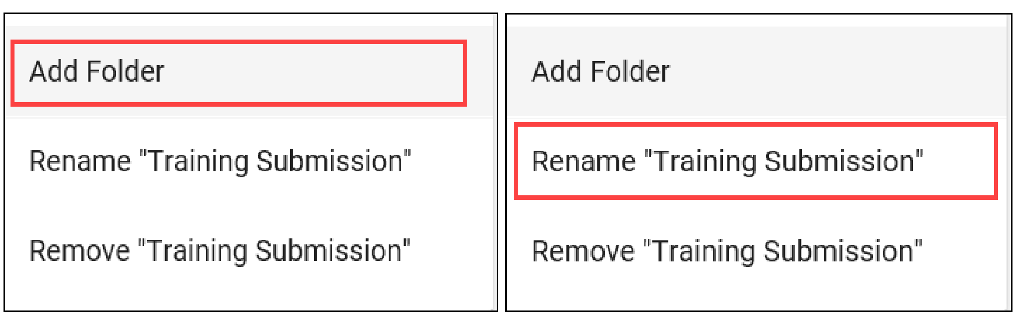
In January 2020 the Office of Design and Construction and the Office of Portfolio Management/Customer Engagement will discontinue running monthly BI Customer Stakeholder Reports and posting them to Google Drive. This change is related to the successful implementation of the PBS Customer Dashboard - which presents similar project and customer oriented data. The last automated run of the BI Stakeholder Reports will be completed January 6th. For more information on this change, please contact bridget.ziorklui@gsa.gov.

Creating Subfolders in File Manager

Have hundreds of documents that you need to manage? Creating subfolders in File Manager can help you keep your files organized. For instance, if you have several years of CILP documents, you can create a subfolder for each year.

To create a subfolder, select a primary folder, hover over the file name and right click the check mark located on the right side of the folder name. Next, click Add Folder. To rename a subfolder, click the check mark to the right of the folder name, and select Rename Folder.





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Meet the Team: Bridget Ziorklui

Bridget C. A. Ziorklui joined the SAS&T team in July and is the newest member of our team. She joined the team as an implementation consultant and part of her duties are preparing the quarterly ePM newsletter, generating project reports, and leading team meetings. Before joining the SAS&T team, Bridget worked as a project manager at the United States Postal Service, and prior to that worked in the mortgage and finance industry. With an MS in Project Management and an MBA in Management Analytics, she will certainly be an asset to the team. When not working, Bridget enjoys sightseeing, visiting restaurants with friends and family, and cooking.

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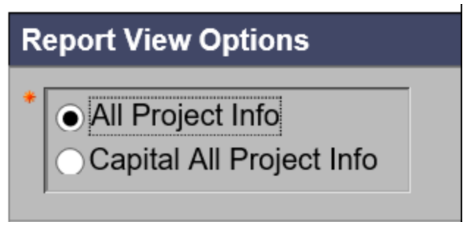
GSA

All Project Info Report

The All Project Info Report is a report that displays key project information in a spreadsheet format. In an update from previous versions, the new version of the report allows users to choose the Default View or the Capital View on the first prompt page.

The Default View displays a list of project fields including project location, description, status, core team members, funding, construction and demolition waste information, and standard milestones.

The Capital View contains additional fields and is well suited for Capital projects. The Capital view includes data such as project location, description, status, core team members, funding, and potential change orders. The report also displays standard milestones including ones that are typically found on Capital projects such as congressional appropriation, site acquisition, design excellence reviews, and AiA meetings.

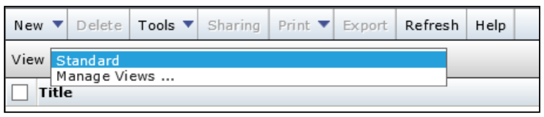


The updated All Project Info Report is located in the Program Reports (Summary) Cognos folder, and it can be filtered by project type, managing org, funding type, or customer.

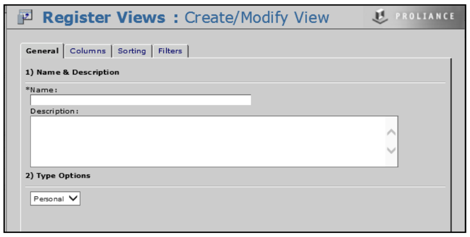
Quick Tip: Create Register Views

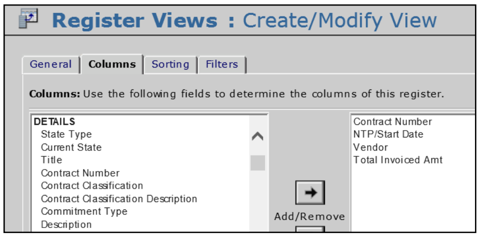
ePM registers contain a list of documents of the same type. Each column of a register displays basic details about the documents. Users can create register views to display pertinent information about the documents. For example, it may be useful to create a register view in a project's Contracts module to display the contract number, vendor name, total invoiced amount, and award date. Below are the steps to create a register view:

1. Log into ePM and navigate to the desired program or project. In the left navigation pane, click on the desired document type, such as Funding or Contracts, to display the register.
2. Click the down arrow in the View selection window and then click Manage Views.



3. Click the New button to open the Views Manager window.
4. On the General tab, enter a name for the register view.





5. On the Columns tab, select the columns that are desired in the new register view.
6. The Sorting tab allows you to sort the view in ascending or descending order on a designated column. On this tab, you can also rearrange the columns in order of preference.
7. The Filters tab can be used to build simple filter statements.
8. Click Save to save the filter view, and click Apply to have the register view applied to the current register.