ePM Quick Reference Guide #76
Creating a Project Template

WHAT IS A TEMPLATE

Project templates facilitate project creation by pre-populating settings, documents and data which will be copied onto future projects. Some of these pre-populated settings and documents are:

- Project Properties basic requirements
- Cost & Internal Period settings by current fiscal year
- Cost Account grouping structure
- Activity Code Group for PM schedule template
- Daily Work Journal Sets
- Add Schedule Milestones

Template projects are created from the Organization workspace and exist within individual Programs. When creating a template project for a region specific Program, user must select a Project Reference, which determines the default information that will populate the new template project.

WHO WILL USE THIS

- ePM National System Administrator
- ePM Zonal System Administrator
- ePM Regional System Administrator

HOW TO

Complete the following steps to create a project template.

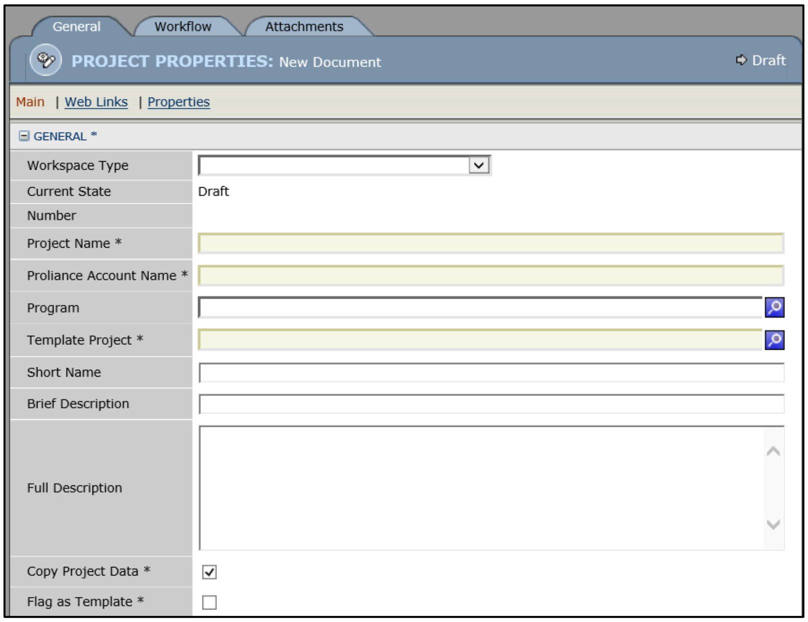
A. PROJECT PROPERTIES

1. Log into ePM as a user with the Project Properties security role and select the Organization workspace.
2. Navigate to Portfolio > Projects to display the project list.
3. Click 'New' to create a new project using the "Project Property Basics" default template.
4. Enter the following required information:

    - **Workspace Type:** Project
    - **Project Name:** Use the GSA Standard Naming Convention for Project Templates
        - For Capital Programs
            - ePM 1.3 Master Project Template
            - Post Occupancy Lease Alteration Template
        - For Small Programs:
            - Small Project with NO Design Template
            - Small Project with Design Template
            - <$25k Template
            - Post Occupancy Lease Alteration >$25K Template
            - Move Only Template
            - Study Only Template

- Furniture Fixtures and Equipment (FFE) Only Template

Note: The IRIS and FMIS integrations require the ePM 1.3 Master Project Template.



- **Proliance Account Name *:** Enter the Project Name without any spaces or special characters. This name is used by integration accounts to access specific projects in ePM. The account name cannot be changed once the project leaves the Draft workflow state. The account name is required.
  (i.e. RxmasterprojecttemplateMMYYYY) where "x" = region number such as R11
- **Short Name:** Optional
- **Brief Description:** Optional
- **Program:** Click the Magnifying Glass drop-down list to open the Programs dialog box and select the name of the live program to where the new project will be added. The dialog box contains both live and template programs in the Active workflow state, but by default are filtered to display only Live Programs.

IMPORTANT: Ensure that the GSA live program is selected as opposed to a template program. ePM automatically flags any project created within a template program as a template project.

EXAMPLES OF GSA LIVE PROGRAMS:
Region 7 – Greater Southwest Region Capital Project Program
Region 11 – National Capital Region Small Project Program

- **Template Project *:** Click the magnifying glass drop-down list to open the Template dialog box and select the name of the template project. The dialog box contains both live and template projects in the Execution workflow state. By default the box is filtered to display only Template projects.

- **Copy Project Data:** Select the check box to copy all document and service data from the Project Reference to the new project. **Leave this blank**. The new project will contain no data. Your selection cannot be changed once the project leaves the Draft workflow state, Leave this option blank.

- **Flag as Template:** Select the check box to copy all document and service data from the Project Reference to the new project. If you leave this blank, the new project will contain no data. Your selection cannot be changed once the project leaves the Draft workflow state. Select this option.

- **PCN/Line Item:** For the Project Template ONLY enter the word: TEMPLATE

- **Project Time Zone:** Select the appropriate Time Zone (Pacific, Mountain, Central, or Eastern).

- **Daylight Saving Time:** Select this option if Daylight Saving Time is applicable.

- **FMIS Integration Enabled:** Yes

- **IRIS Integration Enabled:** Yes

5. Click 'Save'.
6. Check the BCM enabled box.
7. Click 'Save'.
8. Select the 'Workflow' in the top toolbar and select 'Set to Planning' to transition the document to the 'Planning' state.
9. In the pop up window that asks you if you want to add people, add yourself to the template. This will allow you to continue working on the template.
10. Reopen the project and click 'Edit'. Expand the Content Management Sites section. Click 'Add Line' and enter the following site information:

Table 1.1 Content Management Sites

URL	Description
http://gsa.gov/portal/content/176759	ePM Quick Reference Guides
http://www.gsa.gov/epm	ePM on GSA.gov
http://insite.gsa.gov/epm	ePM on GSA InSite (Internal Only)
epmsupport@gsa.gov	ePM Helpdesk
https://epm.pbs.gsa.gov/ev/default.aspx	ePM Earned Value Data Entry and Update Utility
https://epm.pbs.gsa.gov/filemanager/default.aspx	ePM File Manager
https://epm.pbs.gsa.gov/Portal	ePMXpress (Small Projects)
https://sites.google.com/a/gsa.gov/epm-management-reports/home	ePM/Cognos Management Reports Google Site
https://sites.google.com/a/gsa.gov/national-lessons-learned-database/	GSA National Lessons Learned Library

11. Click 'Save'.

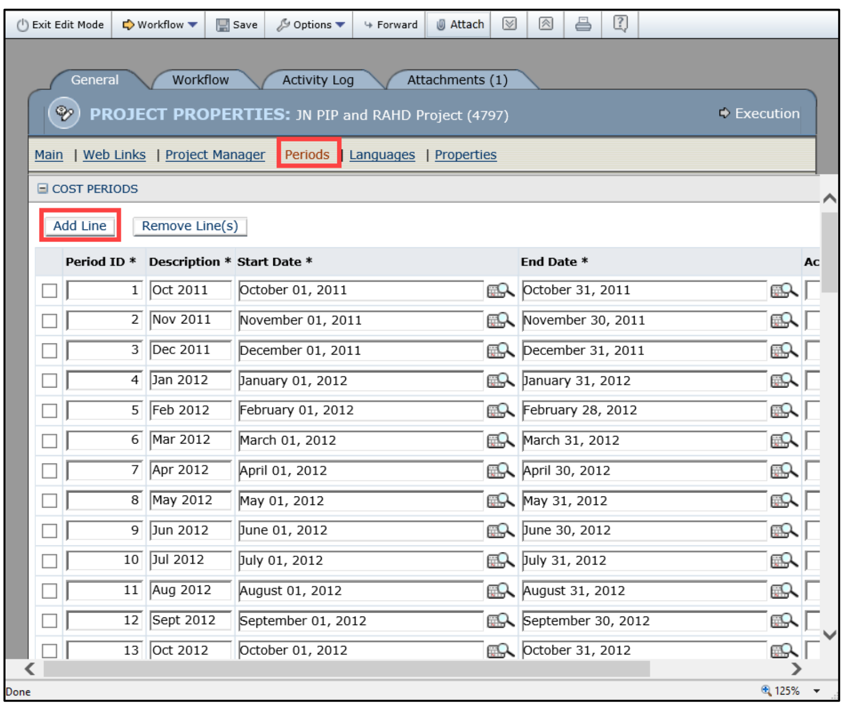
B. DEFINING PERIODS IN THE PROJECT TEMPLATE

Note: This is only for Capital projects. This step is not required for small projects that are not using the EV utility to measure construction contracts.

Periods must be defined in the system to feed cost controlling documents. Instead of setting these periods in a Project Properties document AFTER each project is created, it is more efficient to enter them in the project template. There are two types of periods that will require data entry for project template setup. They include the following:

- **Cost Periods** must be setup to reflect 12 months of the fiscal year. You must manually create periods for each fiscal year as required. Start with the prior fiscal year. Add at least 2 years of periods. Additional periods can be added at a later time if necessary.
- **Internal Periods** (Planned Obligation Periods) must be setup to reflect 12 months of the fiscal year. You must manually create periods for each fiscal year as required.

1. While logged into the template project, click Project Properties.
2. Click the project name to open the Project Properties window.
3. Click the Properties link and then click 'Edit'.
4. In the Cost Periods section, click 'Add Line' to add a new row. Enter the following: Period ID, Description, Start Date, End Date, and Accounting Code.



5. Click Add Line to add another row and repeat.
6. In the Internal Periods section, click 'Add Line' to add a new row. Enter the following: Period ID, Description, Start Date, End Date, and Accounting Code.
7. Click 'Save and Synchronize'.

C. ADDRESS BOOK – STAFF ACCOUNT EXPORT

1. Export the Zonal System Administrator (ZSA) and Regional System Administrator (RSA) to each template. The list of current ZSA and RSAs is available on InSite.
2. Export regional users to templates if the regions request it.
3. Go to org address book and export the roles in the Display Name column with the security categories in the Security Category column.

Table 1.2 Staff Account Export

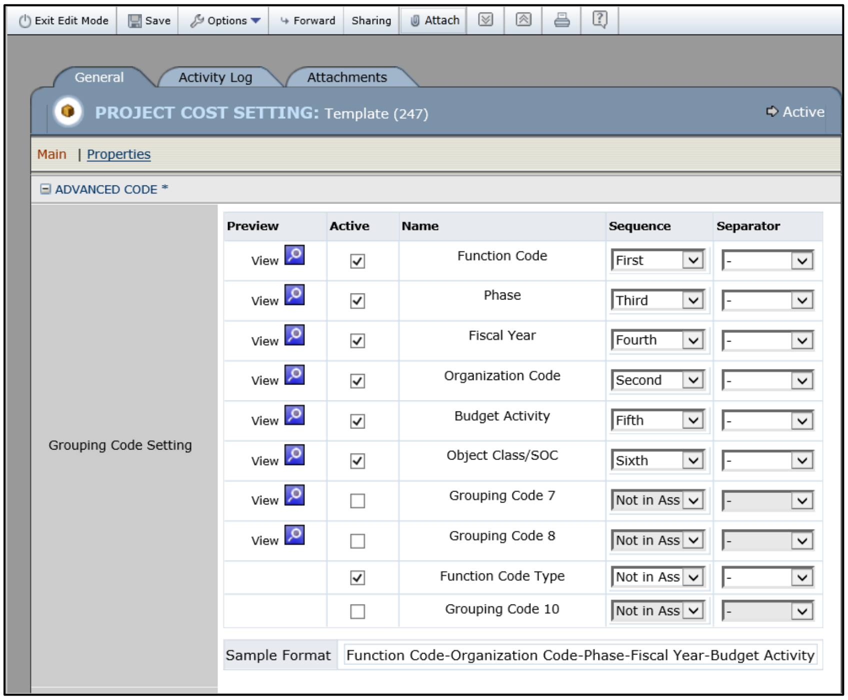
Display Name	Security Category
BI Integration User Account	Administrator
GSA ASID ADAPTER	Administrator
GSA.INVOICEREPORT.ADAPTER	Administrator
Admin Version Controller	Administrator
CP Obligation Report Integration User Account	Administrator
CP Obligation Report Integration Account	Administrator
GSA.PUNCHLIST.ADAPTER	Punchlist Integration Adapter
GSA.SUBMITTAL.ADAPTER	Submittal Integration Adapter

D. SETTING UP COST SETTINGS (CAPITAL PROJECTS ONLY)

The GSA Work Breakdown Structure is comprised of 5 main elements. These are setup with the Cost Settings document. It promotes efficiency and consistency to have these defined in the Project Template to relieve the burden on the ePM System Administrators to define them for each individual project. Below are the steps to successfully setup the Cost Settings in the Project Template:

1. Navigate to the template project.
2. Navigate to Administration > Cost >Project Cost Settings. This will open the Project Cost Settings register.
3. Select 'Template' to open the Cost Settings Document which contains all Grouping Code Settings.
4. Select 'Edit'.
5. Check the 'Active' option box and set the required 'Sequence' as follows:

Function Code: First
Organization Code: Second
Phase: Third
Fiscal Year: Fourth
Budget Activity: Fifth
Object Class/SOC: Sixth
Function Code Type: Seventh



6. Click ‘Save and Synchronize’.
7. PM Tools-->Financial→ Cost accounts rows to the Cost Accounts register.
8. There is a “Default” Cost Account created by the system as a requirement. Workflow this document to “Inactive” state so that no one selects this cost account on any project.

E. SETTING “PM SCHEDULE” ACTIVITY CODE GROUP

PM schedules require Activity Code Groups to be created and configured properly in the project template. The titles and sequencing must be accurately entered into ePM to support Business Intelligence reporting. The user must have appropriate security rights in order to make changes to the Activity Code Groups. The following are steps to setup the “PM Schedule” Activity Code Group in the project template:

1. Navigate to the template project.
2. From the Navigation pane, browse to Administration > Scheduling > Activity Code Groups.
3. Select ‘New’ from the toolbar to create a new Activity Code Group.
4. Enter “PM Schedule” for the Title.
   IMPORTANT: Do not enter any other title name than specified. The BI Reports specifically is coded to read the title as “PM Schedule”.
5. Setup the sequencing of Activity Codes under Advanced Code in the order below:

   Phase: First
   Milestone Type: Second
   Agency: Third

6. Select ‘Save’.
7. Workflow the document to the Active state.

F. SETTING UP MILESTONES AND ACTIVITY CODES

Note: Please refer to ‘QRG79_Creating Schedules in ePM’ to learn more about creating the proper schedule for Small or Capital projects.

1. Navigate to the template project.
2. Navigate to Schedules > PM Schedule.
3. Put a check mark in the box for the PM Schedule and select View Collaborative Gantt or CPM Gantt, which opens the Gantt chart.
4. Right-click in the Task Name column and select ‘Insert Milesone’.
5. Set up milestones with the Activity Codes from the matrix referenced in the tables below:

Small Project with NO Design Template [Small]	
Milestone Display Name	**Milestone Activity Code**
Customer Request	01
Project Initiated	28
Initial Scope and Requirements Finalized with Customer	41
Client Concurrence on Final Scope, Schedule and Cost Estimate	42
Project Authorization/ RWA Acceptance	02
PM Submits Construction or Design/Build PR	34
Contracting Accepts Construction or Design/Build PR	35
Construction or Design/Build Contract Award	09
Construction Start/NTP	11
Substantial Completion	13
Project Closeout	27

Small Project with Design Template [Small]	
Milestone Display Name	Milestone Activity Code
Customer Request	01
Project Initiated	28
Initial Scope and Requirements Finalized with Customer	41
Client Concurrence on Final Scope, Schedule and Cost Estimate	42
Project Authorization/ RWA Acceptance	02
Design Procurement Request Submitted	43
Contracting Accepts Design Procurement Request	44
Design Award	19
Design Start/NTP	21
Design Complete	10
PM Submits Construction or Design/Build PR	34
Contracting Accepts Construction or Design/Build PR	35
Construction or Design/Build Contract Award	09
Construction Start/NTP	11
Substantial Completion	13
Project Closeout	27

Small under $25k Template [Small]	
Milestone Display Name	Milestone Activity Code
Project Authorization/ RWA Acceptance	02
PM Submits Construction or Design/Build PR	34
Construction or Design/Build Contract Award	09
Construction Start/NTP	11
Substantial Completion	13

Post Occupancy Lease Alteration >$25K Template [Small]	
Milestone Display Name	Milestone Activity Code
Customer Request	01
Project Initiated	28
Initial Scope and Requirements Finalized with Customer	41
Client Concurrence on Final Scope, Schedule and Cost Estimate	42
Project Authorization/ RWA Acceptance	02
Request Lessor Pricing	63
Issue Lease Amendment for Alterations	64
Construction Start/NTP	11
Substantial Completion	13
Project Closeout	27

Move Only [Small]	
Milestone Display Name	Milestone Activity Code
Project Authorization/ RWA Acceptance	02
Move Award	68
Move Start/NTP	69
Move Complete	70

Study Only [Small]	
Milestone Display Name	Milestone Activity Code
Pre-Design/Study Award	17
Pre-Design/Study Complete	18
Project Authorization/ RWA Acceptance	02

Furniture Fixtures and Equipment (FFE) Only Template [Small]	
Milestone Display Name	Milestone Activity Code
Project Authorization/ RWA Acceptance	02
FFE Award/Order	65
FFE Delivery	66
FFE Installation	67

ePM 1.3 Master Project Template / Master Project Template [Capital]	
Milestone Display Name	Milestone Activity Code
Customer Request	01

ePM 1.3 Master Project Template / Master Project Template [Capital]	
Project Initiated	28
Initial Scope & Requirements Finalized With Customer	41
Pre-Design/Study Award	17
Pre-Design/Study Complete	18
Customer Concurrence on final scope, schedule and cost estimate	42
Initial Financial Agreement w Customer	04
Define Project Funding Requirement	62
Requirements Finalized	03
Project Authorization/ RWA Acceptance	02
Congressional Appropriation	61
Site Acquisition Start	29
Site Acquisition Complete	23
Design Acquisition Plan Finalized	05
Design PR Submitted	43
Contracting Accepts Design PR	44
Design RFP Published in FedBizOpps	06
Design RFP Proposals Received	30
SSEB/Design Firms Shortlisted	31
Design Firm Selected and Price Proposal Requested	32
Design Award	19
CMc Pre-Construction Services Contract Award	74
AiA Award	26
Design Start / NTP	21
Design Excellence Peer Review #1	48
Concept Design Approval (Commissioner's Presentation)	22
Design Excellence Peer Review #2	49
CD's 15% Development Submission	50
CD's 50% Development Submission	51
CD's 90% Development Submission	52
AiA Meetings Requiring Customer Presence 1 - Initial Art Panel Meeting	53
AiA Meetings Requiring Customer Presence 2 - Artist Selection Meeting	54
AiA Meetings Requiring Customer Presence 4 - Artist Site Visit (56)	56
AiA Meetings Requiring Customer Presence 5 - Artist Concept Presentation	57
Design Complete	10
CMa Award	24
Signed Occupancy Agreement(s)	08
Construction or Design/Build Acquisition Plan Finalized	33
PM Submits Construction or Design/Build PR	34
Contracting Accepts Construction or Design/Build PR	35
Construction or Design/Build RFP Issued	07
Construction or Design/Build Proposals Received	36
Construction or Design/Build Firms Interviews Complete	37
Successful Construction or Design/Build Firm Selected	38
Construction or Design/Build Contract Acquisition/Legal Reviews Started	39

ePM 1.3 Master Project Template / Master Project Template [Capital]	
Construction or Design/Build Contract Acquisition/Legal Reviews Completed	40
Construction or Design/Build Contract Award or CMc Construction Option	09
CXa Award	25
Construction Start/NTP	11
Partnering Session	73
Construction Peer Review 15%	58
Construction Peer Review 65%	59
Construction Peer Review 90%	60
Pre-Occupancy Tenant Access	12
Substantial Completion	13
Construction Complete	20
Rent Start	14
Occupancy	15
Project Closeout	27

Capital Post Occupancy Lease [Capital]	
Milestone Display Name	Milestone Activity Code
Customer Request	01
Project Initiated	28
Initial Scope & Requirements Finalized With Customer	41
Customer Concurrence on final scope, schedule and cost estimate	42
Project Authorization/ RWA Acceptance	02
Request Lessor Pricing	63
Issue Lease Amendment for Alterations	64
Construction Start/NTP	11
Substantial Completion	13
Project Closeout	27

6. Add summaries (initiation, planning, execution, etc), if desired.
7. Clear your name out of the Responsible Person column.
8. Close the Gantt window and workflow the PM Schedule to Approved.

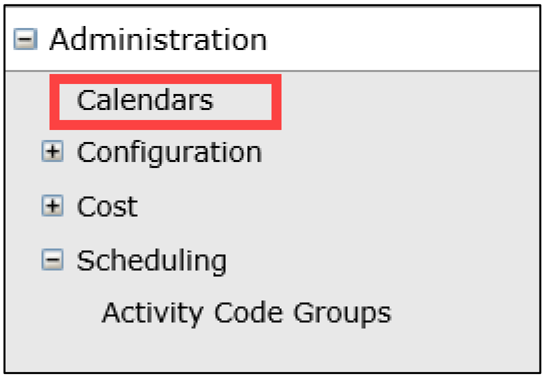
G. EARNED VALUE SETUP: CALENDAR AND RESOURCE

This is only for Capital projects unless there’s a small project that will use the Earned Value Utility.

A Calendar and Resource document is required to be setup within the project template to ensure the Gantt Spreadsheet view displays the associated Spend Plan cost.

Creating a New Calendar

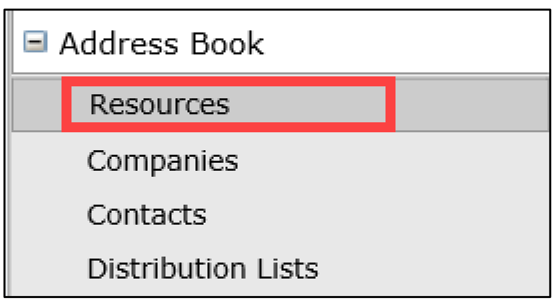
1. In the project template, navigate to Administration > Calendars.



2. Select the dropdown arrow next to the New button and select Calendar.
3. Enter “EV Mode 1 Calendar” as the Title.
4. Enter the Start and Finish work hours for every day Sunday through Saturday: Start 12:00 AM Finish 12:00 AM
5. Workflow the document to Active state and select ‘Save’ in the toolbar.

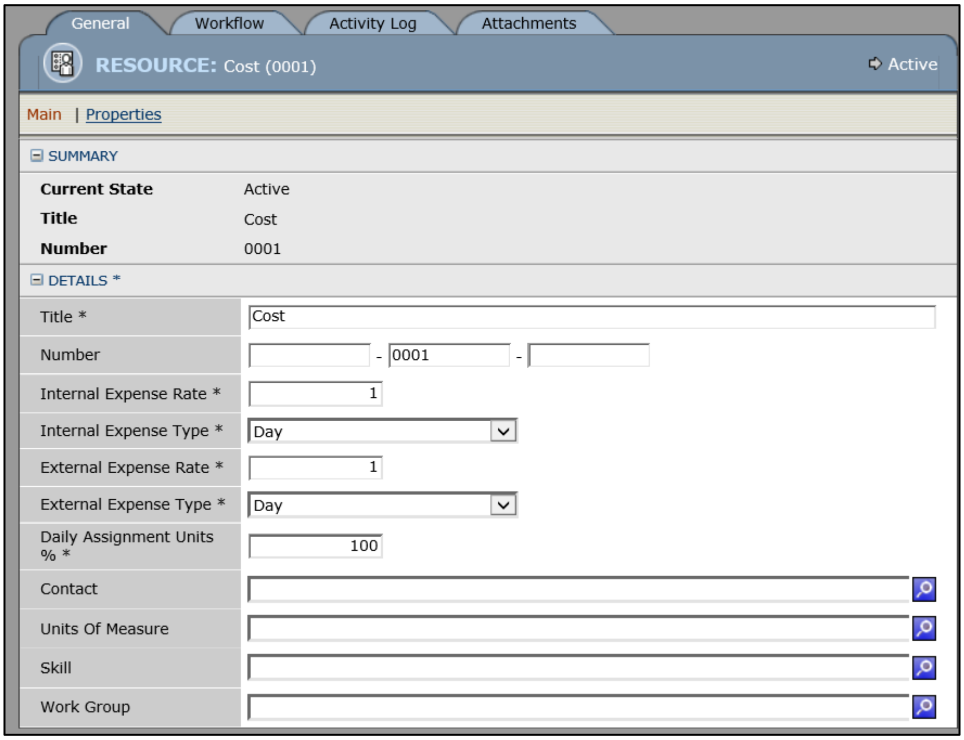
Creating a Resource Document

1. In the project template navigate to Address Book > Resources.



2. Select dropdown arrow next to the New button and select Resource.
3. Enter “Cost” as the Title.
4. Enter and setup the Expense Rate and Expense Type:

   Internal Expense Rate: 1
   Internal Expense Type: Day
   External Expense Rate: 1
   External Expense Type: Day



5. Click ‘Save’ on the toolbar.
6. Workflow the document to the Active state.

H. EARNED VALUE SETUP: ‘EV SUMMARY’ REGISTER VIEW (FOR CAPITAL PROJECT TEMPLATES ONLY)

Create the following Register View to support the overview of all activities performed with the EV Schedule document sub type. This step is only required for Capital templates.

1. In the project, navigate to PM Tools > Schedules > Schedules.
2. From the View picklist, choose Manage Views.
3. Click ‘New’.
4. Enter EV Schedules as the Name of the view.
5. Choose Shared as the Type Options.
6. Add columns: Number, Title, Current State, Start Date, Finish Date, Modified Date, Classification Information 1.
7. Set the Sorting parameters: Descending by Modified Date and ascending by Number
8. Set the Filter: Subtype Name Is EV Schedule
9. Click ‘Save’.

I. EARNED VALUE SETUP: ‘EV SUMMARY’ GANTT VIEW (FOR CAPITAL PROJECT TEMPLATES ONLY)

This step is only required for Capital templates.

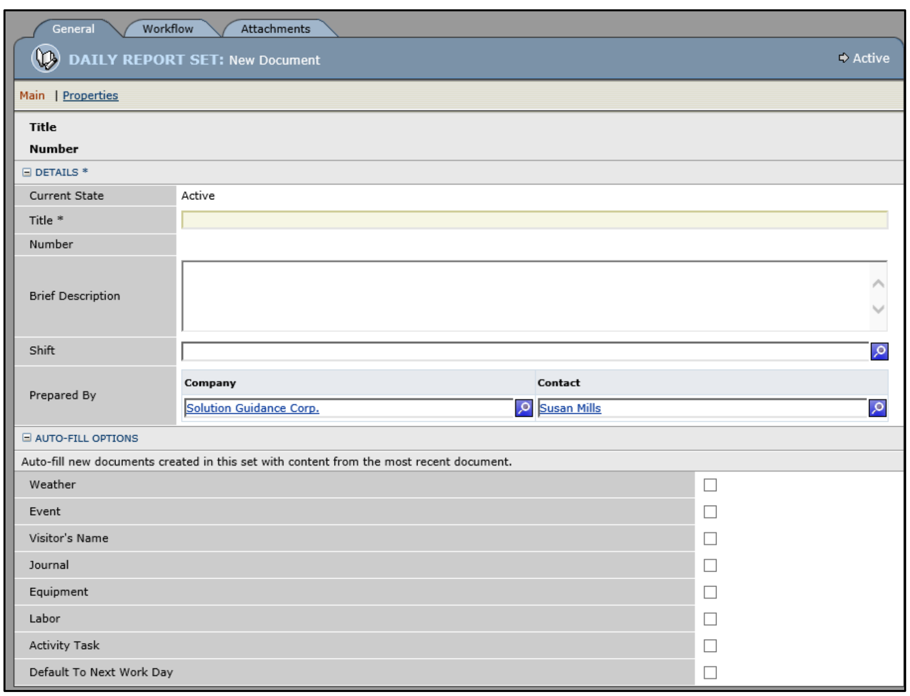
GSA's Earned Value requirements involve the need for s-curve illustrations within the Schedule Combined Gantt View. The following steps detail how to setup the Gantt View to accommodate an s-curve in the Combined Gantt View:

1. In the project, navigate to PM Tools > Schedules > Schedule
2. From the View picklist, choose Manage Gantt Views.
3. Click 'New'.
4. Enter EV Summary as the Name of the view.
5. Choose Shared as the Type Options.
6. Add columns: Task Name, Status, Original Work, Actual Work, Remain Work, Early Start, Early Finish, Actual Start, Actual Finish, Remain Duration, % Complete, Unit of Measurement, (S) Current Work (Non-Cum), (S) Current Remaining Work (Non-Cum), (C) Current Actual Work (Non-Cum), (C) Current Remaining Work (Non-Cum), (C) Current Actual Work (Cum), (C) Current Remaining Work (Cum), (C) Approved Work (Non-Cum), (C) Approved Work (Cum)
7. Click 'Save'.

J. SETTING UP STANDARD DAILY REPORT SETS

There are (5) Field Report Sets that must be created to support GSA ePMXpress and Cognos reports. Follow the instructions below to ensure these Field Reports are created in the Project Template.

1. Navigate to Construction Management/Field Report Set. The Field Report Set register displays.
2. Click 'New' to create a new Field Report Set. The Field Report Set document opens.



3. Create (5) Field Report Set documents with the following "Title" for each.

<u>Title</u>

- CO Status
- Daily Report
- Detailed Status
- Executive Status
- Obligation Variance Explanation

4. Be sure to remove your name as the “Prepared By” contact.
5. Select ‘Save’ after creating each Daily Report Set document.

K. SETTING UP DEFAULT MISCELLANEOUS CONTRACT REQUIREMENTS

Each project will have a default Miscellaneous Contract setup with the appropriate Procuring Office party so Miscellaneous Invoices can immediately commence once a project is created and Funding is handed off for commitments.

1. Navigate to PM Tools > Contract Management > Contracts.
2. Select arrow next to ‘New’ button and select Expense Log.
3. Expand the Details section and enter Expense Log for the Title.
4. Expand the Contract Parties section. Select PBS for the company for the Procuring Office Company, Vendor, and Manager. Leave the contact field empty.
5. Select the Workflow dropdown from the toolbar and select ‘Approve’.
6. Execute the workflow and return to register.

L. PROJECT SPECIFIC NON-SHARED LOOKUP SETUP

There is a set of lookups which need to be non-shared in the project template so when a user goes to create a new project, they are non-sharable.

Lookup Type	System Lookup Type
Agency	ActivityCode04Type
Area/Zone	AreaZone
Building	Location1Type
Building ID	ReportingCode1Type
Contract Specification Section	ContractSpecificationSectionType
File Manager	DocUDFLookup2
Floor	Location2Type
Meeting Set	MeetingMinutesSetName
Phase	GroupingCode2Type
Room	Location3Type
Shell/TI	ReportingCode3Type
Work Area Type	WorkAreaType
Work Category	WorkCategoryType

1. Enter the Program Workspace and enter the appropriate program.
2. Go to Administration > Project Config. (Managed) > Lookup Lists.
3. Select one of the lookups in the above table to open the Lookup Version Manager.
4. Go to Assigned Workspaces tab. Locate your Project Template project and click the project name.

5. Validate the non-shared lookup is assigned to the project. If Sharable box is checked, uncheck it and click ‘Save and Close’.
6. Repeat for the remaining lookup lists in the above table.

Note: If an update is being made to the project template and projects already exist, the user will need to go to Lookup Version Manager tab, click ‘New’, rename Lookup Version Title, uncheck the Sharable box, and click ‘Save and Close’. Go to the Assigned Projects tab, place a checkmark in the box next to ePM 1.3 Master Project Template. Click ‘Reassign to Existing Lookup’. Select the picklist New Lookup Version. Click the Add link to select the new lookup version created. Click OK and OK again. If projects exist, cleanup will need to be performed to each project. A new lookup version will need to be created for each project.

M. MOVE TEMPLATE TO EXECUTION

1. Navigate to Project Properties for the template.
2. Click the project name to open the Project Properties window.
3. Click ‘Workflow’ and choose ‘Set to Execution’.

> **IMPORTANT:** Old versions of project templates must be transitioned to the “cancelled” state in the system after a new project template is created.

N. TESTING

1. Create a project in ePMXpress or ePM using the new template.
2. If it is successful, proceed to step O.

O. CANCELLING PROJECT TEMPLATES

Once a new project template replacement is created, it is imperative to cancel project templates that will no longer be required. Users cannot immediately delete project templates in the system once they reside in the Active state.

1. Navigate to Project Properties for the template.
2. Click the project name to open the Project Properties window.
3. Click ‘Workflow’ and choose ‘Cancel’.

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