WHAT IS…

The Consolidation Projects Fact Sheet is a one-page report that provides a summary of key information for projects in the Consolidation Program (site requires GSA access). The report contains schedule data, financial information, and key project issues.

WHO WILL USE THIS?

- Program Managers
- Project Managers
- GSA Executives

HOW TO UPDATE SMALL PROJECTS

A. PROJECT DETAIL

1. Using Internet Explorer, go to the ePM Portal.
2. Click ‘ePMXpress’ in the list of applications.
3. Choose the desired project.
4. Navigate to the ‘Project Detail’ tab. Click ‘Edit’ to begin editing.
5. Enter the following information:
   - Project Name
   - Current State
   - Building ID(s)
   - Project Type
   - Customer(s)
   - Building Address
   - Project Description
     - Note: The Consolidation Projects Fact Sheet 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.

6. Scroll to the Project Status section. Click ‘Add Status’ and enter the status narrative.
   - Note: The Consolidation 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 ‘View History’ to view all prior of Project Status journal entries.

7. Scroll to the Team Members section. Click ‘Add Line’ to begin selecting team members.
8. In the search field, type the team member’s name, and click ‘Find’.
9. Click the appropriate name in the list.
10. Select the appropriate role from the ‘Project Role’ list. Team members that will be displayed on the Consolidation Projects Fact Sheet 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 the company name will be reported)
Construction Contractor: KEY.CC (Note: only the company name will be reported)
Const. Management: KEY.CONM (Note: only the company name will be reported)


12. Click ‘Save’ in the toolbar.

B. SCHEDULE

1. Navigate to the ‘Schedule’ tab. Click ‘Edit’ to begin editing.
2. All milestones should already be present in the project schedule. However, you may need to add a milestone. In this case, click ‘Add Milestone’.
3. Select a milestone from the Activity dropdown list. Schedule milestones that will be displayed on the Consolidation Projects Fact Sheet 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
   • 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 ‘OK’.
7. To remove a milestone, select the milestone by checking the box to the left of the Activity then clicking ‘Delete Milestone’.
8. 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).

9. Click ‘Save’.
C. FINANCIALS

1. To edit ePMXpress financial information, navigate to the ‘PM Financials’ tab.
2. Click ‘New Funding’ 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 ‘Save’.

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

D. ISSUES

1. Enter the following information:
   - Title
   - 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 Description field.
   - GSA Initiatives
   - Category
   - Condition
   - Action Summary: Include the steps that are necessary to resolve the issue in the Actions field.
• Escalate/Promote to Fact Sheet: ‘Yes’ must be selected in order for the issue to appear on fact sheets.

2. Click ‘Save’.

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

**HOW TO UPDATE CAPITAL PROJECTS**

**E. PROJECT INFORMATION**

1. Log into ePM as a user and click ‘Enter Project’ next to 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. This will open the ‘Project Properties’ page. Click the Project Number to launch the Project Properties editing window.

4. Click ‘Edit’ to begin editing.

5. Enter the following information:
   - Project Type
   - Current State
   - Customer(s): Contact your Regional System Administrator for assistance in editing the Customer Lookup List
   - 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 Project Description.

6. Click ‘Save’. 
F. PROJECT TEAM

The Project Team section of the GSA Project Stakeholder report provides details on personnel assigned to each project in specific key roles. All key personnel for a project should be added to the ‘Contacts’ section of a project in ePM. Please refer to QRG 127: User Access & Certification Administration for more information about requesting user access and exporting users to projects.

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 appropriate role and click ‘OK’ to return to the contact window.

- Team members that will be displayed on the Consolidation Projects Fact Sheet include:
  - Project Manager: KEY.PM
  - 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)

- Note: Team members must have a ‘Key’ role in order to appear on the Consolidation Projects Fact Sheet.
6. Click the ‘Save’ and confirm the entries.
7. 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. DETAILED STATUS

1. Navigate to ‘PM Tools’ in the left-hand menu, expand the ‘Project Management’ menu, and choose ‘Detailed Status’.
2. Click ‘New’.

3. In the Daily Report Setup window, click the magnifying glass icon.
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 the Consolidation Projects Fact Sheet, the first 1,000 characters of the Detailed 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.
9. Click ‘Workflow’ in the top toolbar and select ‘Accept/Approve’ to transition the document to the ‘Accepted/Approved’ state.
H. 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 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 the Consolidation Projects Fact Sheet 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
   - GSA Initiatives, if applicable
4. Click ‘Workflow’ 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 on the Key Properties Fact Sheet, Consolidation Fact Sheet, and GSA Project Stakeholder Fact Sheet.
I. 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. Update the dates in the Early Start field and click ‘OK’.
   - 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)
     - Project Authorization/RWA Acceptance (Activity Code 02)
5. 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.
6. Click ‘OK’.

J. FINANCIALS

Project Financials include all sources of project funding.

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 ‘New’ 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
   - Item Amount
   - Building ID
6. Click ‘Save’.
7. Click ‘Workflow’ and choose ‘Approve.’

**Appropriations**

8. Navigate to ‘PM Tools’ in the left-hand menu and expand the ‘Portfolio Planning’ menu and choose ‘Appropriation (and Adjustment)’.
9. Click ‘New’ to begin creating the Appropriation.

10. In the Prospectus: New Document window, enter the:
   - Appropriation title
   - Fiscal Year
   - Public Law
   - Budget Activity
11. Click the Schedule of Values page and click ‘Add’, 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
12. Click ‘Save’.
13. Click ‘Workflow’ and choose ‘Set to Pending.’ The authorized approver will then approve the Appropriation.

K. GENERATING REPORTS

1. From the ePM Portal click ‘ePM.’

3. Click ‘My Home’.
4. Click ‘Fact Sheet Reports’.
5. Locate the ‘Consolidation Projects 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 Consolidation Projects Fact Sheet. Click ‘Run’.

7. On the first Report Parameters page, select the program(s) and click ‘Next’.
8. On the second Report Parameters page, select the Project Type(s) and click ‘Next’.
9. On the third Report Parameters 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.
10. To finalize the project selection, click ‘Insert’. The selection(s) will appear in the Choice box.
11. Click 'Run Report'.
Consolidation Fact Sheet
March 29, 2019
U.S. General Services Administration

MA-Boston-O'Neill FB-Limited Scope Systems Replacement
10 Causeway Street, Boston, MA 02222
MA01532: THOMAS P. O'NEILL JR.

Project Type: Repair and Alteration
Current State: Execution
Team:
- Project Manager: John Naurer
- Project Sponsor: Contract Officer
- Contract Specialist: Michele Valencia
- Property Manager: DEXX LLC
- Architect/Engineer: BDEX, LLC
- Const Contractor: PHD Inc
- Const Management:

Customers:
- 00000000: Shell

Description:
PROJECT SUMMARY
The purpose of this project is to replace and upgrade the elevators, fire alarm system, and building automation systems at the O'Neill Federal Building in Boston, MA. The replacement of the building's elevators, fire alarm system, and upgrades to the building automation system (BAS) will allow for improved building performance and energy efficiency.

The O'Neill Building is located next to North Station, one of Boston's main commuter rail stations, and the TD Garden Arena. Constructed in the late 1980s, the building consists of an eleven-story high-rise and a five-story low-rise, connected by a five-story atrium. A basement level parking garage provides parking for approximately 200 vehicles.

MULTI-ASSET PROJECT
This is a multi-asset project. Portions of the work accepted as substantially complete valued at $1,000,000 or greater will be reported to GSA's Central Office.

RISKS & CHALLENGES
The scopes of the three projects overlap; the elevators tie into the fire alarm system and the BAS network.

Schedule Milestones:

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Baseline</th>
<th>Planned</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Request</td>
<td>3/8/14</td>
<td>3/8/14</td>
<td></td>
</tr>
<tr>
<td>Initial Scope and Requirements Finalized with Customer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Client Concurrency on Final Scope, Schedule, and Cost Estimate</td>
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<tr>
<td>Project Authorization/RFA Acceptance</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Design PR Submitted</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Contracting Accepts Design PR</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design Award</td>
<td>7/8/15</td>
<td>7/8/15</td>
<td>7/6/15</td>
</tr>
<tr>
<td>Design Start / NTP</td>
<td>8/2/16</td>
<td>11/4/16</td>
<td>11/4/16</td>
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<tr>
<td>Design Complete</td>
<td>12/5/15</td>
<td>10/23/17</td>
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<tr>
<td>PM Submits Construction or DB PR</td>
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<td>11/11/17</td>
<td></td>
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<tr>
<td>Contracting Accepts Construction or DB PR</td>
<td>11/11/17</td>
<td>11/11/17</td>
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<tr>
<td>Construction Start / NTP</td>
<td>11/8/16</td>
<td>11/8/16</td>
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</tr>
<tr>
<td>Substantial Completion</td>
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Project Financials (includes ePM and ePMXpress Data):

<table>
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<th>Amount</th>
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<td>$10,145,000.00</td>
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<tr>
<td>Appropriation Summary</td>
<td>$10,145,000.00</td>
</tr>
</tbody>
</table>

Status:
As of Date: 7/3/18

O'Neill Ltd. Scope Prospectus (LMA00013) – Executive Status: 7/3/2018

PROJECT SUMMARY
This project will replace and upgrade the elevators, fire alarm system, and building automation system (BAS) at the O'Neill Federal Building in downtown Boston in order to improve building performance and energy efficiency. This is a multi-asset project. Portions of the work accepted as substantially complete valued at $1,000,000 or greater will be reported to GSA's Central Office.

VM000002 – Building Automation System (BAS)
D/B Contractor: RGG8 Enterprises, Inc. (Awarded: 1/30/17)
Contract Am’t: $3,085,139
RGG8 has installed 241 VAVs and 80 FCUs. One valve in the Penthouse remains to be installed; a shutdown is not required. Programming of the new Niagara 4 network is proceeding; RGG8 is preparing to upgrade the existing Tridium 3.8 server to Niagara 4.

VM000032 – Fire Alarm System
D/B Contractor: Pipette & Howard Electric Service Awarded: 9/14/16 Contract Am’t:
Issues
No issues entered
Substantial Completion Notes
No notes entered

PCN: VM00002-VM000032-VM000033
## 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 127 - User Access & Certification Administration
- QRG 137 - Cost Accounts