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 a region specific Program, user must select a Project Reference, which determines the default information that will populate the new template project.

Why would I create a project template for my region?
“Project Templates” exist within individual Programs. They facilitate project creation by pre-populating settings, documents and data which will be copied onto future projects. Some of these pre-populated settings and documents are:

- 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
- Add Schedule Milestones

Who Will Use This?

√ ePM National System Administrator

Creating a Project Template

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 IN THE SYSTEM AFTER A NEW PROJECT TEMPLATE IS CREATED.

  - **Project Name**:
    - For Capital Programs “ePM 1.3 Master Project Template”
    - For Small Programs:
      1. “Small Project with NO Design Template”
      2. “Small Project with Design Template”
      3. Some Programs have funding based Templates

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

  - **Proliance 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. `RxmasterprojecttemplatemMMYYYY`) where “x” = region number such as R11

  - **Short Name**: Optional
  - **Brief Description**: Optional

  - **Program**: Click the Magnifying Glass drop-down list to open the Programs dialog box and select the name of the live program to where the new project will be added. 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 the GSA live program is selected as opposed to a template program. ePM 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.
• **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.

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.

7. **Content Management Sites**: Click ‘Add Line’ and enter the following site information:

<table>
<thead>
<tr>
<th>URL</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="http://gsa.gov/portal/content/176759">http://gsa.gov/portal/content/176759</a></td>
<td>ePM Quick Reference Guides</td>
</tr>
<tr>
<td><a href="http://www.gsa.gov/epm">http://www.gsa.gov/epm</a></td>
<td>ePM on GSA.gov</td>
</tr>
<tr>
<td><a href="http://insite.gsa.gov/epm">http://insite.gsa.gov/epm</a></td>
<td>ePM on GSA Insite (Internal Only)</td>
</tr>
<tr>
<td>Display Name</td>
<td>Security Category</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>BI Integration User Account</td>
<td>Administrator</td>
</tr>
<tr>
<td>GSA ASID ADAPTER</td>
<td>Administrator</td>
</tr>
<tr>
<td>GSA ASID USER</td>
<td>Administrator</td>
</tr>
</tbody>
</table>

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!**
### Cancelling Project Templates

It is imperative to remove project templates that will no longer be required once a new project template replacement is created. User 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.

<table>
<thead>
<tr>
<th>ePM Quick Reference Guide #76</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GSA.INVOICEREPORT.ADAPTER</strong></td>
</tr>
<tr>
<td><strong>Admin Version Controller</strong></td>
</tr>
<tr>
<td><strong>CP Obligation Report Integration User Account</strong></td>
</tr>
<tr>
<td><strong>CP Obligation Report Integration Account</strong></td>
</tr>
<tr>
<td><strong>IRIS Allowance Integration Account</strong></td>
</tr>
<tr>
<td><strong>IRIS Appropriation Integration Account</strong></td>
</tr>
<tr>
<td><strong>FMIS Invoice Integration Account</strong></td>
</tr>
<tr>
<td><strong>FMIS Obligation Integration Account</strong></td>
</tr>
<tr>
<td><strong>GSA.PUNCHLIST.ADAPTER</strong></td>
</tr>
<tr>
<td><strong>GSA.SUBMITTAL.ADAPTER</strong></td>
</tr>
</tbody>
</table>

*These accounts will be created for the Financial Integrations Q4 2014*
3. Select ‘Workflow’ in the top tool bar and Select ‘Cancel’ to transition the document to the ‘Cancelled’ state.
Defining Periods In The 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 the 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. ePM Support has a utility that can be run to populate FY 2008-FY 2016. Please email for assistance.
- **Internal Periods** must be setup to reflect 12 months of the Fiscal Year. ePM Support has a utility that can be run to populate FY 2008-FY 2016. Please email for assistance.
Setting Up Cost Settings

The GSA Work Breakdown Structure is comprised 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 the ePM 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 desired to launch in the Projects workspace.

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


5. Select the ‘Edit’ button.

6. Check the ‘Active’ option box and set the 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.

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>System Lookup Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency</td>
<td>ActivityCode04Type</td>
</tr>
<tr>
<td>Area/Zone</td>
<td>AreaZone</td>
</tr>
<tr>
<td>Building</td>
<td>Location1Type</td>
</tr>
<tr>
<td>Building ID</td>
<td>ReportingCode1Type</td>
</tr>
<tr>
<td>Contract Specification Section</td>
<td>ContractSpecificationSectionType</td>
</tr>
<tr>
<td>File Manager</td>
<td>DocUDFLookup2</td>
</tr>
<tr>
<td>Floor</td>
<td>Location2Type</td>
</tr>
<tr>
<td>Meeting Set</td>
<td>MeetingMinutesSetName</td>
</tr>
<tr>
<td>Phase</td>
<td>GroupingCode2Type</td>
</tr>
<tr>
<td>Room</td>
<td>Location3Type</td>
</tr>
<tr>
<td>Shell/TI</td>
<td>ReportingCode3Type</td>
</tr>
<tr>
<td>Work Area Type</td>
<td>WorkAreaType</td>
</tr>
<tr>
<td>Work Category</td>
<td>WorkCategoryType</td>
</tr>
</tbody>
</table>

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 your 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, user 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.
Setting up your Milestones and Activity Codes

**Note:** Please reference ‘QRG79_Creating Schedules in ePM’ to learn more about creating the proper schedule for the Small or Capital projects.

1. Go to Applications > Scheduling > Schedules

2. Select your PM Schedule and select View Collaborative Gantt

3. Select Insert Milestone

4. (for Small Project Templates) set up for Milestones with the Activity Codes from the matrix below

5. Close your Gantt window and workflow your PM Schedule to Approved.
### Small Project with NO Design Template

<table>
<thead>
<tr>
<th>Milestone Display Name</th>
<th>Activity Code3 Type Mapping</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Request</td>
<td>01-Customer Request</td>
</tr>
<tr>
<td>Requirements Finalized</td>
<td>03-Requirements Finalized</td>
</tr>
<tr>
<td>Funds in Place</td>
<td>02-Funds in Place</td>
</tr>
<tr>
<td>Construction Contract Award</td>
<td>09-Prime Contract Award</td>
</tr>
<tr>
<td>Construction Start/NTP</td>
<td>11-Construction Start/NTP</td>
</tr>
<tr>
<td>Substantial Completion</td>
<td>13-Substantial Completion</td>
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</tbody>
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</tr>
<tr>
<td>Design Award</td>
<td>19-Design Award</td>
</tr>
<tr>
<td>Design Start</td>
<td>19-Design Award</td>
</tr>
<tr>
<td>Design Complete</td>
<td>21-Design Start / NTP</td>
</tr>
<tr>
<td>Construction Contract Award</td>
<td>09-Prime Contract Award</td>
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**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 ePM Regional Administrator
2. In the project template Navigation Pane, browse to Administration / Calendars
3. Select the dropdown arrow next to 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:

![Calendar Hours](image)

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

**Creating a Resource document**
1. In the project template Navigation Pane, browse to Address Book / Resources
2. Select dropdown arrow next to 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:

![Expense Setup](image)
5. Select Save from the toolbar.

6. Workflow the document to the Active state

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**Earned Value Setup: ‘EV Summary’ Register View (For Capital Project Templates Only)**

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 (For Capital Project Templates Only)

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. Open the Project > Schedules > Open a Schedule
2. In the upper-right corner, select the Gantt View icon
3. Select the New button to create a new view
4. On the General tab and for the Name field, enter “EV Summary”
5. View should be marked as Shared
6. On the Columns tab, add the following columns to the view and click on Save:
Setting up standard Daily Report Sets

There are (5) Daily Report Sets that must be created to support GSA "ePMXpress 2.0" and Cognos reports. Follow the instructions below to ensure these Daily Reports are created in the Project Template.

1. Log into ePM as a 1.3 Regional Administrator and select the Project Template.


4. Create (5) Daily Report Set documents with 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.  
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 arrow next to the New button 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 PBS 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