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Ad-Hoc Reporting in ePMXpress

ePMXpress Ad-hoc reporting received a much needed boost with the recent installation of release 4.1. The updates make all data fields in ePMXpress available to include in a report. Many of the more popular fields like Project Manager, Project Status, and Project Team were highly requested fields and are now available. Building Number and Building Description previously caused an error message which has been resolved.

One major improvement is that Actual Schedule dates can be pulled into a report. They show up as a yes/no value, therefore to get the Actual Date you must include the Estimated Date field in the report. When the value is “yes”, that means that the Estimated Date equals the Actual Date. If the value is “no”, then the Estimated Date has not been marked as Actual for that particular schedule item.

Some data groups are automatically available when you select other data groups. For example, the Project and Program data groups are always available no matter which data group is selected. PM Funding is another data group that is automatically available when any of the Funding related options like PM Obligations or PM Estimates are selected. This will help as you are building ad-hoc reports to be able to maximize the number of fields available to report against concurrently.

We encourage you to explore the My Reports area of ePMXpress to try out the ad-hoc reporting feature for yourself. Remember to filter by region and/or Small Projects to limit your results to your area of interest. There are common filter statements provided in the Quick Start Guide or contact your ePM Regional System Administrator for assistance.

FY14 Capital Project Starts

It is time to prepare for projects starting in FY14. The ePM Student Guide, Users’ Pre-Training Checklist, a Project Stand Up checklist and many other helpful documents are available for download on the ePM Insite page insite.gsa.gov/epm.

Project teams awaiting congressional funding for FY14 should begin planning project team training, a document management strategy, and inclusion into the ODC measure program. Teams anticipating construction contract awards and starts should plan to create and baseline a spendplan in ePM for the EV measure. A valuable lesson learned for new project teams is the HSPD-12 process (necessary for access into ePM) has been one of the most reported challenges getting contractors on board, so please start this process as soon as possible.

Did you know?

A total of 422 users logged into ePM and ePMXpress 4,225 times during the shutdown.
It is very important that every active project should have one PCN or RWA number. If a project has multiple PCN or RWA numbers the project team should choose the one more representative of their work. Once the financial integration with FMIS is turned on the projects will be linked by PCN or RWA number. Work with your ePM RSA to make sure your project is ready for integration.

Allen Matz, a member of the System Administration Support and Training (SAST) team, has been supporting ePM since November of 2010. He primarily supports GSA Region 8, but has also worked in Regions 5, 6, and 7 both supporting project teams and training other team members. Allen also is the backup to the National ePM Help Desk for licensing and time-off coverage.

As a graduate from Colorado State University (CSU), with a BS in Information Technology, Allen has extensive experience in SQL and Access databases, programming in Visual Basic and VBA, and has many years in network administration and industry specific application support. He is currently enrolled at the CSU Graduate School for a Masters in Project Management.

Before his current role, Allen worked for over two decades in the Homebuilding industry performing construction management, purchasing management, custom report designs, and training new employees on purchasing best practices and the company purchasing system. For the Colorado division of a large national homebuilder, Allen wrote a Purchase Order (PO) program for tracking construction overruns and extras, which later became the framework for a national rollout of that PO system for that homebuilding company.

Allen has lived in Denver for 35 years with his wife and two daughters, one a junior in college and one a senior in high school. Allen’s interests are in continuing education and eventually performing as an instructor in the increasingly popular online higher education community. Allen enjoys travelling, hiking, biking, and has been a volunteer for Habitat for Humanity, and is a regular contributor for Excel problem solving on the popular MrExcel collaboration website.

Some advantages of using ePM are instantaneous access to documents from anywhere and the ability to track the workflow, editing, and viewing of ePM documents.

-Allen Matz

The Executive Project Fact Sheet is a concise, one-page report that provides an overview of a project. The General Information section of the report displays projects basic such as the Project Manager, Region, Service Center, and Delivery Method. The Scope section of the report shows key square footage including the Total Gross Area, Usable Area, and Total Rentable Area. The Earned Value section displays the Contract Number, On-Schedule and On-Budget indicators, and Available Contingency for measured construction contracts. The Schedule section shows progress percent and start and finish dates for several milestones including Design, Construction, and Close Out. The Financial section shows the funding that has been Received, Pending, or Projected broken down by function code.

The Executive Project Fact Sheet, located in the Fact Sheet Reports folder, can be generated for both Capital and Small Projects.