

# ePM Quick Reference Guide #73

## Key Properties Fact Sheet

### 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.

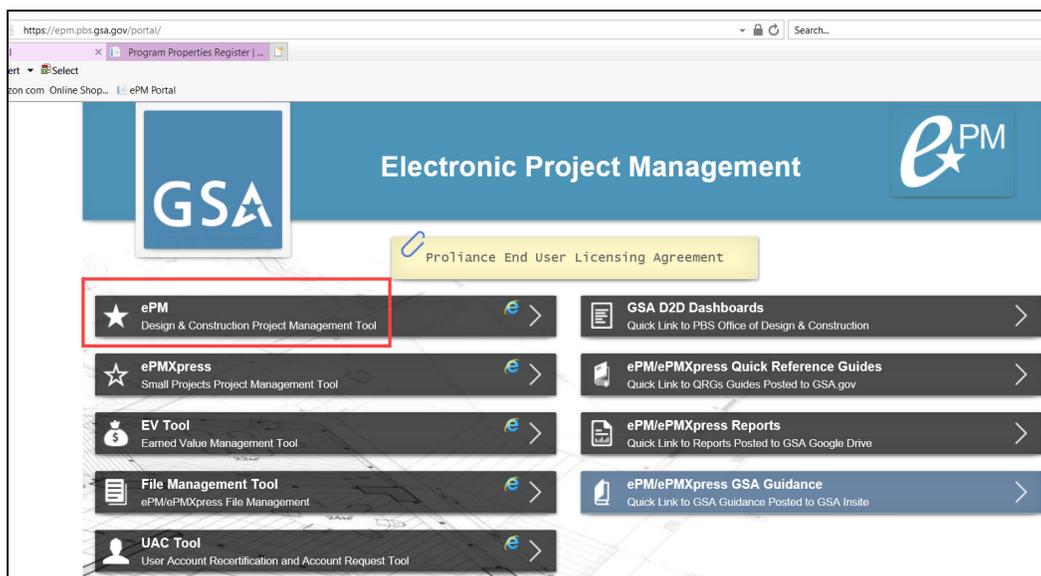
### WHO USES...

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

### HOW TO

#### A. PROJECT INFORMATION

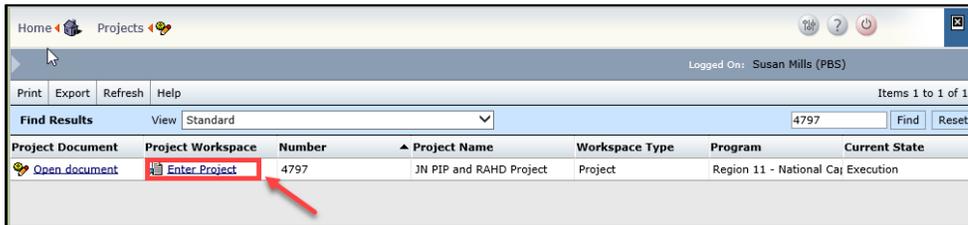
1. Using Internet Explorer, go to the [ePM Portal](https://epm.pbs.gsa.gov/portal/).
2. Click 'ePM' in the list of applications.



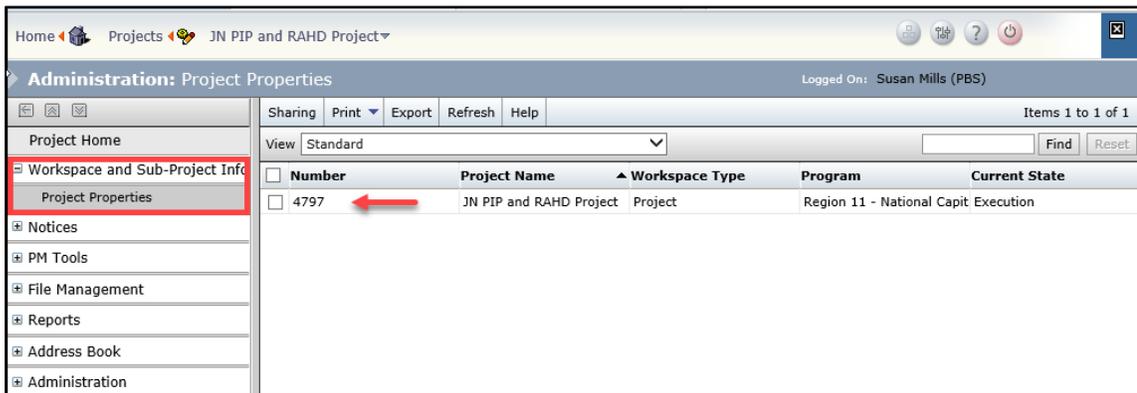
# ePM Quick Reference Guide #73

## Key Properties Fact Sheet

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

# ePM Quick Reference Guide #73

## Key Properties Fact Sheet

GENERAL													
Workspace Type	Project												
Current State	Execution												
Number	4797												
Project Name	JN PIP and RAHD Project												
Proinance Account Name	piarahltestproject												
Program	Division 11 - National Capital Region Capital Project Program												
Short Name	JN PIP and RAHD Project												
Brief Description	Brief Description field: Tenant funded (RWA) renovation at Building 85, DFC, and includes the project. ONRR is expected to occupy 21,565 USF within Bldg. 41 during the project as IRS-30 will continue to fill the original OIA and the RSF within Bldg. 85 (CO0576AA). Bldg. 41's second floor will therefore need to have non-accessible square feet of 31,500 USF recognized as it will be "vacant" in REKIDS, but unavailable. The primary purpose of the project is to improve the security of prisoner movement from the time they arrive to the building to when they are released on the first floor. Periodic inspections include...												
Full Description													
Template Project	BePM 1.0 Master Project Template												
Copy Project Data	No												
Flag as Template	No												
FHIS Integration Enabled	No												
IRIS Integration Enabled	No												
Releasing After Approve Invoice	Yes												
Project Address:	<table border="1"> <tr> <td>Street Address</td> <td></td> </tr> <tr> <td>City/Town</td> <td>Juneau</td> </tr> <tr> <td>County</td> <td></td> </tr> <tr> <td>State/Prov</td> <td>AK</td> </tr> <tr> <td>Zip/Postal Code</td> <td></td> </tr> <tr> <td>Country</td> <td></td> </tr> </table>	Street Address		City/Town	Juneau	County		State/Prov	AK	Zip/Postal Code		Country	
Street Address													
City/Town	Juneau												
County													
State/Prov	AK												
Zip/Postal Code													
Country													
Address Information Notes													
Phone Numbers													
Fax Numbers													
CPIA Line Item	15220												
Number of Occupants													
Inside Parking Spaces													
Outside Parking Spaces													
Project Time Zone	(GMT-9:00) Eastern Time (US & Canada)												
Daylight Saving Time	Yes												
ECM Integration Enabled	▼												

PROJECT DETAILS	
Project Description	the following scope items: New architectural finishes throughout, new ductwork in tenant areas w/VAV boxes for each temperature control
Gross SF	10000
Rentable SF	9000
Usable SF	7000
At-In Project Utilization Rate	6000
Inside Parking SF	2000

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

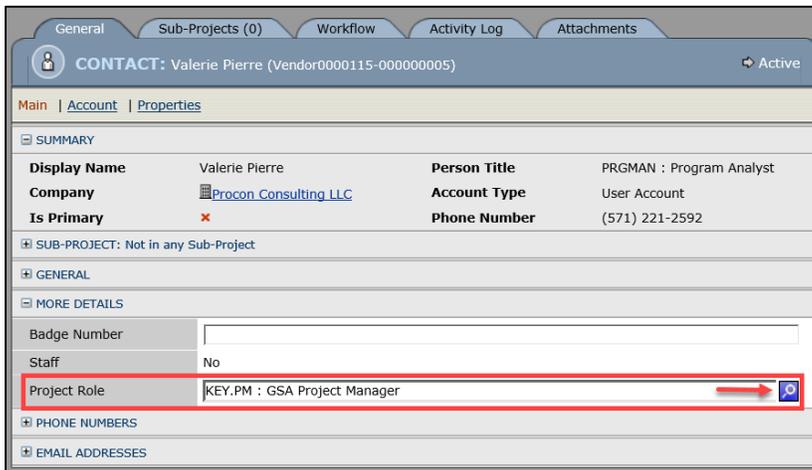
1. Navigate to the 'Address Book' in the left-hand menu and select 'Contacts' to open the window.



# ePM Quick Reference Guide #73

## Key Properties Fact Sheet

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'.

# ePM Quick Reference Guide #73

## Key Properties Fact Sheet

New Delete Sharing Print Export Refresh Help				
View Standard				
<input type="checkbox"/>	Set Name	Number	Title	Current State
<input type="checkbox"/>	Detailed Status	00001	VP sample	Accepted/Approved
<input type="checkbox"/>	GC Dailies June 2017	00002	GC DR September 12	Accepted/Approved
<input type="checkbox"/>	GC Dailies June 2017	00003	New DR	Draft
<input type="checkbox"/>	Detailed Status	00004	Sample	Active
<input type="checkbox"/>	GC dailies Dec 2018	00005	GC Dailey	Active
<input type="checkbox"/>	Executive Status	00006	New Journal	Active
<input type="checkbox"/>	Daily Report	00007	Reliance DR week ending 20190	Draft

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'.
5. Click 'Next' on the Daily Report Setup window.
6. Click 'Finish' on the second 'Daily Report Setup' window.

**Daily Report Setup** (2 of 2)

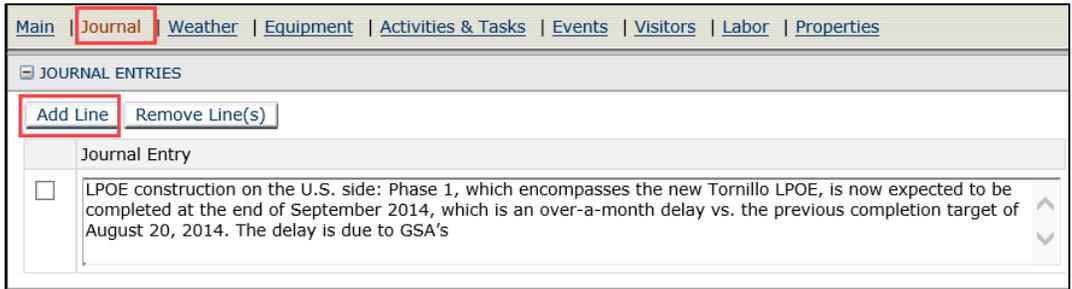
2) Below are the available document subtypes for daily reports. Please choose one:

Daily Reports

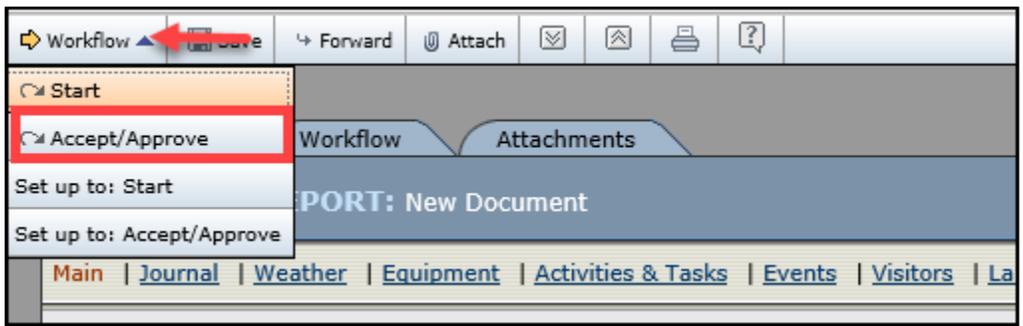
7. In the 'Daily Report: New Document' window, enter the Title and Journal Date.
8. Click 'Journal' to go to the Journal page. Click 'Add Line' and enter the current status entry in the new journal box. Include a narrative on on-going procurement, design, and construction activities such as recently 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.

# ePM Quick Reference Guide #73

## Key Properties Fact Sheet



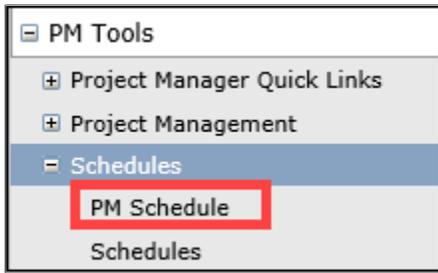
- Click 'Workflow' in the top toolbar and select 'Accept/Approve' to transition the document to the 'Accepted/Approved' state.



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

### D. PROJECT SCHEDULE

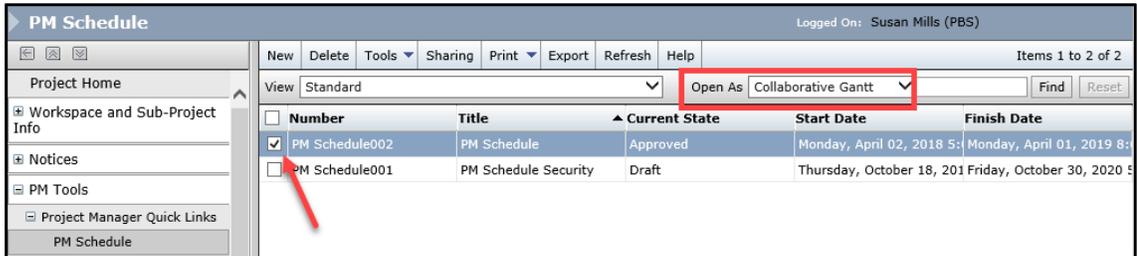
- Navigate to 'PM Tools' in the left-hand menu, expand the 'Schedules' menu, and choose 'PM Schedule'.



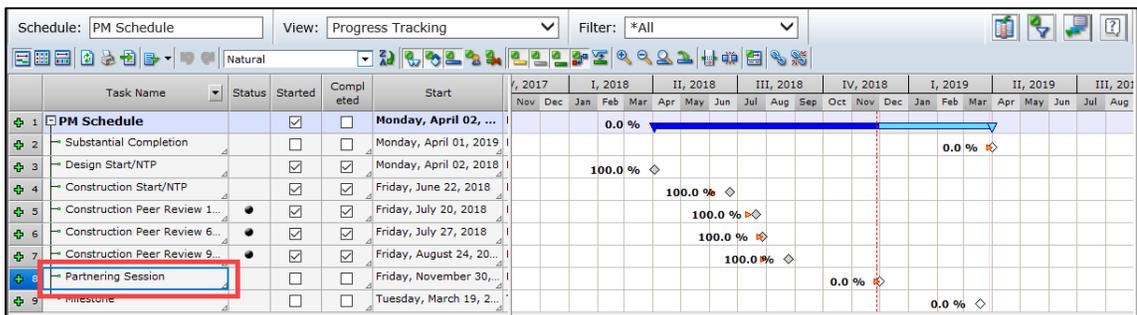
- In the Schedule register, check the box next to the schedule (or schedules) you wish to view, then click 'Tools' and select to either open in Collaborative Gantt or CPM Gantt view.

# ePM Quick Reference Guide #73

## Key Properties Fact Sheet



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'.

# ePM Quick Reference Guide #73

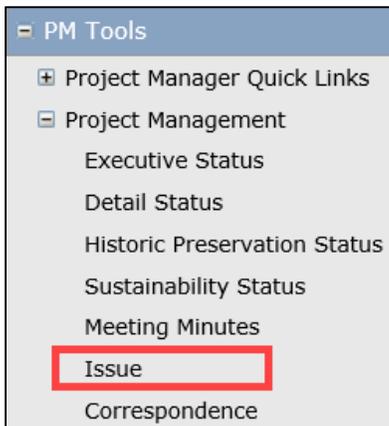
## Key Properties Fact Sheet

The screenshot shows a software interface for a 'Partnering Session'. At the top, the 'Name' is 'Partnering Session' and the 'Responsible Person' is 'Valerie Pierre'. Below this is a 'Linked Activity Document' field with an 'Open' button. The main section is divided into three tabs: 'Schedule', 'Advanced', and 'Activity Codes', with 'Schedule' selected. The 'Schedule' section contains a table with columns for 'Actual', 'Remaining', and 'Total'. The rows are 'Duration (Days)', 'Duration (Hours)', and 'Work', all showing '0.0'. Below the table is a 'No Work' checkbox and a 'Unit of Measure' field. The 'Dates' section has 'Start' and 'Finish' dropdown menus, both set to 'Friday, November 30, 2018'. The 'Progress' section shows '% Complete' at '0.0 %' and checkboxes for 'Started' and 'Complete'. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

### 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.

# ePM Quick Reference Guide #73

## 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

Number	Issue -						
Title *	<input type="text"/>						
Brief Description	<input type="text"/>						
Full Description	<input type="text"/>						
▣ ADDITIONAL INFORMATION							
GSA Initiatives	<input type="text"/>						
▣ INITIATING PARTY							
Reported by	<table border="1"><tr><td>Company</td><td>Contact</td></tr><tr><td><input type="text" value="Solution Guidance Corp."/></td><td><input type="text" value="Susan Mills"/></td></tr></table>	Company	Contact	<input type="text" value="Solution Guidance Corp."/>	<input type="text" value="Susan Mills"/>		
Company	Contact						
<input type="text" value="Solution Guidance Corp."/>	<input type="text" value="Susan Mills"/>						
Date Reported	<input type="text" value="Monday, March 25, 2019"/>						
Created Date	<input type="text" value="Monday, March 25, 2019"/>						
▣ RESPONSIBLE PARTY							
Response	<table border="1"><tr><td>Company</td><td>Contact</td></tr><tr><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td>Contract</td><td><input type="text"/></td></tr></table>	Company	Contact	<input type="text"/>	<input type="text"/>	Contract	<input type="text"/>
Company	Contact						
<input type="text"/>	<input type="text"/>						
Contract	<input type="text"/>						
Potential Liability	<input type="text" value="0"/>						
Escalate/Promote to Fact Sheet?	<input type="radio"/> Yes <input checked="" type="radio"/> No						
Action Summary	<input type="text"/>						
▣ CLASSIFICATION / LOCATION							
Current State	<input type="text" value="Draft"/>						
Category	<input type="text"/>						
Condition	<input type="text"/>						

# ePM Quick Reference Guide #73

## Key Properties Fact Sheet

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.

# ePM Quick Reference Guide #73

## Key Properties Fact Sheet

**FUNDING: New Document** Draft

Main | Financial Summary | **Line Items** | Settings | Properties

**SUMMARY**

<b>Current State</b>	Draft	<b>Creation Date</b>	Friday, March 22, 2019
<b>Total Funding Received</b>	\$0.00	<b>Budget Handoff Complete</b>	✘
<b>Project ETPC</b>	\$0.00	<b>Cost Handoff Complete</b>	✘

**DETAILS \***

Title \*

IRIS Line Item or RWA Number

Detailed Description

RWA Type

**ADDITIONAL INFORMATION**

Expiration Date

- 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

**FUNDING: New Document** Draft

Main | Financial Summary | **Line Items** | Settings | Properties

Budget

Page 1 of 1

Add Remove Split

*Work Item	Item Description	*Cost Account Ref	*Item Amount	*ACR Column	Currency	Project Currer Building ID
1			0.00 Pending Funding		USD	0.00

Ready

Total Item Amount

Loaded 1 of 1

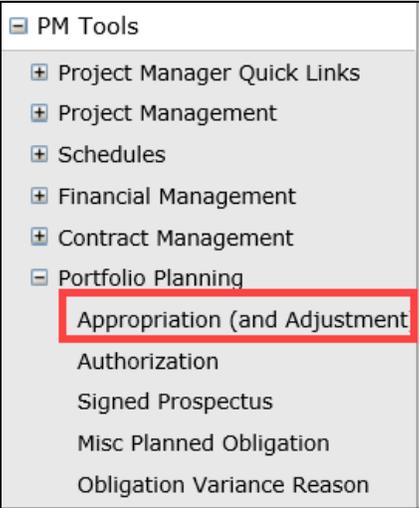
- Click 'Save'.
- Click 'Workflow' and choose 'Approve.'

# ePM Quick Reference Guide #73

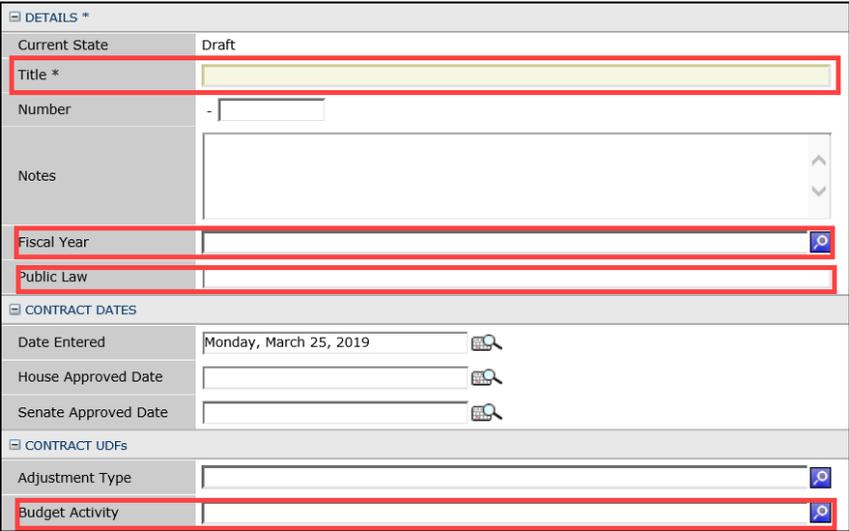
## Key Properties Fact Sheet

### 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

## ePM Quick Reference Guide #73

### Key Properties Fact Sheet

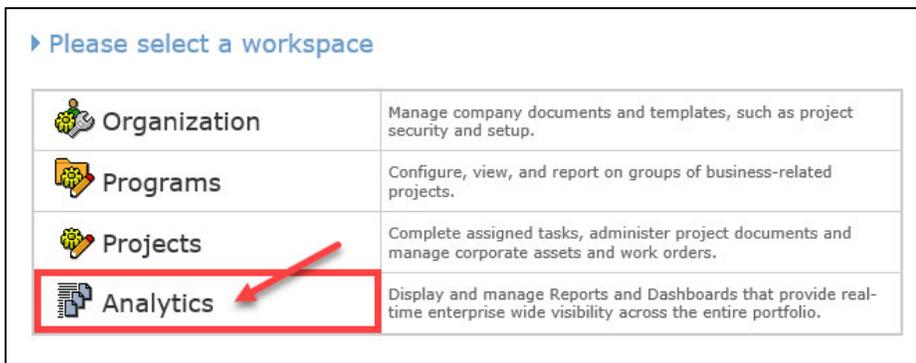
- Description
  - Scheduled Amount
  - Function Code Type: Studies, Design, Site Acquisition, Construction, M&I, Construction-Admin, or Admin
12. Click 'Save'.
  13. Click 'Workflow' and choose 'Set to Pending.' The authorized approver will then approve the Appropriation.

## GENERATING THE REPORT

1. Click 'ePM' on the ePM Portal.



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



3. Click 'My Home'.
4. Click the 'Fact Sheet Reports' folder.