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A system wide cleanup effort is in progress to update project roles in ePM. The “Key Participant” field, which is used to populate the Detailed Project Fact Sheet for Capital Projects, has been reduced to 36 roles. What does this mean for you? This new list will assist project managers and their staff in managing the project address book. The Non-Key lookup list has not changed and still contains a large number of roles to select for project team members.

REMINDER:

If you have not done so, please remember to recertify before August 31, 2013 to keep your ePM users license.



This year 602 ePM and ePMXpress users completed the end users survey. Annually we ask our users to provide feedback on GSA’s ePM Suite of Software Applications. The results from this survey will help the ePM Management Team make future decisions on ePM support, resources, training, system development and other issues. Thank you for participating in the survey. Your feedback and opinions matter and will help us to better serve your ePM needs in the future. We will share the survey results in one of the upcoming issues. Users can submit feedback anytime to an ePM RSA, the ePM Help Desk or epminfo@gsa.gov.

Closeout Agenda

Challenged with a need to formalize project closeout in the Ohio Service Center, Craig Kozikowski and his team developed a closeout agenda to help facilitate and improve the closeout and transition process. Using the form as a guide, the Service Center conducts a formal project closeout meeting on all projects. All warranty, O&M, and minutes of the closeout meeting are discussed and stored in ePM. Through this process, the building management team learns what's under warranty, what needs to be maintained, and how to access the information. Using ePM in this way, the regional building management office thus receives and downloads turn-over documentation in a standardized and efficient way on all projects, rather than by different means such as in hard copy, hard digital media or by email attachments. Implementation has led to greater cross-functional collaboration between project management, contracting, and building management. If you are an internal user and you are interested in obtaining a copy of the closeout agenda see the Internal ePM Chatter Page. There is also an ePM Closeout Checklist that was developed and is available on the ePM InSite page under “ePM Closeout”.

Project Closeout & Transition Meeting
(Insert project name)
 (Insert project control number)
 (Insert contractor contract name, delivery order number and AON number)
 (Insert design A/E firm name, contract number and AON number if applicable)

Attendees:

Project Manager	(Insert name)	attendance mandatory
Project Manager (Primary POC)	(Insert name)	attendance mandatory
Secondary Project Manager	(Insert name)	attendance mandatory
CSM Contract (Primary POC)	(Insert name)	attendance mandatory
Contract Specialist	(Insert name)	attendance as-needed
Contracting Officer	(Insert name)	attendance as-needed
Turnover (Primary POC)	(Insert name)	attendance if applicable
Turnover Manager (Team member)	(Insert name)	attendance if applicable
Building Management specialist	(Insert name)	attendance if applicable
Project Sponsor	(Insert name)	attendance as-needed

Agenda:

Overview
 The project was a temporary endeavor with defined start and end points, and objectives. The planned objectives and subsequent requirements incorporated by the approved change control process, have been fulfilled. The customer and project team have worked cooperatively to complete work. ePM provides formal project closeout, consistent with PM best practices. This is the purpose of this meeting. Project closeout other than contract closeout, which is now handled within PMSC.

- Project Name (Insert project name)
- Project Location (Insert region number or specific location) at the (Insert building name) - (Insert O&M date)
- ePM Project Number - (Insert ePM record number)
- Contractual Completion Date (Insert date)
- Final Completion Date (Insert date)
- Insert any other information (e.g. PM work or design and construction contracts) that has been satisfactorily completed and accepted by the customer and project team. Project completion releases the project team for management within the...

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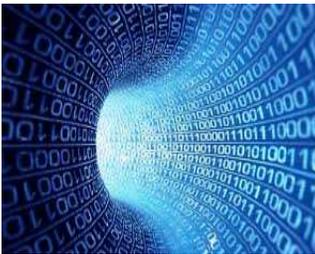
<http://www.gsa.gov/epm>



We have created two new pages on ePM website on GSA.gov for external users: **ePM Minimum Requirements** and **ePM Support**. The ePM Minimum Requirements show users what information is required both for internal and external users. The ePM Support page lists how to contact the help desk and has a link to the Meridian website to access ePM software, utilities, plug-in’s and desktop requirements. The ePM Newsletters and Quick Reference Guides (QRGs) can also be found on this website.

The ePM Team has developed an “ePM Financial Integration Process **FINANCIAL** Chart” for Internal GSA Users. This chart depicts the steps included in ePM’s planned financial integrations with IRIS and FMIS. There are also pages that outline how projects will be handled with both single and multiple funding sources. To look at a copy of this chart go to ePM on InSite - then go under “Training & Support” then Training Materials.





Quick Tip

Have a question about ePM processes, policy, reporting, training, quick reference guides, or who to contact in your region for ePM questions? You can contact your GSA PM or RSA or for online resources, internal users can use the ePM Insite page and external users can use the gsa.gov website. Both links can be found below in the User Resources section.

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>

User Resources

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

Quick Reference Guides

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

ePM Contacts:

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Kirsten DeLashmutt

PBS CIO Project Manager
Kirsten.Delashmutt@gsa.gov



As a former ePM Regional System Administrator (RSA), Jodi Harris brings a wealth of experience to her current role as an ePM Trainer.

When she first joined ePM in 2011 as an RSA, Jodi focused on defining processes and implementing consistency for ePM use in Region 7. For example, her work was pivotal for creating specific ePM project roles for adoption. Additionally, she standardized role responsibilities for both new and existing ePM projects. Creating uniformity in ePM work processes ensured that project data was captured in an accurate and consistent manner, thereby ensuring integrity for data reports. Jodi also provided input in establishing standard naming conventions for use in design documents, standard submittals and submittal packages, project photos, daily reports, and general correspondence.

Now as an ePM Trainer for Regions 3, 4, 6, 7, and 11, Jodi is creating knowledge synergies in ePM. With real world expertise on how ePM works on the backend, she is positioned to resolve questions and problems that project teams may not even anticipate. She saves the ePM teams and its members both time and money by frontloading her trainings with extra advice and insight to avoid problems that can derail projects.

Jodi recommends that ePM users communicate both the positive and negative experiences with the ePM team. Opening the lines of communication allows users to get the assistance they need to fully use the system.

Before getting into construction and system administration, Jodi studied business at Midwestern State University in Wichita Falls, TX. She enjoys hunting and fishing because these activities allow her to spend time with family and friends outdoors.

FMSP COGNOS REPORTING

The FMSP Project Status with Milestones Report enables program managers to view key information about small projects. The report displays critical information such as each project's Building ID, Project Manager, Customer Agency, Funding Information, and Estimated Project Value. Users can customize the report by filtering for the Managing Organization, Agency, Responsible Office, Building, or Project Team Member fields.

The FMSP Project Status with Milestones Report, located in the Fact Sheet Reports folder, can be generated for both Capital and Small Projects.

Project Details						Funding Information				Milestone Schedule Information				
NY0270ZZ: EMANUEL CELLER US CO						FY	Budget Activity	ASID	Amt	Approved	Task	Baseline Finish	Estimated Finish	Actual Finish
PM(s): Allyson Price						2011	80	N0759924	\$367,000.00	10/27/2011	01 - Customer Request	09/01/2010		09/01/2010
CO(s): 1005: District Courts of the United States						2010	80	N0759924	\$630,001.00	10/27/2011	09 - Prime Contract Award	10/06/2011		10/06/2011
Agency: 1005: District Courts of the United States											11 - Construction Start / Notice To Proceed	10/06/2011		10/06/2011
Responsible: 2.PSB.2PSBB: Brooklyn Field Office											13 - Substantial Completion	07/31/2012		07/31/2012
Total Estimated Value: \$997,001.00											13 - Substantial Completion	07/31/2012		07/19/2013
Program: Region 02 - Northeast and Caribbean Region Small Project Program											20 - Construction Complete	08/31/2012		08/31/2012

Detailed Status: Additional funding was required in award the project. This additional funding was not received until late September 2011 (September 29, 2011)

