ePM Quick Reference Guide #131
Fact Sheet Reporting

WHAT IS...

The ePM Fact Sheet reports are comprised of narratives, charts, and other pertinent key performance indicators desired for management and customer review. Below is a summary of each fact sheet report. Instructions for data entry begin on page 9 for small projects and on page 12 for capital projects.

KEY PROPERTIES FACT SHEET

The Key Properties Fact Sheet is a one-page report featuring key project information including team, status, schedule, financials, and issues for Capital projects. This report is used during the PBS Commissioner's monthly key properties meeting, which focuses on highly visible projects.

Program	Capital
Project Type	New Construction R&A Reimbursable
Project Stage	Design Construction

GSA BI PROJECT STAKEHOLDER REPORT

The Project Stakeholder Report is a one-page report featuring key project information including schedule, financials, status, and issues for projects that are over $25K. These reports are used for the Office of Customer Engagement initiative, and they are shared with GSA clients. Therefore, it is essential that system data be kept up to date.

Program	Small Capital
Project Type	New Construction R&A Reimbursable
Project Stage	Design Construction

CONSOLIDATION FACT SHEET

The Consolidation Fact Sheet is a one-page report featuring key project information including team, status, schedule, financials, and issues for projects that received funding in the FY14, FY15, FY16, FY17, FY18, and FY19 consolidation programs. ePM/ePMXpress project data must be validated/updated for monthly consolidation projects meetings.

Program	Small Capital
Project Type	New Construction R&A Reimbursable
Project Stage	Design

	Construction

DETAILED FACT SHEET

The Detailed Fact Sheet (DFS) is a comprehensive, multi-page report that pulls data sets from many areas within ePM. The DFS shows the following information: detailed status, executive status, scope, schedule, financial health, issues and team. The DFS should be edited through the daily activity on the project, and no less than on a monthly basis.

Project Type	New Construction R&A Reimbursable
Project Stage	Design Construction

EXECUTIVE FACT SHEET

The Executive Fact Sheet (EFS) is a concise, one-page report that provides an overview of a project including project manager, executive status, scope, schedule, earned value performance indicators, and financials. The EFS should up be updated on a monthly basis.

Program	Capital
Project Type	New Construction R&A Reimbursable
Project Stage	Design Construction

CAPITAL PROJECTS INFORMATION DASHBOARD

The Capital Projects Dashboard (CPID) integrates capital project data from multiple source systems and presents a consolidated view of program and project information. Most of the information in CPID is updated in source systems (IRIS, Prospectus, and REXUS) instead of in ePM. For more information on CPID, visit the CPID InSite page (internal only).

Program	Capital
Project Type	New Construction R&A Reimbursable
Project Stage	Design Construction

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SMALL PROJECTS DASHBOARD

The Small Projects Dashboard (SPD) integrates small project data from multiple source systems and presents a consolidated view of program and project information. For more information on SPD, visit the SPD InSite page (internal only).

Program	Small
Project Type	R&A Reimbursable
Project Stage	Planning Design Construction

PBS CUSTOMER DASHBOARD

The PBS Customer Dashboard is a web-based interactive database with project and occupancy information for federal agencies with space managed by the Public Buildings Service (PBS) of the U.S. General Services Administration (GSA). For more information on the PBS Customer Dashboard, visit the Office of Customer Engagement Google Site.

Program	Capital Small
Project Type	New Construction R&A Reimbursable
Project Stage	Planning Design Construction

WHO USES…

- GSA Project Managers
- General Contractor
- Construction Manager
- Architect / Engineer
- Contracting Officer and Staff
- GSA Executives
- Owner Representative
- Program Managers

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REPORTING AND DASHBOARD MATRIX

The matrices below outline the data entry requirements for each fact sheet and dashboard:

Small Projects

Required Entry	ePMXpress Module	Report/Dashboard			
		Stake	Consol	SPD	Cust
Program	Project Detail	X		X	
Project Template	Project Detail				X
PCN/RWA	Project Detail	X	X	X	X
Project Number	Project Detail	X	X	X	X
Project Name	Project Detail	X	X	X	X
Building ID	Project Detail	X	X	X	X
Customer	Project Detail	X	X	X	X
Project Type	Project Detail	X	X	X	X
Managing Org	Project Detail	X		X	
Funding Type	Project Detail			X	X
Delivery Method	Project Detail				
Design Funding FY	Project Detail				
Construction Funding FY	Project Detail			X	
Building Type	Project Detail				
Project Description	Project Detail	X	X	X	X
Project Status	Project Detail	X	X	X	X
C&D Waste	Project Detail			X	
Project Manager	Project Team	X	X	X	X
Contracting Officer	Project Team	X	X	X	X
Project Executive	Project Team				
Project Sponsor	Project Team	X	X	X	X
Contracting Specialist	Project Team		X	X	
Customer Representative	Project Team	X		X	X
Property Manager	Project Team			X	
Milestones	Schedule	X	X	X	X
Funding	PM Financials	X	X	X	X
ECCA - Construction Estimate	PM Financials				
Issues	Issues	X	X		
PMP	File Manager				
Project Schedule	File Manager	X			

Key:
Key Prop = Key Properties Fact Sheet
Stake = Stakeholder Fact Sheet
Consol = Consolidation Fact Sheet
DFS = Detailed Project Fact Sheet
EFS = Executive Project Fact Sheet
SPD = Small Projects Dashboard
Cust = PBS Customer Dashboard

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Capital Projects

If information is pulled from another system, the source system is listed in the report/dashboard field.

Required Entry	ePM Module	Report/Dashboard						
		Key Prop	Stake	Consol	DFS	EFS	CPID	Cust
Project Number	Project Properties	X	X	X				X
Project Name	Project Properties	X	X	X	X	X		X
Program	Project Properties		X		X	X	X	
Brief Description	Project Properties	X						
Full Description	Project Properties							
Project Template	Project Properties							X
Building ID	Project Properties				X		X	
CPA Line Item	Project Properties						X	
Number of Occupants	Project Properties				X	X		
Parking Spaces/Square Footage	Project Properties	X			X	X	Prospectus	
Project Description	Project Properties		X	X	X		Prospectus	X
Square Footage	Project Properties	X			X	X	Prospectus	X
All-In Project Utilization Rate	Project Properties	X						
Project Type	Project Properties	X	X	X	X	X		X
Building Type	Project Properties							
Delivery Method	Project Properties	X			X	X	IRIS	
Managing Organization	Project Properties		X			X		
PCN/Line Item	Project Properties	X	X	X			IRIS	X
Customers	Project Properties		X	X	X		REXUS	X
Project Management	Executive Status	X	X	X	X	X		X
	Detailed Status	X	X	X	X			X
	Issue	X	X	X	X			
Scheduling and Milestones	PM Schedule	X	X	X	X	X	Prospectus	X
Financial Management	Allowances				X	X		X
	Funding Requests							
	RWAs	X	X	X	X	X		X
Contract Management	Contracts				X			
	Contract Mods				X			
	PCOs				X			
	Earned Value				X	X		
Portfolio Planning	Appropriation (and Adjustment)	X	X	X			Prospectus	

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Design Management	**Design Submissions**				X			
Construction Management	**RFIs**				X			
	Submittals Packages				X			
	Punchlist				X			
Address Book	**Companies**	X		X	X			
	Contacts	X	X	X	X			X
	Project Manager	X	X	X	X	X	IRIS	X
	Contracting Officer	X	X	X	X			X
	Sponsor		X	X				X

Key:
Key Prop = Key Properties Fact Sheet
Stake = BI Stakeholder Fact Sheet
Consol = Consolidation Fact Sheet
DFS = Detailed Project Fact Sheet
EFS = Executive Project Fact Sheet
CPID = Capital Projects Dashboard
Cust = PBS Customer Dashboard

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The matrix below lists all of the schedule milestones that appear on each report.

Schedule Milestone	Report				
	Key Prop	Stak e	Consol	DFS	EFS
Project Initiation					X*
Customer Request (Activity Code 01)			X	X	
Project Initiated (Activity Code 28)			X	X	
Initial Scope and Requirements Finalized with Customer (Activity Code 41)			X	X	
Client Concurrence on Final Scope, Schedule and Cost Estimate (Activity Code 42)			X	X	
Requirements Finalized (Activity Code 03)	X			X	
Planning					X*
Congressional Appropriation (Activity Code 61)					
Project Authorization/RWA Acceptance (Activity Code 02)	X	X	X	X	
Initial Financial Agreement with Customer (Activity Code 04)				X	
Define Project Funding Requirement (Activity Code 62)				X	
Site Acquisition Start (Activity Code 29)				X	
Site Acquisition Complete (Activity Code 23)				X	
Pre-Design Award (Activity Code 17)				X	
Pre-Design Complete (Activity Code 18)				X	
Design Acquisition Plan Finalized (Activity Code 05)				X	
Design Procurement Request Submitted (Activity Code 43)			X	X	
Contracting Accepts Design Procurement Request (Activity Code 44)			X	X	
Design RFP Published in FedBizOpps (Activity Code 06)	X			X	
Design RFP Proposals Received (Activity Code 30)				X	
SSEB/Design Firms Shortlisted (Activity Code 31)				X	
Design Firm Selected and Price Proposal Requested (Activity Code 32)				X	
Design					X*
Design Award (Activity Code 19)	X		X	X	
Design Start / NTP (Activity Code 21)	X		X	X	
Concept Design Approval (Commissioner's Presentation) (Activity Code 22)				X	
CMa Award Date (Activity Code 24)				X	
Design Complete (Activity Code 10)	X		X	X	
Construction or Design/Build Acquisition Plan Finalized (Activity Code 33)				X	
PM Submits Construction or Design/Build PR (Activity Code 34)		X	X	X	
Contracting Accepts Construction or Design/Build PR (Activity Code 35)			X	X	
Construction or Design/Build RFP Issued (Activity Code 07)	X			X	
Construction or Design/Build RFP Proposals Received (Activity Code 36)				X	

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Construction or Design/Build Firms Interviews Completed (Activity Code 37)				X	
Successful Construction or Design/Build Firm Selected (Activity Code 38)				X	
Construction or Design/Build Contract Acquisition/Legal Reviews Started (Activity Code 39)				X	
Construction or Design/Build Contract Acquisition/Legal Reviews Completed (Activity Code 40)				X	
Construction					X*
Construction or Design/Build Contract Award (Activity Code 09)	X	X	X	X	
Construction Start/NTP (Activity Code 11)	X	X	X	X	
Signed Agreement (OA) (Activity Code 08)				X	
CXa Award Date (Activity Code 25)				X	
AiA Award Date (Activity Code 26)				X	
Pre-Occupancy Tenant Access (Activity Code 12)				X	
Substantial Completion (Activity Code 13)	X	X	X	X	
Rent Start (Activity Code 14)				X	
Occupancy (Activity Code 15)	X			X	
Construction Complete (Activity Code 20)				X	
Closeout					X*
Project Closeout (Activity Code 27)	X		X	X	

* If there are no summary tasks (Project Initiation, Planning, Design, Construction, or Closeout), all first level tasks print on the EFS.

HOW TO UPDATE SMALL PROJECTS

PROJECT DETAIL

1. Using Internet Explorer, go to the ePM Portal.
2. Click ‘ePMXpress’ in the list of applications.

3. Navigate to the ‘Project Detail’ tab. Click ‘Edit’ to begin editing.
4. Enter the following information on the Project Detail tab:
    - Project Name
    - Current State
    - Building ID(s)
    - Project Type
    - Customer(s)
    - Building Address
    - 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 ePMXpress Description field.

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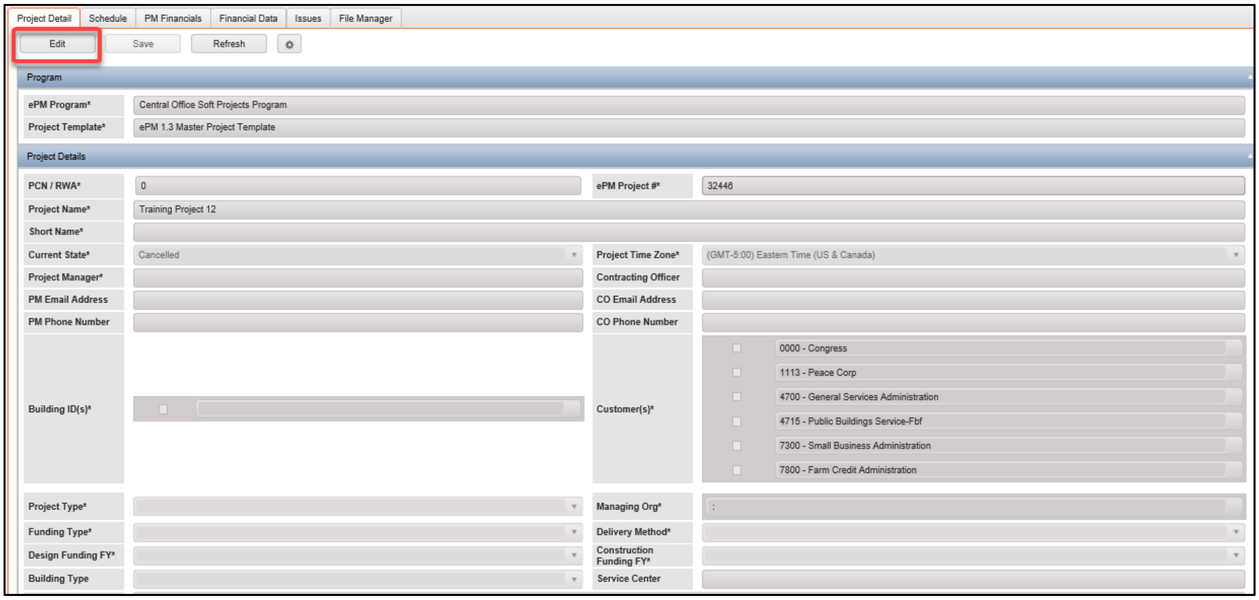
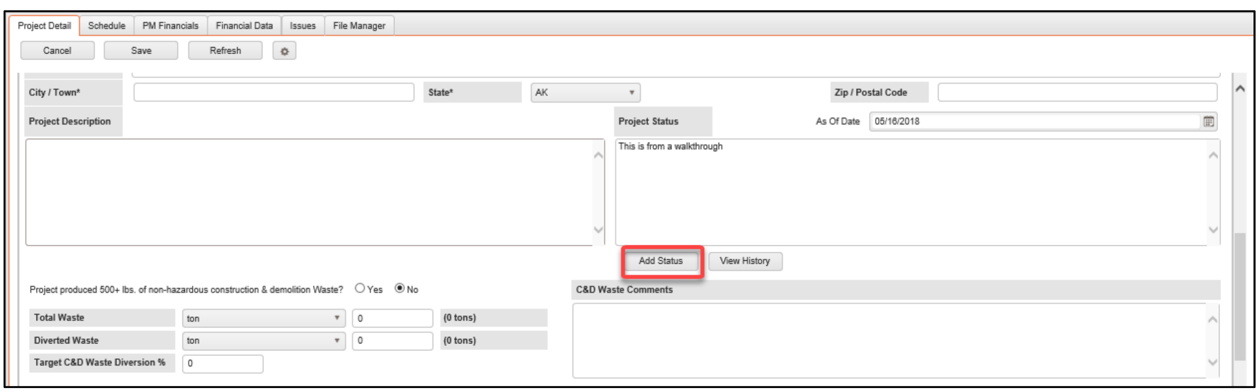


5. Scroll to the Project Status section. Click ‘Add Status’ and enter the status narrative.
    - Note: All reports except for the Detailed Fact Sheet will only display the first 1,000 characters of the status field.
    - Use this section to provide a narrative on on-going procurement, design, and construction activities such as recently awarded contracts, scope changes, and tenant changes.
    - Click ‘View History’ to view all prior of Project Status journal entries.



6. Scroll to the Team Members section. Click ‘Add Line’ to begin selecting team members.
7. In the search field, type the team member’s name, and click ‘Find’.
8. Click the appropriate name in the list.
9. Select the appropriate role from the ‘Project Role’ list. Team members that will be displayed on the fact sheets 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

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- Architect/Engineer: KEY.AE (Note: only company name will be reported)
- Construction Contractor: KEY.CC (Note: only company name will be reported)
- Const. Management: KEY.CONM (Note: only company name will be reported)

10. Choose a ‘Project Access’ level.

Organization	Contact	Email	Phone	Project Role	Project Access*
AECOM Design	Allen Matz	allen.matz@gsa.gov	(303) 503-6134		No Access
PBS	Andrew Morettini	Andrew.Morettini@gsa.gov	(152) 802258_		No Access
Meridian Systems Inc.	Antonio Wynder	antonio.wynder@gsa.gov	(202) 501-9119		No Access
PBS	Bert Aultman	bert.aultman@gsa.gov	(202) 365-4282		ePM 1.3: GSA-PM
PBS	BI Integration User Account				Administrator
CBRE	Bill Slaybaugh Jr.	Bill.Slaybaugh@CBRE.com	(206) 8293032		No Access
Hensel Phelps Construction	Brian Maximuk	bmaximuk@henselphelps.com	(310) 490-4599		No Access
Solution Guidance Corp.	Brian Rothery	brian.rothery@gsa.gov	(703) 961-1602	KEY.PM : GSA Project Manager	No Access

11. Click ‘Save’ in the toolbar.

SCHEDULE

1. Navigate to the ‘Schedule’ tab. Click ‘Edit’ to begin editing.
2. All milestones should already 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 fact sheets 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.

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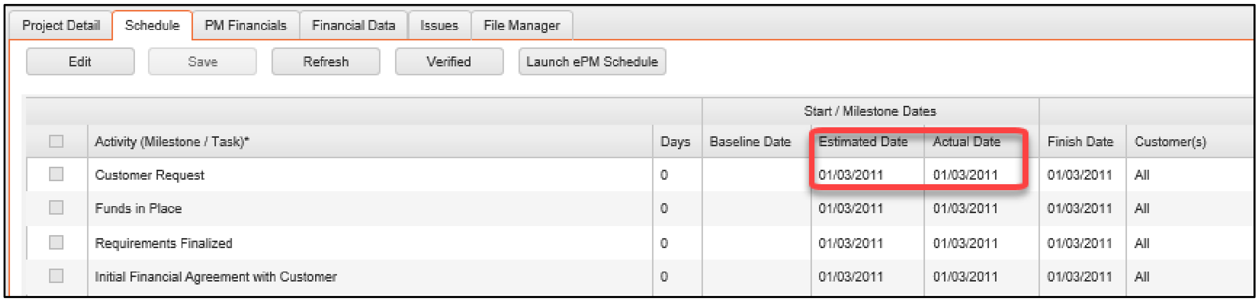
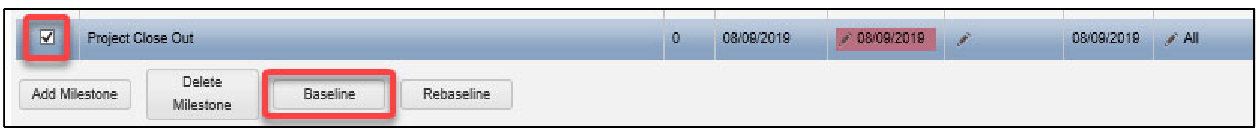


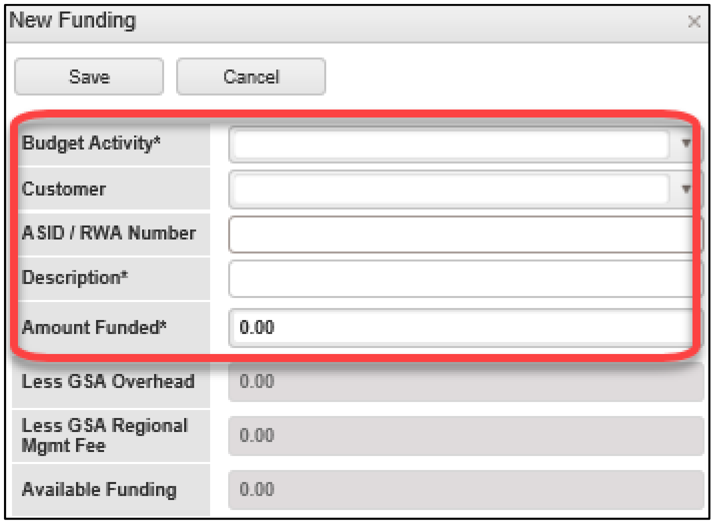
5. Select the affected Customer(s).
6. To add notes about a milestone click on the pencil icon to the right of that milestone, enter notes, and click ‘OK’.
7. To remove a milestone, select the milestone by checking the box to the left of the Activity then clicking ‘Delete Milestone’.
8. To baseline a 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’.

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.

ISSUES

1. With the appropriate project open, click on the ‘Issues’ tab.
2. Enter the following required 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.

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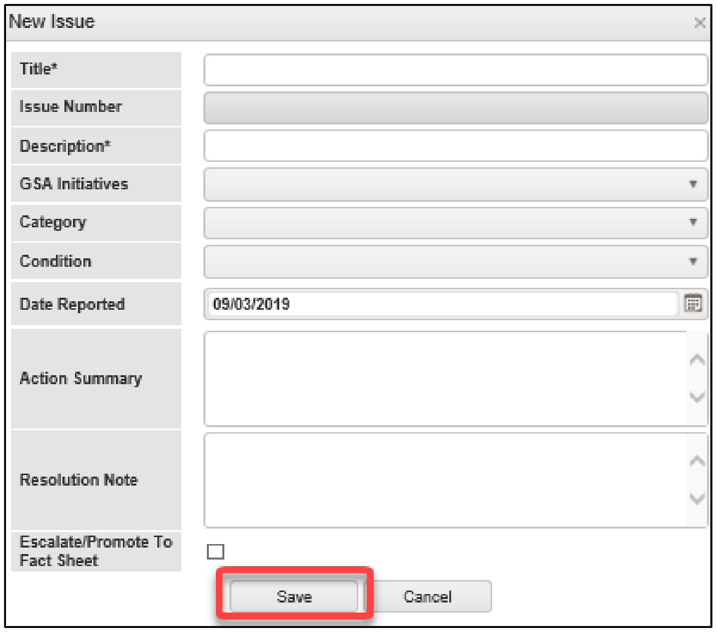

3. Click ‘Save’.

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

HOW TO UPDATE CAPITAL PROJECTS

PROJECT INFORMATION

1. Log into ePM as a user and select 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. When the ‘Project Properties’ page opens, click the Project Number to launch the Project Properties editing window, and click ‘Edit’ to begin editing.

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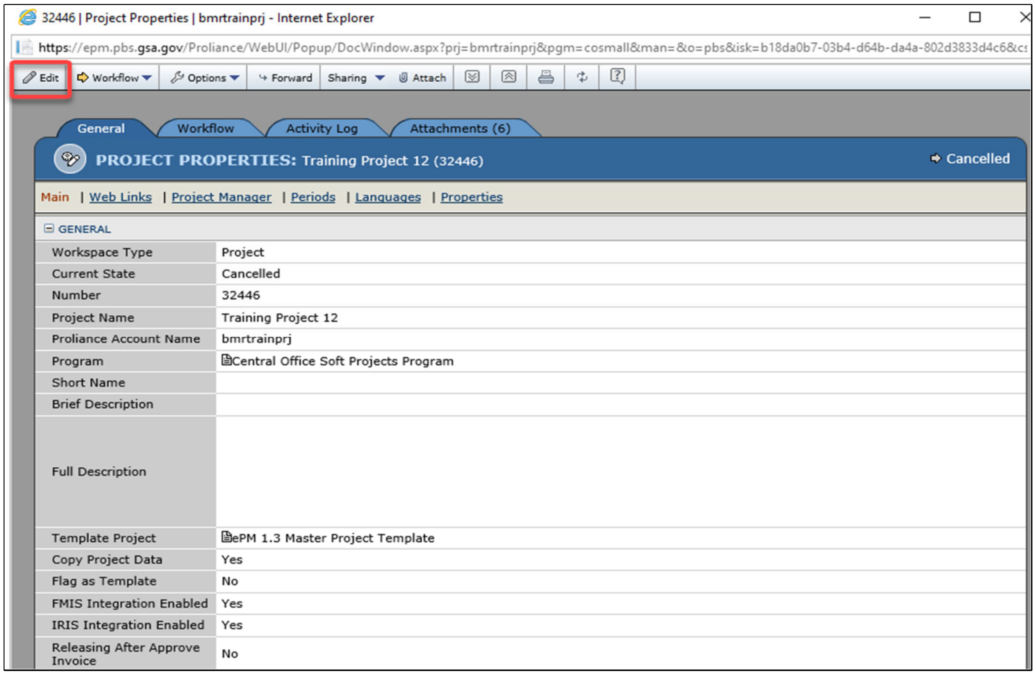


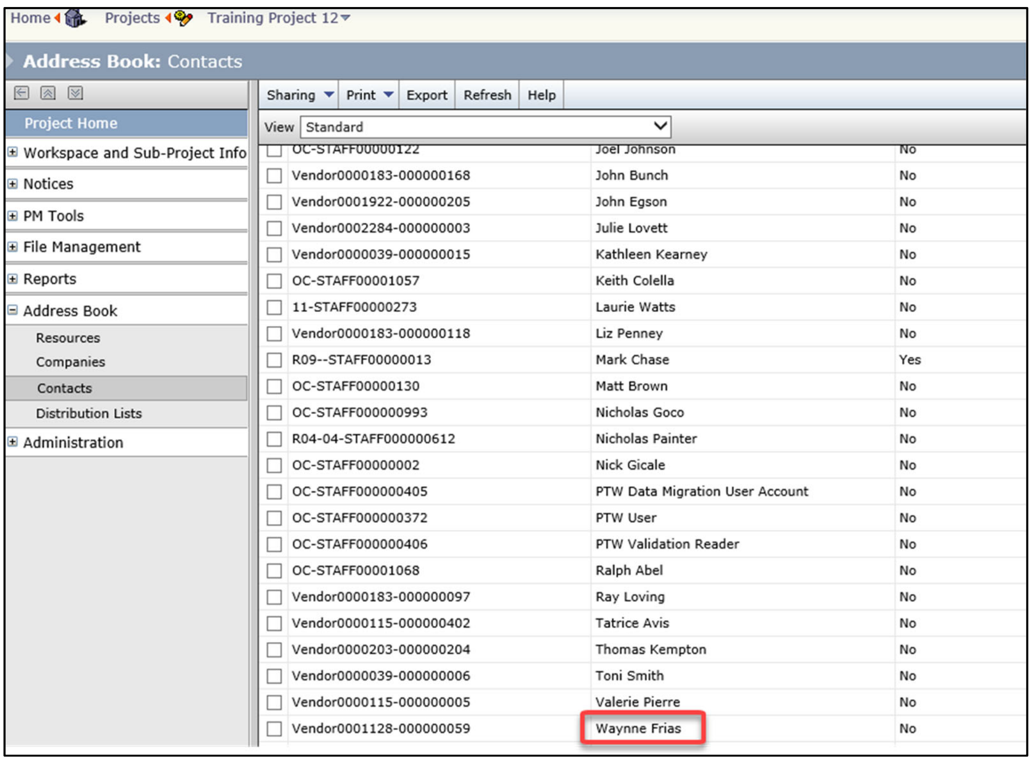
4. Enter the following information:
    - Current State
    - Project Name: Use the GSA Standard Naming Convention for projects:
        - State-City-BuildingName-ProjectName-SubLocation
        - *Example: CA-Los Angeles-Reagan CH-Upgrade Doors-2nd Floor*
    - Short Name
    - Brief Description: Note: reports will only display the first 255 characters entered
    - Project Address
    - CPA Line Item
    - Number of Occupants
    - Inside Parking Spaces
    - Outside Parking Spaces
    - 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.
    - Gross SF (numeric characters only)
    - Rentable SF (numeric characters only)
    - Usable SF (numeric characters only)
    - Inside Parking SF (numeric characters only)
    - Project Type
    - Delivery Method
    - Managing Organization
    - Building ID
    - PCN/RWA

- CPA Line Item Number
- Customer(s): Contact your Regional System Administrator for assistance in editing the Customer Lookup List

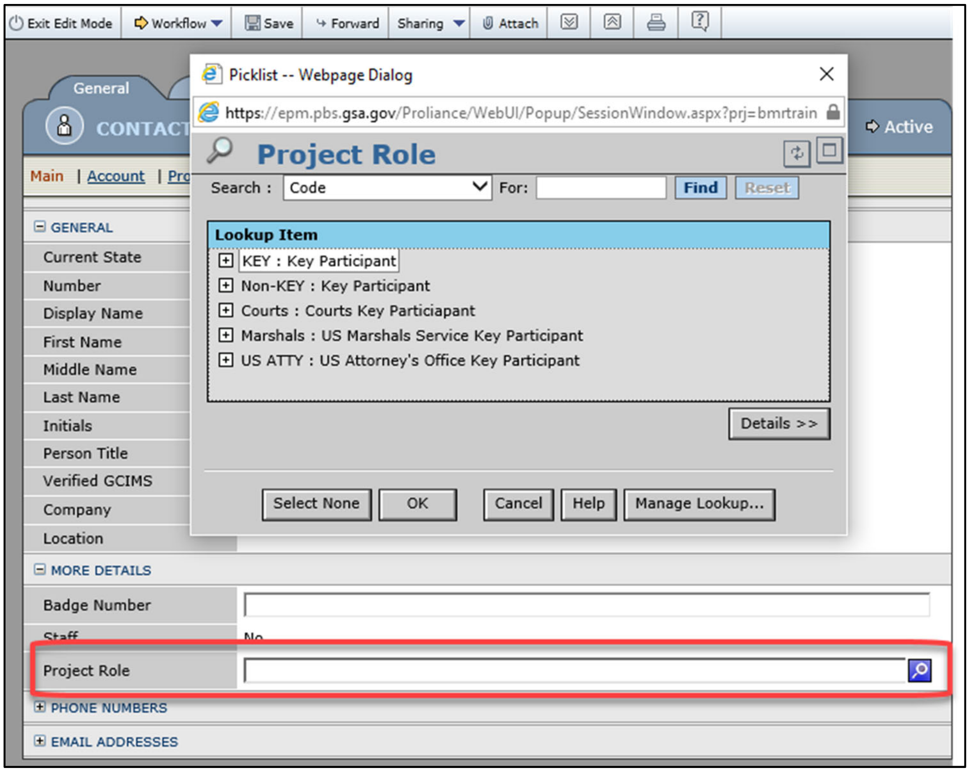
5. Click ‘Save’.

PROJECT TEAM

1. Important contacts need to be designated with the following values in the ‘Project Role’ lookup. If multiple contacts are assigned the same lookup value, then multiple names will be displayed.
2. Navigate to the ‘Address Book’ in the left-hand menu and select ‘Contacts’ to open the window.
3. Click a user’s name to open the Contact window.



4. Click ‘Edit’ to begin editing.
5. 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.



6. Select the appropriate role and click ‘OK’.
   - Team members that will be displayed on the fact sheets include:
     - Project Manager: KEY.PM
     - Project Sponsor: KEY.PRJSP
     - 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 Detailed Project Fact Sheet.
7. Click ‘Exit Edit Mode’ and confirm the entries.
8. Repeat this step for each person that is considered a key team member.

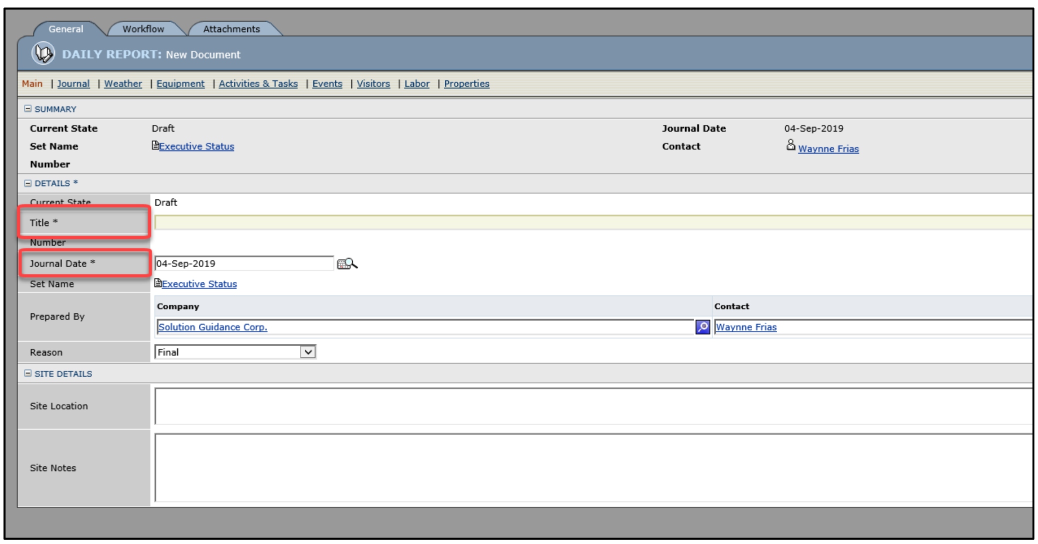
> **IMPORTANT:** Indicate only one person on the team as the Key Project Manager.

EXECUTIVE STATUS

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

2. Click the 'New'.

3. Choose 'Executive Status' report set from the Daily Report Setup picklist by clicking the magnifying glass icon. This will open the Daily Report Set window.
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.
7. In the 'Daily Report: New Document' window, enter the Title and Journal Date.



8. Click 'Journal' to go to the Journal page. Update the 'Journal' page to include a narrative on on-going procurement, design, and construction activities such as recently awarded contracts, scope changes, and tenant changes.
   - Note: On all fact sheet reports except for the Detailed Fact Sheet, only the first 1,000 characters of the Executive Status will be displayed. On the Detailed Fact Sheet, the 3,000 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 or workflow the document to the 'Active' state.

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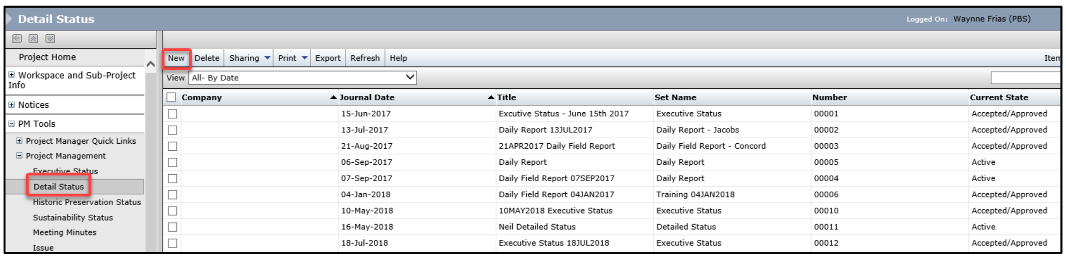
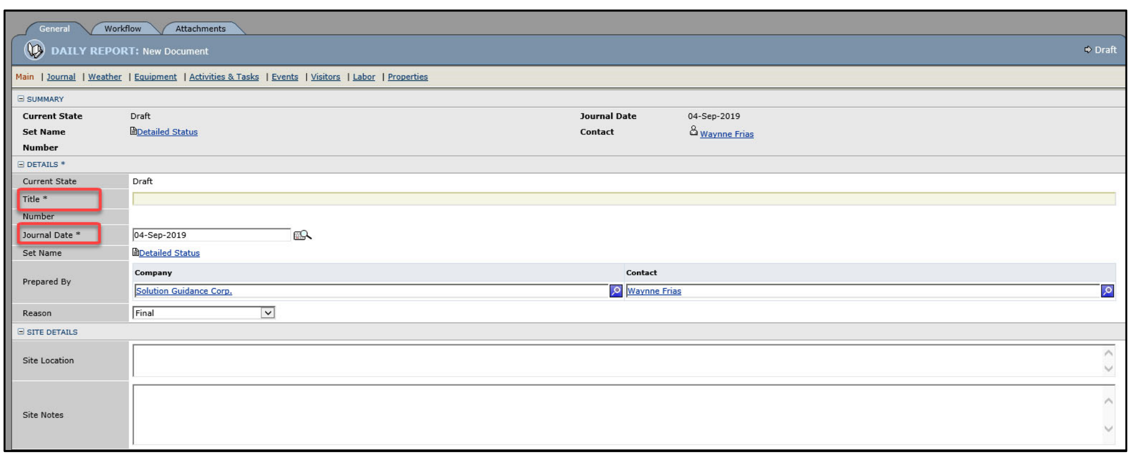
DETAILED STATUS

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



3. Choose ‘Detailed Status’ report set from the Daily Report Setup picklist by clicking the magnifying glass icon. This will open the Daily Report Set window.
4. In the Daily Report Set window, click ‘Add’ to select the Detailed Status. Click ‘OK’.
5. Click ‘Next’ on the Daily Report Setup window.
6. Click ‘Finish’ on the second ‘Daily Report Setup’ window.
7. In the ‘Daily Report: New Document’ window, enter the Title and Journal Date.



8. Click Journal to go to the Journal page. Update the ‘Journal’ page to include a narrative on on-going procurement, design, and construction activities such as recently awarded contracts, scope changes, and tenant changes.
   - Note: On all fact sheet reports <u>except</u> for the Detailed Fact Sheet, only the first 1,000 characters of the Detailed Status will be displayed. On the Detailed Fact Sheet, the 3,000 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 or workflow the document to the 'Active' state.

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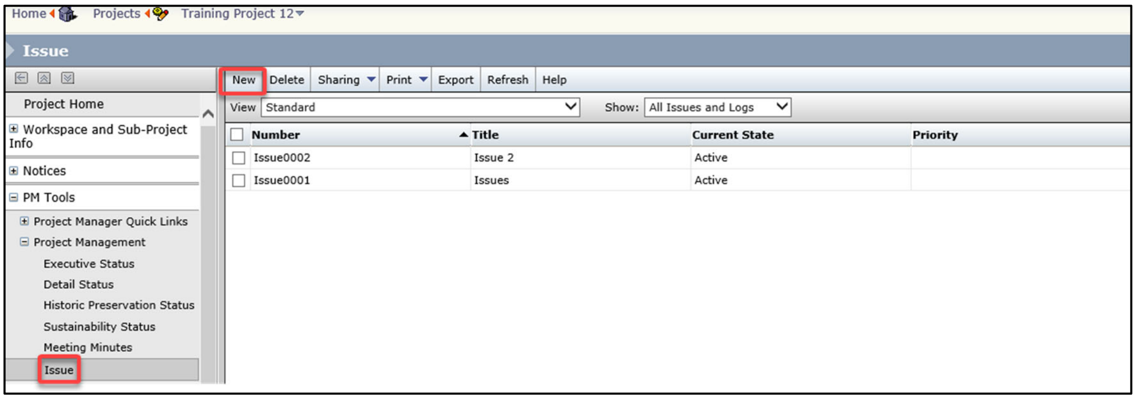
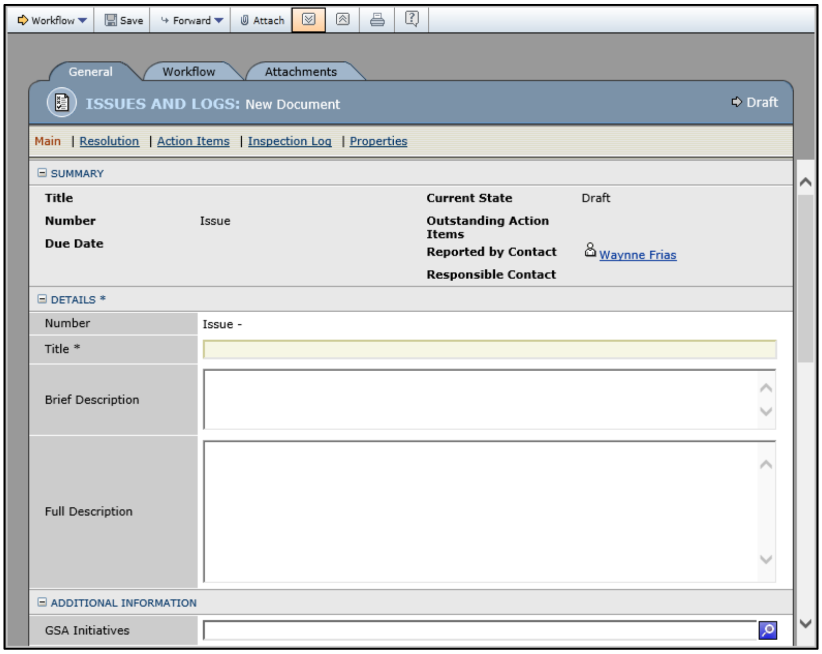
ISSUES

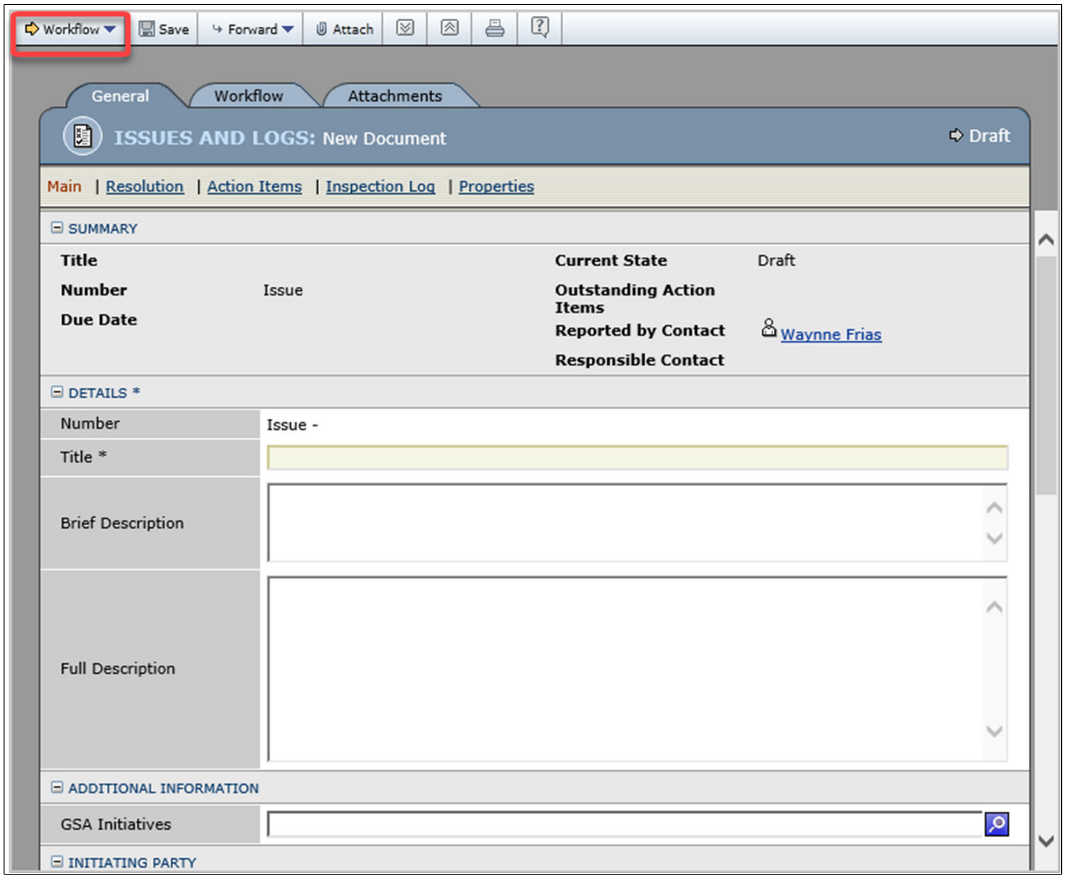
1. Navigate to 'PM Tools' in the left-hand menu, expand the 'Project Management' menu, and choose 'Issue.'
2. Click 'New' to create a new Issue.



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 report 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



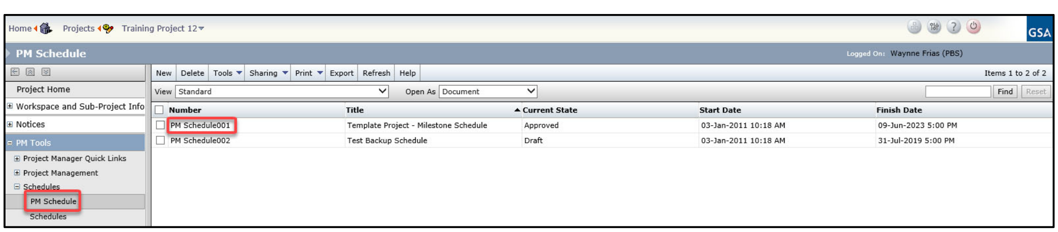
4. Click ‘Workflow’ in the top toolbar and select ‘Activate’ to transition the document to the ‘Active’ state.



> **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.

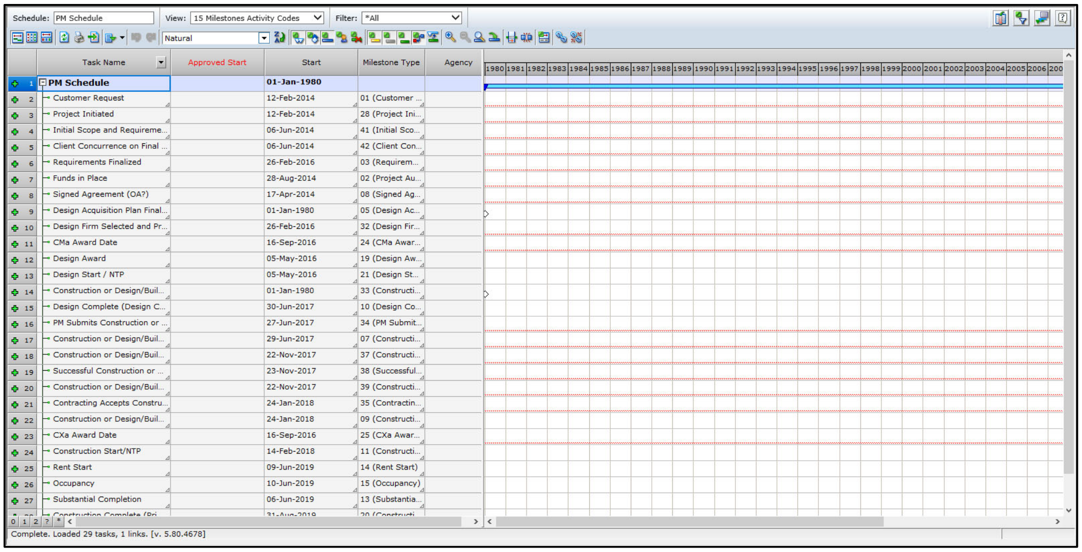
SCHEDULE

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 task, which opens the ‘Milestone Properties’ window. Then update the dates in the Early Start field and click ‘OK’.
   - Schedule milestones that will be displayed on fact sheets 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)
     - Requirements Finalized (Activity Code 03)
     - Funds in Place (Activity Code 02)
     - Initial Financial Agreement with Customer (Activity Code 04)
     - Define Project Funding Requirement (Activity Code 62)
     - Site Acquisition Start (Activity Code 29)
     - Site Acquisition Complete (Activity Code 23)
     - Pre-Design Award (Activity Code 17)
     - Pre-Design Complete (Activity Code 18)
     - Design Acquisition Plan Finalized (Activity Code05)
     - Design Procurement Request Submitted (Activity Code 43)
     - Contracting Accepts Design Procurement Request (Activity Code 44)
     - Design RFP Published in FedBizOpps (Activity Code 06)
     - Design RFP Proposals Received (Activity Code 30)
     - SSEB/Design Firms Shortlisted (Activity Code 31)
     - Design Firm Selected and Price Proposal Requested (Activity Code 32)
     - Design Award (Activity Code 19)
     - Design Start / NTP (Activity Code 21)
     - Concept Design Approval (Commissioner's Presentation) (Activity Code 22)
     - CMa Award Date (Activity Code 24)
     - Design Complete(Activity Code 10)
     - Construction or Design/Build Acquisition Plan Finalized (Activity Code 33)
     - PM Submits Construction or Design/Build PR (Activity Code 34)
     - Contracting Accepts Construction or Design/Build PR (Activity Code 35)
     - Construction or Design/Build RFP Issued (Activity Code 07)
     - Construction or Design/Build RFP Proposals Received (Activity Code 36)
     - Construction or Design/Build Firms Interviews Completed (Activity Code 37)
     - Successful Construction or Design/Build Firm Selected (Activity Code 38)
     - Construction or Design/Build Contract Acquisition/Legal Reviews Started (Activity Code 39)
     - Construction or Design/Build Contract Acquisition/Legal Reviews Completed (Activity Code 40)
     - Construction or Design/Build Contract Award (Activity Code 09)
     - Construction Start/NTP (Activity Code 11)
     - Signed Agreement (OA?) (Activity Code 08)
     - CXa Award Date (Activity Code 25)
     - AiA Award Date (Activity Code 26)
     - Pre-Occupancy Tenant Access (Activity Code 12)
     - Substantial Completion (Activity Code 13)
     - Rent Start (Activity Code 14)
     - Occupancy (Activity Code 15)

- Construction Complete (Activity Code 20)
- Project Closeout (Activity Code 27)



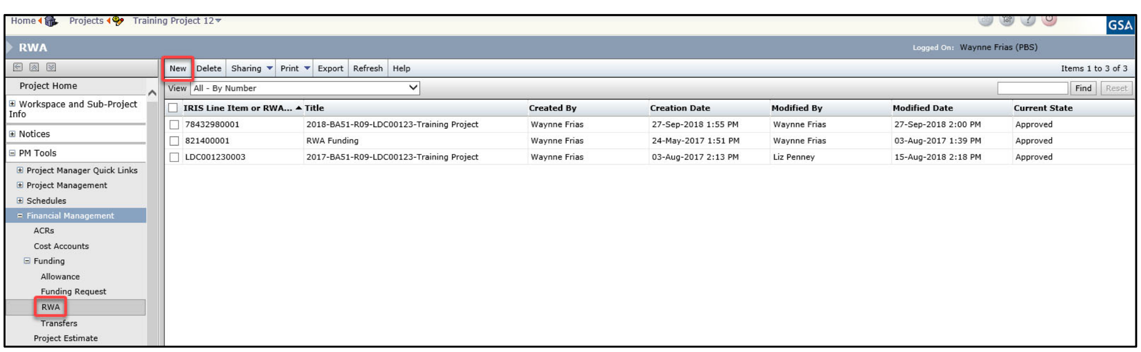
4. To enter or update actual dates, double-click the name of a task, which opens the 'Milestone Properties' window. Then update the dates in the Actual Start field.
5. Click 'OK'.

FINANCIALS

Project Financials include all sources of project funding.

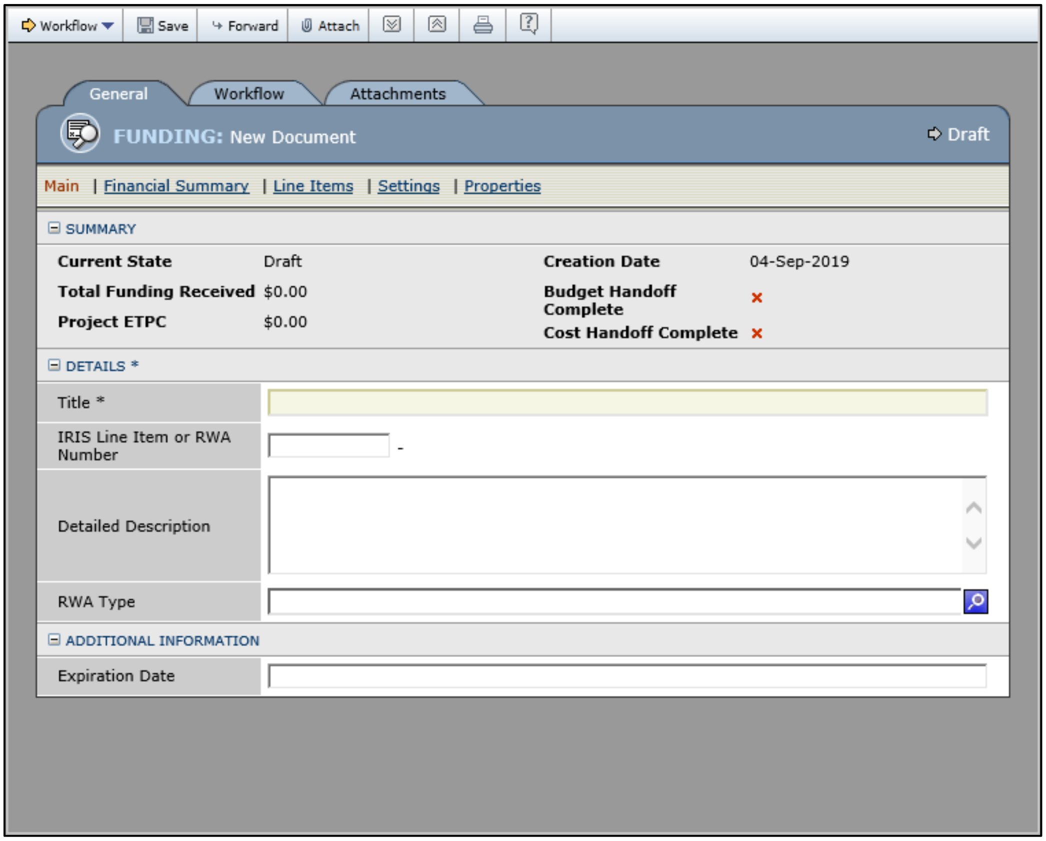
RWAs

1. Navigate to 'PM Tools' in the left-hand menu and expand the 'Financial Management' menu. Then expand the 'Funding' menu and choose 'RWA.'

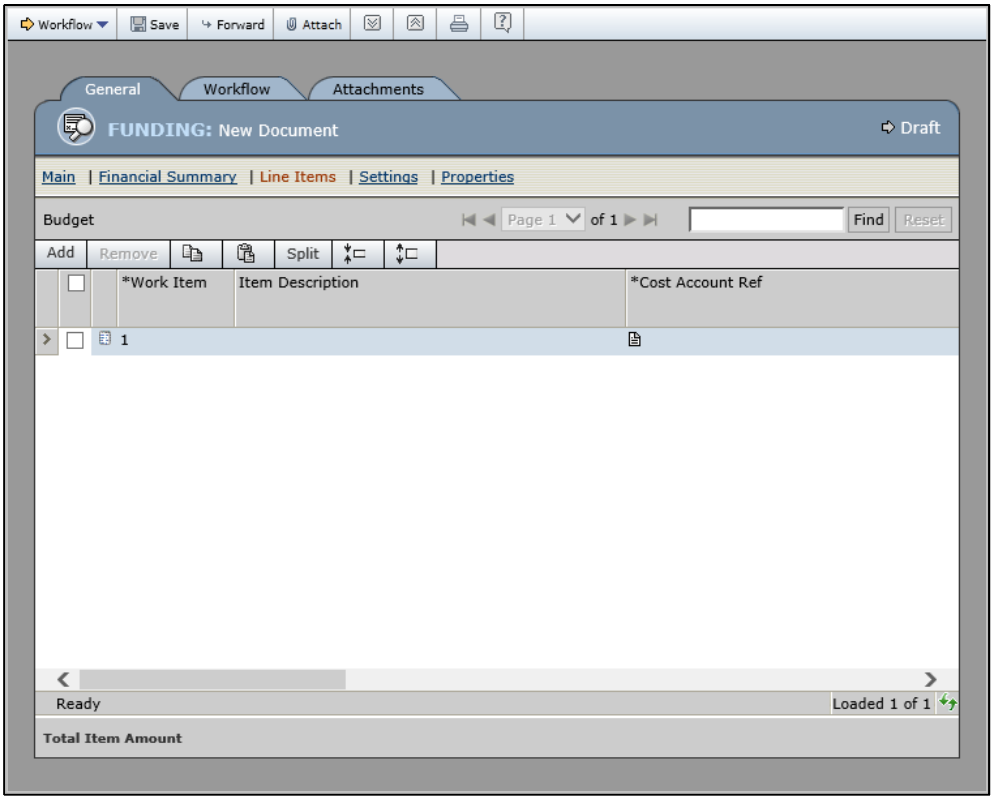


2. Click 'New' to begin creating the RWA.

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.



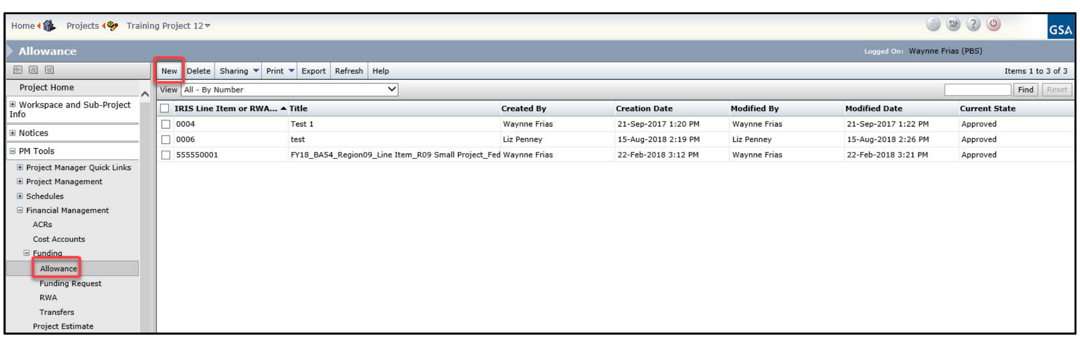
5. Click the Line Items page and click ‘Add’. In the new line that appears, enter the:
   - Work Item
   - Item Description
   - Cost Account Ref: Create new cost accounts for each unique combination of Function Code, Fiscal Year, and Budget Activity
   - Item Amount
   - Building ID



6. Click 'Save'.
7. Click 'Workflow' and choose 'Approve.'

Allowance

8. Navigate to 'PM Tools' in the left-hand menu and expand the 'Financial Management' menu. Then expand the 'Funding' menu. Click 'Allowance.'



9. Click 'New' to begin creating the Allowance.

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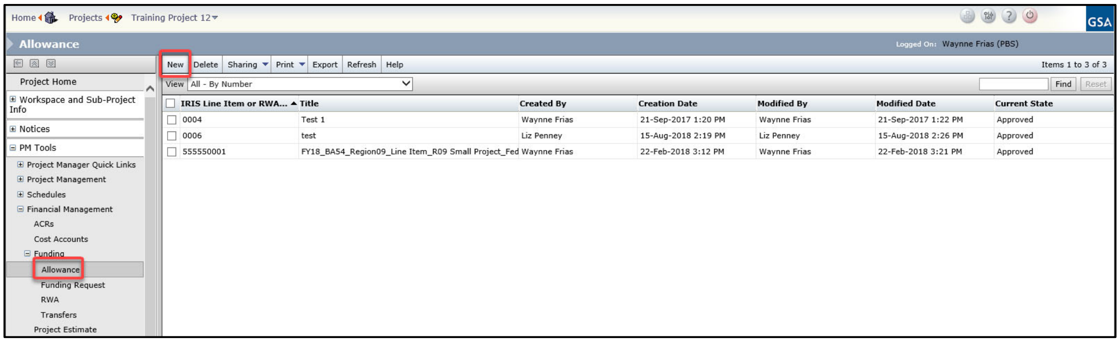
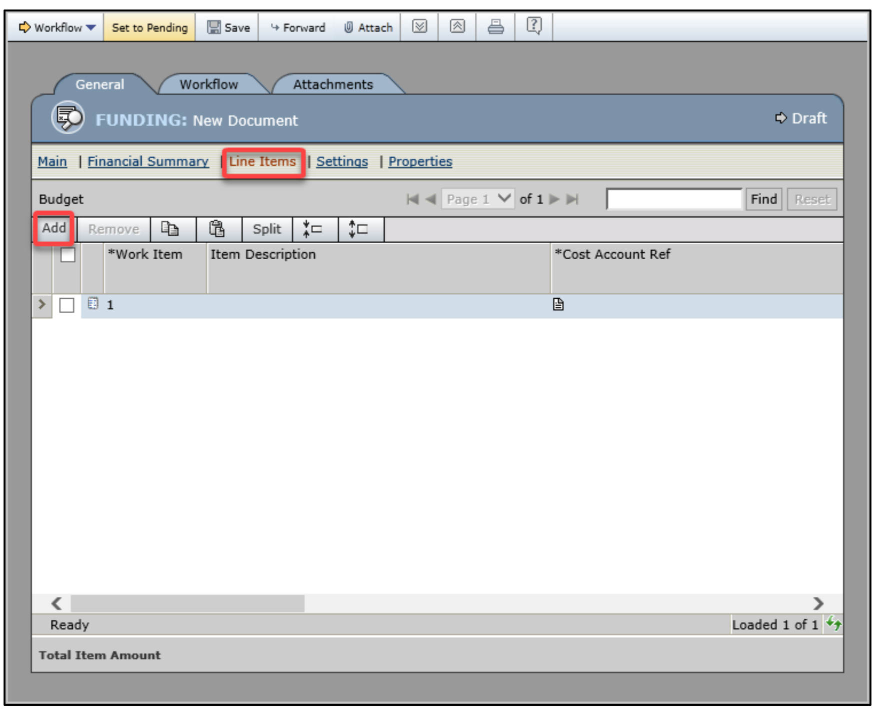
Fact Sheet Reporting

10. In the ‘New Document’ window, enter the Allowance title using the following naming convention: *FY_BA_Region_Line Item_Program_Building Name*



11. Click the Line Items page and click ‘Add’. In the new line that appears, enter the:
    - Work Item
    - Item Description
    - Cost Account Ref: Create new cost accounts for each unique combination of Function Code, Fiscal Year, and Budget Activity
    - Item Amount
    - Building ID



12. Click ‘Save’.
13. Click ‘Workflow and choose ‘Set to Pending.’ The authorized approver will then approve the Allowance. Funding documents must be in the approved state in order to appear on the report.

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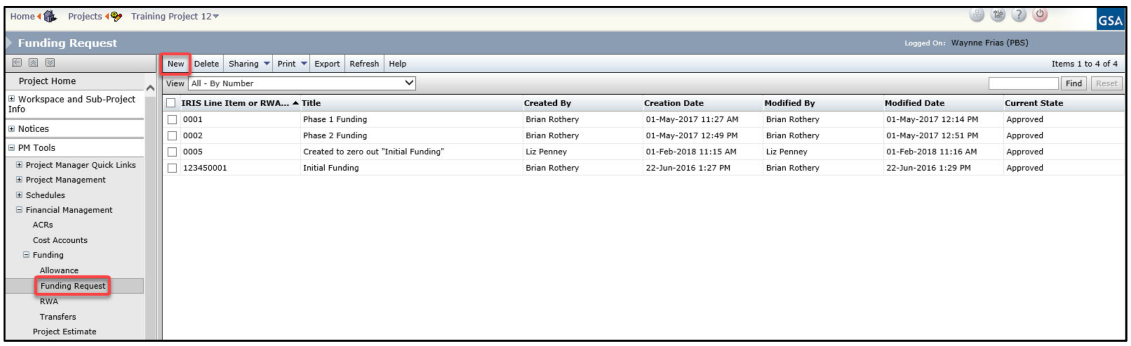
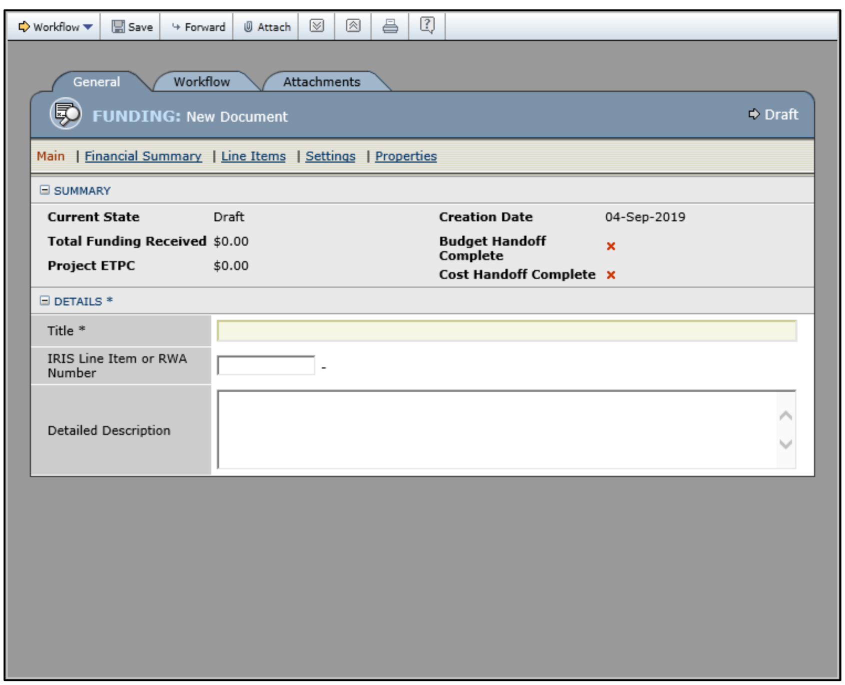
Fact Sheet Reporting

Funding Requests

14. Navigate to ‘PM Tools’ in the left-hand menu and expand the ‘Financial Management’ menu. Then expand the ‘Funding’ menu. Click on ‘Funding Request.’

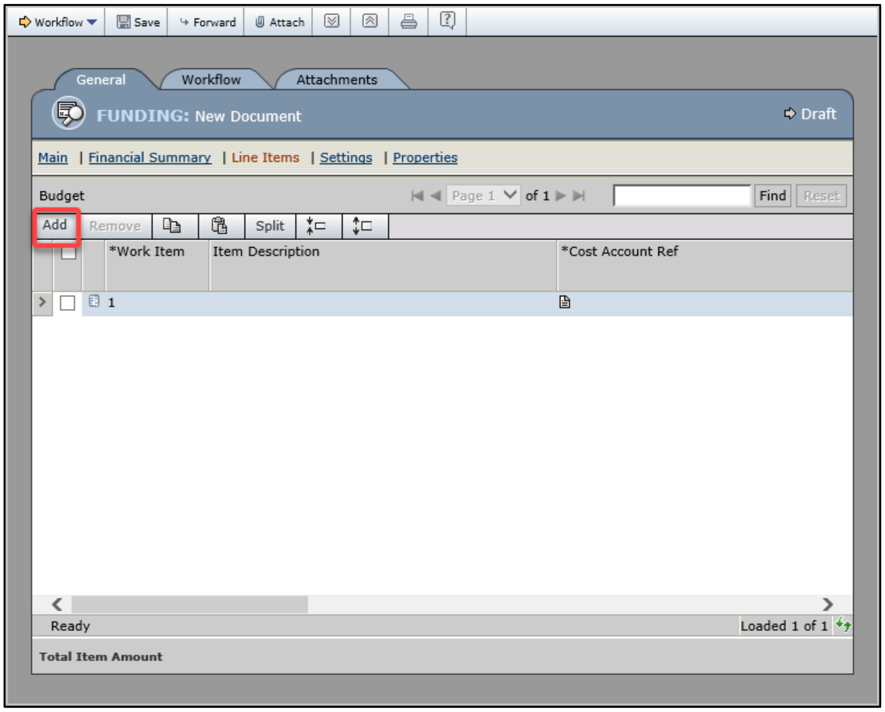


15. Click ‘New’ to begin creating the funding request.
16. In the ‘New Document’ window, enter the Funding Request title using the following naming convention: *FY_BA_Region_Line Item_Program_Building Name*



17. Click the Line Items page and click ‘Add’. In the new line that appears, enter the:
    - Work Item
    - Item Description
    - Cost Account Ref: Create new cost accounts for each unique combination of Function Code, Fiscal Year, and Budget Activity

- Item Amount
- Building ID

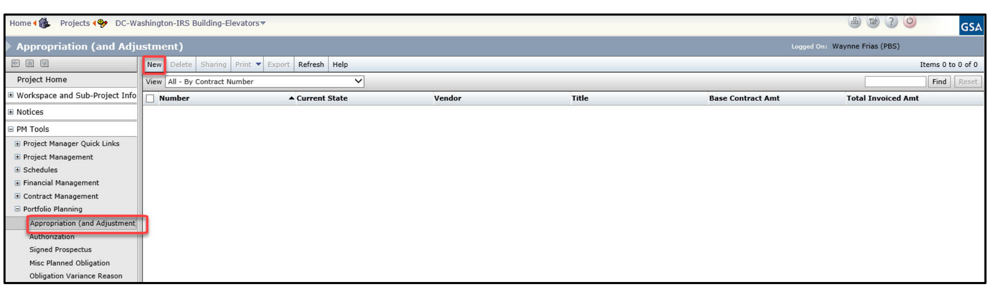


18. Click ‘Save’.
19. Click ‘Workflow’ and choose Set to Pending. The authorized approver will then approve the Funding Request.

Appropriations

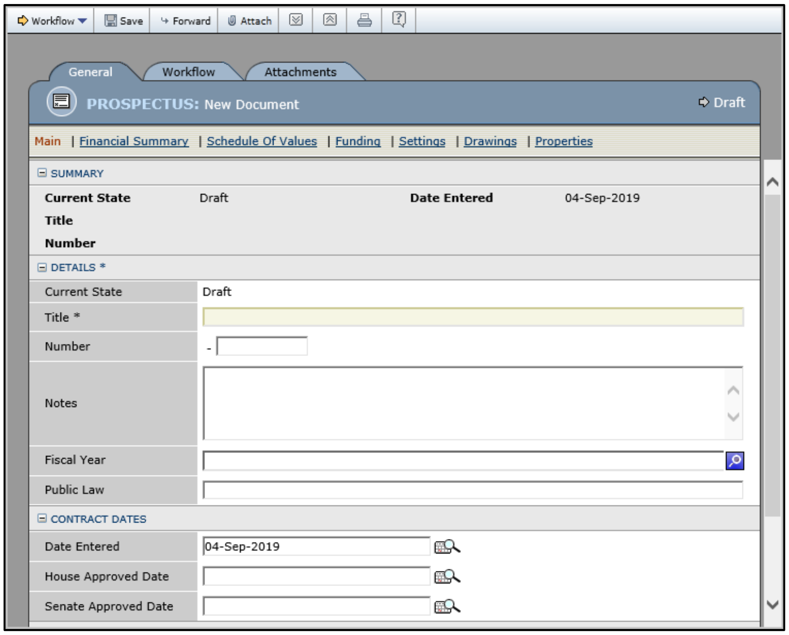
20. Navigate to ‘PM Tools’ in the left-hand menu and expand the ‘Portfolio Planning’ menu and choose ‘Appropriation (and Adjustment)’.

21. Click ‘New’ to begin creating the Appropriation.

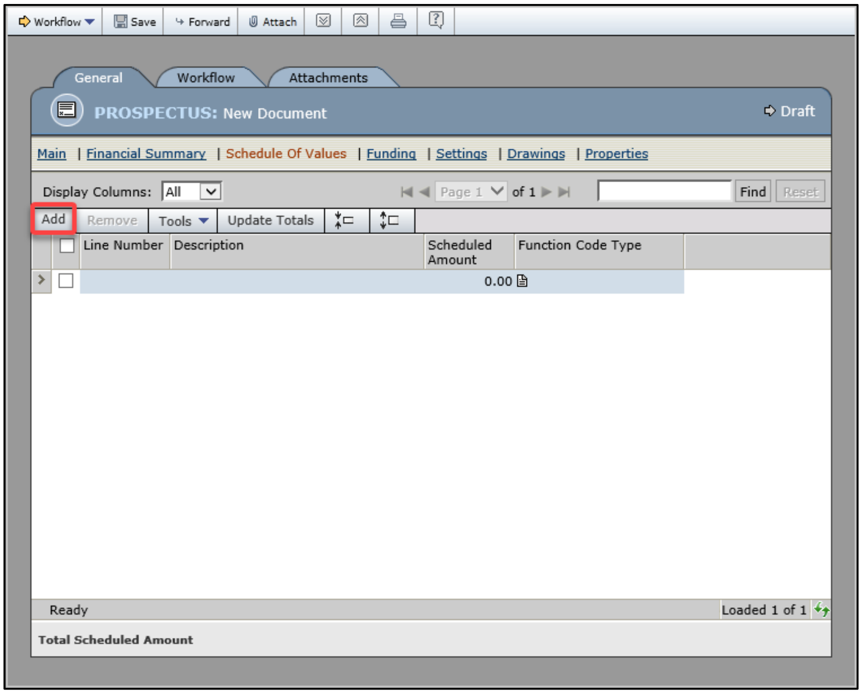


22. In the New Document window, enter the:
    - Appropriation title

- Fiscal Year
- Public Law
- Budget Activity



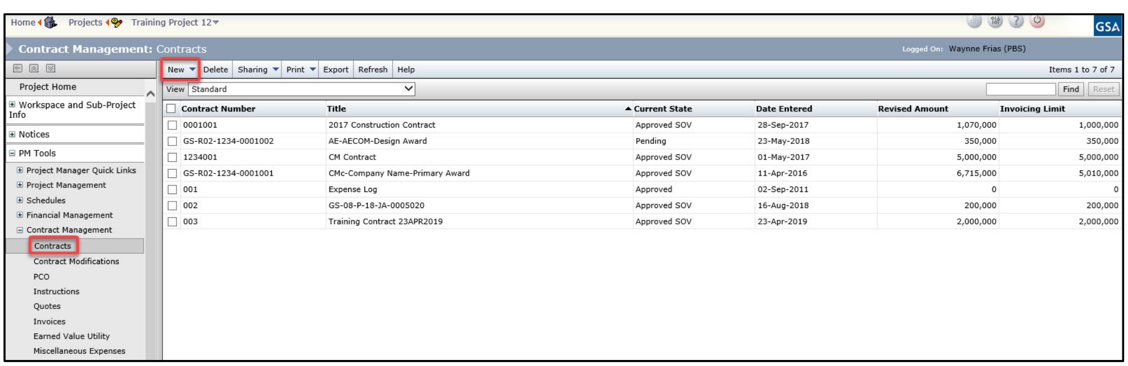
23. Click the Schedule of Values page and choose ‘All’ in the Display Columns field.
24. Click ‘Add’, and in the new line that appears, enter the:
    - Line Number
    - Description
    - Scheduled Amount
    - Function Code Type: Studies, Design, Site Acquisition, Construction, M&I, Construction-Admin, or Admin



25. Click ‘Save’.
26. Click ‘Workflow’ and choose ‘Set to Pending.’ The authorized approver will then approve the Appropriation.

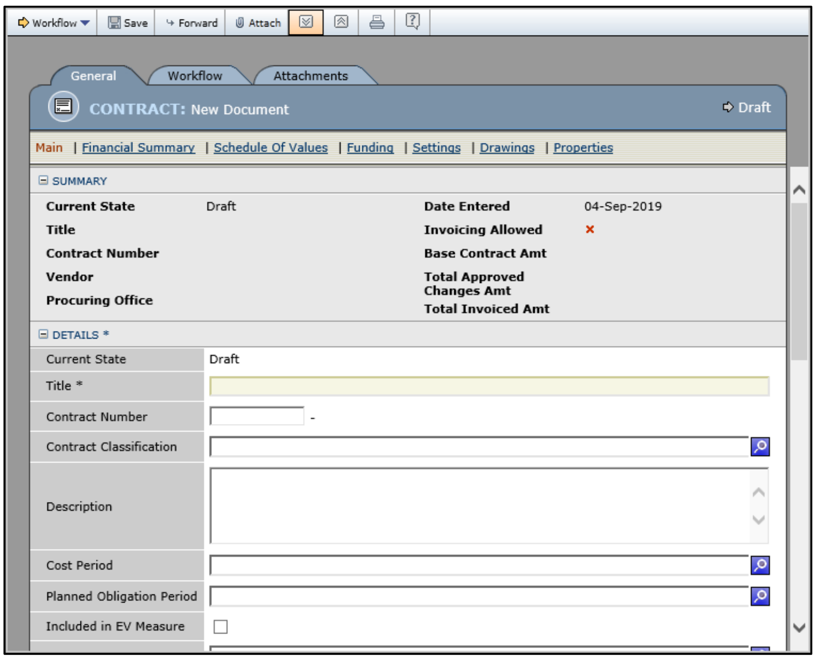
CONTRACTS

1. Navigate to ‘Contract Management’ in the left-hand menu, expand the menu, and choose ‘Contracts’.
2. Click the arrow next to ‘New’, and select ‘Contract’ to open a new Contract window.



3. On the Main page, fill in the following fields:
   - Title
   - Contract Number
   - Contract Classification

- Description
- Cost Period
- Planned Obligation Period
- Contractor Type
- Contract Duration (Calendar Days)
- Pegasys Document Number
- (NTP (Notice to Proceed)/Start Date
- Finish Date
- Planned Substantial Completion Date
- Estimated Substantial Completion Date
- Procuring Office
- Vendor
- EV Mode



4. Click on the ‘Schedule of Values’ (SOV) page to create contract line items. For each SOV line, enter a Description and Scheduled Amount. On the corresponding Cost Allocation line, enter a Description, Cost Account, Building ID, CSI Code, Shell/TI, and Linked Funding Line Item.

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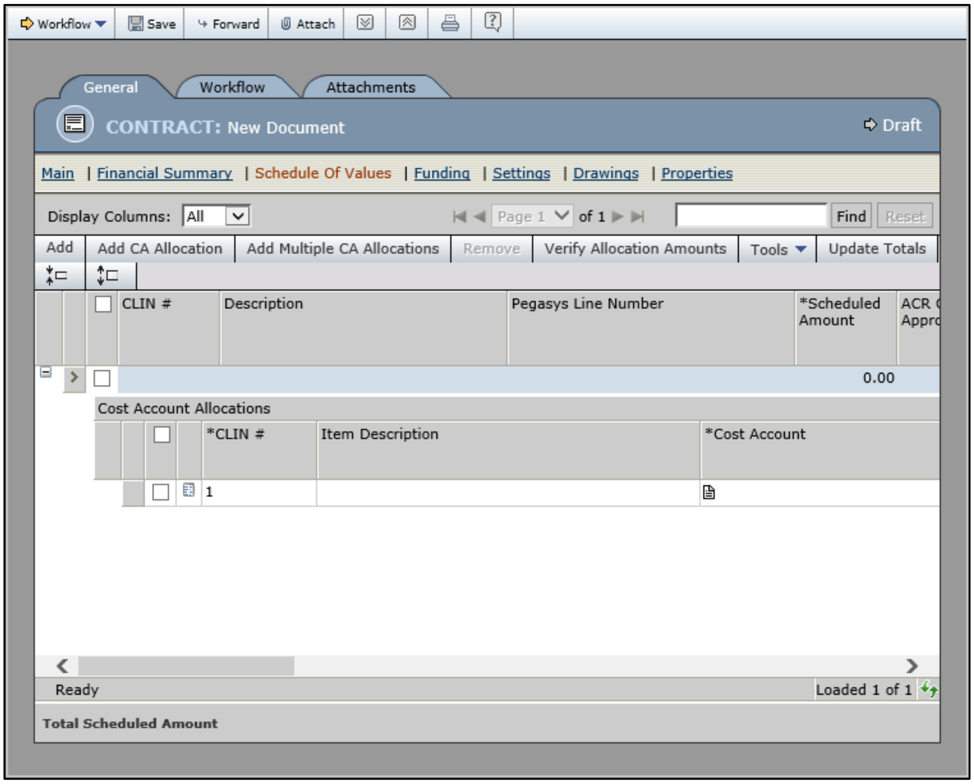
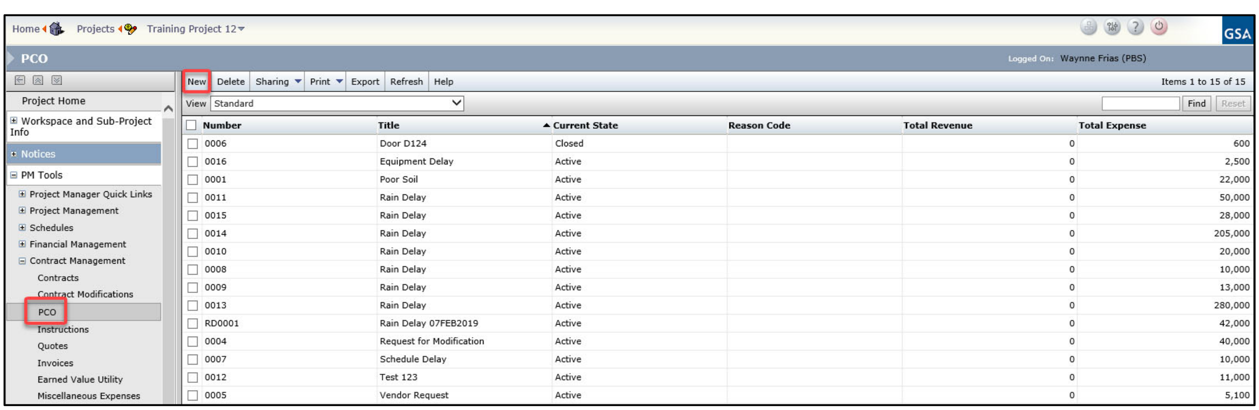
Fact Sheet Reporting



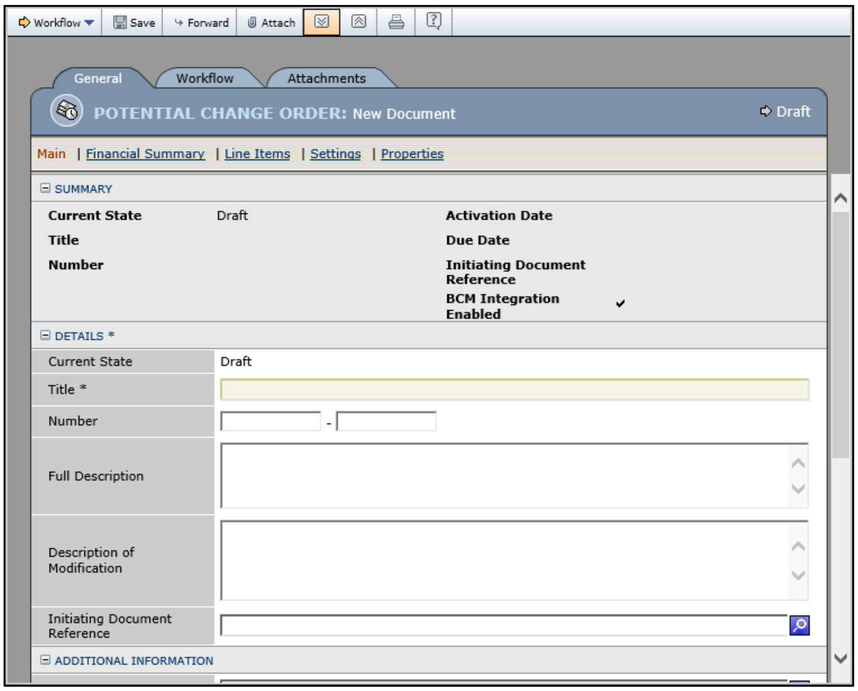
5. Click ‘Workflow’ in the top toolbar, select ‘Set to Pending’ to transition the contract to the ‘Pending’ state, and route the contract for approval. The authorized approver will then approve the contract.

POTENTIAL CHANGE ORDERS

1. Navigate to ‘PM Tools’ in the left-hand menu, expand the ‘Contract Management’ menu, and click ‘PCO.’
2. Click ‘New’ to begin creating the PCO.



3. Enter the following information:
    - Title
    - Full Description
    - Due Date



4. Click on the 'Line Items' page and make sure the 'Display Columns' field displays 'Expense'.
5. In the upper grid, click 'Add' and enter the following information:
    - Item Description
    - Preliminary Estimate amount
    - Target Contract Ref: Select a contract reference, if known
6. In the lower grid, select the appropriate allocation by clicking the lookup icon in the 'Cost Account Ref' field.
7. Enter the following information:
    - Building ID
    - CSI Code
    - Shell/TI
    - Linked Drawdown Item

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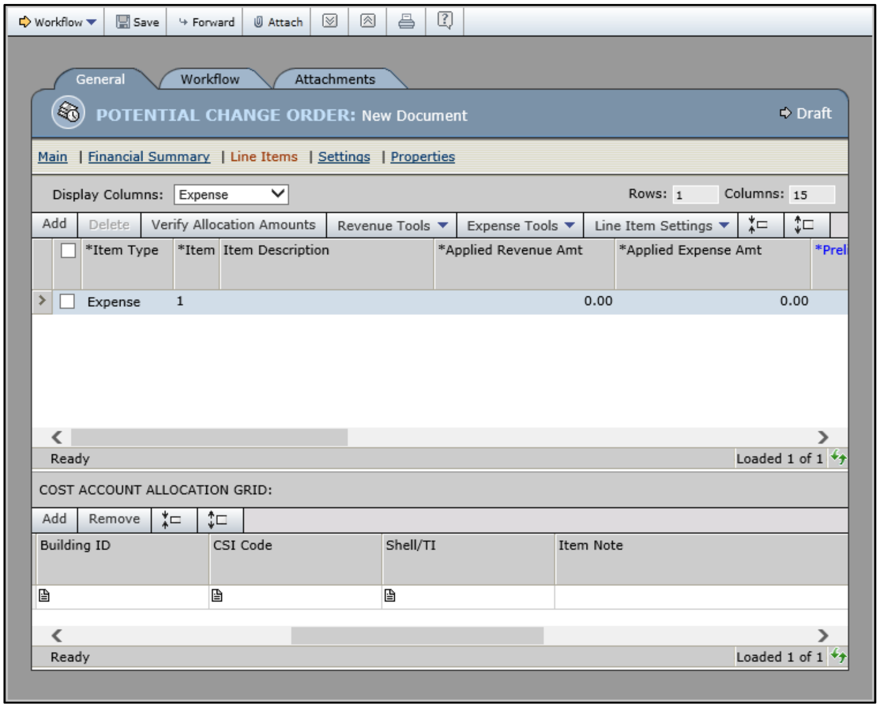
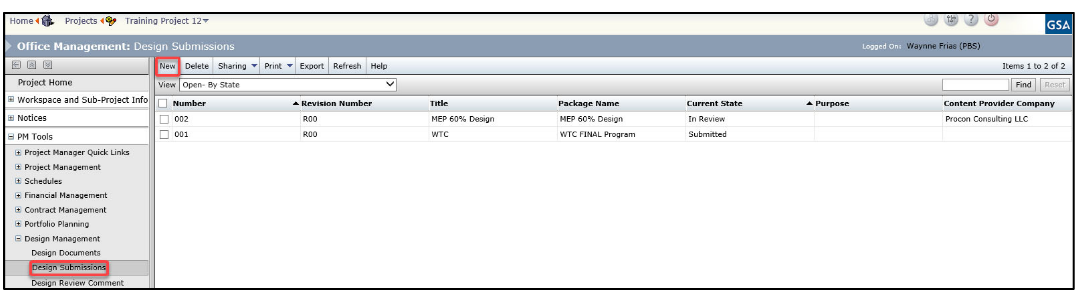
Fact Sheet Reporting



8. Click 'Workflow' in the top toolbar and select 'Active' to transition the contract to the 'Pending' state and route the PCO for approval. The authorized approver will then approve the PCO.

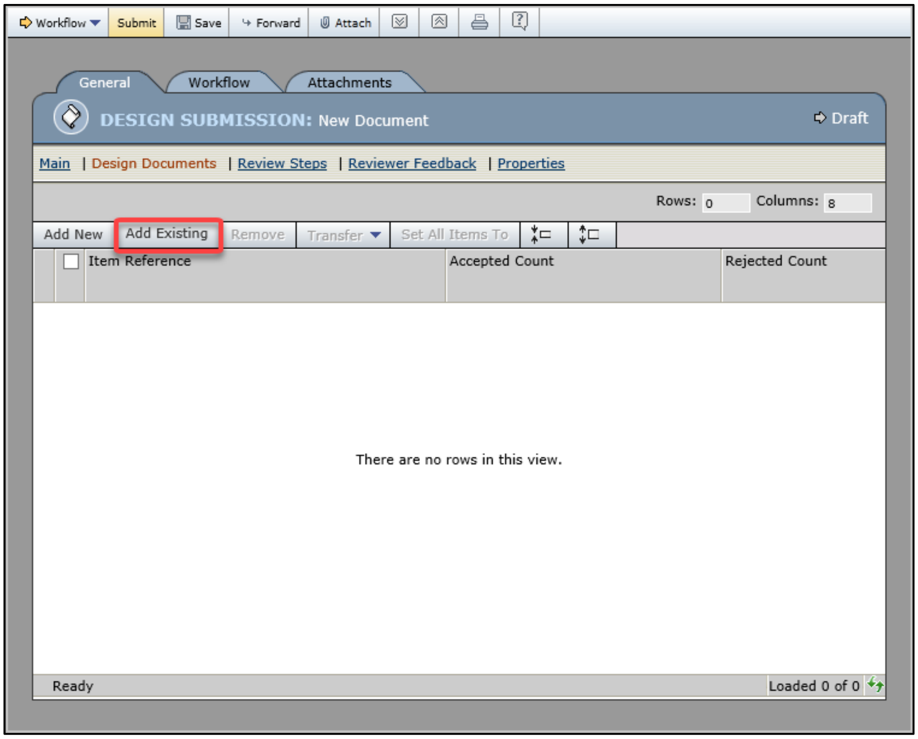
DESIGN SUBMISSIONS

1. Navigate to 'PM Tools' in the left-hand menu, expand the 'Design Management' menu, and click Design Submissions.
2. Click 'New' to begin creating a Design Submission.



3. In the Details section, enter the following required information:
   - Title
   - Package Name
   - Revision Number
4. Click the 'Design Documents' page.

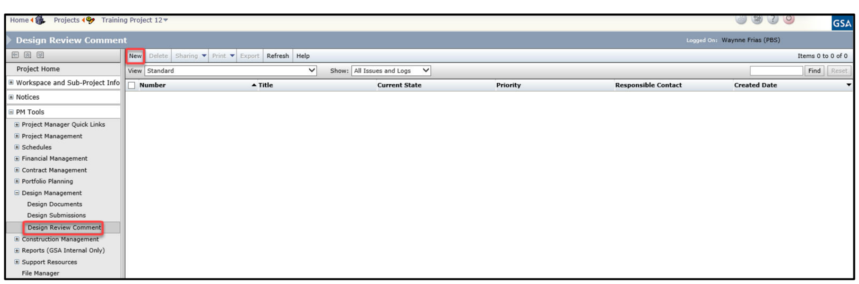
5. Click ‘Add Existing’ to see a list of available design documents that can be added to the submission.



6. Select one, multiple, or all documents to add to the submission. Then click ‘OK’.
7. Click ‘Workflow’ in the top toolbar and select ‘Submit.’

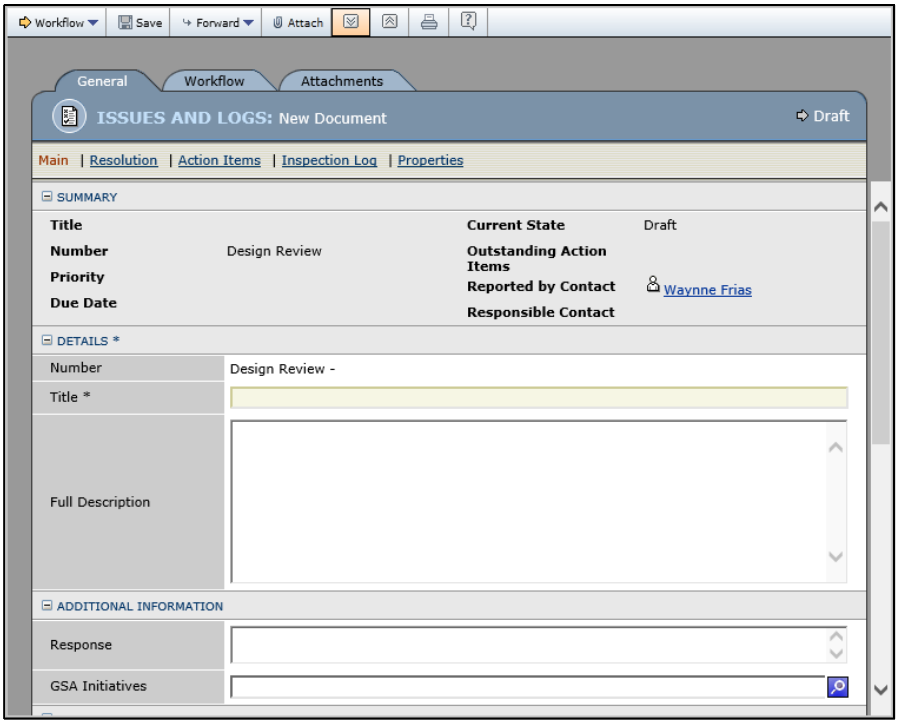
DESIGN REVIEW COMMENTS

1. Navigate to ‘PM Tools’ in the left-hand menu, expand the ‘Design Management’ menu, and click Design Review Comment.’
2. Click ‘New’ to begin creating a design review comment.



3. Enter the following required information:
   - Title
   - Full Description

- Priority
- Discipline



4. To reference a Design Document(s) in the comment, click the magnifying glass next to ‘Design Documents.’ In the ‘Design Document’ window, click the ‘Add’ link next to the document that you wish to reference. Click ‘OK’.
5. Click ‘Resolution’ to enter narrative in the Resolution Note field about steps that need to be taken to resolve the design issue.
6. Click ‘Workflow’ in the top toolbar and select ‘Submit.’

RFIS

1. Navigate to ‘PM Tools’ in the left-hand menu, expand the ‘Construction Management’ menu and click RFIs.
2. Click ‘New’ to begin creating an RFI.

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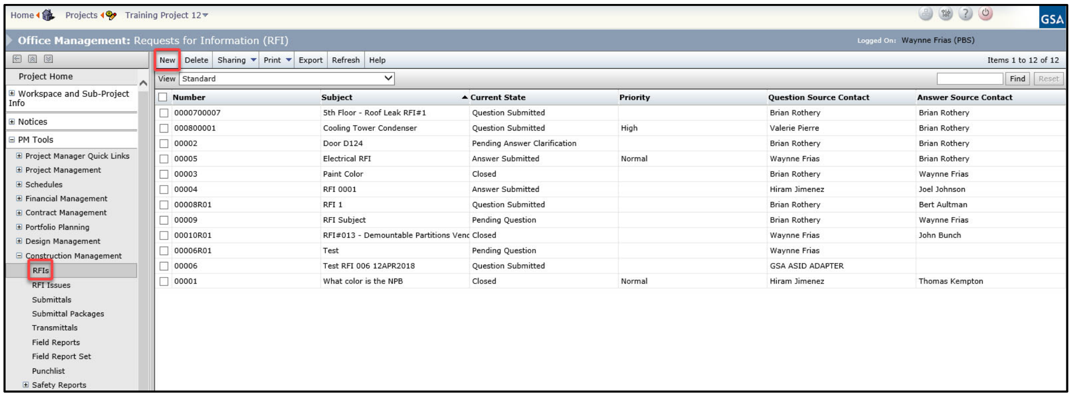
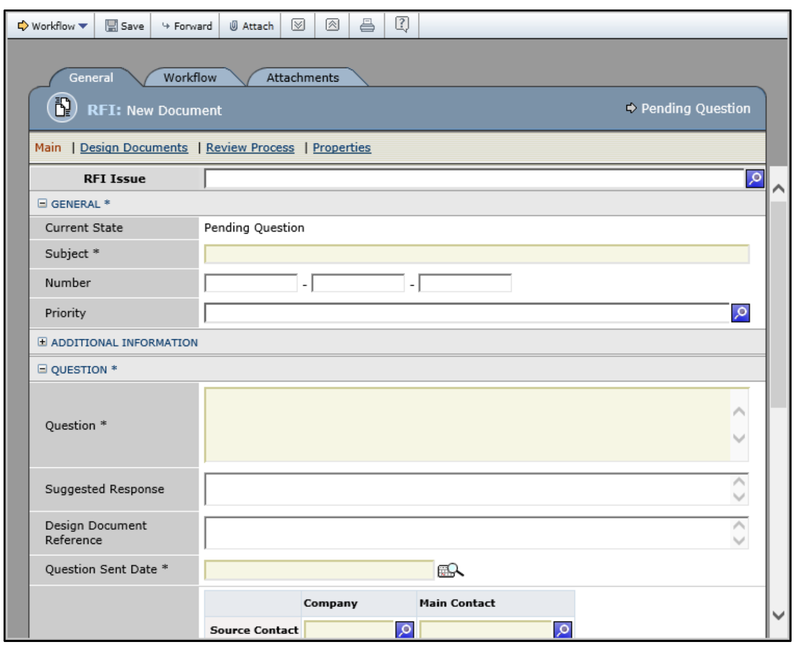
Fact Sheet Reporting



3. Enter the following information:
    - Subject
    - Question
    - Question Sent Date
    - Question Source Main Contact
    - Due Date
    - Cost Impact (Optional)
    - Schedule Impact (Optional)
    - Answer Source Main Contact: If you know the name of the person who will answer the RFI



4. To reference a Design Document(s) in the RFI, click 'Design Documents.' Then click 'Add Line' and click the magnifying glass icon to select a design document.
5. Select a Design Document by clicking the 'Add' link. Then click 'OK'.
6. Click 'Workflow' in the top toolbar, and select 'Submit Question.'

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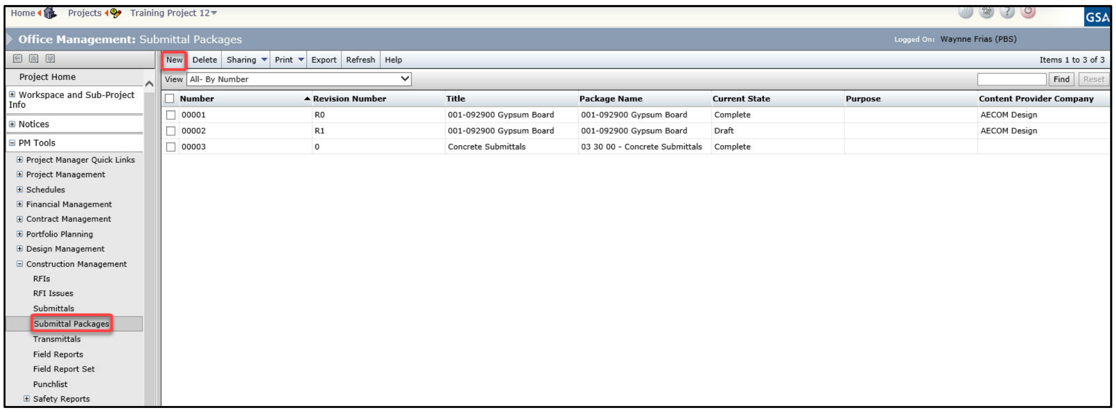
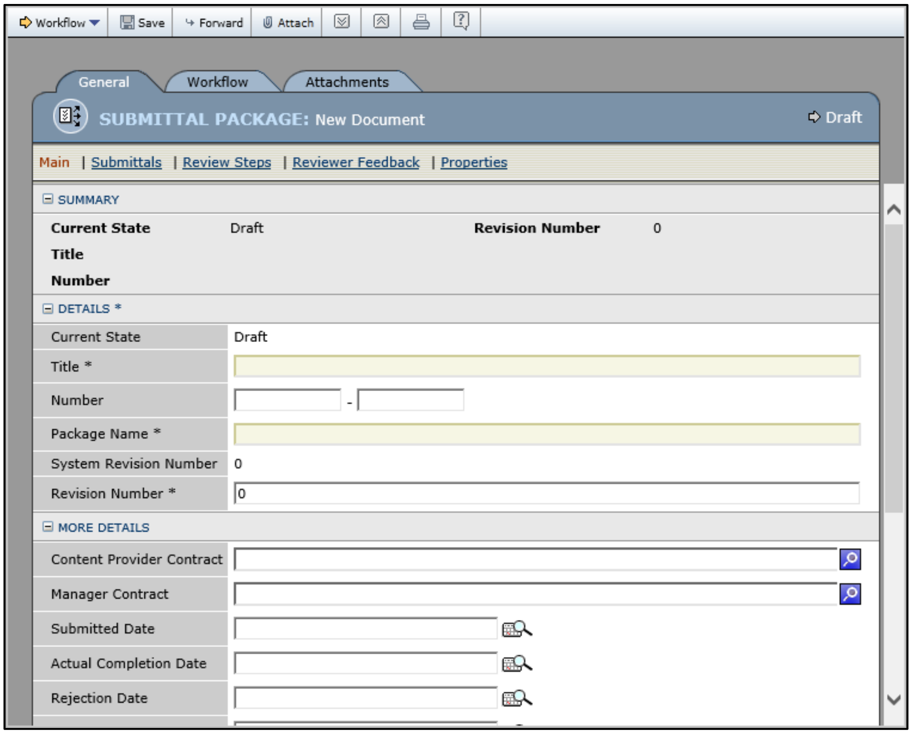
Fact Sheet Reporting

SUBMITTAL PACKAGES

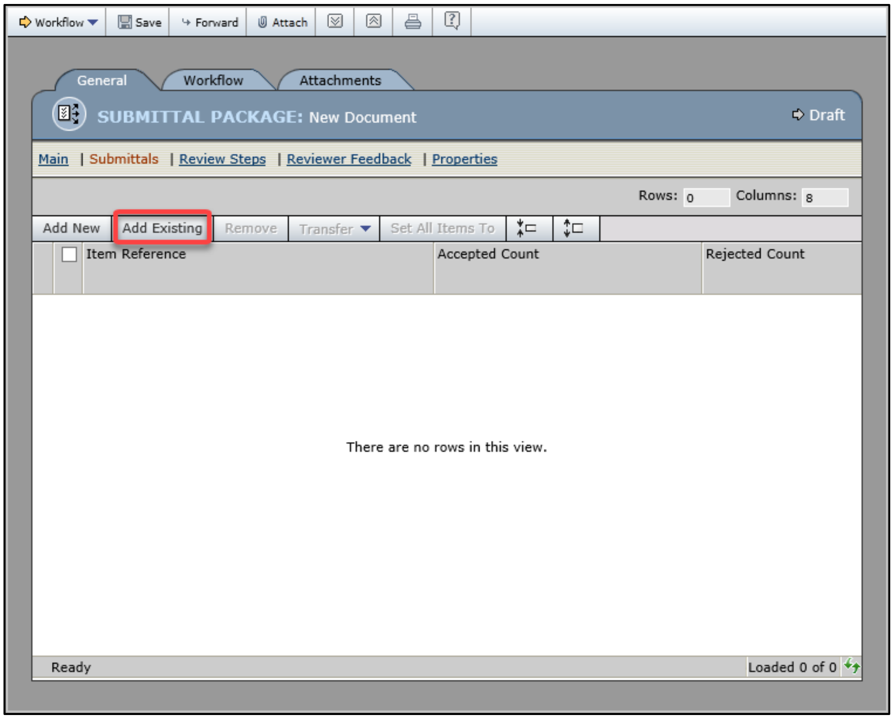
1. Navigate to ‘PM Tools’ in the left-hand menu, expand the ‘Construction Management’ menu, and click ‘Submittal Packages.’
2. Click ‘New’ to begin creating the Submittal Package.



3. Enter the following information:
   - Title
   - Package Name
   - Revision Number
   - Due Date



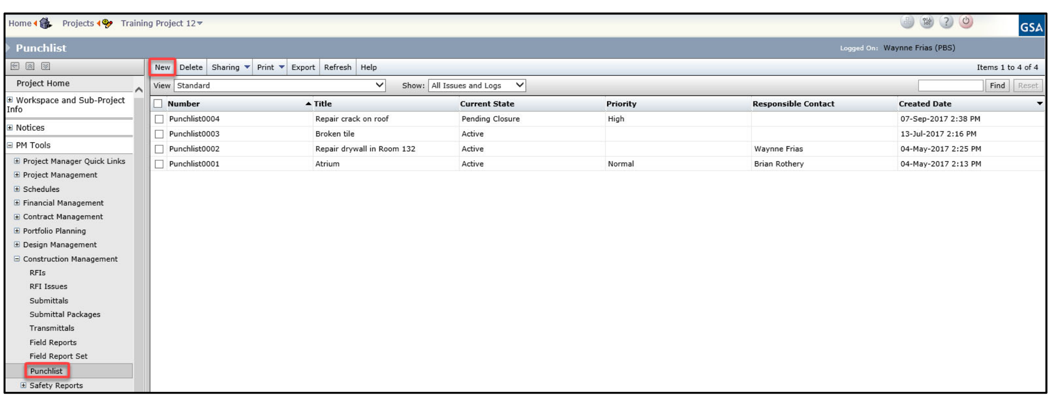
4. Click ‘Submittals’ and then click ‘Add Existing’ to see a list of available submittals that can be added to the package.



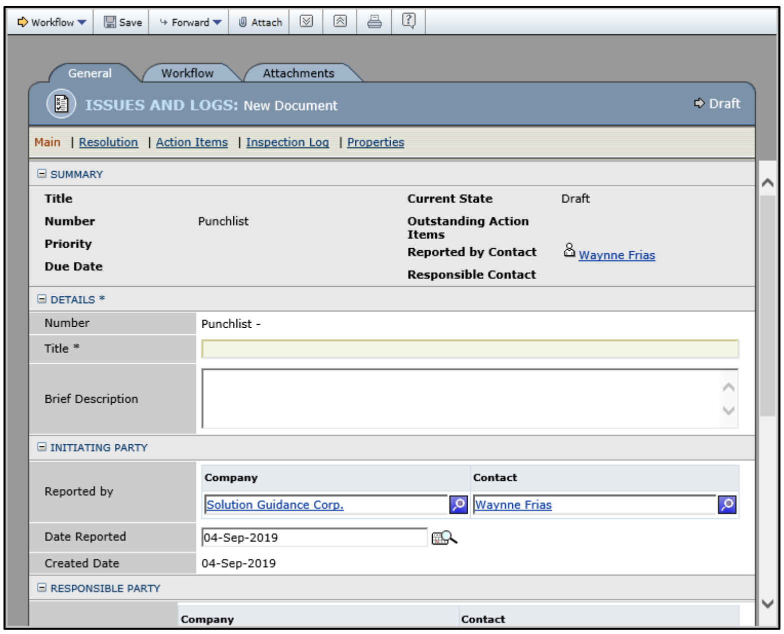
5. Select one, multiple, or all submittals to add to the package by clicking the 'Add' link next to each submittal's name. Click 'OK'.
6. Click 'Workflow' in the top toolbar and select 'Submit.' The Submitted Date field on the main page of the submittal page will auto populate when the package transitions to the submitted workflow state. All submittals in the package will also be updated.

PUNCHLISTS

1. Navigate to 'PM Tools' in the left-hand menu, expand the 'Construction Management' menu, and click 'Punchlist.'
2. Click 'New' to begin creating the Punchlist.



3. In the Details section, enter the Punchlist's Title and Description.
4. In the Classification/Location section, enter the following information:
    - Priority
    - Discipline
    - Area/Zone
    - Cause
    - Building
    - Floor
    - Room
    - Category
    - Condition



5. Click 'Resolution' to enter narrative about steps that need to be taken to complete the punchlist work items.
6. Click 'Workflow' in the top toolbar and select 'Activate.'

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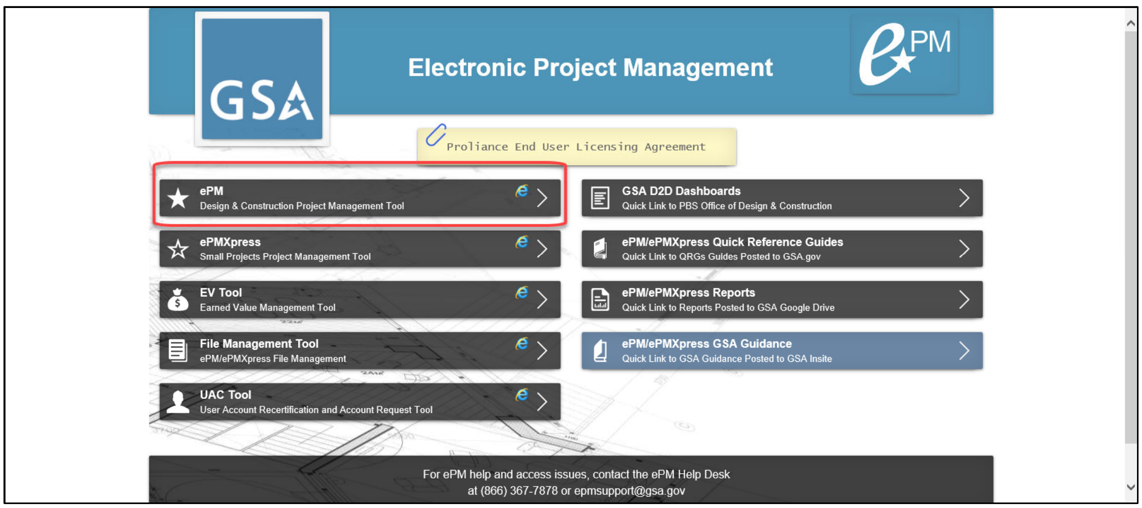
Fact Sheet Reporting

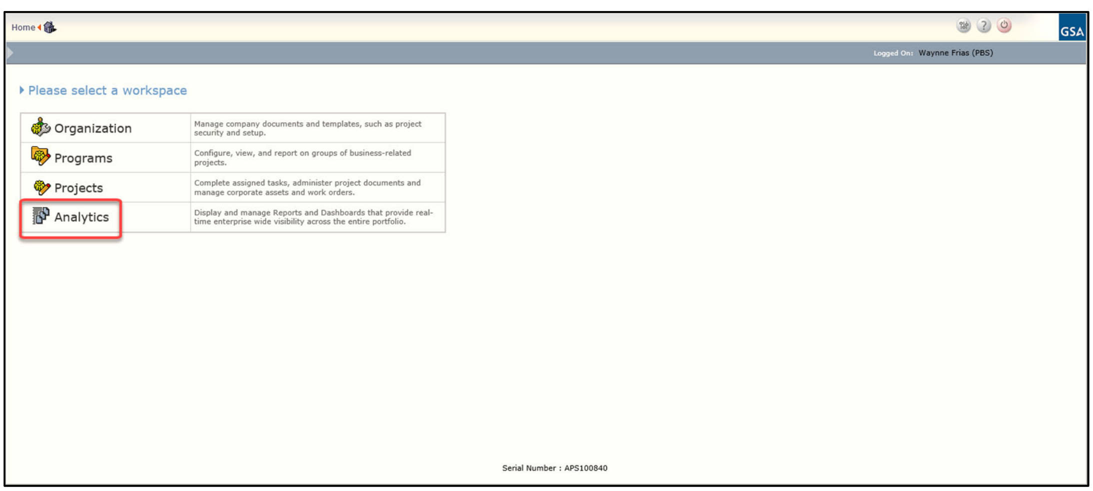
GENERATING REPORTS

The fact sheet reports can be run at any time via the Cognos reporting tool. The reports are located in the ‘Fact Sheet Reports’ folder. If you do not have Cognos access, please contact your GSA RSA or ZSA for more information.

1. From the ePM Portal, click ‘ePM’.



2. Click ‘Analytics’ on the ePM Workspace page.



3. Click the ‘My Home’ link.
4. Enter the ‘Fact Sheet Reports’ folder.
5. Choose one of the following reports:
    - Consolidation Projects Fact Sheet

- Detailed Project Fact Sheet (All Project States)
- Executive Project Fact Sheet (Single Page)
- GSA Project Stakeholder Report
- ODC Project Fact Sheet (Key Properties)

6. Select the report parameters related to your request.
7. Click 'Next.'
8. Select the programs and projects to include in the report results.
9. Click 'Run Report.'

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 12 - RFI Creation
- QRG 14 - Submittals
- QRG 15 - Submittal Package Review
- QRG 17 - Design Documents
- QRG 26 - PCOs
- QRG 31 - Funding Document Creation
- QRG 32 - Funding Document Approval
- QRG 40 - Field Reports
- QRG 41 - Issues and Logs
- QRG 42 - Creating Schedules
- QRG 68 - ePMXpress
- QRG 79 - Creating Milestone Schedules
- QRG 101 - Editing the Detailed Project Factsheet
- QRG 104 - File Manager
- QRG 105 - Earned Value
- QRG 127 - User Access & Certification Administration
- QRG 137 - Cost Accounts
- Small Projects Dashboard InSite
- Capital Projects Information Dashboard InSite
- Office of Customer Engagement Google Site