

# ePM Quick Reference Guide #71

## Executive Project Fact Sheet

### WHAT IS THE EXECUTIVE PROJECT FACT SHEET?

The Executive Project Fact Sheet is one-page report that contains high-level information from ePM. This report displays the following information:

- Project Basics
- Executive Status
- Scope
- Schedule
- Financial Summary

### WHO WILL USE THIS?

- Program Managers
- Project Managers
- GSA Executives

### HOW TO...

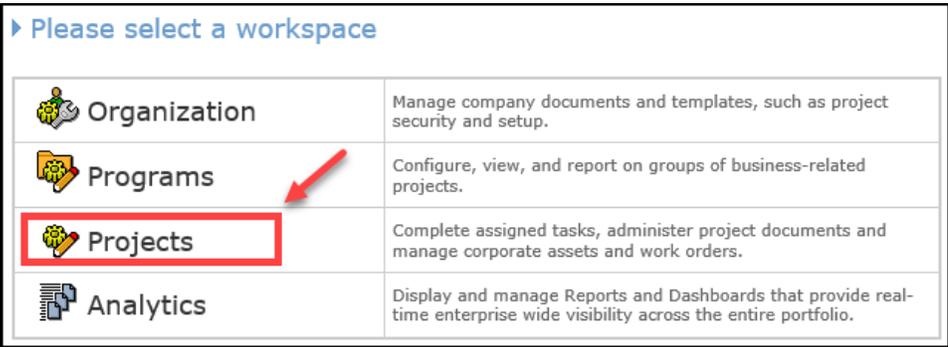
The Executive Project Fact Sheet should be edited on a monthly basis. Below are the steps to edit the information that appears on the report:

#### A. GENERAL INFORMATION

The Project Properties document is where general information on the Executive Project Fact Sheet is entered. From the Project Properties document, users can update:

- Project Type
- Delivery Method
- Location
- Building ID
- Scope

1. Log into ePM as a user and click the Projects workspace.

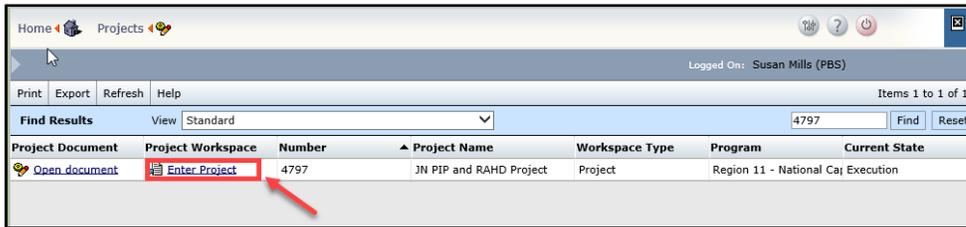


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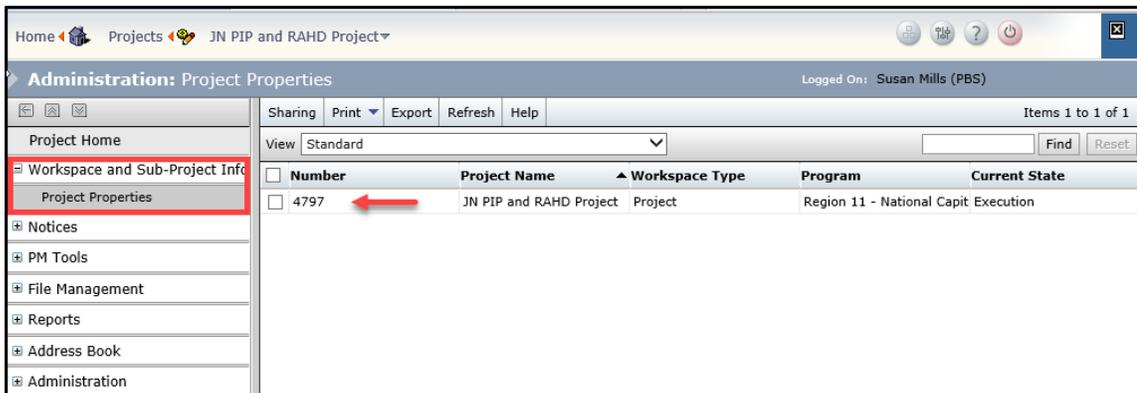
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2. Click 'Enter Project' next to the project that you would like to edit.



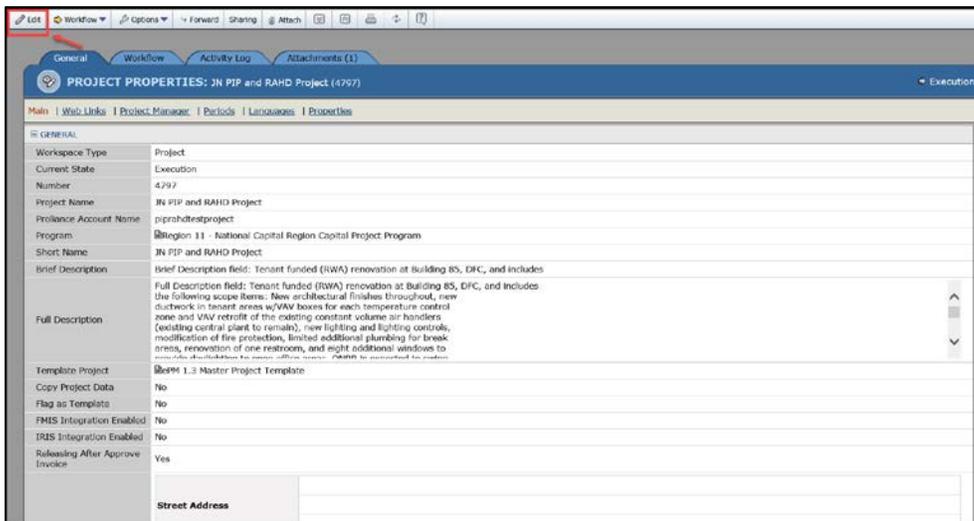
3. Navigate to 'Workspace and Sub-Project Info' in the left-hand navigation panel, expand the menu, and choose 'Project Properties'.



4. This will open the 'Project Properties' page. Click the Project Number to launch the Project Properties editing window.
5. Click 'Edit' to begin editing.
6. Enter the following information:
  - Service Center
  - Project Type
  - Delivery Method
  - Total Gross Area (SF)
  - Inside Parking Area (SF)
  - Usable Area (SF)
  - Inside Parking Spaces and Outside Parking Spaces
  - Number of Occupants
  - Total Rentable Area (SF)
  - Building ID

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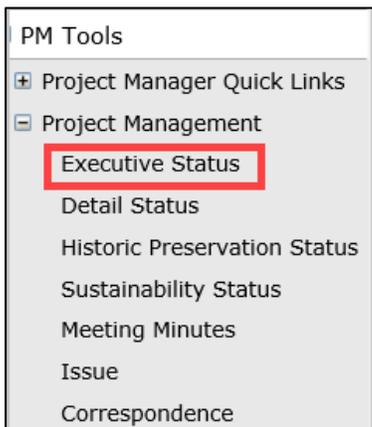
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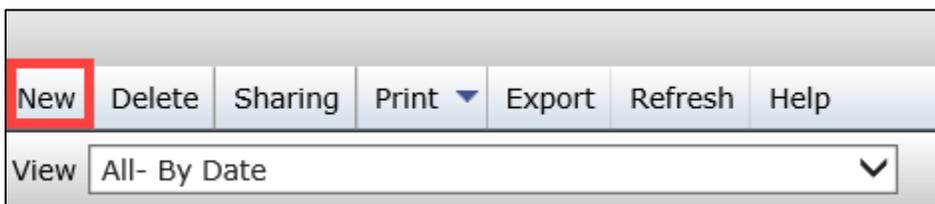
7. Click 'Save'.

### B. EXECUTIVE STATUS

1. Navigate to 'PM Tools' in the left-hand menu, expand the 'Project Management' menu, and choose 'Executive Status'.



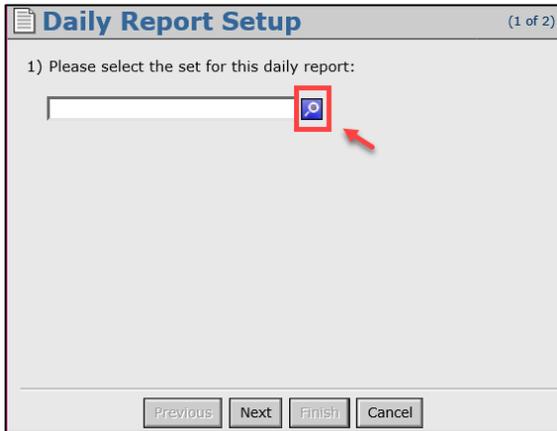
- 2.
3. Click 'New'.



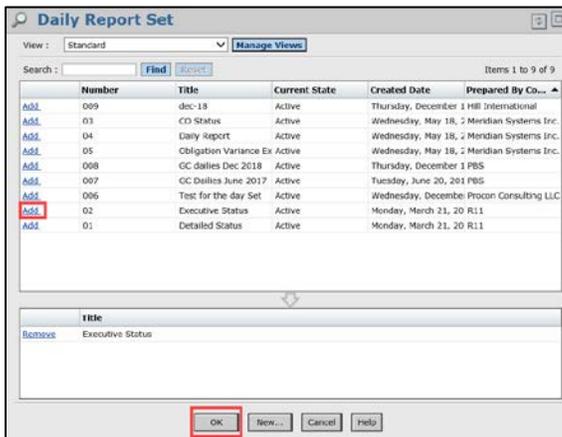
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- In the Daily Report Setup window, click the magnifying glass icon.



- In the Daily Report Set window that opens, click 'Add' to select the Executive Status. Click 'OK'.



- Click 'Next' on the Daily Report Setup window.
- Click 'Finish' on the second 'Daily Report Setup' window.
- In the 'Daily Report: New Document' window, enter the Title. The Journal Date will automatically populate with the current date. If the date needs to be changed, enter a new Journal Date.

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9. Click 'Journal' to go to the Journal page. Then click 'Add Line' to begin entering the narrative. Update the 'Journal' page to include a narrative on on-going procurement, design, and construction activities such as recently awarded contracts, scope changes, and tenant changes.
  - Note: On the Executive Project Fact Sheet, the first 3,000 characters of the Executive Status will be displayed.
  - 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.
10. Click 'Workflow' in the top toolbar and select 'Accept/Approve' to transition the document to the 'Accepted/Approved' state.

**NOTE:** A new daily report should be created for each entry.

### C. EARNED VALUE

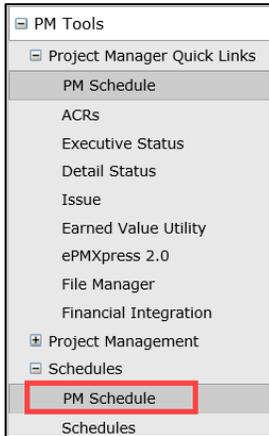
See QRGs 105 and 106 for detailed instructions on updating the Earned Value module for all active construction projects.

### D. SCHEDULE

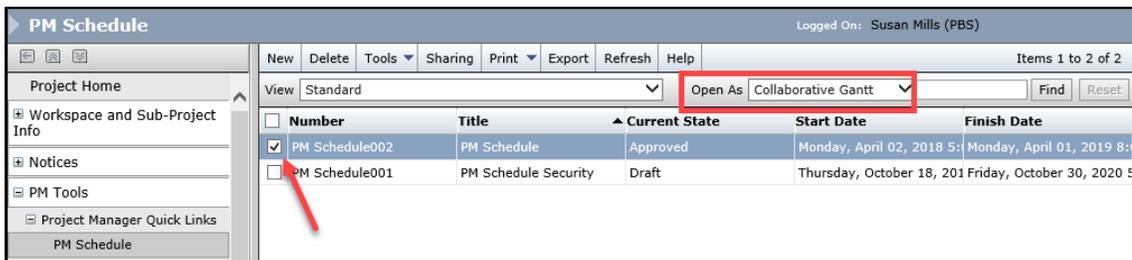
1. Navigate to 'PM Tools' in the left-hand menu, expand the 'Schedules' menu, and choose 'PM Schedule'.

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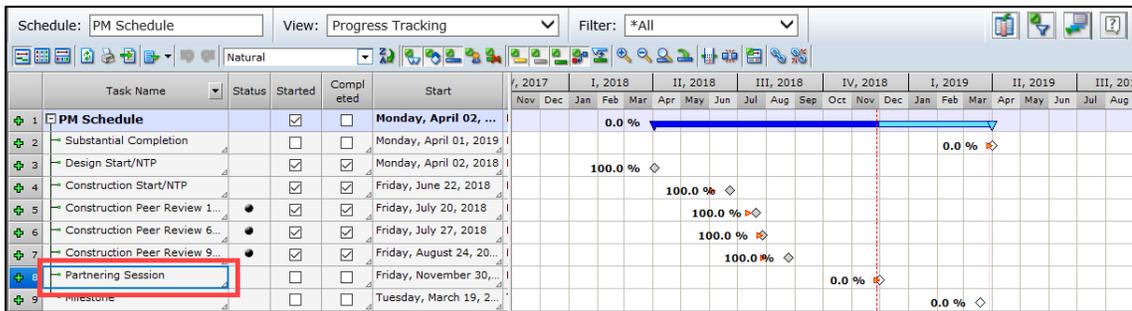
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- In the Schedule register, check the box next to the schedule (or schedules) you wish to view, then click 'Tools' and select to either open in Collaborative Gantt or CPM Gantt view.



- To enter or update estimated dates, double-click the name of a milestone.



- In the 'Milestone Properties' window, update the dates in the Early Start field and click 'OK'.
- To enter or update actual dates, double-click the name of a milestone, which opens the 'Milestone Properties' window. Then update the dates in the Actual Start field.
- Click 'OK'.

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Name: Partnering Session  
 Responsible Person: Valerie Pierre  
 Linked Activity Document: [Open]

Schedule | Advanced | Activity Codes | Notes

**Schedule**

|                  | Actual | Remaining | Total |
|------------------|--------|-----------|-------|
| Duration (Days)  | 0.0d   | 0.0d      | 0.0d  |
| Duration (Hours) | 0.0h   | 0.0h      | 0.0h  |
| Work             | 0.0    | 0.0       | 0.0   |

No Work      Unit of Measure: [ ]

**Dates**

|        | Actual                 | Early                     | Late |
|--------|------------------------|---------------------------|------|
| Start  | [Actual] (highlighted) | Friday, November 30, 2018 |      |
| Finish |                        | Friday, November 30, 2018 |      |

**Progress**

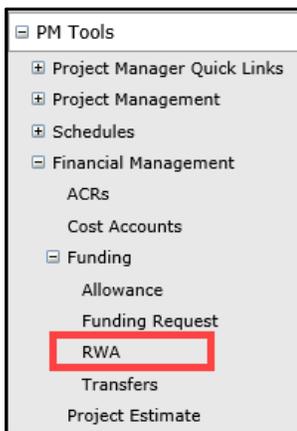
% Complete: 0.0 %       Started       Complete

[OK] [Cancel] [Help]

### E. FINANCIAL

#### RWAs

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.

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5. Click the Line Items page and click 'Add'. 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

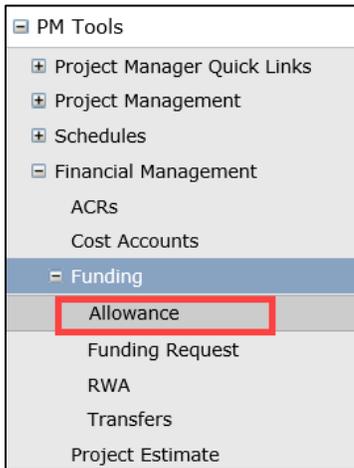
6. Click 'Save'.
7. Click 'Workflow' and choose 'Approve.'

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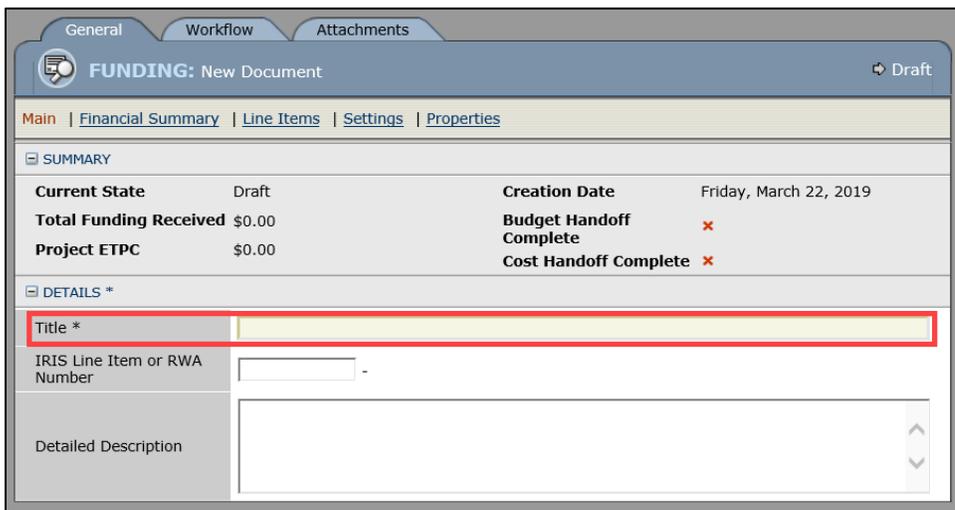
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### Allowance

- Navigate to 'PM Tools' in the left-hand menu and expand the 'Financial Management' menu. Then expand the 'Funding' menu. Click 'Allowance.'



- Click 'New' to begin creating the Allowance.
- In the 'New Document' window, enter the Allowance title using the following naming convention:  
*FY\_BA\_Region\_Line Item\_Program\_Building Name*



- 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
- Click 'Save'.

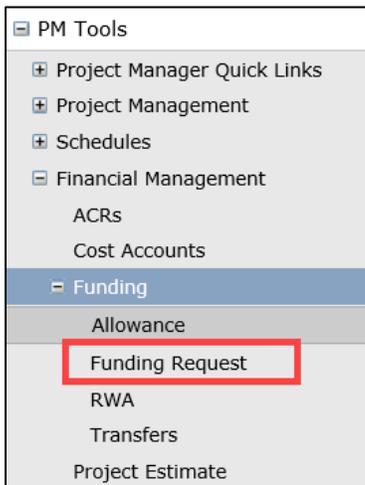
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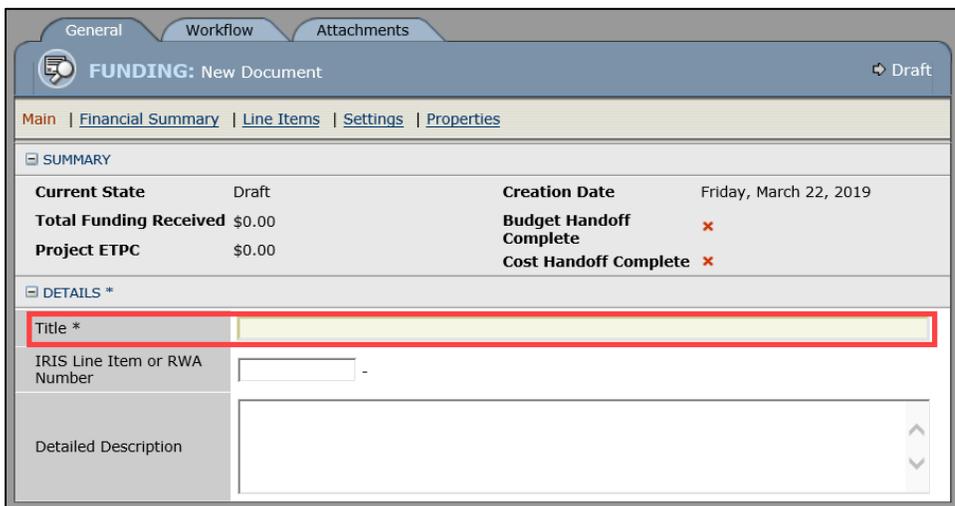
- Click 'Workflow' and choose 'Set to Pending.' The authorized approver will then approve the Allowance. Funding documents must be in the approved state in order to appear on the report.

### Funding Requests

- Navigate to 'PM Tools' in the left-hand menu and expand the 'Financial Management' menu. Then expand the 'Funding' menu. Click 'Funding Request.'



- Click 'New' to begin creating the funding request.
- In the 'New Document' window, enter the Funding Request title using the following naming convention: *FY\_BA\_Region\_Line Item\_Program\_Building Name*



- Click the Line Items page and click 'Add'. 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

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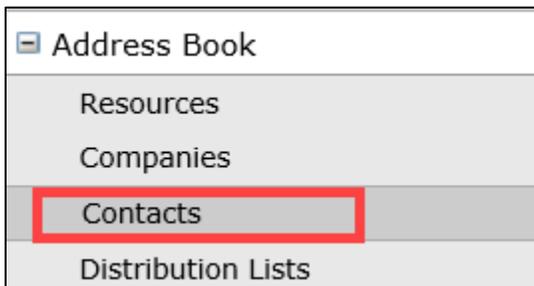
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- Item Amount
  - Building ID
18. Click 'Save'.
  19. Click 'Workflow' button and choose 'Set to Pending'. The authorized approver will then approve the Funding Request.

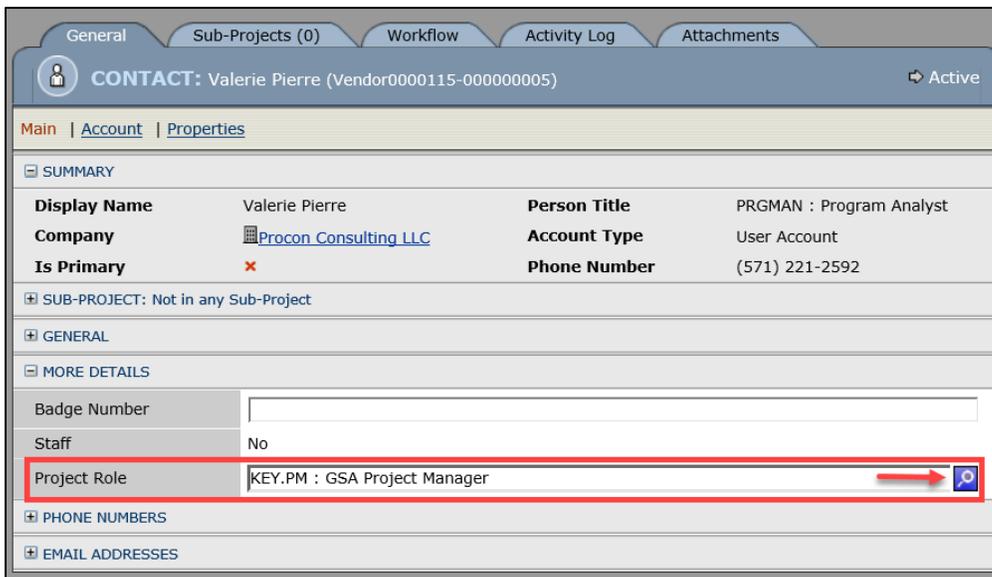
### F. TEAM MEMBERS – PROJECT MANAGER

Team Members are located in the project address book.

1. Navigate to the 'Address Book' in the left-hand menu and select 'Contacts' to open the window.



2. Click a user's name to open the 'Contact window'.
3. Click 'Edit' to begin editing.
4. 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.
5. Select the Key.Project Manager role and click 'OK' to return to the contact window. Indicate only one person on the team as the Key Project Manager.



6. Click 'Save'.

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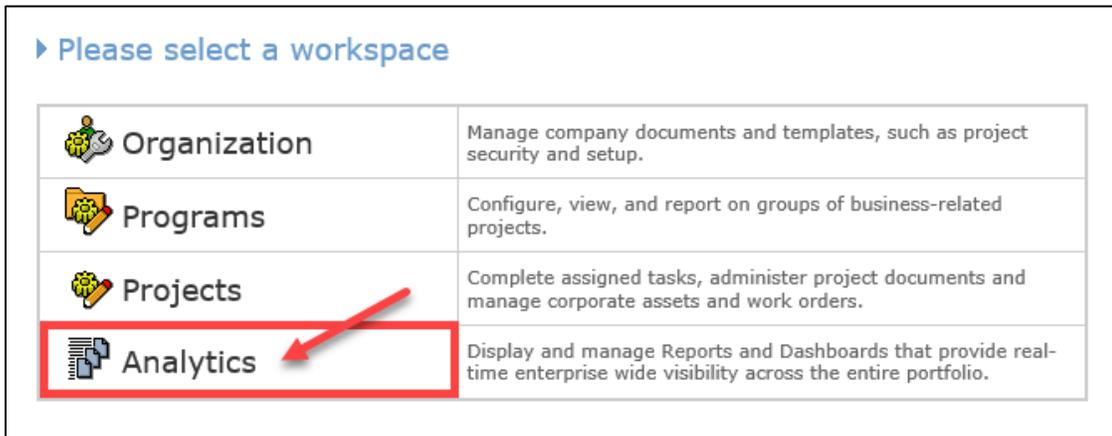
### G. GENERATING REPORTS

The Executive Project Fact Sheet can be run at any time via the Cognos reporting tool. If you do not have Cognos access, please contact your ePM administrator.

1. From the ePM Portal click on ePM.



2. Next click 'Analytics' on the 'ePM Workspace' page.



3. Click 'My Home'.
4. Click 'Fact Sheet Reports'.
5. Locate the "Executive Project Fact Sheet." In the Actions column, click the blue arrow button to run the report with options.
6. Select the report format in the Format field. PDF is the recommended format for the Executive Project Fact Sheet. Click 'Run'.

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Select how you want to run and receive your report.

**Format:**  
 PDF

**Accessibility:**  
 Enable accessibility support

**Language:**  
 English (United States)

**Delivery:**  
 View the report now  
 Save the report  
 Print the report:  
 Printer location:   
 Send me the report by email  
 Send the report to my mobile device

**Prompt values:**  
 No values saved  
 Prompt for values

7. On the Select Programs page, select the program and click 'Next'.
8. On the Select Projects page, either enter a keyword to locate the project(s) or scroll through the project list. Hold down the Ctrl key on the keyboard and use the mouse to select multiple projects.
9. To finalize the project selection, click 'Insert'. The selection(s) will appear in the Choice box.

**Select Project State:**

- Cancelled
- Completed
- Execution
- On-Hold
- Planning
- Close Out

**Select Projects:**

**Keywords:**  
 Type one or more keywords separated by spaces.

**Options**

**Results:**

- 18221: CA-Los Angeles-FB-DEA R&A
- 18291: CA-Los Angeles-Edward R Roybal FB&CH-R&A for Courts Consolidation Planning
- 27135: CA-San Diego-San Ysidro LPOE-Phase 3 Southbound Realignment
- 2721: CA-Calexico-BS Main Bldg-Calexico West LPOE Capital Projects
- 27898: CA-San Diego-San Ysidro LPOE-Admin and East Ped Bldg Phase 2
- 30660: CA-San Jose-Limited R&A Peckham San Jose FB and USCH
- 3316: CA-Los Angeles-District CT-Follow on Projects
- 33751: CA-SAN DIEGO-EDWARD J. SCHWARTZ-FOB CT FY16 DBB delivery - Grand Jury, EPA, EOIR, Building System Upgrade
- 34244: CA-RICHMOND-FRANK HAGEL FEDERAL-Fire Pump Room & Sprinkler System Renovation
- 34305: CA-RICHMOND-FRANK HAGEL FEDERAL- Partial Seismic Upgrade
- 36868: CA-Richmond-Frank Hagel FB-Chiller Replacement
- 36869: CA-Richmond-Frank Hagel FB-Air Handler Controls Upgrade (AHUs 6,7,8,10&10A)
- 38571: CA-San Diego-Edward J Schwartz FB&CH-FY16 Capital D-B Project
- 46787: R9 - Laser Scanning Project
- 48908: HI-Honolulu-Prince J Kuhio FOB-DHS/ICE-ERO & DHS/ICE-OPLA-Tenant Improvement
- 50061: CA-San Diego-Edward J. Schwartz FB&CH-USMS Cellblock Renovation
- 50714: CA-Richmond-Frank Hagel FB-Elevator Modernization Construction
- 50957: CA-San Francisco-Phillip Burton FB&CT-USMS-20th FL Detention Refresh
- 50958: CA-Los Angeles-Edward R Roybal FB&CH-USMS-Detention Refresh
- 54014: AZ-Phoenix-Federal Building & C-HHS-OMHA

**Choice:**

10. Click 'Finish' to run the report.

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### SAMPLE REPORT

## Executive Project Fact Sheet

**CA-SAN DIEGO-EDWARD J. SCHWARTZ-FOB CT FY16 DBB delivery - Grand Jury, EPA, EOIR, Building System Upgrade**

**GENERAL INFORMATION**

Project Manager(s): Ana Lau (415) 522-4097  
 Region:  
 Service Center: 1.1PC: Design and Construction Division  
 Project Type: RA: Repair and Alteration  
 Program Area:  
 Delivery Method: D-B-B: Design - Bid - Build

**Executive Status:** Project Phase/% Complete: Construction/11.5%  
 On-Budget/Schedule: Yes/Yes  
 Recent Activities: Fireproof patching, wall & derestory soffit framing in 4th floor EOIR. Fireproof patching in 4th floor EPA. Wall & duct work layout in 1st Floor Grand Jury space.  
 Upcoming Activities: In-progress review of Construction Submittals and RFIs. Overhead cable tray installation in 4th floor EOIR. Overhead duct work and electrical in-wall rough-in in 4th floor EPA. Overhead mechanical, electrical, plumbing rough-in 1st floor Grand Jury. 15% Construction Excellence Peer Review scheduled for Feb. 11-12, 2019. No construction scheduled between 12/21/2018 - 1/1/2019.  
 Risks/Concerns: None  
 Customer Successes/Concerns:

| SCOPE                       |           |          | EARNED VALUE                                 |          |            |                       |
|-----------------------------|-----------|----------|----------------------------------------------|----------|------------|-----------------------|
|                             |           |          | Contract                                     | OnBudget | OnSchedule | Avail. Cntgcy (\$000) |
| Total Gross Area:           | SF        | SM       | 47PK0118C0007003: GC - Construction Contract | ●        | ●          | \$1,390               |
| Inside Parking Area:        | SF        | SM       |                                              |          |            |                       |
| Gross Area without Parking: | SF        | SM       |                                              |          |            |                       |
| Usable Area:                | 29,320 SF | 2,724 SM |                                              |          |            |                       |
| Inside Parking Spaces:      | Spaces    |          |                                              |          |            |                       |
| Outside Parking Spaces:     | Spaces    |          |                                              |          |            |                       |
| Number of Occupants:        |           |          |                                              |          |            |                       |
| Total Rentable Area:        | 38,702 SF | 3,596 SM |                                              |          |            |                       |
| ARRA related Area:          | SF        | SM       |                                              |          |            |                       |

| SCHEDULE                               |          |          |          | FINANCIAL                              |                 |            |                 |
|----------------------------------------|----------|----------|----------|----------------------------------------|-----------------|------------|-----------------|
| Milestone                              | Baseline | Planned  | Actual   | Funding (\$000)                        |                 |            |                 |
|                                        |          |          |          | Function Code                          | Received        | Pending    | Projected       |
| Project Authorization / RWA Acceptance | 4/20/16  | 4/20/16  | 4/20/16  |                                        | \$2,238         | \$0        | \$2,238         |
| Requirements Finalized                 |          |          |          |                                        |                 |            |                 |
| Site Acquisition Start                 |          |          |          |                                        |                 |            |                 |
| Site Acquisition Complete              |          |          |          |                                        |                 |            |                 |
| Design RFP Published in FedBizOpps     | 6/8/16   | 6/8/16   | 6/8/16   | 221: CM Design Review                  | \$24            | \$0        | \$24            |
| Design Award                           | 12/1/16  | 12/1/16  | 12/1/16  | 413: Primary Contracts                 | \$13,898        | \$0        | \$13,898        |
| Design Start / NTP                     | 12/1/16  | 12/1/16  | 12/1/16  | 414: Other Contracts                   | \$0             | \$0        | \$0             |
| Design Complete                        | 12/1/17  | 12/1/17  | 12/1/17  | 511: Management & Inspection - Constr. | \$2,024         | \$0        | \$2,024         |
| Construction or D/B RFP Issued         | 12/15/17 | 12/15/17 | 12/15/17 | 982: Distributed Nonrecurring RWA'S    | \$2             | \$0        | \$2             |
| Construction or D/B Contract Award     | 5/31/18  | 7/13/18  | 7/13/18  | 9R2: Indirect Costs Transf To RWA      | \$1             | \$0        | \$1             |
| Construction Start / NTP               | 6/29/18  | 7/23/18  | 7/23/18  | <b>Total</b>                           | <b>\$18,187</b> | <b>\$0</b> | <b>\$18,187</b> |
| Substantial Completion                 | 4/30/20  | 4/30/20  |          |                                        |                 |            |                 |
| Occupancy                              | 6/30/20  | 6/30/20  |          |                                        |                 |            |                 |
| Project Closeout                       | 4/30/21  | 4/30/21  |          |                                        |                 |            |                 |

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### REFERENCES

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

- QRG 01 - Navigating ePM
- QRG 02 - Using the ePM Address Book
- QRG 31 - Funding Document Creation
- QRG 32 - Funding Document Approval
- QRG 40 - Field Reports
- QRG 41 - Issues and Logs
- QRG 42 - Creating Schedules
- QRG 79 - Creating Milestone Schedules
- QRG 104 - File Manager
- QRG 105 - Earned Value