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Need guidance on Cognos reporting? Internal users are encouraged to visit [ePM on InSite](#) to access two overview presentations that provide guidance about Cognos.

The Capital Projects Overview gives users step-by-step instructions for running critical reports including the Detailed Fact Sheet and Contract Value/Performance (CVP) Report.

The Small Projects Overview gives guidance on running four useful reports especially designed for the needs of small project users. This overview also contains directions on creating ad hoc reports in ePMXpress.

Both presentations contain information about the organization of report folders in Cognos and tips for setting up reports so that they are delivered on a pre-determined schedule.

GREENVILLE - REGION 04



With a prime location near two major cities (Charlotte, NC and Atlanta, GA) but low cost of living, Greenville, SC is one of the fastest growing cities in the south. The substantial community growth is reflected in its need to renovate and expand municipal buildings like the US District Courthouse (Greenville). Currently in its final concept design phase, Greenville is designed to accommodate 10-year growth needs and will include six courtrooms, eight chambers, and 70 secure parking spaces. Additionally, there are provisions for future expansion to support 30-year growth needs.

Laura Shadix, GSA Project Manager, and her team found the ePM Minimum Requirements helpful in developing a collaborative approach to managing the project. In fact, the project team realized that ePM provided an optimal forum for facilitating collaboration among members and communication to customers.

Laura knew the first step to successfully implementing ePM was “training, training, training.” She required project team training to create community among the members, and encouraged individual training based on project member needs. Although working with ePM is new to the project team, Greenville uses multiple ePM features.

Most Used Features:

- Contract and Modifications for A/E Contracts
- Invoices
- Cost Accounts – Site & Design
- Meeting Minutes
- Design Review Office Business Application (OBA)

“ePM is becoming a good resource and tool for the team.”

Laura Shadix, PM

Project members see value in the budget and cost accounts and the ability to track potential and/or pending change orders and paid invoices. This feature allows for greater control over the project’s development. Other useful ePM features are the Executive and Detailed Project Fact Sheets that provide the entire team an informative summary of the project. The project team members also like the history and document workflow of ePM.

These collaborative opportunities, however, did not just happen. Laura designated one day each month as a Project Team Work Session. These meetings fostered learning and allowed for critiquing among the project members. Through these discussions the members understood and appreciated that ePM was a tool that supported effective project management and promoted team building. One major teaming exercise required Greenville members to customize ePM for their needs like Register Views. The ePM File Manager was organized and aligned with the A/E Scope of Work and Design Phases. The project team is currently discussing the file structure for Revit Models during its monthly ePM meeting.

Yet the real value is that ePM brings a new dimension to customer engagement. Customers are directly involved with project development through ePM’s customized reports and external user accounts. The PM can tap several strategies that provide customer inclusion in a transparent and streamlined manner. The Greenville team will continue to stretch the boundaries of using ePM for pure collaboration to involve the entire spectrum of stakeholders. Uploading basic information like project schedule, meeting minutes, design submissions, design review comments, and the project address book are foundational pieces that can foster a community of collaborators.



Quick Tip

The process for adding a project role to each contact in a project's address book, has recently been streamlined. Additionally users can now add a Project Role column in the address book register view.

Identifying the team member roles on a project should help managers organize the project address book. Adding a key participant role will promote the name and role of the team member to reports available in Cognos.

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.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

Earned Value and KPI Measures Reports.

The Office of Design and Construction recently changed the frequency of Earned Value measures and KPI reporting for Capital projects. In the past, these reports were disseminated to GSA and PBS leadership on a quarterly basis. As these reports provide critical data for more timely results, the frequency will be increased as follows:

- ePM Capital Projects Adoption KPI Report: run on the 10th of every month
- Earned Value Measures: due the last day of each month. Reports are pulled the following day.
- Project Narratives for that month are due on the 10th of the following month.
- Finalized KPI and Measures Reports for that month will be issued to PBS and GSA Leadership by middle of the following month

Some exciting progress has been made recently with using ePM:

- The Capital Projects Schedule and Budget Measure was conducted in ePM on 77 projects for the first quarter of the 2013 fiscal year.
- Over 30 Cognos reports have been developed to share project data in ePM.
- Additionally, over 5,700 design review comments have been logged using the Design Review OBA.



REMINDER — LOCKED ACCOUNTS



A user's ePM account automatically locks after 90 days of inactivity. For locked accounts, the user needs to contact the appropriate RSA or ePM Help Desk for access. To facilitate a request, every user must be prepared to validate the reason(s) that access is needed in order to unlock the account.

Meet the team

Liz Penney is the ePM Zonal System Administrator for Regions 5 & 6 and has been a part of the ePM team since June 2011. Liz has experience in Commercial Real Estate & Construction Management and a degree from DePaul University, (Lincoln Park Campus) Chicago, IL. She loves art, live music, cooking, entertaining and the outdoors. She has a fiancé and two witty children who bring her constant laughter.

Together, the four of them enjoy spending time antiquing, specifically finding glass paperweights and old war knives to add to their collections.

As an Zonal System Administrator, Liz specializes in the areas of budget-cost-management (BCM), Earned Value and Planned Value for Capital Projects. In addition to her work on Capital Projects, Liz has also taken a lead training role in the rollout of ePMXpress 2.0. A unique approach Regions 5 & 6 implemented, Liz explains, is that they bundled the training of ePMXpress with the use of the Suite of Planning Tools and found this effort provided for a more effective adoption.

