WHAT IS…

The ePM Fact Sheet reports are comprised of narratives, charts, and other pertinent key performance indicators desired for management and customer review. Below is a summary of each fact sheet report. Instructions for data entry begin on page 5 for small projects and on page 8 for capital projects.

**KEY PROPERTIES FACT SHEET**

The Key Properties Fact Sheet is a one-page report featuring key project information including team, status, schedule, financials, and issues for Capital projects. This report is used during the PBS Commissioner’s monthly key properties meeting, which focuses on highly visible projects.

<table>
<thead>
<tr>
<th>Program</th>
<th>Capital</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Type</td>
<td>New Construction R&amp;A Reimbursable</td>
</tr>
<tr>
<td>Project Stage</td>
<td>Design Construction</td>
</tr>
</tbody>
</table>

**STAKEHOLDER (SDE) FACT SHEET**

The Project Stakeholder Report is a one-page report featuring key project information including schedule, financials, status, and issues for projects that are over $25K. These reports are used for the SDE (Service Delivery Excellence) initiative, and they are shared with GSA clients. Therefore, it is essential that system data be kept up to date.

<table>
<thead>
<tr>
<th>Program</th>
<th>Small Capital</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Type</td>
<td>New Construction R&amp;A Reimbursable</td>
</tr>
<tr>
<td>Project Stage</td>
<td>Design Construction</td>
</tr>
</tbody>
</table>

**CONSOLIDATION FACT SHEET**

The Consolidation Fact Sheet is a one-page report featuring key project information including team, status, schedule, financials, and issues for projects that received funding in the FY14, FY15, or FY16 consolidation program. ePM/ePMXpress project data must be validated/updated for monthly consolidation projects meetings.

<table>
<thead>
<tr>
<th>Program</th>
<th>Small Capital</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Type</td>
<td>New Construction R&amp;A Reimbursable</td>
</tr>
</tbody>
</table>
FACT SHEET REPORTING

**DETAILED FACT SHEET**

The Detailed Fact Sheet (DFS) is a comprehensive, multi-page report that pulls data sets from many areas within ePM. The DFS shows the following information: detailed status, executive status, scope, schedule, financial health, issues and team. The DFS should be edited through the daily activity on the project, and no less than on a monthly basis.

<table>
<thead>
<tr>
<th>Program</th>
<th>Capital</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Type</td>
<td>New Construction</td>
</tr>
<tr>
<td></td>
<td>R&amp;A</td>
</tr>
<tr>
<td></td>
<td>Reimbursable</td>
</tr>
<tr>
<td>Project Stage</td>
<td>Design</td>
</tr>
<tr>
<td></td>
<td>Construction</td>
</tr>
</tbody>
</table>

**EXECUTIVE FACT SHEET**

The Executive Fact Sheet (EFS) is a concise, one-page report that provides an overview of a project including project manager, executive status, scope, schedule, earned value performance indicators, and financials.

<table>
<thead>
<tr>
<th>Program</th>
<th>Capital</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Type</td>
<td>New Construction</td>
</tr>
<tr>
<td></td>
<td>R&amp;A</td>
</tr>
<tr>
<td></td>
<td>Reimbursable</td>
</tr>
<tr>
<td>Project Stage</td>
<td>Design</td>
</tr>
<tr>
<td></td>
<td>Construction</td>
</tr>
</tbody>
</table>

**WHO USES...**

GSA Project Managers  
General Contractor  
Construction Manager  
Architect / Engineer  
Contracting Officer and Staff  
GSA Executives  
Owner Representative  
Program Managers
**REPORTING MATRIX**

The matrices below outline the data entry requirements for each fact sheet report:

### Small Projects

<table>
<thead>
<tr>
<th>Required Entry</th>
<th>ePMXpress Module</th>
<th>Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Properties (Description, Address, Project Type, etc.)</td>
<td>Project Detail</td>
<td>Key Prop</td>
</tr>
<tr>
<td>Schedule</td>
<td>Schedule</td>
<td>X</td>
</tr>
<tr>
<td>Funding</td>
<td>PM Financials</td>
<td>X</td>
</tr>
</tbody>
</table>

### Capital Projects

<table>
<thead>
<tr>
<th>Required Entry</th>
<th>ePM Module</th>
<th>Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Properties (Description, Address, Project Type, etc.)</td>
<td>Project Properties</td>
<td>Key Prop</td>
</tr>
<tr>
<td>Customers</td>
<td>Project Properties</td>
<td>X</td>
</tr>
<tr>
<td>Project Management</td>
<td>Executive Status</td>
<td>X</td>
</tr>
<tr>
<td>Scheduling and Milestones</td>
<td>PM Schedule</td>
<td>X</td>
</tr>
<tr>
<td>Financial Management</td>
<td>Allowances</td>
<td>X</td>
</tr>
<tr>
<td>Contract Management</td>
<td>Contracts</td>
<td>X</td>
</tr>
<tr>
<td>Portfolio Planning</td>
<td>Appropriation (and Adjustment)</td>
<td>X</td>
</tr>
<tr>
<td>Design Management</td>
<td>Design Submissions</td>
<td>X</td>
</tr>
<tr>
<td>Construction Management</td>
<td>RFIs</td>
<td>X</td>
</tr>
<tr>
<td>Address Book</td>
<td>Companies</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Contacts</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Key Project Manager</td>
<td>X</td>
</tr>
</tbody>
</table>
The matrix below lists all of the schedule milestones that appear on each report.

<table>
<thead>
<tr>
<th>Schedule Milestone</th>
<th>Key Prop</th>
<th>SDE</th>
<th>Consol</th>
<th>DFS</th>
<th>EFS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Initiation</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Customer Request (Activity Code 01)</td>
<td></td>
<td>X</td>
<td>X</td>
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<td></td>
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<tr>
<td>Project Initiated (Activity Code 28)</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>Initial Scope and Requirements Finalized with Customer (Activity Code 41)</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Client Concurrence on Final Scope, Schedule and Cost Estimate (Activity Code 42)</td>
<td></td>
<td></td>
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<td>X</td>
<td>X</td>
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<tr>
<td>Requirements Finalized (Activity Code 03)</td>
<td>X</td>
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<tr>
<td><strong>Planning</strong></td>
<td>X</td>
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<tr>
<td>Congressional Appropriation (Activity Code 61)</td>
<td></td>
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<tr>
<td>Project Authorization/RWA Acceptance (Activity Code 02)</td>
<td></td>
<td>X</td>
<td>X</td>
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</tr>
<tr>
<td>Initial Financial Agreement with Customer (Activity Code 04)</td>
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<td></td>
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<td>X</td>
</tr>
<tr>
<td>Site Acquisition Start (Activity Code 29)</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Site Acquisition Complete (Activity Code 23)</td>
<td></td>
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<td></td>
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<tr>
<td>Pre-Design Award (Activity Code 17)</td>
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<tr>
<td>Pre-Design Complete (Activity Code 18)</td>
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<td>X</td>
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<tr>
<td>Design Acquisition Plan Finalized (Activity Code 05)</td>
<td></td>
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<td></td>
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<td>X</td>
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<tr>
<td>Design Procurement Request Submitted (Activity Code 43)</td>
<td></td>
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<tr>
<td>Contracting Accepts Design Procurement Request (Activity Code 44)</td>
<td></td>
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<tr>
<td>Design RFP Published in FedBizOpps (Activity Code 06)</td>
<td></td>
<td>X</td>
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<tr>
<td>Design RFP Proposals Received (Activity Code 30)</td>
<td></td>
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</tr>
<tr>
<td>SSEB/Design Firms Shortlisted (Activity Code 31)</td>
<td></td>
<td></td>
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<tr>
<td>Design Firm Selected and Price Proposal Requested (Activity Code 32)</td>
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<td><strong>Design</strong></td>
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<tr>
<td>Design Award (Activity Code 19)</td>
<td></td>
<td>X</td>
<td>X</td>
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<tr>
<td>Design Start / NTP (Activity Code 21)</td>
<td></td>
<td></td>
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<td>X</td>
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<tr>
<td>Concept Design Approval (Commissioner's Presentation) (Activity Code 22)</td>
<td></td>
<td></td>
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<tr>
<td>CMa Award Date (Activity Code 24)</td>
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<td>X</td>
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<tr>
<td>Design Complete (Activity Code 10)</td>
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<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Construction or Design/Build Acquisition Plan Finalized (Activity Code 33)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Schedule Milestone

<table>
<thead>
<tr>
<th>Schedule Milestone</th>
<th>Report</th>
<th>Key Prop</th>
<th>SDE</th>
<th>Consol</th>
<th>DFS</th>
<th>EFS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PM Submits Construction or Design/Build PR (Activity Code 34)</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Contracting Accepts Construction or Design/Build PR (Activity Code 35)</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Construction or Design/Build RFP Issued (Activity Code 07)</td>
<td></td>
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<td>X</td>
</tr>
<tr>
<td>Construction or Design/Build RFP Proposals Received (Activity Code 36)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Construction or Design/Build Firms Interviews Completed (Activity Code 37)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Successful Construction or Design/Build Firm Selected (Activity Code 38)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Construction or Design/Build Contract Acquisition/Legal Reviews Started (Activity Code 39)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Construction or Design/Build Contract Acquisition/Legal Reviews Completed (Activity Code 40)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Construction or Design/Build Contract Award (Activity Code 09)</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Construction Start/NTP (Activity Code 11)</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Signed Agreement (OA) (Activity Code 08)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>CXa Award Date (Activity Code 25)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>AiA Award Date (Activity Code 26)</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Pre-Occupancy Tenant Access (Activity Code 12)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Substantial Completion (Activity Code 13)</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Rent Start (Activity Code 14)</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Occupancy (Activity Code 15)</td>
<td></td>
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<td></td>
<td>X</td>
</tr>
<tr>
<td>Construction Complete (Activity Code 20)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Closeout</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Closeout (Activity Code 27)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

* If there are no summary tasks (Project Initiation, Planning, Design, Construction, or Closeout), all first level tasks print on the EFS.

### HOW TO...

Complete the following steps to create update projects for fact sheet reports. See screenshots beginning on page 17 for additional information.

**Small Projects (Capital Projects instructions begin on page 8)**

#### A. PROJECT DETAIL

1. Navigate to the ‘Project Detail’ tab. Click the ‘Edit’ button to begin editing.
2. Enter the following information on the Project Detail tab:

- **Project Name**
- **Current State**
- **Building ID(s)**
- **Project Type**
- **Customer(s)**
- **Building Address**
- **Project Description**
  - Note: The fact sheet reports will only display the first 255 characters of the Description field.
  - For consolidation projects, this field should also contain the Spend Plan’s project savings verbiage found on the [Consolidation Program Google Site](#). You can copy this information from the Spend Plan and paste it directly into the ePMXpress Description field.

3. Scroll to the Project Status section. Click ‘Add Status’ and enter the status narrative.
   - Note: All reports except for the Detailed Fact Sheet will only display the first 1,000 characters of the status field.
   - Use this section to provide a narrative on on-going procurement, design, and construction activities such as recently awarded contracts, scope changes, and tenant changes.
   - Click the View History button to view all prior of Project Status journal entries.

4. Scroll to the Team Members section. Click the ‘Add Line’ button to begin selecting team members.

5. In the search field, type the team member’s name, and click the ‘Find’ button.

6. Click the appropriate name in the list.

7. Select the appropriate role from the ‘Project Role’ list. Team members that will be displayed on the fact sheets include:
   - **Project Manager:** KEY.PM (details displayed include PM phone and email)
   - **Project Sponsor:** KEY.PRJSP
   - **Contracting Officer:** KEY.CO
   - **Contract Specialist:** KEY.CNSPEC
   - **Property Manager:** Non-KEY.PROP
   - **Architect/Engineer:** KEY.AE (Note: only company name will be reported)
   - **Construction Contractor:** KEY.CC (Note: only company name will be reported)
   - **Const. Management:** KEY.COMN (Note: only company name will be reported)

8. Choose a ‘Project Access’ level.

9. Click the ‘Save’ button in the toolbar.

### B. SCHEDULE

1. Navigate to the ‘Schedule’ tab. Click the ‘Edit’ button to begin editing.

2. All milestones should already present in the project schedule. However, you may need to add a milestone. In this case, click the ‘Add Milestone’ button.

3. Select a milestone from the Activity dropdown list. Schedule milestones that will be displayed on the fact sheets are:
   - Customer Request
   - Project Initiated
   - Initial Scope and Requirements Finalized with Customer
   - Client Concurrence on Final Scope, Schedule and Cost Estimate
   - Funds in Place
   - Design PR Submitted
Fact Sheet Reporting

- Contracting Accepts Design PR
- Design Award
- Design Start / NTP
- Design Complete
- PM Submits Construction or Design/Build PR
- Contracting Accepts Construction or Design/Build PR
- Construction or D/B Contract Award
- Construction Start/NTP
- Substantial Completion
- Project Closeout

4. Enter dates in the Estimated Date or Actual Date columns.
5. Select the affected Customer(s).
6. To add notes about a milestone click on the pencil icon to the right of that milestone, enter notes, and click the ‘OK’ button.
7. To remove a milestone, select the milestone by checking the box to the left of the Activity then clicking the ‘Delete Milestone’ button.
8. To baseline a milestone, select the milestone by checking the box to the left of the Activity then clicking the ‘Baseline’ button. (All milestones can be selected by checking the box in the header).
9. Click the ‘Save’ button.

C. FINANCIALS

1. To edit ePMXpress financial information, navigate to the ‘PM Financials’ tab.
2. Click the ‘New Funding’ button to add a funding source.
3. Enter the following information in the New Funding window:
   - Budget Activity
   - ASID/RWA Number: if available
   - Description
   - Amount Funded
4. Click the ‘Save’ button.

**IMPORTANT:** Funding from all sources should be entered including BA54, BA55, BA64, and BA80.

D. ISSUES

1. Since Issues cannot be created in ePMXpress, users may input project issues as part of their ‘Status’ update. If you wish to create an issue in ePM instead of using ePMXpress, login to ePM, navigate to ‘PM Tools’ in the left-hand menu, then expand the ‘Project Management’ menu, and choose Issue.
2. Click ‘New’ to create a new Issue.
3. Enter the following required information:
   - Title
   - Full Description:
     - Use this section to report major issues/risks to the project’s completion such as funding shortfalls, contractor disputes, and schedule delays.
     - The fact sheet reports will only display the first 255 characters of the Full Description field.
• **Escalate/Promote to Fact Sheet**: ‘Yes’ must be selected in order for the issue to appear on fact sheets.
• **Action Summary**: Include the steps that are necessary to resolve the issue in the Actions field.
• **Category**
• **Condition**

4. Click the ‘Workflow’ button in the top toolbar and select Activate to transition the document to the ‘Active’ state.

**IMPORTANT**: Only the 3 most recently updated ‘Issue’ documents in the ‘Active’ state with ‘Promote to Factsheet’ selected will be reported.

---

**Capital Projects**

**E. PROJECT INFORMATION**

1. Log into ePM as a user and select the project that you would like to edit.
2. Navigate to ‘Workspace and Sub-Project Info’ in the left-hand navigation panel, expand the menu, and choose ‘Project Properties’.
3. When the ‘Project Properties’ page opens, click the Project Number to launch the Project Properties editing window, and click the ‘Edit’ button to begin editing.
4. Enter the following information:
   - **Current State**
   - **Project Name**: Use the GSA Standard Naming Convention for projects:
     - State-City-BuildingName-ProjectName-SubLocation
     - Example: CA-Los Angeles-Reagan CH-Upgrade Doors-2nd Floor
   - **Short Name**
   - **Brief Description**: Note: reports will only display the first 255 characters entered
   - **Project Address**
   - **Number of Occupants**
   - **Inside Parking Spaces**
   - **Outside Parking Spaces**
   - **Project Description**
     - Note: The fact sheet reports will only display the first 255 characters of the Description field.
     - For Consolidation projects, this field should also contain the Spend Plan’s project savings verbiage found on the [Consolidation Program Google Site](https://sites.google.com). You can copy this information from the Spend Plan and paste it directly into the Project Description.
   - **Gross SF**
   - **Rentable SF**
   - **Usable SF**
   - **Inside Parking SF**
   - **Project Type**
   - **Delivery Method**
   - **Managing Organization**
   - **Building ID**
F. PROJECT TEAM

1. Important contacts need to be designated with the following values in the ‘Project Role’ lookup. If multiple contacts are assigned the same lookup value, then multiple names will be displayed.
2. Navigate to the ‘Address Book’ in the left-hand menu and select ‘Contacts’ to open the window.
3. Click a user’s name to open the Contact window.
4. Click the Edit button to begin editing.
5. Open the ‘More Details’ section of the window and click the magnifying glass next to the Project Role box in order to open the Project Role dialog box.
6. Select the appropriate role and click the ‘OK’ button.

- Team members that will be displayed on the fact sheets include:
  - Project Manager: KEY.PM
  - Project Sponsor: KEY.PRJSP
  - Contracting Officer: KEY.CO
  - Contract Specialist: KEY.CNSPEC
  - Property Manager: Non-KEY.PROP
  - Architect/Engineer: KEY.AE (Note: only company name will be reported)
  - Construction Contractor: KEY.CC (Note: only company name will be reported)
  - Construction Management: KEY.CONM (Note: only company name will be reported)

7. Click the ‘Exit Edit Mode’ button and confirm the entries.
8. Repeat this step for each person that is considered a key team member.

IMPORTANT: Indicate only one person on the team as the Key Project Manager.

G. EXECUTIVE STATUS

1. Navigate to ‘PM Tools’ in the left-hand menu, expand the ‘Project Management’ menu, and choose ‘Executive Status’.
2. Click the ‘New’ button.
3. Choose ‘Executive Status’ report set from the Daily Report Setup picklist by clicking the magnifying glass icon. This will open the Daily Report Set window.
4. In the Daily Report Set window, click ‘Add’ to select the Executive Status. Click the ‘OK’ button.
8. Click ‘Journal’ to go to the Journal page. Update the ‘Journal’ page to include a narrative on ongoing procurement, design, and construction activities such as recently awarded contracts, scope changes, and tenant changes.

- Note: On all fact sheet reports except for the Detailed Fact Sheet, only the first 1,000 characters of the Executive Status will be displayed. On the Detailed Fact Sheet, the 3,000 characters of the Executive Status will be displayed.
H. DETAILED STATUS

1. Navigate to ‘PM Tools’ in the left-hand menu, expand the ‘Project Management’ menu, and choose ‘Detailed Status’.
2. Click the ‘New’ button.
3. Choose ‘Detailed Status’ report set from the Daily Report Setup picklist by clicking the magnifying glass icon. This will open the Daily Report Set window.
4. In the Daily Report Set window, click ‘Add’ to select the Detailed Status. Click the ‘OK’ button.
8. Click Journal to go to the Journal page. Update the ‘Journal’ page to include a narrative on ongoing procurement, design, and construction activities such as recently awarded contracts, scope changes, and tenant changes.

- Status narrative will be reported from the ‘Journal Entry’ area on the ‘Journal’ tab. Only one journal entry (the most recently entered) will be displayed in the report.

9. Click ‘Workflow’ in the top toolbar and select ‘Accept/Approve’ to transition the document to the ‘Accepted/Approved’ state.

I. ISSUES

1. Navigate to ‘PM Tools’ in the left-hand menu, expand the ‘Project Management’ menu, and choose ‘Issue.’
2. Click ‘New’ to create a new Issue.
3. Enter the following required information:
   - **Title**
   - **Full Description:**
     - Use this section to report major issues/risks to the project’s completion such as funding shortfalls, contractor disputes, and schedule delays.
     - The field is limited on report to 300 characters (be concise).
   - **Escalate/Promote to Fact Sheet:** ‘Yes’ must be selected in order for the issue to appear on fact sheets.
   - **Action Summary:** Include the steps that are necessary to resolve the issue in the Actions field
   - **Category**
   - **Condition**
4. Click ‘Workflow’ in the top toolbar and select ‘Activate’ to transition the document to the ‘Active’ state.
**J. SCHEDULE**

1. Navigate to ‘PM Tools’ in the left-hand menu, expand the ‘Schedules’ menu, and choose ‘PM Schedule’.
2. In the Schedule register, check the box next to the schedule (or schedules) you wish to view, then click ‘Tools’ and select to either open in Collaborative Gantt or CPM Gantt view.
3. To enter or update estimated dates, double-click the name of a task, which opens the ‘Milestone Properties’ window. Then update the dates in the Early Start field and click the ‘OK’ button.

   • Schedule milestones that will be displayed on the factsheet include:
     - Customer Request (Activity Code 01)
     - Project Initiated (Activity Code 28)
     - Initial Scope and Requirements Finalized with Customer (Activity Code 41)
     - Client Concurrence on Final Scope, Schedule and Cost Estimate (Activity Code 42)
     - Requirements Finalized (Activity Code 03)
     - Funds in Place (Activity Code 02)
     - Initial Financial Agreement with Customer (Activity Code 04)
     - Site Acquisition Start (Activity Code 29)
     - Site Acquisition Complete (Activity Code 23)
     - Pre-Design Award (Activity Code 17)
     - Pre-Design Complete (Activity Code 18)
     - Design Acquisition Plan Finalized (Activity Code 05)
     - Design Procurement Request Submitted (Activity Code 43)
     - Contracting Accepts Design Procurement Request (Activity Code 44)
     - Design RFP Published in FedBizOpps (Activity Code 06)
     - Design RFP Proposals Received (Activity Code 30)
     - SSEB/Design Firms Shortlisted (Activity Code 31)
     - Design Firm Selected and Price Proposal Requested (Activity Code 32)
     - Design Award (Activity Code 19)
     - Design Start / NTP (Activity Code 21)
     - Concept Design Approval (Commissioner’s Presentation) (Activity Code 22)
     - CMa Award Date (Activity Code 24)
     - Design Complete(Activity Code 10)
     - Construction or Design/Build Acquisition Plan Finalized (Activity Code 33)
     - PM Submits Construction or Design/Build PR (Activity Code 34)
     - Contracting Accepts Construction or Design/Build PR (Activity Code 35)
     - Construction or Design/Build RFP Issued (Activity Code 07)
     - Construction or Design/Build RFP Proposals Received (Activity Code 36)
     - Construction or Design/Build Firms Interviews Completed (Activity Code 37)
     - Successful Construction or Design/Build Firm Selected (Activity Code 38)
     - Construction or Design/Build Contract Acquisition/Legal Reviews Started (Activity Code 39)
     - Construction or Design/Build Contract Acquisition/Legal Reviews Completed (Activity Code 40)
     - Construction or Design/Build Contract Award (Activity Code 09)
     - Construction Start/NTP (Activity Code 11)
4. To enter or update actual dates, double-click the name of a task, which opens the 'Milestone Properties' window. Then update the dates in the Actual Start field.
5. Click the ‘OK’ button.

K. FINANCIALS

Project Financials include all sources of project funding.

RWA

1. Navigate to ‘PM Tools’ in the left-hand menu and expand the ‘Financial Management’ menu. Then expand the ‘Funding’ menu and choose ‘RWA.’
2. Click the ‘New’ button to begin creating the RWA.
3. In the ‘New Document’ window, enter the RWA title using the following naming convention: 
   FY_BA_Region_RWA#_Program_Building Name
4. Enter the RWA Number, Detailed Description, RWA Type, and Expiration Date.
5. Click the Line Items page and click the ‘Add’ button. In the new line that appears, enter the:
   - Work Item
   - Item Description
   - Cost Account Ref: Create new cost accounts for each unique combination of Function Code, Fiscal Year, and Budget Activity
   - Item Amount
   - Building ID
6. Click the ‘Save’ button.
7. Click the ‘Workflow’ button and choose ‘Approve.’

Allowance

8. Navigate to ‘PM Tools’ in the left-hand menu and expand the ‘Financial Management’ menu. Then expand the ‘Funding’ menu. Click ‘Allowance.’
9. Click the ‘New’ button to begin creating the Allowance.
10. In the ‘New Document’ window, enter the Allowance title using the following naming convention: 
    FY_BA_Region_Line Item_Program_Building Name
11. Click the Line Items page and click the Add button. In the new line that appears, enter the:
    - Work Item
    - Item Description
    - Cost Account Ref: Create new cost accounts for each unique combination of Function Code, Fiscal Year, and Budget Activity
    - Item Amount
    - Building ID
12. Click the ‘Save’ button.
13. Click the ‘Workflow’ button and choose ‘Set to Pending.’ The authorized approver will then approve the Allowance. Funding documents must be in the approved state in order to appear on the report.

**Funding Requests**

14. Navigate to ‘PM Tools’ in the left-hand menu and expand the ‘Financial Management’ menu. Then expand the ‘Funding’ menu. Click on ‘Funding Request.’
15. Click the ‘New’ button to begin creating the funding request.
16. In the ‘New Document’ window, enter the Funding Request title using the following naming convention: FY_BA_Region_Line Item_Program_Building Name
17. Click the Line Items page and click the Add button. In the new line that appears, enter the:
   - **Work Item**
   - **Item Description**
   - **Cost Account Ref:** Create new cost accounts for each unique combination of Function Code, Fiscal Year, and Budget Activity
   - **Item Amount**
   - **Building ID**
18. Click the ‘Save’ button.
19. Click the Workflow button and choose ‘Set to Pending.’ The authorized approver will then approve the Funding Request.

**Appropriations**

20. Navigate to ‘PM Tools’ in the left-hand menu and expand the ‘Portfolio Planning’ menu and choose ‘Appropriation (and Adjustment).’
21. Click the ‘New’ button to begin creating the Appropriation.
22. In the New Document window, enter the:
   - **Appropriation title**
   - **Fiscal Year**
   - **Public Law**
   - **Budget Activity**
23. Click the Schedule of Values page and click the ‘Add’ button, and in the new line that appears, enter the:
   - **Line Number**
   - **Description**
   - **Scheduled Amount**
   - **Function Code Type:** Studies, Design, Site Acquisition, Construction, M&I, Construction-Admin, or Admin
24. Click the ‘Save’ button.
25. Click the ‘Workflow’ button and choose ‘Set to Pending.’ The authorized approver will then approve the Appropriation.

**L. CONTRACTS**

1. Navigate to ‘Contract Management’ in the left-hand menu, expand the menu, and choose ‘Contracts’.
2. Click the arrow next to the ‘New’ button, and select ‘Contract’ to open a new Contract window.
3. On the Main page, fill in the following fields:
   - **Title**
   - **Contract Number**
• **Contract Classification**
• **Description**
• **Cost Period**
• **Planned Obligation Period**
• **Contractor Type**
• **Contract Duration (Calendar Days)**
• **Pegasys Document Number**
• **(NTP (Notice to Proceed)/Start Date**
• **Finish Date**
• **Planned Substantial Completion Date**
• **Estimated Substantial Completion Date**
• **Procuring Office**
• **Vendor**
• **EV Mode**

4. Click on the ‘Schedule of Values’ (SOV) page to create contract line items. For each SOV line, enter a Description and Scheduled Amount. On the corresponding Cost Allocation line, enter a Description, Cost Account, Building ID, CSI Code, Shell/TI, and Linked Funding Line Item.

5. Click ‘Workflow’ in the top toolbar, select ‘Set to Pending’ to transition the contract to the ‘Pending’ state, and route the contract for approval. The authorized approver will then approve the contract.

### M. POTENTIAL CHANGE ORDERS

1. Navigate to ‘PM Tools’ in the left-hand menu, expand the ‘Contract Management’ menu, and click ‘PCO.’
2. Click the ‘New’ button to begin creating the PCO.
3. Enter the following information:
   • **Title**
   • **Full Description**
   • **Due Date**
4. Click on the ‘Line Items’ page and make sure the ‘Display Columns’ field displays ‘Expense’.
5. In the upper grid, click the ‘Add’ button and enter the following information:
   • **Item Description**
   • **Preliminary Estimate amount**
   • **Target Contract Ref**: Select a contract reference, if known
6. In the lower grid, select the appropriate allocation by clicking the lookup icon in the ‘Cost Account Ref’ field.
7. Enter the following information:
   • **Building ID**
   • **CSI Code**
   • **Shell/TI**
   • **Linked Drawdown Item**
8. Click ‘Workflow’ in the top toolbar and select ‘Active’ to transition the contract to the ‘Pending’ state and route the PCO for approval. The authorized approver will then approve the PCO.
N. DESIGN SUBMISSIONS

1. Navigate to ‘PM Tools’ in the left-hand menu, expand the ‘Design Management’ menu, and click Design Submissions.
2. Click the ‘New’ button to begin creating a Design Submission.
3. In the Details section, enter the following required information:
   - **Title**
   - **Package Name**
   - **Revision Number**
4. Click the ‘Design Documents’ page.
5. Click the ‘Add Existing’ button to see a list of available design documents that can be added to the submission.
6. Select one, multiple, or all documents to add to the submission. Then click the ‘OK’ button.
7. Click ‘Workflow’ in the top toolbar and select ‘Submit.’

O. RFIS

1. Navigate to ‘PM Tools’ in the left-hand menu, expand the ‘Construction Management’ menu and click RFIs.
2. Click the ‘New’ button to begin creating an RFI.
3. Enter the following information:
   - **Subject**
   - **Question**
   - **Question Sent Date**
   - **Question Source Main Contact**
   - **Due Date**
   - **Cost Impact (Optional)**
   - **Schedule Impact (Optional)**
   - **Answer Source Main Contact:** If you know the name of the person who will answer the RFI
4. To reference a Design Document(s) in the RFI, click ‘Design Documents.’ Then click the ‘Add Line’ button and click the magnifying glass icon to select a design document.
5. Select a Design Document by clicking the ‘Add’ link. Then click the ‘OK’ button.
6. Click ‘Workflow’ in the top toolbar, and select ‘Submit Question.’

P. DESIGN REVIEW COMMENTS

1. Navigate to ‘PM Tools’ in the left-hand menu, expand the ‘Design Management’ menu, and click Design Review Comment.
2. Click the ‘New’ button to begin creating a design review comment.
3. Enter the following required information:
   - **Title**
   - **Full Description**
   - **Priority**
   - **Discipline**
4. To reference a Design Document(s) in the comment, click the magnifying glass next to ‘Design Documents.’ In the ‘Design Document’ window, click the ‘Add’ link next to the document that you wish to reference. Click the ‘OK’ button.
5. Click ‘Resolution’ to enter narrative in the Resolution Note field about steps that need to be taken to resolve the design issue.
6. Click ‘Workflow’ button in the top toolbar and select ‘Submit.’

Q. SUBMITTAL PACKAGES

1. Navigate to ‘PM Tools’ in the left-hand menu, expand the ‘Construction Management’ menu, and click ‘Submittal Packages.’
2. Click the ‘New’ button to begin creating the Submittal Package.
3. Enter the following information:
   - **Title**
   - **Package Name**
   - **Revision Number**
   - **Due Date**
4. Click ‘Submittals’ and then click the ‘Add Existing’ button to see a list of available submittals that can be added to the package.
5. Select one, multiple, or all submittals to add to the package by clicking the ‘Add’ link next to each submittal’s name. Click the ‘OK’ button.
6. Click ‘Workflow’ button in the top toolbar and select ‘Submit.’ The Submitted Date field on the main page of the submittal page will auto populate when the package transitions to the submitted workflow state. All submittals in the package will also be updated.

R. PUNCHLISTS

1. Navigate to ‘PM Tools’ in the left-hand menu, expand the ‘Construction Management’ menu, and click ‘Punchlist.’
2. Click the ‘New’ button to begin creating the Punchlist.
3. In the Details section, enter the Punchlist’s title.
4. In the Classification/Location section, enter the following information:
   - **Priority**
   - **Discipline**
   - **Area/Zone**
   - **Cause**
   - **Building**
   - **Floor**
   - **Room**
   - **Category**
   - **Condition**
5. Click ‘Resolution’ to enter narrative about steps that need to be taken to complete the punchlist work items.
6. Click the ‘Workflow’ button in the top toolbar and select ‘Activate.’
GENERATING REPORTS

The fact sheet reports can be run at any time via the Cognos reporting tool. The report is located in the ‘Fact Sheet Reports’ folder. If you do not have Cognos access, please request your GSA RSA or ZSA to run it for you.

1. To run the Fact Sheet reports manually via Cognos once logged into ePM, click the ‘Analytics’ link on the ‘ePM Workspace’ page (note you must be assigned an ePM Analytics license to access this area of the application).
2. Click the ‘My Home’ link.
3. Click the ‘Fact Sheet Reports’ folder.
4. Choose one of the following reports:
   - **Key Properties Reports**
   - **Stakeholder Reports**
   - **Consolidation Reports**
   - **Detailed Fact Sheet**
   - **Executive Fact Sheet**
5. Select the report parameters related to your request.
6. Click ‘Next.’
7. Select the projects to include in the report results.
8. Click ‘Run Report.’
SMALL PROJECTS (CAPITAL PROJECTS SCREENSHOTS BEGIN ON PAGE 23)
Fact Sheet Reporting

D3

D3

D4

D3
CAPITAL PROJECTS

![E1](image1)

### Project Document Details

<table>
<thead>
<tr>
<th>Project Document</th>
<th>Description</th>
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<tbody>
<tr>
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<tr>
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![E2](image2)

### Project Workspace Details

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<tr>
<td>MD-SUTTLE-CENSUS</td>
<td>Office-Office Region 1</td>
</tr>
<tr>
<td>DC-WASHINGTON-DULLEY</td>
<td>Office-Office Region 1</td>
</tr>
<tr>
<td>DC-WASHINGTON-DULLEY</td>
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<td>Office-Office Region 1</td>
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</tbody>
</table>

![E3](image3)

### Project Properties

- **Project Name**: JN PIP and RAHO Project
- **Number**: 4797

---

**ePM 6.2**

*Page 24 of 62*
### Fact Sheet Reporting

#### General
- **Workspace Type**: Project
- **Current State**: On-Hold
- **Number**: 4797
- **Project Name**: IN PIP and RAHD Project
- **Program**: Region 11 - National Capital Region Capital Project Program
- **Brief Description**: December 14, 2011: 3rd floor - while removing sheet carpeting at the future North work platform/weather well location it was discovered that wiring previously powering floor box receptacles was in fact still energized underneath the carpeting. The floor box was unenergized and turned off.

#### Workflow
- **Template Project**: BoPM 1.3 Master Project Template
- **Copy Project Data**: No
- **Plug as Template**: No
- **PMIS Integration Enabled**: No
- **JADIS Integration Enabled**: No
- **Releasing After Approval**: No
Fact Sheet Reporting

1) Please select the set for this daily report:

   - Executive Status

2) Below are the available document subtypes for daily reports. Please choose one:

   Daily Reports

G5

G6
Fact Sheet Reporting

Daily Report Setup

2) Below are the available document subtypes for daily reports. Please choose one:

Daily Reports
Fact Sheet Reporting
### Fact Sheet Reporting

#### ePM 6.2

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<th>Number</th>
<th>Title</th>
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<tr>
<td>J1</td>
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<td>23-Dec-2010 12:00 AM</td>
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<td>01-Oct-2011 09:00 AM</td>
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<tr>
<td>J3</td>
<td>PM Schedule 005  FIPS - RTO Schedule</td>
<td>Draft</td>
<td>09-Oct-2011 09:00 AM</td>
<td>01-Nov-2011 09:00 AM</td>
</tr>
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#### ePM 6.2

<table>
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</tr>
</tbody>
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**J1** and **J2** indicate specific tasks or projects within the Fact Sheet Reporting section.
Fact Sheet Reporting
Fact Sheet Reporting

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<th>Date Entered</th>
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<td>789012</td>
<td>Construction Contract</td>
<td>Planned</td>
<td>17-Feb-2016</td>
</tr>
</tbody>
</table>

There are no rows in this view.

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**K23**

**K24**

**K25**

---

**L1**

**L2**
Fact Sheet Reporting

N5

N5

N6
Fact Sheet Reporting

![Diagram of ePM 6.2 showing issue and log details]

P3

P3

P3

P3
Fact Sheet Reporting

Q3

Q4

Q4
Fact Sheet Reporting
Reference the following ePM Quick Reference Guides (QRGs) for additional information. QRGs can be accessed through the ePM Portal - [https://epm.pbs.gsa.gov/Portal](https://epm.pbs.gsa.gov/Portal)

- QRG 01 - Navigating ePM
- QRG 02 - Using the ePM Address Book
- QRG 12 - RFI Creation
- QRG 14 - Submittals
- QRG 15 - Submittal Package Review
- QRG 17 - Design Documents
- QRG 26 - PCOs
- QRG 31 - Funding Document Creation
- QRG 32 - Funding Document Approval
- QRG 40 - Field Reports
- QRG 41 - Issues and Logs
- QRG 42 - Creating Schedules
- QRG 68 - ePMXpress 2.0
- QRG 79 - Creating Milestone Schedules
- QRG 101 - Editing the Detailed Project Factsheet
- QRG 104 - File Manager
- QRG 105 - Earned Value