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Coming Soon**ePMXpress 2.0****for Small Projects**

ePMXpress 2.0 will provide a totally new look and data entry experience. ePMXpress 2.0 will be its own application that works in tandem with Proliance. It will include new functionality such as:

Project Details

- Ability for select users to create new projects
- Toggle between projects
- Customizable project grouping
- Project Managers can manage team members

Financials - NEW Cuff Records and Estimates!

- New Cuff Records tracking sheet
- Streamlined estimate and contract entry/creation
- Create iterative estimates

Schedule

- Schedule template will come with default activities

Reporting

- Create simple ad-hoc reports
- Run reports directly



REGION 5 BUDGET ANALYSTS

NAIMA PRINCE & MOHAMMED AHMED

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



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.



QuickTip

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/proliance>

GSA User Resources

<http://insite.pbs.gsa.gov/epm>

Quick Reference Guides

<http://www.meridiansystems.com/epminfo>

ePM Contacts:

Nick Gicale
ePM Project Manager
Nick.Gicale@gsa.gov

Tom Kollaja
Capital Projects Rep
Tom.Kollaja@gsa.gov

Ralph Abel
Small Projects Rep
Ralph.Abel@gsa.gov

Marie Johnston
PBS CIO Project Manager
Marie.Johnston@gsa.gov



THE COGNOS PAGE

GSA recently launched a new [Cognos](#) section on the ePM InSite page. Users can get general information about Cognos including a complete list of all reports, arranged by category, with the reports target audience and a brief description of each report.

The Cognos page also includes tutorials on setting up report views and scheduling reports. We will continually update InSite with helpful guidance and tips gleaned from users in the Cognos community. If you have any suggestions about items that you would like to see on this page, please let us know!

Keeping Users Informed... GSA Releases Two New Reports

CV/P Report: The Contract Value/Performance (CV/P) Report is used to assess the timeliness of project delivery and GSA's ability to complete construction projects within the planned budgets.

Project	(in) Vendor	Contract	Current Contract Amt. (All Mods)	Approved Vendor (All Mods)	W/P Start Date	(in) Reduction	Substantial Completion Dates	Work in Place (WIP)	Performance	
							Estimated Actual	At Risk Amt. % Program	On Schedule	
Region 07 - Regional Summary										
Total			\$10,942,715	\$12,199,815				\$11,559,417	73.9%	73.9%
% to Budget and to Schedule										
% Budget and to Schedule										
National Summary										
Total			\$10,942,715	\$12,199,815				\$11,559,417	73.9%	73.9%
% to Budget and to Schedule										
% Budget and to Schedule										

This report allows users to determine a contracts schedule and budget performance. For each contract, the list of fields includes the vendor, contract number, current contract amount including mods, approved baseline amount including adjudicated mods, substantial completion dates, work in place, and schedule and budget performance indicators (red, yellow, or green).

The CV/P Report can be generated at the national, regional, project or contract level and the regional and national performance summary are also displayed.

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.

