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**Change Requests**

The ePM team has recently streamlined the process for users to submit change requests (CRs) of the system. All feedback should be submitted to your GSA Project Manager and/or your ePM Regional System Administrator (RSA).

The estimated time to resolve CRs will vary depending on complexity. Simple requests can be implemented by the RSA, examples include: changes to permissions, workflow, and look-up lists. Whereas a com-



plex CR may involve analysis by the ePM Implementation Team when a configuration change impacts multiple projects and/or programs. Other CRs that affect the base Proliance product may require coordination with the software vendor.

All CRs are now tracked and considered with respect to scope, cost and complexity. To date, over 200+ CRs have been submitted and 50+ have been resolved. Please continue to share your ideas to improve the ePM system.

**Fact Sheet training has begun....**

ePM Fact Sheet training kicked off in Ft. Worth, TX (GSA Region 7) on May 18th. The room was full of Capital Project Managers, the D&C Division Director, and the R7 ODC Regional Coordinator. The PMs actively participated in the training, and are now prepared to generate Fact Sheets from ePM for distribution to management and customers. ePM Fact Sheet Training is a key milestone for GSA Regions in the transition from the Project Information Portal (PIP) to ePM. PMs should be on the lookout for this training in June.

When ePM was introduced many projects were nearing or already under construction, thus teams had accumulated an extensive amount of project-related data. Project teams were faced with tough questions about how to migrate existing data and documents into ePM.

Practicality is a key approach for teams confronted with having to backload data. A balance must exist between populating the bare minimum for reporting and collaboration versus the need to recreate each and every individual field of information. The published Minimum Requirements should be the starting point for usage amongst project teams. Some modules within ePM require a full history of data updated in ePM. Whereas other modules can begin to be used at any stage of the project, with only a snapshot of the historical data.



Certain types of information are cumulative, and therefore necessitate backloading data. The Budget and Reporting and Contract Management modules are two illustrative examples. In order to have a complete financial picture, all funding documents, cost accounts, contracts, and modifications need to be entered into ePM. Teams should involve their Budget Analyst to verify that funding and contract amounts are correct.

Other modules such as Design Documents, RFI's, and Submittals can be grouped and uploaded as attachments rather than as individual ePM documents. Here are some time-saving tips for backloading attachments:

- Load only the 100% Construction Documents Set as a Design Submission and no other progress drawings if your design is complete.
- Attach an archived Dr. Checks report as a single design comment for an entire submission.

*NOTE: While these proposed backloading methods will expedite the time to enter historical project data, there will be limited reporting and querying available if information is stored as file attachments. Project teams are encouraged to populate each individual document if time and resources are available.*

Meeting minutes, Correspondence, and Contractor Schedules are areas that are easy to transition to ePM at any point in the project. Older correspondence files and meeting minutes can be uploaded as attachments. New meeting minutes and correspondences can originate in ePM and be routed appropriately. Contractors can upload monthly schedule updates from their scheduling software into ePM using the Schedule Import tool. In addition,

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### PIP to ePM Transition

On May 9th, Bill Guerin, Assistant Commissioner, Office of Design & Construction, confirmed the strategic direction of ePM as the project management, collaboration, and reporting tool for PBS. Fact Sheet training will be coming to each Region to facilitate the initial transition of data from the Project Information Portal (PIP) to ePM. For the remainder of FY'11, project teams should continue to update core areas of the PIP including: measures, schedules, and Capital Investment and Leasing Program (CILP). More details on the PIP Decommissioning Plan will be forthcoming.



### ePM Quick Tip:

You can save a step when forwarding documents to contacts within your project. Instead of choosing a company, then choosing a contact name, you can simply tab over to "Contact" and begin typing the contact name you want. ePM will "auto-fill" the name and add the company, as well. Try it on your next RFI or Meeting Minutes.

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the batch uploader tool is available to upload multiple files at one time.

Each project team will need to evaluate the level of effort required to input historical project data in ePM, but can still satisfy the minimum requirements and reporting needs with a practical approach to backloading.



GSA hosted a formal ePM training for management in Central Office. In late April, the Office of Design and Construction's (ODC) Regional Coordinators, Zone Directors and Project Delivery Division Directors gathered in Washington, DC, to attend sessions that introduced a wide range of features, demonstrated their functionality, and illustrated their use at varying program levels.

Another goal of this training was to discuss the expectations of what project information is visible in ePM. Since managers have viewing access for multiple program and project levels, they need to understand the relationship between what information is stored in ePM and what information can be extracted for various reporting purposes. Further topics discussed were training, reporting, evaluating, and responding to Congressional data requests. A major benefit of ePM is that it can easily gather the required information to accommodate last-minute requests.

Laura Stagner, the ODC Zone A Director, observed that "This training was extremely valuable to us. It confirmed ePM's significance at the programmatic level and showed us new abilities to keep in touch with project specifics in real time. With ePM, I expect we will see improved agency communication and project visibility by reducing, for example, the burden of ad hoc data calls to project teams."

The attendees acknowledged high potential in other ePM features. They expressed positive feedback on the design review Office Business Application (OBA) as they often participate in important design review and approval steps. Other key subjects of interest for attendees included reporting, schedules, and program level navigation.

Overall this training demonstrated to this audience that ePM provides new and robust capabilities to access, analyze, and utilize a wide range of project data for organizational and strategic decisions. Regional executives, who have questions or want more information about the topics discussed at the training, are encouraged to coordinate with the ODC Zone Directors.

### ePM Resources:

**ePM Login Site**  
<https://epm.pbs.gsa.gov/proliance>

**ePM Support**  
[epmsupport@gsa.gov](mailto:epmsupport@gsa.gov)

**GSA User Resources**  
<http://insite.pbs.gsa.gov/epm>

**Training Videos and Quick Reference Guides**  
<http://www.meridiansystems.com/epminfo>

