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PIP Data Migration

As a reminder, PBS will be re-iterating the PIP system in FY12 as we move away from Lotus Domino platform. Thousands of projects and data records, as well as 28,000+ documents are currently stored in the PIP. A decommissioning plan is being drafted and there are plans underway to ensure that critical data and documents are safely migrated to ePM.. To help ease the migration from PIP to ePM, a team has been assigned to develop a utility to help automate moving data and documents. More information will be made available in the coming weeks.

ePM Quick Tip:



A quick time saving measure while using ePM is to utilize the Tab functionality in Internet Explorer. This allows you to have several modules open at once in the same browser window. Want to try it out? The next time you are navigating to a new module in ePM, right click on the desired module and choose "Open in New Tab". Now all of your modules are organized as tabs and you can easily jump between them as you do your work.

Case Study: Huntington Federal Building Design Reviews

West Virginia has an impressive history of pioneering public projects such as paving the first brick street, constructing of one of the first suspension bridges, and establishing the first rural free-mail delivery system. These feats of engineering would not have been possible without teamwork, creativity, and an enthusiasm for technological advancement. These team characteristics are vital in renovating the Huntington Federal Building, located in Huntington, WV.



"If we had to do it over again we would have used ePM from the beginning" [for design reviews]...Steve Grisi, GSA PM

Throughout the design stage, the team used DrChecks to collect over 250 design review comments. With the release of the ePM Minimum Requirements document, Stephen Grisi (GSA Project Engineer) and the project team made the critical decision to adopt ePM mid-project.

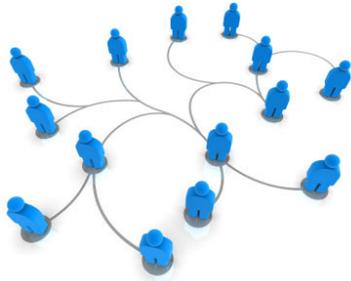
The team was faced with the monumental task of transitioning work methodologies and archived data to a new system. Recognizing the critical need for collaboration, the team was able to coordinate and assist each other in the successful implementation of ePM.



The Design Review Office Business Application (OBA) was an essential element for the successful transition to ePM. To start, the project team participated in an online training session conducted by Kathy Kearney. This seminar provided an overview about the OBA and its many features. After the primary training, Grisi spearheaded additional trainings based on the needs as identified by the project team. For example, a separate AE training was conducted to learn about uploading documents into ePM. Once the batch uploader was installed, the project team was able to smoothly populate ePM with the required project data and documents.

As the project team gained more experience, they realized that ePM solved past challenges. In the past, contractors were required to obtain user accounts to access design review software. With the OBA, external contractors can enter comments into an Excel template and send it to an ePM User with project access to upload. This allows input from subcontractors and consultants who need to contribute to the design review process, but will not have enough involvement on the project to warrant obtaining an HSPD-12 clearance.

Huntington collected 477 Design Review Comments using the OBA for the 95% Submission. Of those 435 have been responded to using the workflow process in ePM.



Automating Allowance Requests

The ePM team began piloting an exciting new feature to help automate the process of submitting and approving allowance requests within ePM. The biggest challenge for the ePM technical team and Alicia Saucedo (ePM Budget SME) was to provide enough flexibility to accommodate the unique workflow processes of each region. After several test sessions in NCR and R2, the technical team has fine-tuned the process and will be rolling out the feature nationwide.

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Storing gPM Information in ePM....Have you been searching for a place to share your Project Management Plan? Well, look no further! The ePM and gPM teams are partnering to establish defined protocols for storing PMPs, Communication Plans, meeting minutes and other important project documents inside of ePM. It is critical to share the most current versions of these key gPM documents with all project team members and stakeholders. Please see the table below to help you with guidance on storage locations in ePM.



Lifecycle	Activity	Location to store document in ePM
Initiation	Project Sponsor is Identified	Upload Charter to File Management > Card Catalog > CILP (If no charter, use PMP)
	Project Manager is Assigned	
Planning	Project Management Plan (PMP) with Clear Goals and Objectives with Risk Analysis	Upload PMP to File Management > Card Catalog > CILP
	Communication Plan (CP)	Upload CP to File Management > Card Catalog > Project Initiation
Execution	Project Rhythm Established with Regular Meetings with Agendas and Minutes	1) Upload Agendas/MMs to Applications > Office Management > Meeting Minutes or 2) Use ePM's minutes function
Closeout	Closeout Steps Occur	Closeout procedures defined in PMP

The OBAs are coming!

A new Office Business Application (OBA) package is in development for release through the GSA catalog. The benefit of the OBAs is that they will allow project team members who lack an ePM account to contribute project data. Not all users will have a need for these OBAs so please work with your Regional System Administrator (RSA) to make that determination.



Q: When will they arrive? A: The OBAs are scheduled to be included in the GSA software catalog by late September.

Q: How will I know they are available? A: All ePM account holders will receive an e-mail notification with detailed instructions on how to download the OBAs to their individual computers.

Q: What are my training options? A: Training will be available in each region through onsite or online classes. To support the release of these OBAs, the GSA Trainers and RSAs are preparing schedules to conduct online training and project-specific training for the design review OBA. For training requests please contact epmtraining@gsa.gov.

ePM Resources:

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

ePM Support
epmsupport@gsa.gov

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

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