WORKLOAD TRACKING

Rob Scheible, the Region 3 ePM Small Projects Regional Coordinator, uses ePM Register Views, ePMXpress, and Cognos to collect regional project workload data. That data is then combined into a workload tracking report. The types of information used in the workload tracking report are the project name, project roles, milestone dates, and funding but it can include any data in ePM.

Rob queries ePM for select data by field office and then sends a weekly report to regional managers. The report provides an overview about the progress on current projects. Besides highlighting progress status, these weekly reports are encouraging dialogue. Case in point, Rob mentioned that “by seeing the reports, it brought other issues to light such as the need for guidance in the region on which role to select for different Project Roles.”

There is a necessary time investment to create an MS Access database, then data needs to be exported out of ePM, ePMXpress and Cognos and imported into MS Access. Since Rob created this process he developed queries and reports that he runs each week. And while there are a few steps to this process, Rob believes that it is well worth it given the information provided every week. This regional report can easily be duplicated in other regions that want to know the same information. For those interested, contact Rob directly to learn the details of how he set this process up for Region 3.

The ePM Team is preparing for ePM’s integration with multiple GSA financial systems. This includes a migration of Capital Projects Application (CPA) data and integrations with the Inventory Reporting Information System (IRIS) and the Financial Management Information System (FMIS). The data from CPA, used by the CFO’s office, will capture project financial information such as: authorizations, appropriations and allowances. Integration with IRIS will facilitate automated project creation in ePM; while integration with FMIS will allow for obligations, payments and other contract data to be populated in ePM for both Capital and Small Projects. The integrations will enable ePM to update nightly with data from GSA financial systems.

The goal of the migration and integrations is to foster data consistency between ePM and the GSA financial systems of record while reducing manual effort. Instructions will be provided to the regions for how project managers can prepare. The financial integrations are scheduled to take place late this summer and will have little impact on the majority of project teams.

In years past, ePM End User Recertification was manually conducted but it became very labor-intensive. The new process will be automated, which will reduce the steps a user needs to take to validate that they still require access to ePM. *End User Recertification is required by users on all GSA IT systems.*

All of these changes are a continuous effort by the ePM team to listen to our users and to work on correcting known problems within ePM. We hope that these changes will make your experience using ePM a positive one. As always, users are encouraged to report any problems to the ePM Help Desk.
Experiencing problems with ePM lately? Check your browser. Currently, ePM is not officially supported with IE 10. (The system is fully compatible with IE 8.) If your browser is updated to IE 10, a work-around solution requires users to click the icon (pictured in the image below). This minimal action turns on compatibility mode allowing ePM to work normally.

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### 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/proline
- **GSA User Resources**
  - http://insite.gsa.gov/epm
- **Quick Reference Guides**
  - http://www.meridiansystems.com/epminfo

### Quick Tip
In an effort to expand the ePM support team, GSA has released three new potential change order (PCO) reports for the Capital Program: National Summary, Regional Summary, and Detail. The National Summary displays an overview for each region’s PCOs for the Capital Program. This report shows the total number of canceled, executed, and active PCOs. For active PCOs, the report displays the proposed value of PCOs and the average number of days they have been open. For executed modifications, the report shows the total number of executed mods, the actual value of executed mods, and the percentage of mods against the original contract value. Users can also compare the executed contract mods against the total value of the Independent Government Estimate (IGE).

The Regional Summary and Detail reports show similar data to the National Summary but on a project-by-project basis. Both reports show additional information about individual PCOs including contract name and number, base contract amount, IGE, and contractor’s quote. Users can either use the Project Number on the National Summary report to drill-down to more details or they can run the reports separately.

### Phase 3
PIP Migration Phase 3 was recently completed and now there are historical PIP schedules for certain ePM Projects. To find these schedules, look in the Schedule module for titles containing “PIPI Import” to easily identify those transferred to ePM. Users with program-level access can view the schedules using the ePM Program Workspace. For more information on the PIP migration phases go to ePM on InSite then select “PIP to ePM Migration”.

### GSA News Report
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