



ePM Quick Reference Guide #079

Creating and Managing Milestone Schedules

WHAT IS...

There are 15 standard schedule milestones required by the GSA Project Manager (PM) to manage Capital Projects through the duration of the project. Additionally, there may be an optional 16th labeled as "Other".

There are 4 additional schedule milestones required for Small Projects. It is a GSA and ePM adoption requirement for all Milestone schedule to be documented and maintained within ePM.

These instructions will guide the PM how to build the ePM Schedule document and view the schedule in Gantt view.

Prerequisite:

All projects must be created from ePM 1.3 Master Project Template configuration or higher release.

Postrequisite:

Please reference QRG78_Updating Schedule Start Dates for instructions how the GSA Project Manager must edit Start dates, baseline, and approve milestones within an ePM Schedule.

WHO USES...

- Project Manager

How To...

VIEWING ACTIVITY CODE GROUP FOR PM SCHEDULE

Activity codes are used to organize tasks in a schedule. Before an activity code can be used in a schedule, it must be part of an activity code group and this group must be linked to the schedule. Once an activity code is used in a planning object, the user can filter and group planning objects based around these codes. Before using the Activity Code Groups, each activity code must be defined as a hierarchical lookup in the project. The GSA PM must know which Activity Code is utilized for PM Schedule requirements. The following instructs how to view the supported Activity Code Groups for PM Schedules.

1. Login to ePM and open a project.
2. In the left menu, browse to Administration > Scheduling > Activity Code Groups. The Activity Code Groups register opens.

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3. Select the register view, “Active – Advanced Code Details”. The (3) required Milestone Activity Codes are displayed as part of the “PM Schedule” Activity Code Group (ACG).

Number	Title	Number	Name	Sequence	Separator
001	PM Schedule	4	Agency	3	-
001	PM Schedule	2	Phase	1	-
001	PM Schedule	3	Milestone Type	2	-

NOTE: The following ACGs should be referenced data already created within the ePM program – project template. All new projects should automatically have this Activity Code Group in Active workflow state. If the activity code group in the project is incorrect, it should be modified to reflect the above settings. If the project contains a Milestone Activity Code Group, these are no longer used and can be deleted.

4. Click the 001 Activity Code Group document to open the document.
5. Notice the Activity Code Group is in Active workflow state. In order to successfully assign Activity Code Groups to ePM schedules, they must be in ‘Active’ state.

Preview	Active	Name	Description	Sequence	Separator
View	X	Schedule Type-4874_sitescampusartnarchitecture	Schedule Type	First	-
View	✓	Phase-04/10/2018	Phase	First	-
View	✓	Milestone Type-04/10/2018	Milestone Type	Second	-
View	✓	Agency-4797_piprahdtstproject	Agency	Third	-
View	X	Default List	Phase	Not in Assembled code	-
View	X	Default List	Project ID	Not in Assembled code	-
View	X	Default List	Energy Conservation Measures (ECM)	Not in Assembled code	-
View	X	Default List	Location	Not in Assembled code	-
View	X	Default List	Floor Grouping	Not in Assembled code	-

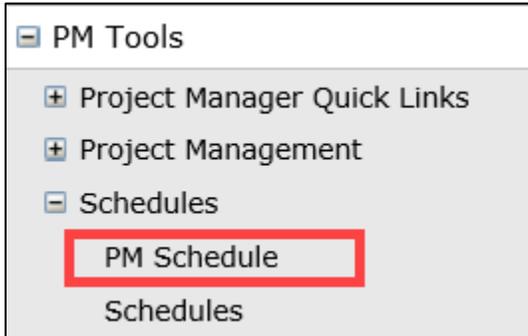
6. Close Activity Code Group document.

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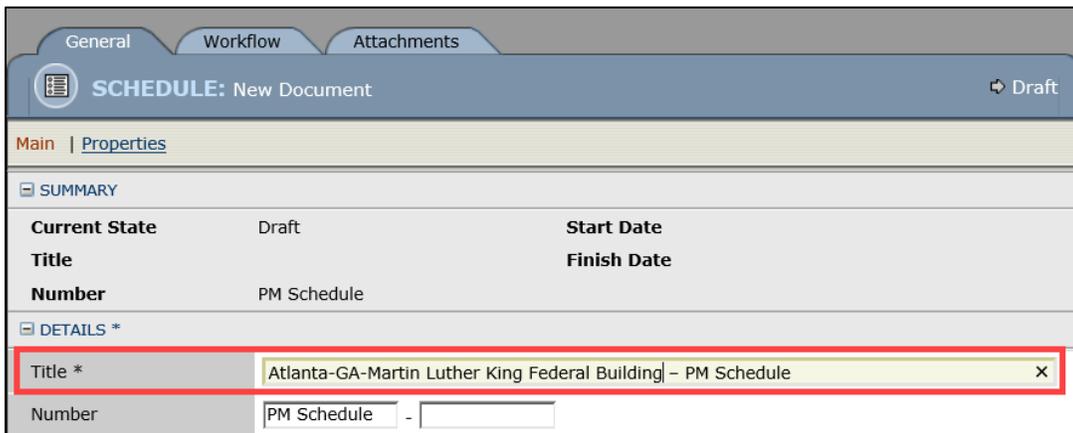
CREATING THE PM SCHEDULE DOCUMENT

1. Login to ePM and enter the project.
2. Browse to the PM Schedule register.



3. Click the New button in the PM Schedule register.
4. Enter the Title of the schedule. The GSA reporting standards require all program/projects to be titled as follows: 'City-State-Project Short Name – PM Schedule'.

EXAMPLE:



5. Enter the required Start and Finish dates for the entire list of milestones

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General | Workflow | Attachments

SCHEDULE: New Document Draft

Main | Properties

SUMMARY

Current State	Draft	Start Date	
Title		Finish Date	
Number	PM Schedule		

DETAILS *

Title *	Atlanta-GA-Martin Luther King Federal Building – PM Schedule
Number	PM Schedule - []
Start Date *	January 01, 2018 [Magnifying Glass]
Finish Date *	December 31, 2021 [Magnifying Glass]

6. Click the Activity Code Group blue magnifying glass Lookup icon.

Priority	[] [Magnifying Glass]
Activity Code Group	[] [Magnifying Glass]
Calendar	[] [Magnifying Glass]

7. Add to assign the titled, “PM Schedule” Activity Code Group to this PM Schedule and click the OK button.

Activity Code Group

View: Standard [Manage Views]

Search: PM [Find] [Reset] Items 1 to 1 of 1

Number	Title	Current State	Sample Format
001	PM Schedule	Active	Phase-Milestone Type-Agency

[Add] [Remove] PM Schedule

[OK] [New...] [Cancel] [Help]

8. Enter the PM’s contact name in the Managing Contact field. The Managing Company will automatically populate.

Managing Contact	Company []	Contact [Magnifying Glass]
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9. Click Save.
10. Vertically scroll down the Schedule document to the Tasks section. Select View Collaborative Gantt. button to launch the Milestone schedule in Gantt view and all default 15 Milestones Activity Codes Register View, for example.



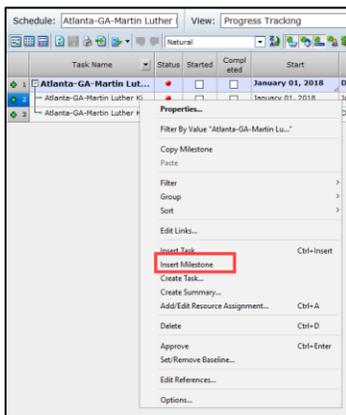
Note: If the Collaborative Gantt button is grayed out, click the Save button on the top tool bar.

11. Expand the vertical pane divider to the right between the spreadsheet and Gantt chart views.
12. The supported Activity Codes appear as Phase, Milestone Type and Agency in supported columns.

CREATING THE MILESTONES IN GANTT VIEW

Activity Codes are used for reporting purposes on several different reports, they also allow the user to sort and filter by code, so it is critical to complete these items.

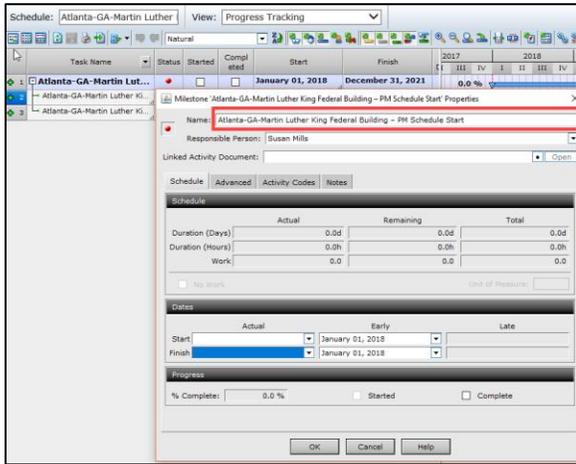
1. Two Milestones are created by default. Insert a new milestone by selecting the Command dropdown list and selecting Insert Milestone.



2. Repeat Step 1 until 16 milestones in total are created for Capital projects, or 20 milestones in total for Small projects. The first two are created automatically as default milestones.
3. Rename all default and new Milestones by double-clicking on the milestone name or left-clicking the triangle shape icon in the bottom lower right corner of each numbered Task Name'.

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4. Edit all Milestone Task Names per the following list and screenshot below:

Milestones List for Capital & Small Projects:

1. Customer Request
2. Funds In Place
3. Requirements Finalized
4. Initial Financial Agreement with Customer
5. Acquisition Plan Finalized
6. Design RFP Issued
7. Prime Contract Solicited
8. Sign Agreement (OA or RWA)
9. Prime Contract Award
10. Design Complete
11. Construction Start / Notice to Proceed
12. Pre-Occupancy Tenant Access
13. Substantial Completion
14. Rent Start
15. Occupancy
16. Other

Additional Milestones for Small Projects:

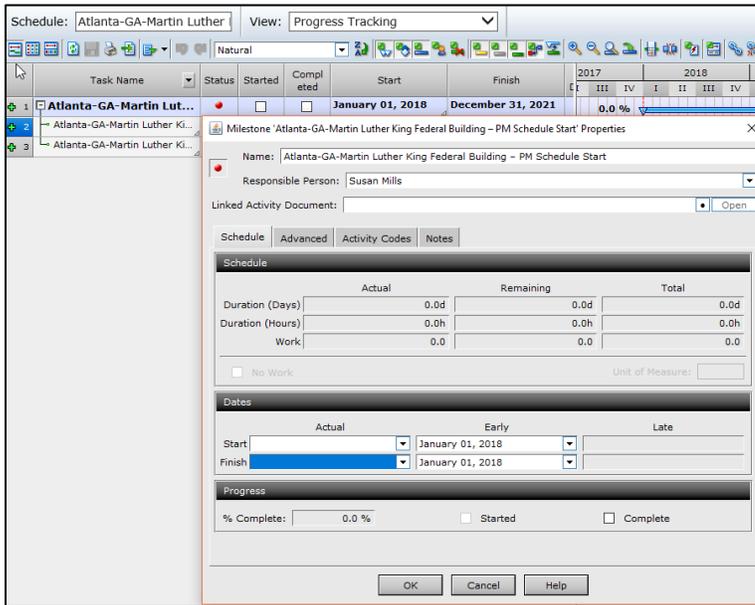
17. Pre-Design Award
18. Pre-Design Complete
19. Design Award
20. Construction Complete

5. Assign the Phase, Milestone Type and Agency activity codes for each Milestone by opening schedule in either the Collaborative or CPM Gantt views. Please note: Collaborative Gantt saves changes automatically whereas CPM Gantt requires to perform a save to retain changes.

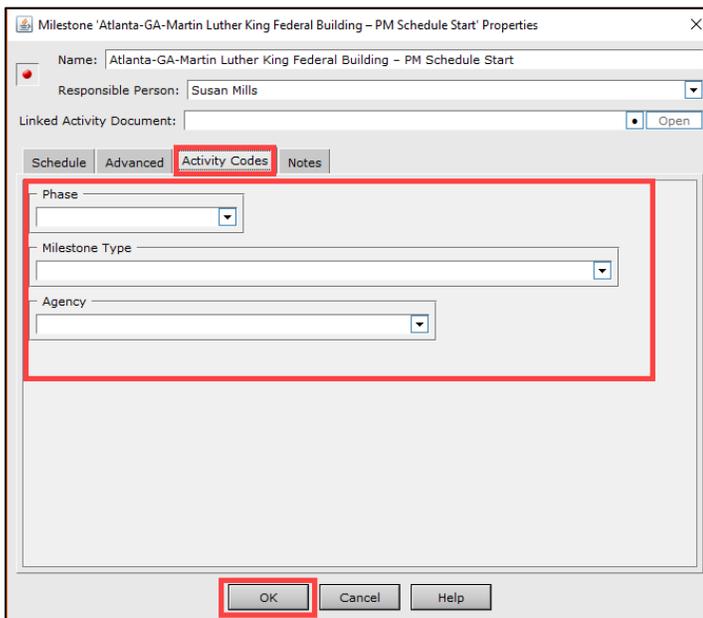
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- Double click on each Milestone Task to launch the properties.



- Click on the Activity Codes tab. For each of the three activity codes, select the drop down and select the appropriate lookup item. Click OK once all three have been updated.



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8. If in CPM Gantt view, the user needs to save changes by clicking on the Save Change icon; otherwise if in Collaborative Gantt, close schedule once updates are complete for each milestone.



9. Close both the Gantt and Schedule documents.

IMPORTANT:

Post requisite Requirement - GSA Project Managers will be required to edit the default Start and Finish dates to each milestone.

REFERENCES

Reference the following ePM Quick Reference Guides (QRGs) for additional information. QRGs can be accessed through the [ePM Portal](#)

- QRG78_ Updating Schedule Start Dates