

Creating PM Schedules in ePM

What is a PM Schedule?

There are **15** standard schedule milestones required by the GSA Project Manager (PM) to manage ARRA Capital Projects through the duration of the project. Additionally, there may be an optional **16th** labeled as "Other".

There are **4** additional schedule milestones required for ARRA Small Projects. It is a GSA and ePM adoption requirement for all Milestone schedule to be documented and maintained within ePM.

These instructions will guide the PM how to build the ePM Schedule document and view the schedule in Gantt view.

Prerequisite:

All projects must be created from ePM 1.3 Master Project Template configuration or higher release.

Postrequisite:

Please reference ***QRG78_Updating Schedule Start Dates*** for instructions how the GSA Project Manager must edit Start dates, baseline, and approve milestones within an ePM Schedule.

Who Will Use This?

✓ Project Manager

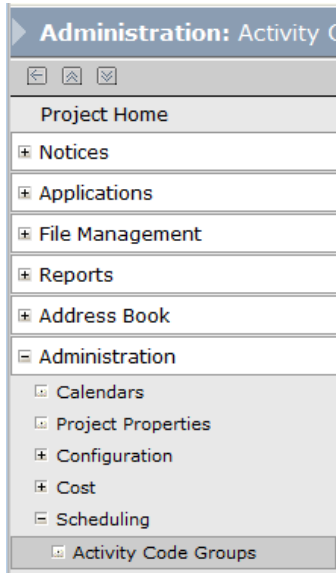
Viewing Activity Code Group for PM Schedule

Activity codes are used to organize tasks in a schedule. Before an activity code can be used in a schedule, it must be part of an activity code group and this group must be linked to the schedule. Once an activity code is used in a planning object, you can filter and group planning objects based around these codes. Before you can use Activity Code Groups, you must define each activity code as a hierarchical lookup in your project. The GSA PM must know which Activity Code is utilized for PM Schedule requirements. The following instructs how to view the supported Activity Code Groups for PM Schedules.

1. Login to ePM and open your project.

ePM Quick Reference Guide #79

- In the left menu, browse to Administration > Scheduling > Activity Code Groups. The Activity Code Groups register opens.



- Select the register view, “Active – Advanced Code Details”. The (3) required Milestone Activity Codes are displayed as part of the “PM Schedule” Activity Code Group (ACG).

New ▾ Delete Print ▾ Refresh Help						Items 1 to 3 of 3
View Active - Advanced Code Details ▾ Apply						Find Reset
<input type="checkbox"/>	Number	Title	▲ Number	Name	Sequence	Separator
<input type="checkbox"/>	001	PM Schedule	3	Milestone Type	2	-
<input type="checkbox"/>	001	PM Schedule	2	Phase	1	-
<input type="checkbox"/>	001	PM Schedule	4	Agency	3	-

NOTE: The following ACGs should be referenced data already created within the ePM program – project template. All new projects should automatically have this Activity Code Group in Active workflow state. If your activity code group is incorrect, this should be modified to reflect the above settings. If your project contains a Milestone Activity Code Group, these are no longer used and can be deleted.

- Left click on any of the items listed to launch 001 Activity Code Group document.

ePM Quick Reference Guide #79

- Notice the Activity Code Group is in Active workflow state. In order to successfully assign Activity Code Groups to ePM schedules, they must be in 'Active' state.

General Workflow Activity Log Attachments

ACTIVITY CODE GROUP: PM Schedule (001) Active

Main | [Properties](#)

☰ SUMMARY

Title PM Schedule
Number 001

☰ DETAILS

Title PM Schedule
Number 001

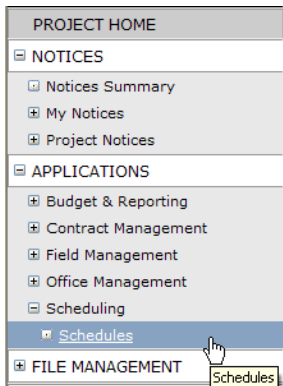
☰ ADVANCED CODE

Preview	Active	Name	Description	Sequence	Separator
View	✗	Schedule Type	Schedule Type	Not in Assembled code	-
View	✓	Phase	Phase	First	-
View	✓	Milestone Type	Milestone Type	Second	-
View	✓	Agency	Agency	Third	-

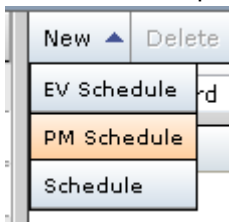
- Close Activity Code Group document.

Creating the Milestone Schedule Document

1. Login to ePM
2. Browse to the Schedule register.



3. Select 'New' dropdown and click on the 'PM Schedule' document sub type.



4. Enter the **Title** of the schedule. The GSA reporting standards require all program/projects to be titled as follows: '**City-State-Project Short Name – Milestone Schedule**'.

EXAMPLE:

Title *	DC-Washington-FOB 10A - Milestone Schedule
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5. Enter the required **Start** and **Finish** dates for the entire list of milestones

Start Date *	10/01/2010	
Finish Date *	10/01/2011	

Creating the Milestone Schedule Document, cont.

- Click the **Activity Code Group** blue magnifying glass Lookup icon and **Add** to assign the titled, **“PM Schedule”** Activity Code Group to this PM Schedule.

- Click on **OK**.
- Enter the PM’s contact name in the Managing Contact field. The Managing Company will automatically populate.

- Click **Save**.
- Vertically scroll down the Schedule document to the **Tasks** section. Select **View Collaborative Gantt**. button to launch the Milestone schedule in Gantt view and all default **15 Milestones Activity Codes** Register View, for example.

Task Name	Approved Start	Start	Approved Scheduling	Milestone Type
1 Project Short Name> – M...		Oct 1, 2010		
2 Project Short Name> – Milestone...		Oct 1, 2010		
3 Project Short Name> – Milestone...		Sep 30, 2011		

- Expand the vertical pane divider to the right between the spreadsheet and Gantt chart views.



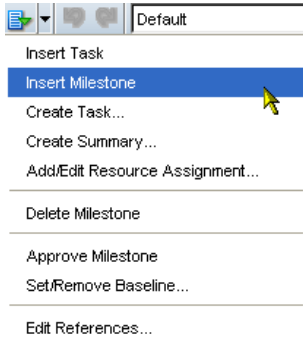
- The supported Activity Codes appear as Phase, Milestone Type and Agency in supported columns.

Phase	Milestone Type	Agency	Task Details
1			Test
2			Test Sta
3			Test Fini

Creating the Milestones in Gantt View

Activity Codes are used for reporting purposes on several different reports as well as allows you to sort and filter by code, so it is critical to complete these items.

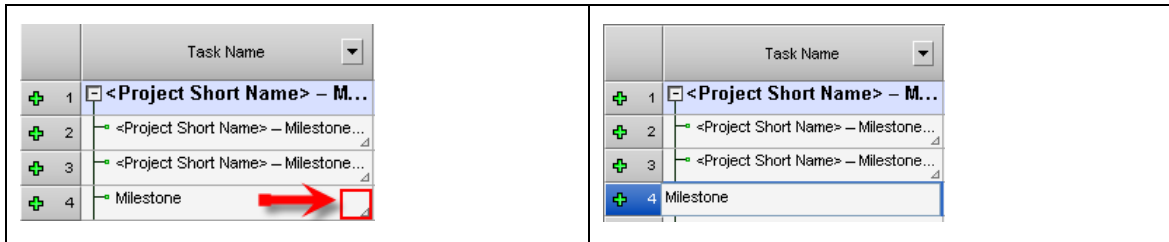
- Two Milestones are created by default. Insert a new milestone by selecting the Command dropdown list and selecting Insert Milestone.



- Repeat Step 1 until 16 milestones in total are created for Capital projects, or 20 milestones in total for Small projects. The first two are created automatically as default milestones.

	Task Name	Approved Start	Start	Approved Scheduling	Milestone Type	Agency
1	<Project Short Name> - M...		Oct 1, 2010			
2	<Project Short Name> - Milestone...		Oct 1, 2010			
3	<Project Short Name> - Milestone...		Sep 30, 2011			
4	Milestone		Oct 4, 2010			
5	Milestone		Oct 4, 2010			
6	Milestone		Oct 4, 2010			
7	Milestone		Oct 4, 2010			
8	Milestone		Oct 4, 2010			
9	Milestone		Oct 4, 2010			
10	Milestone		Oct 4, 2010			
11	Milestone		Oct 4, 2010			
12	Milestone		Oct 4, 2010			
13	Milestone		Oct 4, 2010			
14	Milestone		Oct 4, 2010			
15	Milestone		Oct 4, 2010			
16	Milestone		Oct 4, 2010			

- Rename all default and new Milestones by left-clicking the triangle shape icon in the bottom lower right corner of each numbered Task Name'.



4. Edit all Milestone Task Names per screenshot below:

	Task Name
1	<Project Short Name> – M...
2	<Project Short Name> – Milestone...
3	<Project Short Name> – Milestone...
4	Milestone
5	
6	
7	
8	
9	
10	
11	
12	
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16	
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21	

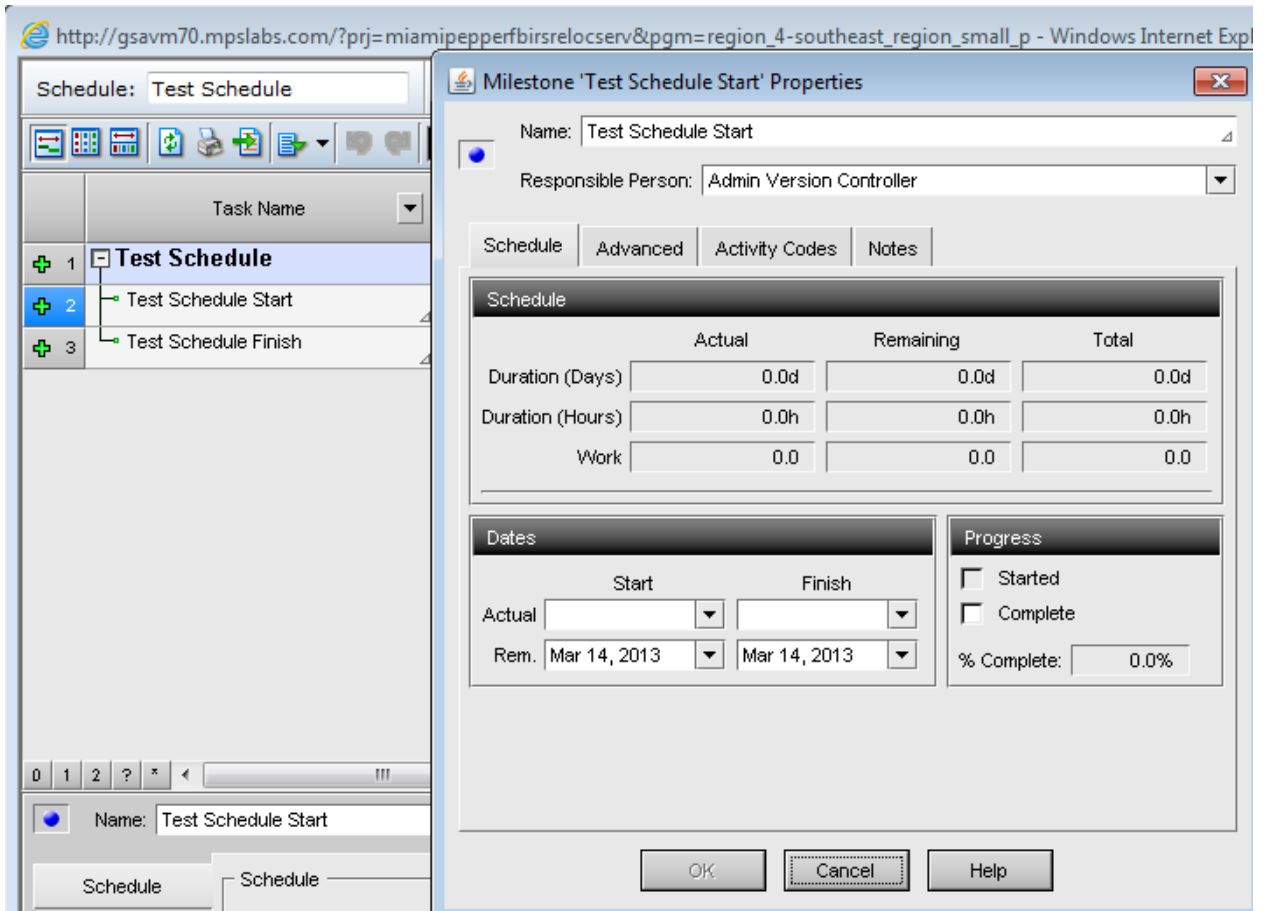
Milestones List for Capital & Small Projects:

1. Customer Request
2. Funds In Place
3. Requirements Finalized
4. Initial Financial Agreement with Customer
5. Acquisition Plan Finalized
6. Design RFP Issued
7. Prime Contract Solicited
8. Sign Agreement (OA or RWA)
9. Prime Contract Award
10. Design Complete
11. Construction Start / Notice to Proceed
12. Pre-Occupancy Tenant Access
13. Substantial Completion
14. Rent Start
15. Occupancy
16. Other

Additional Milestones for Small Projects:

17. Pre-Design Award
18. Pre-Design Complete
19. Design Award
20. Construction Complete

5. Assign the Phase, Milestone Type and Agency activity codes for each Milestone by opening schedule in either the Collaborative or CPM Gantt views. Please note: Collaborative Gantt saves changes automatically whereas CPM Gantt you will need to perform a save to retain changes.
6. Double click on each Milestone Task to launch the properties.



7. Click on the Activity Codes tab.

Milestone 'Test Schedule Start' Properties

Name: Test Schedule Start

Responsible Person: Admin Version Controller

Schedule Advanced **Activity Codes** Notes

Phase

Milestone Type

Agency

OK Cancel Help

8. For each of the three activity codes, select the drop down and select the appropriate lookup item.

Milestone 'Test Schedule Start' Properties

Name: Test Schedule Start

Responsible Person: Admin Version Controller

Schedule | Advanced | Activity Codes | Notes

Phase
2 (Planning)

Milestone Type
02 (Funds in Place)

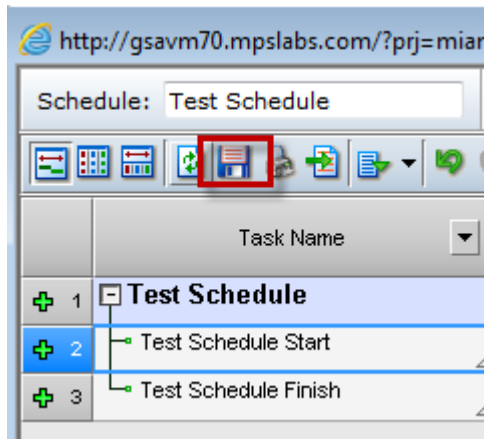
Agency
2011 (Internal Revenue Service National Office)

2011 (Internal Revenue Service National Office)

All (All Customers)

OK Cancel Help

9. Click **OK** once all three have been updated.
If in CPM Gantt view, you will need to save changes by clicking on the Save Change icon; Otherwise if in Collaborative Gantt, close schedule once updates are complete for each milestone.



10. Close both the Gantt and Schedule documents.

IMPORTANT: See Tips section for Milestone prerequisite requirements.

Tips

1. **Prerequisite:** GSA Project Managers will be required to edit the default **Start** and **Finish** dates to each milestone. To learn more about entering these dates for your project schedule, baselining, and approving milestones, please reference **QRG78_ Updating Schedule Start Dates**.
2. The Phase activity codes are assigned to the system Activity Code 2
3. The Milestone Type activity codes are assigned to the system Activity Code 3
4. The Agency activity codes are assigned to the system Activity Code 4
5. PTW Migrated projects will contain all 20