WHAT IS THE EXECUTIVE PROJECT FACT SHEET?

The Executive Project Fact Sheet is a 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.

Please select a workspace

![Workspace Selection]

Manage company documents and templates, such as project security and setup.
Configure, view, and report on groups of business-related projects.
Complete assigned tasks, administer project documents and manage corporate assets and work orders.
Display and manage Reports and Dashboards that provide real-time enterprise-wide visibility across the entire portfolio.
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
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. Click ‘New’.
4. In the Daily Report Setup window, click the magnifying glass icon.

5. In the Daily Report Set window that opens, click ‘Add’ to select the Executive Status. Click ‘OK’.

8. 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.
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’.
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 milestone.

4. In the ‘Milestone Properties’ window, update the dates in the Early Start field and click ‘OK’.

5. 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.

6. Click ‘OK’.
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.
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.’
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 ‘New’ 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 ‘Save’.
13. 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**

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

15. Click ‘New’ 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 ‘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
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’.
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.


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’.
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.

10. Click ‘Finish’ to run the report.
## 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
- **Regions:**
- **Service Centers:** 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 & d/soffit framing in 4th floor EDR. Fireproof patching in 4th floor EPA. Wall & duct work layout in 1st Floor Grand Jury space.
  - Risks/Concerns: None
  - Customer Success/Concerns:

### SCOPE

<table>
<thead>
<tr>
<th>Total Gross Area</th>
<th>SF</th>
<th>SM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inside Parking Area</td>
<td>SF</td>
<td>SM</td>
</tr>
<tr>
<td>Gross Area without Parking</td>
<td>SF</td>
<td>SM</td>
</tr>
<tr>
<td>Usable Area</td>
<td>25,320</td>
<td>2,724</td>
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<tr>
<td>Inside Parking Spaces</td>
<td>Spaces</td>
<td>Spaces</td>
</tr>
<tr>
<td>Outside Parking Spaces</td>
<td>Spaces</td>
<td>Spaces</td>
</tr>
<tr>
<td>Number of Occupants</td>
<td>36,702</td>
<td>3,596</td>
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<tr>
<td>Total Rentable Area</td>
<td>SF</td>
<td>SM</td>
</tr>
<tr>
<td>ARRA related Area</td>
<td>SF</td>
<td>SM</td>
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### EARNED VALUE

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<thead>
<tr>
<th>Contract</th>
<th>OnBudget</th>
<th>OnSchedule</th>
<th>Avail. Crty ($000)</th>
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</thead>
<tbody>
<tr>
<td>GC - Construction</td>
<td>✔️</td>
<td>✔️</td>
<td>$1,990</td>
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### SCHEDULE

<table>
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<tr>
<th>Milestone</th>
<th>Baseline</th>
<th>Planned</th>
<th>Actual</th>
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<tbody>
<tr>
<td>Project Authorization / RWA Acceptance</td>
<td>4/20/16</td>
<td>4/20/16</td>
<td>4/20/16</td>
</tr>
<tr>
<td>Requirements Finalized</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Site Acquisition Start</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Site Acquisition Complete</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design RFP Published in FedBids</td>
<td>6/8/16</td>
<td>6/8/16</td>
<td>6/8/15</td>
</tr>
<tr>
<td>Design Award</td>
<td>12/1/16</td>
<td>12/1/16</td>
<td>12/1/16</td>
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<tr>
<td>Design Start / NTP</td>
<td>12/1/16</td>
<td>12/1/16</td>
<td>12/1/16</td>
</tr>
<tr>
<td>Design Complete</td>
<td>12/1/17</td>
<td>12/1/17</td>
<td>12/1/17</td>
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<tr>
<td>Construction or D/B RFP Issued</td>
<td>12/15/17</td>
<td>12/15/17</td>
<td>12/15/17</td>
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<tr>
<td>Construction or D/B Contract Award</td>
<td>5/31/18</td>
<td>7/13/18</td>
<td>7/13/18</td>
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<tr>
<td>Construction Start / NTP</td>
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<td>Substantial Completion</td>
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<tr>
<td>Occupancy</td>
<td>6/30/20</td>
<td>6/30/20</td>
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<tr>
<td>Project Closeout</td>
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### FINANCIAL

<table>
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<th>Function Code</th>
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<th>Pending</th>
<th>Projected</th>
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<tbody>
<tr>
<td>221: CM Design Review</td>
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<td>$24</td>
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<td>413: Primary Contracts</td>
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<td>$13,898</td>
</tr>
<tr>
<td>414: Other Contracts</td>
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<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>511: Management &amp; Inspection - Constr.</td>
<td>$2,024</td>
<td>$0</td>
<td>$2,024</td>
</tr>
<tr>
<td>982: Distributed Nonrecurring RWA's</td>
<td>$2</td>
<td>$0</td>
<td>$2</td>
</tr>
<tr>
<td>982: Indirect Costs Transf To RWA</td>
<td>$1</td>
<td>$0</td>
<td>$1</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$15,187</strong></td>
<td><strong>$0</strong></td>
<td><strong>$15,187</strong></td>
</tr>
</tbody>
</table>
REFERENCE S

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