WHAT IS...

The Key Properties Fact Sheet is a one-page report featuring key project information including team, status, schedule, issues, and financials for Capital projects. The report is used for the PBS national and regional management meetings.

WHO USES...

- Program Managers
- Project Managers
- GSA Executives
- Construction Manager
- Architect/Engineer
- Contracting Officer
- General Contractor
- Owner Representatives
- Client Organization

HOW TO

A. PROJECT INFORMATION

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

![ePM Portal](https://example.com)
3. Click ‘Projects’ on the ‘ePM Workspace’ page.
4. Click ‘Enter Project’ next to the project that you would like to edit.

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

6. This will open the ‘Project Properties’ page. Click the Project Number to launch the Project Properties editing window.
7. Click ‘Edit’ to begin editing.
8. Enter the following information:
   - Project Delivery Method
   - Project Type
   - Description: The Fact Sheet reports will only display the first 255 characters of the Description field.
   - Scope: Can be found under ‘Project Details’ section
     - Total Gross Area
     - Total Rentable Area
     - All-In Project Utilization Rate
     - Usable Area
     - Inside Parking Area
9. Select ‘Save’ and you have entered/updated Project Information

B. PROJECT TEAM

The Project Team section of the Key Properties Fact Sheet provides details on personnel assigned to each project in specific key roles. The project roles that are shown on the Key Properties Fact Sheet are:

- Project Manager
- Contract Officer
- Contract Specialist
- Property Manager
- Architect/Engineer
- Construction Contractor
- Construction Management

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 Key Properties 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 Key Properties Fact Sheet.

6. Click the ‘Save’ and confirm the entries.

C. EXECUTIVE STATUS

1. Navigate to ‘PM Tools’ in the left-hand menu, expand the ‘Project Management’ menu, and choose ‘Executive Status’.
2. Click ‘New’.
3. In the Daily Report Setup window, click the magnifying glass icon.
4. In the Daily Report Set window, click ‘Add’ to select the Executive Status. Click ‘OK’.

8. Click ‘Journal’ to go to the Journal page. Click ‘Add Line’ and enter the current status entry in the new journal box. Include a narrative on on-going procurement, design, and construction activities such as recently awarded contracts, scope changes, and tenant changes.

   - Note: On the Key Properties Fact Sheet, the first 1,000 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.
9. 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.

D. PROJECT 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 Key Properties Fact Sheet include:
     - Project Authorization/RWA Acceptance (2)
     - Requirements Finalized (03)
     - Site Acquisition Start (29)
     - Site Acquisition Complete (23)
     - Design RFP Published in FedBizOpps (06)
     - Design Award (19)
     - Design Start/NTP (21)
     - Design Complete (10)
     - Construction or D/B RFP Issued (07)
     - Construction or D/B Contract Award (09)
     - Construction Start/NTP (11)
     - Substantial Completion (13)
     - Occupancy (15)
     - Project Closeout (27)

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’.
E. ISSUES

The Issues section of the Key Properties Fact Sheet is used to report any major issue or risk to the project’s completion such as funding shortfalls, contractor disputes, and schedule delays.

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.
Key Properties Fact Sheet

- The field is limited on the Key Properties 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

<table>
<thead>
<tr>
<th>Number</th>
<th>Issue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title *</td>
<td></td>
</tr>
<tr>
<td>Brief Description</td>
<td></td>
</tr>
<tr>
<td>Full Description</td>
<td></td>
</tr>
</tbody>
</table>

**ADDITIONAL INFORMATION**
- GSA Initiatives

**INITIATING PARTY**
- Reported by: Solution Guidance Corp.
- Contact: Susan Mills
- Date Reported: Monday, March 25, 2019
- Created Date: Monday, March 25, 2019

**RESPONSIBLE PARTY**
- Company
- Contact

**CLASSIFICATION / LOCATION**
- Current State: Draft
- Category
- Condition
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.

**F. PROJECT 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.’
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
ePM Quick Reference Guide #73
Key Properties Fact Sheet

- 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.

GENERATING THE REPORT

1. Click ‘ePM’ on the ePM Portal.

![ePM Portal Menu]


![Select a Workspace]

3. Click ‘My Home’.
4. Click the ‘Fact Sheet Reports’ folder.