Over the last month, the ePM team has focused its efforts to ensure that all current security categories are accurate in ePM. The ePM security category of a user is critical because it identifies the appropriate ePM areas for access, controls the viewing level of project data, and provides permissions for document uploads and updates. While all files in the card catalogs can be viewed by internal GSA team members, in order to share content with external users, the documents must be forwarded to the designated recipient(s). For questions about File Manager usage, permissions, or documentation management, please contact your RSA or trainer.

The financial tools of ePM are designed to facilitate and monitor the checkbook of any project, thus helping project managers keep the project within budget. For the last year Naima Prince and Mohammed Ahmed, Budget Analysts (BA’s) in Region 5, have been actively using ePM and both recently shared their ePM experiences with the newsletter team. They cited four benefits of ePM: easy accessibility, national standardization, central repository, and enforcement of team roles and responsibilities. One of the benefits for the BA’s have been that ePM is a web-based tool that allows all of the project data to be stored in one location. National standardization of project management, specifically the financial element of Capital projects, is a huge benefit. Having one central location has saved time for project tracking and reinforced the roles and responsibilities of each project team member. The various ePM modules work as an interrelated set of parts in order for the project to progress. Therefore, every team member must do their part and be accountable for their work to ensure the project finishes on schedule and within budget.

Naima and Mohammed had to learn the translation of ePM versus GSA terminology in order to help teams enter financial information. They said that “ePM has helped them engage with the rest of the project team because they are more than just the finance people in the background”. While the BA’s use several areas within ePM their primary role is in setting up the funding and cost account documents but they also participated in earned value training. After becoming familiar with ePM they understood that ePM allows Central Office to see the big picture while the region can get into the details.

Several business lines are involved with using ePM, the BA’s input the financial data and the Contracting Officers validate the contracts and modifications. By ensuring the financial data is set up properly the project teams know they can rely on the data being generated in reports. As a result of their involvement, Mohammed and Naima have a better understanding of what the data means and how to fix errors with data entry. Naima explained that in Region 5, the Budget Analysts walk the project teams through every financial step of the project so if there are problems they can resolve them. Both BA’s enjoyed learning about earned value and how their work contributes to the performance measure.

“A change in the culture of project management will take place as a result of ePM”

Naima Prince
In order to ensure accurate reporting in register views and Cognos reports the Project Manager name needs to be accurate in two places. 1) The Address Book, tagged as “Key Participant” and “Project Manager” and 2) the Project Properties document, Project Manager page. Only one Project Manager should be entered for each project and it should be consistent in both places.

**ePM Resources:**

**ePM Support**
epmsupport@gsa.gov
1 (866) 367-7878
M-F 7:30 AM -7:00 PM EST

**ePM Login Site**
https://epm.pbs.gsa.gov/porliance

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

**Quick Reference Guides**
http://www.meridiansystems.com/epm

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**Cuff Record Report:** The Cuff Record Report is a summary dashboard of project and contract information. The report allows users to track financial details of their projects at the ASID, contract, and budget activity levels. By clicking on links within the report, users can drill-down to get more detailed information about obligations and outlays on individual contracts. Users also have the opportunity to drill down further and view invoice details including amounts paid to date and payment status.

There are six versions of the Cuff Record Report. Users can choose the master Cuff Record Report for a comprehensive display of all financial information. They can also limit the amount of information that they view by generating the report at the ASID Detail, Budget Activity Detail, Contract Detail, Invoice Detail, or Invoice Ledger levels. Additionally, the report can be generated at the regional and/or project level.