

Connection

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QUICK TIP

Correctly entering cost periods on contracts and invoices is vital for Earned Value Management functionality. Cost periods are defined in the Project Properties area of ePM and should span the contract award and invoicing time frame. Cost periods can be edited and future periods can be added or removed at any time during the life of the project. However, past cost periods cannot be created without considerable rework and contract modifications. Once created, these cost periods will be available for selection in the required documents, contracts and invoices respectively.

Period ID *	Description *	Start Date *	End Date *	Accounting Code	Current *
1	Oct 16	01-Oct-2016	31-Oct-2016	PI17	
2	Nov 16	01-Nov-2016	30-Nov-2016	PI17	
3	Dec 16	01-Dec-2016	31-Dec-2016	PI17	
4	Jan 17	01-Jan-2017	31-Jan-2017	PI17	✓
5	Feb 17	01-Feb-2017	28-Feb-2017	PI17	
6	Mar 17	01-Mar-2017	31-Mar-2017	PI17	
7	Apr 17	01-Apr-2017	30-Apr-2017	PI17	
8	May 17	01-May-2017	31-May-2017	PI17	
9	Jun 17	01-Jun-2017	30-Jun-2017	PI17	
10	Jul 17	01-Jul-2017	31-Jul-2017	PI17	
11	Aug 17	01-Aug-2017	31-Aug-2017	PI17	
12	Sep 17	01-Sep-2017	30-Sep-2017	PI17	



As a reminder, if you have technical questions about ePM, contact ePM Support at epmsupport@gsa.gov.

GUIDANCE FOR RWAs, SMALL PROJECTS IN EPMXPRESS

On March 6th, the PBS Commissioner’s Office issued a memo clarifying requirements to track small projects in ePMXpress. The updated requirements will improve consistent communication and collaboration with our agency customers.

RWAs that meet the following conditions must be tracked in ePMXpress going forward:

- N-Type and A-Type RWAs
- Non-severable
- Dollar threshold range from \$0 - \$3.095 million (prospectus limitation)
- For alterations during occupancy
- In lease and owned space
- For post-lease alteration projects, only projects that have an estimated/actual substantial completion date after May 31st, 2018 need to be managed in ePMXpress

Tracking of small projects funded through BA54, BA55, and BA64 continues to be required (no changes from previous guidance).

The following small project types are excluded from ePMXpress tracking:

- RWA funding tied to an active lease acquisition project managed in GREX
- RWA funded micropurchases
- BA61 funded projects
- Department of Homeland Security - FEMA disaster relief projects

Compliance with the memo will be monitored through the PBS Office of Design and Construction ePM Reconciliation Key Performance Indicator (KPI).

The Commissioner’s memo and guidance can be found on the [ePM InSite page](#).

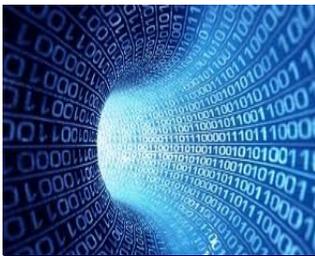
COGNOS CORNER

The Key Properties Fact Sheet is a one-page report featuring important project information including Description, Status, Scope, Schedule, Issues, and Financials. Although the report was developed specifically for Capital projects that are featured in the Commissioner’s monthly Key Properties Meetings, the reports can be generated for any Capital project.



The first part of the report details projects basics including the Project Type, Current State, Team, Customers, and Description. The Status section displays the latest status narrative, and the Scope section gives important details about the project’s square footage. The Schedule section contains a table with the baseline, planned, and actual date for project milestones including Project Authorization / RWA Acceptance, Design Award, Construction Notice to Proceed, and Substantial Completion. If Issues have been entered on a project, up to 3 will be listed in the Issues section. The Project Financials section shows appropriations that have been received, broken down by function code. If BA80 funding has been given to the project, each RWA is listed below the appropriations total.

The Key Properties Fact Sheet is located in the Fact Sheet Reports folder.



USER ADMINISTRATION TRAINING

In February, the ePM Team launched a new online training class on user administration. This class shows Project Managers how to assign users to projects through ePMXpress (for Small projects) and through the UAC Tool (for Small and Capital projects). The class also shows PMs how to use the UAC Tool to request new ePM user accounts, gives an overview of the licensing process, and teaches PMs about security categories and how they are applied when users are assigned to the projects. If you would like to attend the class or if you would like more information about using the UAC Tool to request user accounts and assigning team members access to your projects, contact epmsupport@gsa.gov or your Regional and Zone System Administrators.

ePM Resources:

ePM Support
epmsupport@gsa.gov
 (866) 367-7878
 M-F 7:30 AM - 7:00 PM ET

ePM Portal and User Resources
<https://epm.pbs.gsa.gov/portal/>

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FY18 HURRICANE PROJECTS

GSA recently received over \$100 million from Congress to fund repairs to buildings in regions 2, 4, and 7 that were damaged during the 2017 hurricane season. \$91 million is allocated for 5 Capital projects in Regions 4 and 7, and the remaining \$19 million will be spent on small projects throughout the 3 regions. Project teams are required to create and maintain ePM projects including status, schedules, and funding in accordance with ePM requirements detailed on the ePM [InSite](#) page.

Contact ePM Support for more information at epmsupport@gsa.gov.

R3 CENTRALIZED PROJECT INTAKE PROCESS

The ePM team spoke with Alex Wagner, Rob Scheible, and Brandon Bolstad in Region 3 to find out how they use ePM to simplify their business processes. In 2015, the team devised a method of centralizing the project intake process for small projects. Through this process, all project requests are funneled to Alex, who is responsible for creating the projects in ePM.

Rob, with input from Alex and Brandon, created a Project Transmission Sheet in Google Forms that asks detailed questions such as the project location, schedule, and funding amounts. For BA80 projects, teams fill out the Project Transmission Sheet and send it to Rob for review along with their RWA package. Upon Rob's approval, he sends the form and the RWA package to Alex, who then creates the project in ePM. The Budget Analyst is also included on that message and at that time will complete the entry of the RWA into RETA and send the RWA for signature. The process varies slightly for BA 54; the teams send the form directly to Alex once they have received a PCN from the Budget office. Alex then creates the project in ePM.

Type of Transaction
Please select the appropriate type of request for this transaction *
<small>Only select New - Add to Existing ePM Project if this is a new RWA or PCN that needs to be added to an existing ePM Project. At this time projects that are Study Only, Furniture Only, and Move Only are not required to be in ePM but you need to document a milestone schedule.</small>
<input type="radio"/> New - New ePM Project
<input type="radio"/> RWA Mod
<input type="radio"/> New - Add to Existing ePM Project
<input type="radio"/> New - Leasing Initial Space Alteration/ TI Buydown
<input type="radio"/> New - Study Only
<input type="radio"/> New - Furniture Only
<input type="radio"/> New - Move Only

New Transaction Info - New ePM Project
<small>This section is used to collect your PCN if this is a GSA funded project or determine if your RWA should be classified as an A or B Type in RETA. It is very important that you answer these questions honestly so your RWA can be accurately classified in RETA. As an example, it is very typical that Initial Space Alterations in Owned Space require both GSA and customer funds and typically should be classified as a A-Type RWA.</small>
Is this a project that will need both GSA and customer funds to make an award? Note: If the answer is Yes for a RWA it needs to be processed as either a A-Type or B-Type. *
<input type="radio"/> Yes
<input type="radio"/> No
<small>If you answered yes to the question above or if this is a standalone BA54 (or other GSA funded project) you must provide the PCN here:</small>

The team discovered many benefits to the streamlined intake process. First, having one person create ePM projects has reduced the amount of time that a project manager needs to spend in ePM. Once Alex creates the project with the budget and schedules, all that is left of the PM to do is update the status and verify the schedule and PM Financials on a monthly basis. Next, the process reduced the number of duplicate projects being created in the system because there is one individual who is reviewing all projects before they are created as opposed to many people entering projects. Third, the team has seen an increase in accuracy with one system expert creating projects who knows what the project details are and what is required of the project team. Lastly, the team has found that the process helps with their performance on the small projects reconciliation KPI because they are able to ensure that all required BA54 and BA80 projects are entered in ePM.

For more information on the centralized project intake process, please contact [Alex Wagner](#), [Rob Scheible](#), or [Brandon Bolstad](#).