

ePM Quick Reference Guide #68

ePMXpress

WHAT IS...

ePMXpress is a web-based application custom designed to standardize tracking of Small Projects across all regions. ePMXpress sits "on top" of the more robust ePM project management system, allowing small project teams to optionally use the various ePM modules based on project needs.

WHO USES

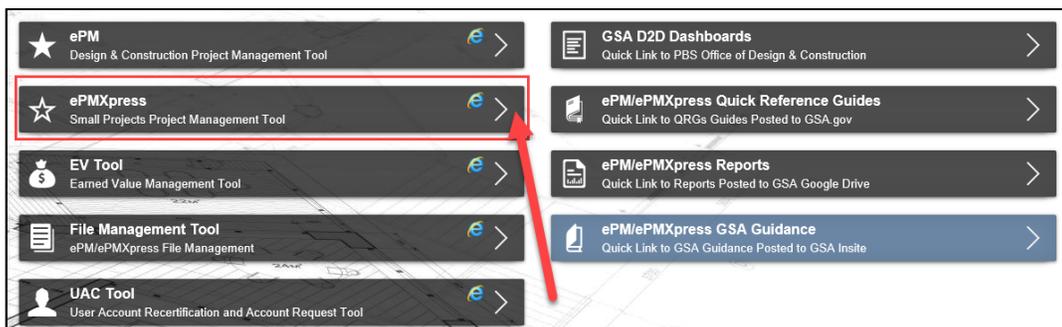
- Project Manager
- Construction Manager
- Contracting Officer

HOW TO...

Complete the following steps to create and update projects in ePMXpress.

A. LOG INTO EPMXPRESS

1. Using Internet Explorer, go to the ePM Portal.
2. Click 'ePMXpress' in the list of applications.



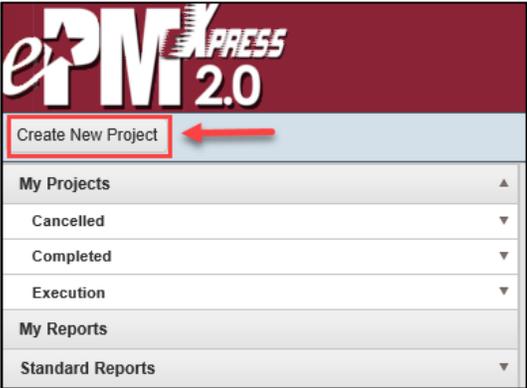
3. Optional: If external to the GSA network: Complete the following Multi-Factor Authentication (MFA) steps. (For screenshots, see [QRG 001: Intro to ePM](#))
 - a. Enter your GSA User ID and click 'Submit'.
 - b. Select a delivery method for your one-time registration code and click 'Submit'. (If your preferred delivery method does not exist, send a request to epmsupport@gsa.gov)
 - c. Enter the four digit registration code you received and click 'Submit'.
 - d. Enter your password and click 'Submit'.

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B. CREATE A NEW PROJECT

1. Click 'Create New Project'.



2. Select the appropriate ePM Program based on Region and Program.
3. Select the Project Template. (Contact your Regional System Administrator for more information about templates).



4. Populate the following fields:
 - PCN/RWA: The RWA or PCN that is entered will display information from IRIS, RETA, and FMIS on the ePMXpress Financial Data tab
 - Project Name: Use the following naming convention: State-City-Building Name-Project Name-SubLocation
 - Current State
 - Building ID(s)
 - Customer(s)
 - Project Type: See the [References](#) section for a list of Project Types
 - Managing Org
 - Funding Type
 - Delivery Method: See the [References](#) section for a list of Delivery Methods
 - Design Funding FY
 - Construction Funding FY
 - Project Description

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- Note: ePM 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.

5. In the Project Team section, click 'Add Line' to open the 'Select Contact' window.
6. In the Search field, type the name of the GSA Project Manager and click 'Find'.

7. Click the GSA PM's name in the list.
8. Select "Key:PM : GSA Project Manager" as the Project Role.

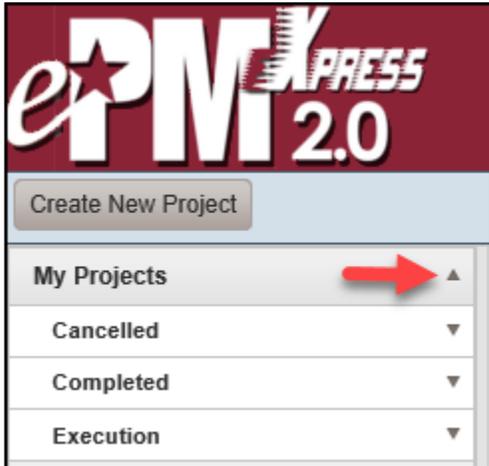
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9. Select Project Access as appropriate. Repeat steps 6-10 for Contracting Officer and Project Sponsor/Project Executive.
10. **Optional:** Add more project team members as needed. (Team members can be added after project creation. See section E below.)
11. Enter milestone Estimate dates. (The milestone schedule can be updated after project creation. See section F below.)
12. Enter authorized project funding. (Funding can be updated after project creation. See section G below.)
13. Click 'Save' in the toolbar.

C. OPEN AN EXISTING PROJECT

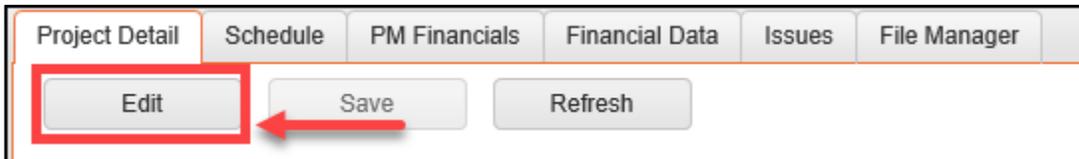
1. In the left menu, click the appropriate level 1 grouping to expand level 2.



2. Click on the appropriate level 2 grouping to display available projects.
3. Click on the appropriate project open that project in the window.

D. EDIT PROJECT DETAILS

1. With the appropriate project open, click the 'Project Detail' tab.
2. Click 'Edit' in the toolbar.



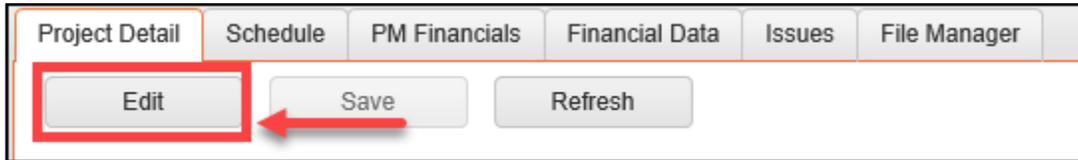
3. Edit fields as needed. (For the Project Status field see section L below)
4. Click 'Save' in the toolbar.

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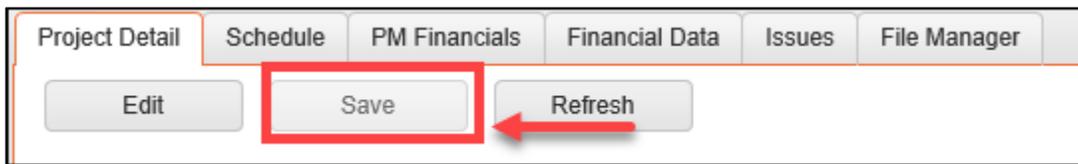
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E. EDIT THE PROJECT TEAM

1. With the appropriate project open, click the 'Project Detail' tab.
2. Click 'Edit' in the toolbar.



3. In the Project Team section, click 'Add Line' to open the Select Contact window.
4. In the Search field type the name of the project team member and click 'Find'.
5. Click the appropriate name in the list.
6. Select the appropriate role from the Project Role list.
7. Select Project Access as appropriate.
8. Click 'Save' in the toolbar.



F. EDIT THE MILESTONE SCHEDULE

1. With the appropriate project open, click the 'Schedule' tab.
2. Click 'Edit' in the toolbar.
3. To add a milestone, click 'Add Milestone' and enter a description in the 'Activity (Milestone/Task)' column.
4. To remove a milestone, select the milestone by checking the box to the left of the Activity then clicking 'Delete Milestone'.
5. Enter an Estimated Date for each milestone.

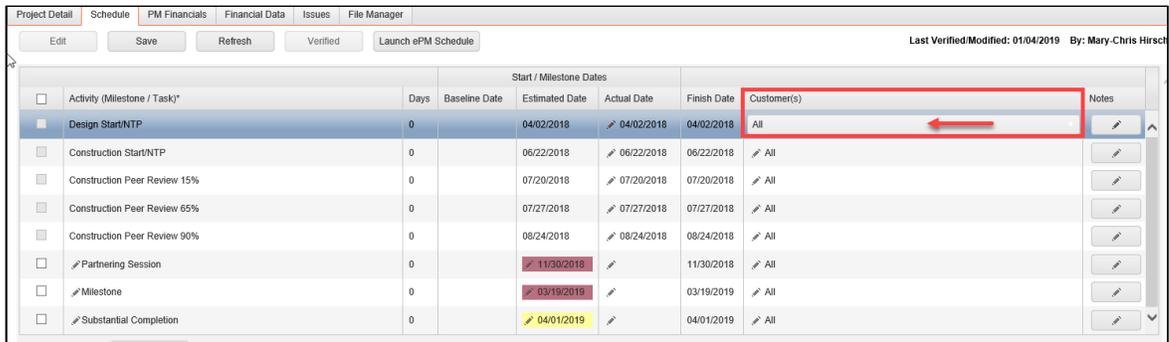
		Start / Milestone Dates						
<input type="checkbox"/>	Activity (Milestone / Task)*	Days	Baseline Date	Estimated Date	Actual Date	Finish Date	Customer(s)	Notes
<input type="checkbox"/>	Design Start/NTP	0		04/02/2018	04/02/2018	04/02/2018	All	
<input type="checkbox"/>	Construction Start/NTP	0		06/22/2018	06/22/2018	06/22/2018	All	
<input type="checkbox"/>	Construction Peer Review 15%	0		07/20/2018	07/20/2018	07/20/2018	All	
<input type="checkbox"/>	Construction Peer Review 65%	0		07/27/2018	07/27/2018	07/27/2018	All	
<input type="checkbox"/>	Construction Peer Review 90%	0		08/24/2018	08/24/2018	08/24/2018	All	
<input type="checkbox"/>	Partnering Session	0		11/30/2018		11/30/2018	All	
<input type="checkbox"/>	Milestone	0		03/19/2019		03/19/2019	All	
<input type="checkbox"/>	Substantial Completion	0		04/01/2019		04/01/2019	All	

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- To baseline a milestone, select the milestone by checking the box to the left of the Activity then clicking 'Baseline' (All milestones can be selected by checking the box in the header)
- Enter actual dates for each milestone as they are completed.
- If the project has multiple customers and the milestone only impacts one of those customers, select the appropriate customer from the list next to that milestone.

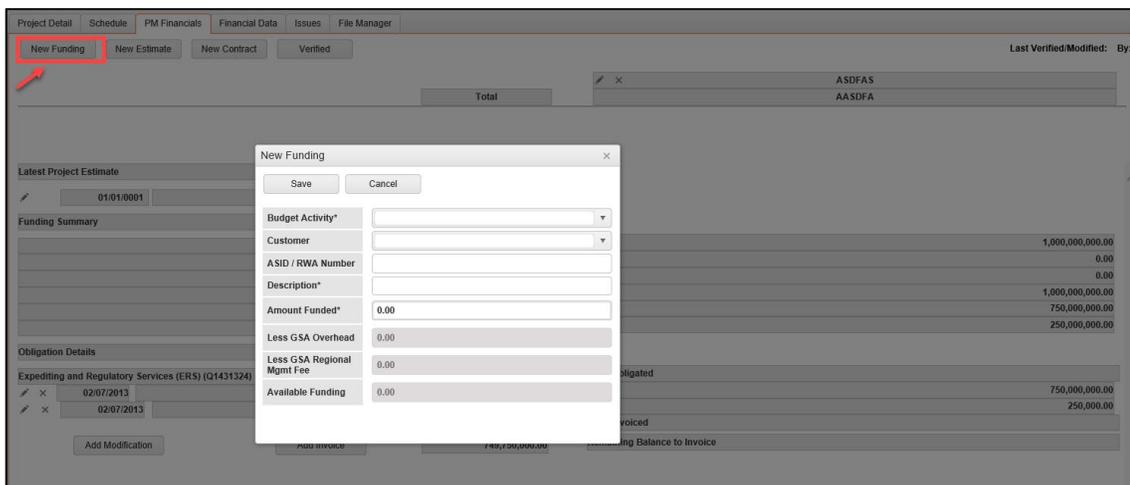


- To add notes about a milestone, click the pencil icon to the right of the milestone, enter notes, and click 'OK'.
- Click 'Save' in the toolbar.
- Optional: If no changes are needed to the milestone schedule click 'Verified' in the toolbar to update the last verified date. (See section L below for more information)
- Optional: To manage milestones in a Gantt view click 'Launch ePM Schedule' in the toolbar.

G. CREATE NEW FUNDING

PM Financials are your personal record/checkbook - not the official financial record.

- With the appropriate project open, click the 'PM Financials' tab.
- Click 'New Funding' in the toolbar.
- Populate required fields marked with an "*".



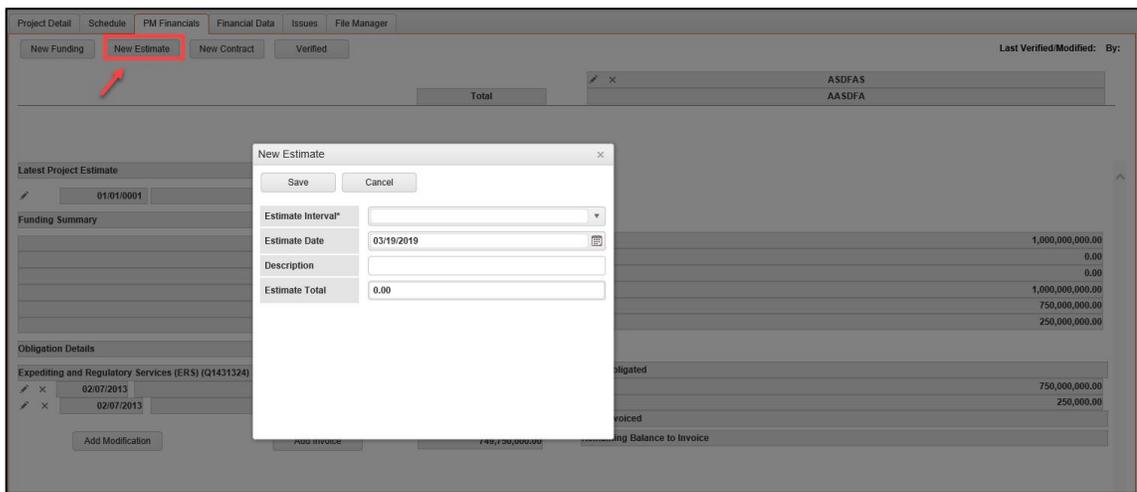
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4. **Optional:** Populate additional fields as needed.
5. Click 'Save' in the toolbar.
6. Repeat steps 2 through 5 as needed to add additional funding streams.
7. Note: You will need to create a funding document, even if it is \$1.00, before creating a project estimate or a contract obligation.

H. CREATE A NEW ESTIMATE

1. With the appropriate project open, click the 'PM Financials' tab.
2. Click 'New Estimate' in the toolbar.
3. Populate required fields marked with an "*" .



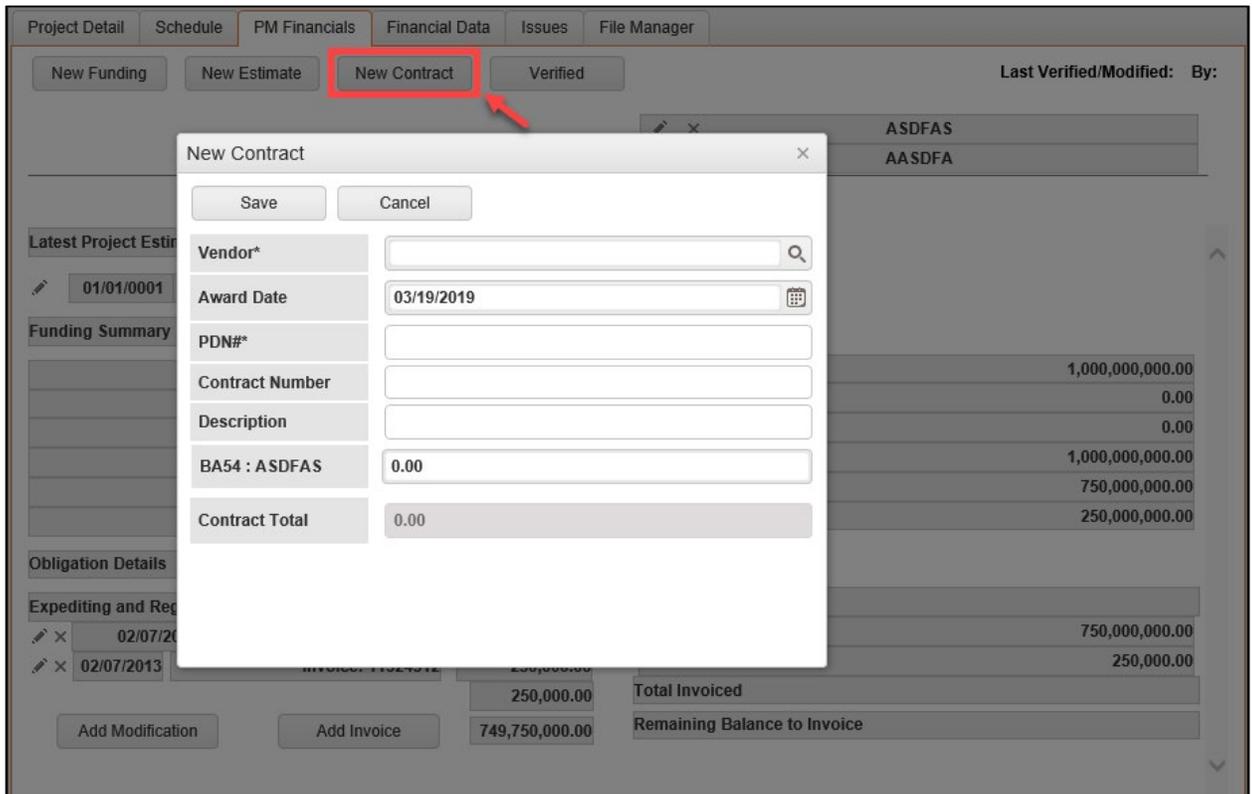
4. **Optional:** Populate additional fields as needed.
5. Click 'Save' in the toolbar.
6. Repeat steps 2 through 5 as needed.

I. CREATE A NEW CONTRACT, MODIFICATION, OR INVOICE

1. Contract
 - a. With the appropriate project open, click the 'PM Financials' tab.
 - b. Click 'New Contract' in the toolbar.
 - c. Populate required fields marked with an "*" .

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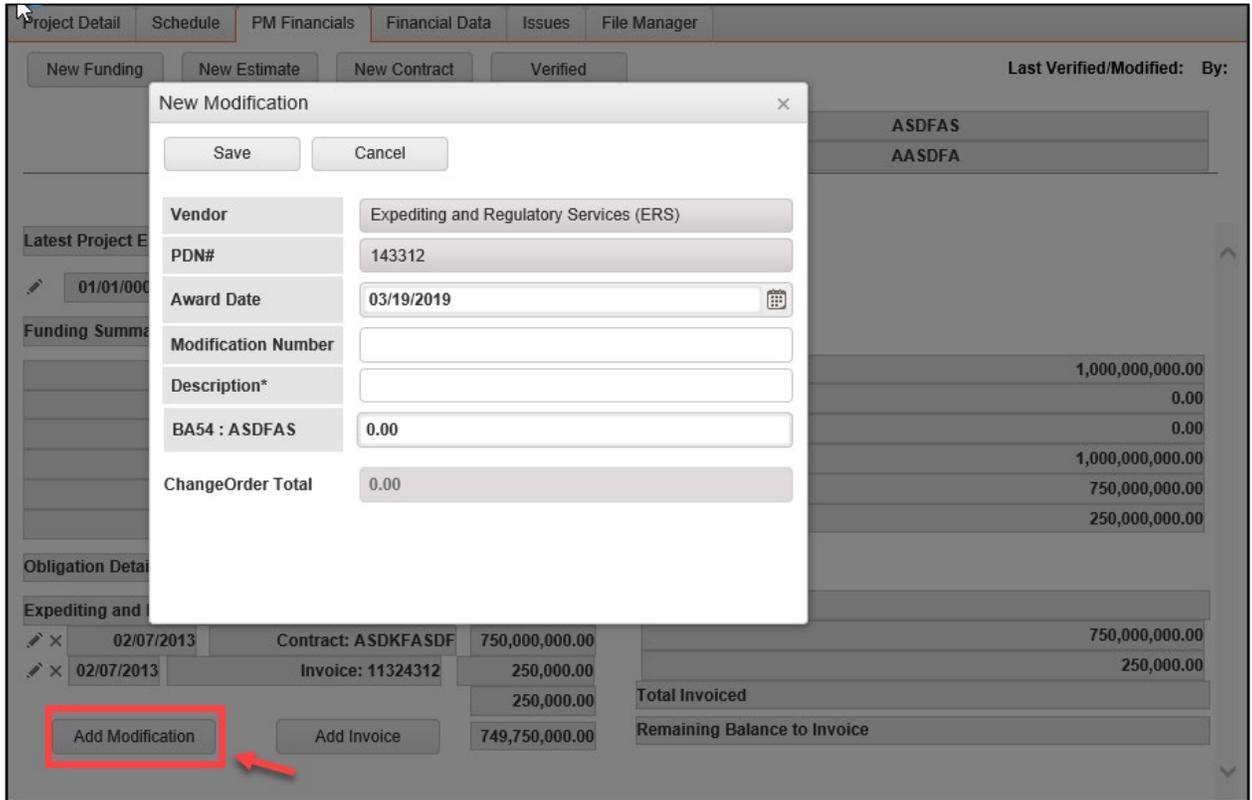
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- d. **Optional:** Populate additional fields as needed.
- e. Click 'Save' in the toolbar.
- f. Repeat steps b through e as needed.
2. Modification
 - a. With the appropriate project open, click the 'PM Financials' tab.
 - b. Click 'Add Modification' below the appropriate contract.
 - c. Populate required fields marked with an "*".

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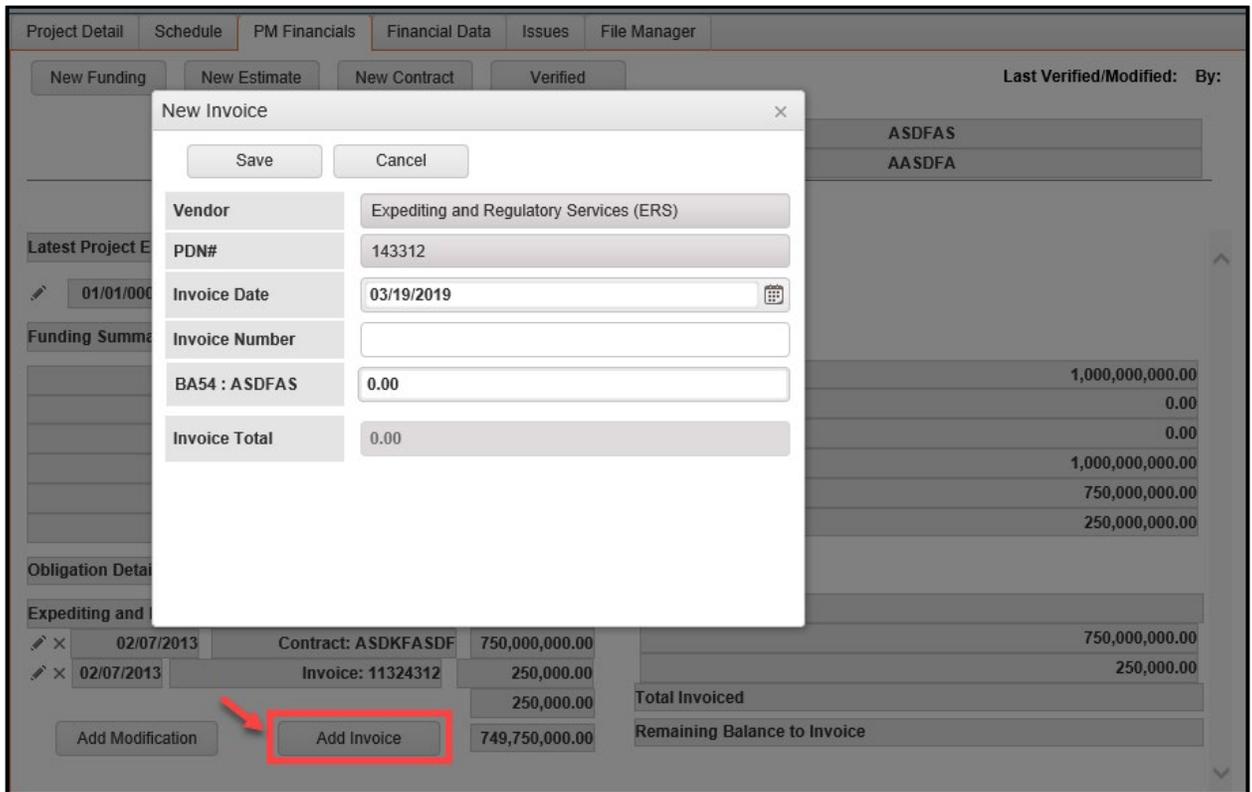
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- d. **Optional:** Populate additional fields as needed.
 - e. Click 'Save' in the toolbar.
 - f. Repeat steps b through e as needed.
3. Invoice
 - a. With the appropriate project open, click the 'PM Financials' tab.
 - b. Click 'Add Invoice' below the appropriate contract.
 - c. Populate required fields marked with an "*" .

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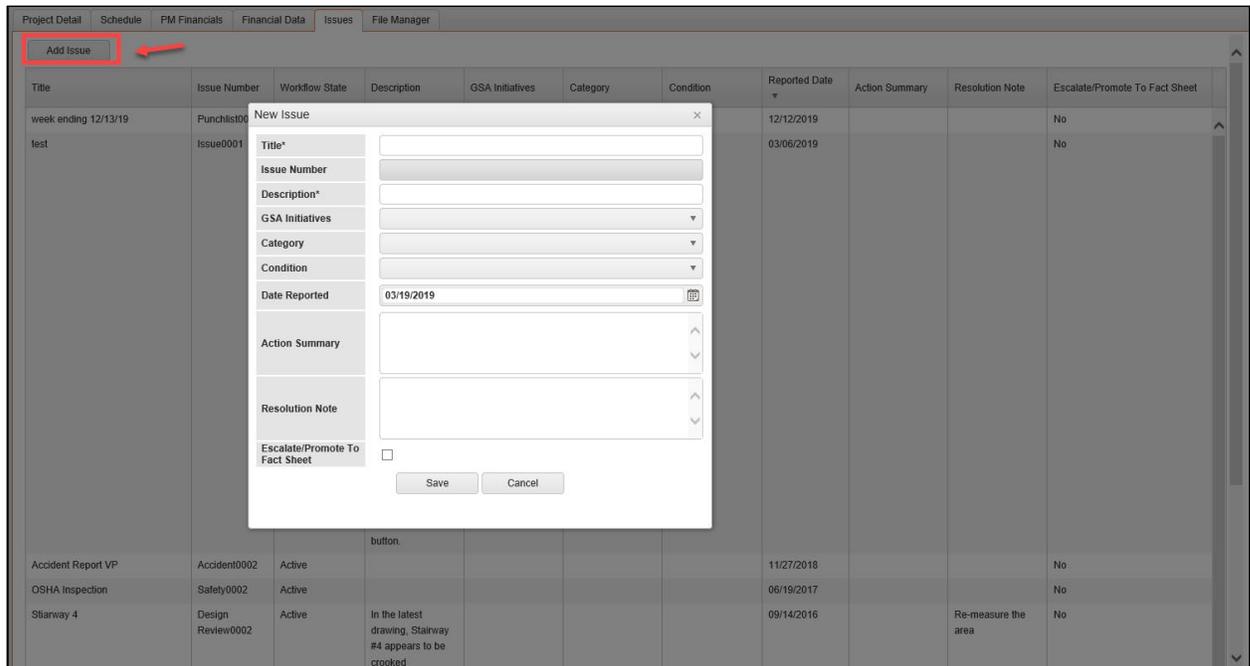
- d. **Optional:** Populate additional fields as needed.
- e. Click 'Save' in the toolbar.
- f. Repeat steps b through e as needed.

J. CREATE AN ISSUE

1. With the appropriate project open, click the 'Issues' tab.
2. Click 'Add Issue' in the toolbar.
3. Populate required fields marked with an "*" .

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4. **Optional:** Populate additional fields as needed.
5. Click 'Save' in the toolbar.

K. EDIT AN ISSUE

1. With the appropriate project open, click the 'Issues' tab.
2. Click the Issue that you wish to edit.
3. Edit the available fields as necessary.
4. Click 'Save' in the toolbar.

L. PROVIDE PROJECT UPDATES

Updates are required monthly, at a minimum, per Central Office guidance. Regional, Field Office, and/or Customer requirements may require updates more often.

1. Project Status
 - a. With the appropriate project open, click the 'Project Details' tab.
 - b. Click 'Edit' in the toolbar.
 - c. Click 'Add Status' below the Project Status field.
 - d. Select the 'As Of Date'.
 - e. Populate the 'Project Status' memo field.
 - f. Click 'Save' in the toolbar.
2. Schedule
 - a. If updates to the schedule are required see section F above.
 - b. If not, click 'Verified' in the toolbar.
3. PM Financials

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- a. If updates to the PM Financials are required see sections G-I above.
- b. If not, click 'Verified' in the toolbar.

M. CHANGE EPMXPRESS PREFERENCES

Users can change how projects are grouped and displayed in the left menu.

1. Click the 'My Preferences' icon in the top right of the screen.
2. In the Menu Grouping section, select the Level 1 grouping and Level 2 grouping.
3. Click 'Save'.

GUIDANCE

Description	Under \$25K	\$25K - \$150K	Over \$250K
Within 15 days of Project Authorization/Funding			
Create Project (B1-B13)	✓	✓	✓
Enter Estimated Milestone Dates (F5)	✓	✓	✓
Identify Project Manager (E1-E8)	✓	✓	✓
Project Management Plan (File Manager)			✓
Project Task Schedule (File Manager)			✓
At Construction or Design/Build Procurement Request Submitted			
Baseline Award Dates (F6)		✓	✓
Enter Funding (G1-G6)	✓	✓	✓
At Construction Start/NTP			
Baseline Substantial Completion Date (F6)	✓	✓	✓
Monthly Updates			
Enter additional Project Status (J1a-J1f)	✓	✓	✓
Verify Milestone Dates (J2a-J2b)	✓	✓	✓
Verify PM Financials (J3a-J3b)	✓	✓	✓
At Substantial Completion			
Enter Actual Substantial Completion Date (J2a-J2b)	✓	✓	✓
Enter Sustainability and Waste Diversion data	✓	✓	✓

Please refer to the [FY20 Small Projects ePM/ePMXpress Requirements](#) (requires GSA access) document for specific usage requirements for small projects.

REFERENCES

N. DELIVERY METHOD DEFINITIONS

- CMCC: Construction Manager as Constructor (at Risk) Full and Open Procurement: Delivery Method of the project is primarily CMc, and the associated acquisition strategy is full and open
- CMCI: Construction Manager as Constructor (at Risk) IDIQ/BPA: Construction Manager as Constructor (at Risk) IDIQ/BPA: Delivery Method of the project is primarily CMc, and the associated acquisition strategy is indefinite delivery/indefinite quantity (IDIQ) contract or Blanket Purchase Agreement (BPA)
- CMCS: Construction Manager as Constructor (at Risk) Set Aside - Small Business, HUB, SDVOSB: Delivery Method of the project is CMc, and procurement is done through contracts that are exclusively for HUB or SDVOSB contractors
- D/B-BC: Design/Build Bridging Full and Open Procurement: Delivery Method for the project is design/build bridging, and the acquisition strategy is full and open
- D/B-BI: Design/Build Bridging IDIQ/BPA: Delivery Method for the project is design/build bridging, and the acquisition strategy is indefinite delivery/indefinite quantity (IDIQ) contract or Blanket Purchase Agreement (BPA)
- D/B-BS: Design/Build Bridging Set Aside - Small Business, HUB, SDVOSB: Delivery method for the project is design/build bridging, and the procurement is done through contracts that are exclusively for HUB or SDVOSB contractors
- D/BC: Design/Build Full and Open Procurement: Delivery Method for the project is design/build, and the acquisition strategy is full and open
- D/BI: Design/Build IDIQ/BPA: Delivery Method for the project is design/build, and the acquisition strategy is indefinite delivery/indefinite quantity (IDIQ) contract or Blanket Purchase Agreement (BPA)
- D/BS: Design/Build Set Aside - Small Business, HUB, SDVOSB: Delivery Method for the project is design/build, and procurement is done through contracts that are exclusively for HUB or SDVOSB contractors
- D-B-BC: Design Bid Build Full and Open Procurement: Delivery Method for the project is traditional design bid build delivery, and the acquisition strategy is full and open
- D-B-BI: Design Bid Build IDIQ/BPA: Delivery Method for the project is traditional design bid build delivery, and the acquisition strategy is indefinite delivery/indefinite quantity (IDIQ) contract or Blanket Purchase Agreement (BPA)
- D-B-BS: Design Bid Build Set Aside - Small Business, HUB, SDVOSB: Delivery Method for the project is traditional design bid build delivery, and the procurement is done through contracts that are exclusively for HUB or SDVOSB contractors
- DC: Design Only Full and Open Procurement: Delivery method for the project is only design, and the acquisition strategy is full and open
- DI: Design Only IDIQ/BPA: Delivery method for the project is only design, and the acquisition strategy is indefinite delivery/indefinite quantity (IDIQ) contract or Blanket Purchase Agreement (BPA)

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- DS: Design Only Set Aside - Small Business, HUB, SDVOSB: Delivery method for the project is only design, and procurement is done through contracts that are exclusively for HUB or SDVOSB contractors
- IPD: Integrated Project Delivery: Contractually requires collaboration among the primary parties (GSA, A/Er, and contractor) so that the risk, responsibility, and liability for project delivery are collectively managed and appropriately shared
- S: Service
- O: Other
- TBD: To Be Determined

O. PROJECT TYPE DEFINITIONS

- Repair and Alteration: Design, repair, and alteration of owned space
- Repair and Alteration Below \$25,000: Design, repair and alteration, under \$2500, of owned or leased space
- Post Occupancy Lease Alteration: Design, repair, and alteration of leased space
- New Construction: Design and construction of a new facility
- Disaster Supplemental Funding: Design, repair, and alteration of space that was damaged during a disaster such as hurricane, tornado, or flood
- Energy/Water Project: Design and alteration of space to reduce the use of energy and water resources
- Fire and Life Safety Project: Upgrade, replacement, and improvement of fire protection systems and life safety features
- Judicial Security Project: alterations to improve physical security in Government-owned buildings occupied by the Judiciary and the Department of Justice, U.S. Marshals Service
- Lease Cost Avoidance Plan (LCAP): Space repair and alteration in order to avoid increased lease costs
- Space Consolidation Project: Design, repair, and alteration of space in an effort to consolidate agencies' space and reduce their annual rent
- Site Only: Purchase or transfer of land
- Study Only: Study, such as a feasibility study or program development study, for a possible future project
- Design Only: Design of owned or leased space that may be repaired or constructed at a later date
- Furniture, Fixtures, and Equipment (FF&E): Delivery and installation of furniture, fixtures, and equipment
- Service Contracts: Project entails the maintenance of a building system such as heating, ventilating, and air conditioning systems over a certain period of time
- Prospectus Lease: Project in which the total space requirements included in the lease agreement will result in a net annual rent that exceeds the current prospectus threshold
- Lease Procurement: Project entails procurement of space in leased facility
- Non-Space Projects: Project does not involve design or construction of space. Examples include information technology, disposal, or space planning projects.

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- Other

P. OTHER QUICK REFERENCE GUIDES

Reference the following ePM Quick Reference Guides (QRGs) for additional information. QRGs can be accessed through the [ePM Portal](#).

- QRG 001 - Navigating ePM
- QRG 104 - File Manager