

Customer Project Fact Sheet Report

What is Customer Project Fact Sheet Report?

This report runs from a data warehouse with a 24 hr latency period. It can be processed on demand or can be scheduled. It provides a summarized and categorized status for a selected (Shell/TI) Customer and project.

Who Will Use This?

- ✓ Project Manager
- ✓ Program Manager
- ✓ GSA Executive

The results of the report include the following details:

- **Project Details**
 - Building Number
 - Building Name
 - Address
 - Congressional District
 - Project Manager
- **RWA Funding Information**
 - RWA #
 - RWA Fiscal Year
 - RWA Expiration
- **Issues**
 - 'Is In Dispute' is checked
- **Gallery Image Source**
 - Thumbnail Images
- **Date Tracking Rules (Color-coded);**
LEGEND: (e) (e) (a) N/A
 - If the **Completion Date** is in the future (with respect to the Data Warehouse refresh date) then it is shown in Normal Black Colored text and appended with '(e)'.
 - If the **Completion Date** is in the past but the activity has not been marked completed then it is shown in Bold Red Text and appended with '(e)'
 - If the **Completion Date** is in the past and the activity has been marked completed then it is shown in Bold green text and appended with '(a)'
 - If the **Completion Date** is missing then 'N/A' is shown.
 If the Baseline Date (task Stage Type) is missing then 'N/A' is shown.
- **Schedule Information**
 - Milestone – AB Code
 - Date Tracking
- **Daily Work Journal**
 - Detailed Status
 - Executive Status
- **Key Partners**
 - Contact
 - Partner Website
- **Total Funding**
 - Obligated to Date
 - Balance to Date

Steps to run this report

1. Log into ePM using the Organization, User Name, and Password provided by your system administrator.

Organization	pbs
User Name	johnuser
Password	••
Login	

2. ePM has a fourth distinct Workspace ePM “**Analytics**” in addition to the Organization, Program and Project workspaces. Only licensed reporting users will see this workspace as an option. Select the ePM “**Analytics**” workspace to launch the **IBM Cognos Connection** page.

 Organization	Manage company documents and templates, such as project security and setup.
 Programs	Configure, view, and report on groups of business-related projects.
 Projects	Complete assigned tasks, administer project documents and manage corporate assets and work orders.
 Analytics	Display and manage Reports and Dashboards that provide real-time enterprise wide visibility across the entire portfolio.

3. Within the **Public Folder** list of projects, locate and run the “**Status of Projects Report**” by selecting the report name underlined in blue.

- OR -

Under **Actions**, select the blue arrow button to run the report with options.

<input type="checkbox"/>	Name ↕	Modified ↕	Actions
<input type="checkbox"/>	<u>Customer Project Fact Sheet</u>	November 10, 2010 12:26:42 PM	   More...

4. A list of Agencies appear as an option to select. Select an Agency.

Note



The Customer Project Fact Sheet Report displays all Agencies across all ePM regional Programs. Use the Search capabilities and **Options** to narrow and filter the list of agencies using keywords

5. Select or de-select the option box to “**Display Financial Section**” based on your preference to include or exclude financial related data.

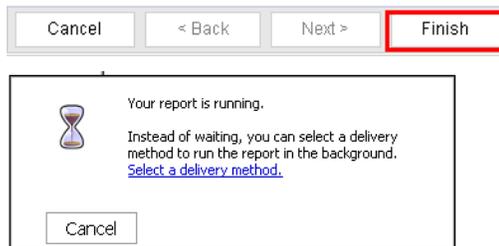
Display Financial Section

6. Select **Next** button.

Steps to run this report, cont.

1. The selection set of **Projects** appear separated by a **Results** and **Choices** pane. In the **Results** pane, select one or many projects to present the selection set in the **Choices** pane. To finalize your project selection, select the  button. Your selection(s) will appear in the **Choices Window Pane**.

2. Select **Finish** button. The report will display a prompt that it is currently running



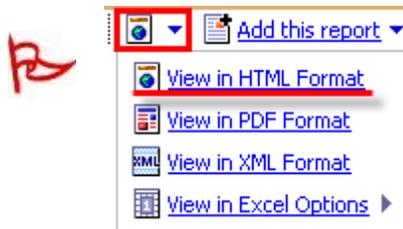
3. By default, the report is setup to run with the **Top / Page up / Page down / Bottom** links as illustrated at the bottom of the resulted report. Select **Page down** to view proceeding pages.

Printed on: Nov 15, 2010 10:48:41 AM

[Top](#) [Page up](#) [Page down](#) [Bottom](#)

Important

If you prefer to print on one page without having to refresh individual pages, run the report and then select a different report format option, such as the **HTML** format output.



Sample Report View



Customer Project Fact Sheet

DC, Washington Herbert Hoover Building (Phase II and III) Department of Commerce

GENERAL INFORMATION

Project Manager(s): Kathleen Myer (202) 205-3240
 Region: 11: National Capital
 Service Center: PDD: Property Development Division
 Project Type: 01: Lease
 Program Area: FBM: Federal Buildings & Modernizations
 Delivery Method: CMC: Construction Manager as Constructor



Description: This is where some body puts the description of the project so it shows up on some reports

LOCATION

Building Number: 10020800
Building Name: AK0000AA ANCHORAGE
Address: 110 Igloo Street
 Anchorage, AK 10000
Congressional District: Some District

Building Number: DC0003ZZ
Building Name: JAMES L. WHITTEN FB
Address: 12TH & JEFF DRIVE SW
 WASHINGTON, DC 20250
Congressional District:

Sample Report View, cont.



Customer Project Fact Sheet

DC, Washington Herbert Hoover Building (Phase II and III) Department of Commerce

STATUS

Executive Status

Sample data: The CMc Ph 1 construction contract was awarded on 11/30/07. NTP was issued on 01/07/08. The project is eight phases. Ph 1 builds out CY6 swing space, including the NPS White House Visitor Center office space, and replaces the original cooling towers. Substantial completion occurred in Oct 2009. The HCHB project received 2009 ARRA funding for Phases 2 and 3. Award of Phase 2 and Phase 3 construction occurred on 07/24/09.

Detailed Status

Sample data: The project received ARRA funding for Phases 2 and 3 in 2009. Award of Phase 2 and Phase 3 design, Construction and M&I services was made July 24, 2009. The balance of the project's five phases is expected to continue with normal funding requests beginning in FY2013 for Phase 4. The White House Visitor Center has undergone its modernization in Phase 1 as originally anticipated. The OA for the existing space has been signed. The move-in is scheduled for late October or early November 2009.

The National Aquarium's relocation and new entrance in the central portion of the southern façade along Constitution Avenue has been preliminarily supported by NCPC and CFA. A working session to review the latest concept design is scheduled for mid-November, 2009. The NA has requested an approximately 50% increase in space to approximately 27,000SF at the south end of the building. NOAA continues to provide financial support to NA. The Aquarium received partial funding for design of the new entrance and exhibit areas in FY08. Work is ongoing to finalize the outlease for the National Aquarium. DOC and GSA have executed a RWA to support the Aquarium's concept design effort.

Sample Report View, cont.



Customer Project Fact Sheet

DC, Washington Herbert Hoover Building (Phase II and III)
Department of Commerce

SCHEDULE

Milestone	Baseline Dates	Completion Date (Actual/Estimated)
Customer Request	07/08/2010	07/08/2010(a)
Funds in Place	07/12/2010	07/12/2010(a)
Requirements Finalized	07/14/2010	07/14/2010(a)
Initial Financial Agreement	07/15/2010	07/15/2010(e)
Acquisition Plan Finalized	07/16/2010	07/16/2010(e)
Design RFP Issued	07/19/2010	07/29/2010(e)
Prime Contract Solicited	07/20/2010	07/30/2010(e)
Signed Agreement	07/22/2010	08/02/2010(e)
Prime Contract Award	07/23/2010	08/03/2010(e)
Design Complete	08/09/2010	08/09/2010(e)
Milestone-Other #16	07/08/2010	08/16/2010(e)
Milestone-Other #17	08/31/2010	08/17/2010(e)

FINANCIAL

RWA Funding

RWA #	RWA Fiscal Year	RWA Expires	Total Funding	Obligated to Date	Balance to Date
0002	FY 2010	FY 2011	\$3,418,787	\$2,097,148	\$1,321,639
0003	FY 2010	FY 2011	(\$22,071)		
0004	FY 2010		(\$200)		
0728	FY 2010	FY 2012	\$500,000		

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Sample Report View, cont.



Customer Project Fact Sheet

DC, Washington Herbert Hoover Building (Phase II and III)
Department of Commerce

ISSUES/ACTIONS

Category Condition	Description	Assigned To	Condition	Status
SCOPE	<p>Issue: Specification requires removal metal boxes with insulation on pumps per the HVAC insulation spec, 230700, 3.5 - Equipment, Tanks, and Vessel Insulation Installation, C, 1, 2 and 3, Insulation Installation on Pumps. Please direct your sub-contractor to comply with the specifications and a submittal/shop drawing is required for this work.</p> <p>Action: Action Summary</p>	Department of Commerce	Moderate	Open

Key: ○ Minor Impact ◐ Moderate Impact ● Major Impact

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Customer Project Fact Sheet

DC, Washington Herbert Hoover Building (Phase II and III)
Department of Commerce

GALLERY

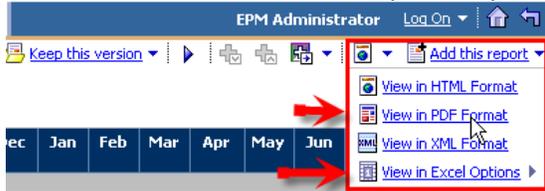


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Tips

- ✓ **Saving Report into a different format:** After you run a report, select an option to view in a different format. See “Add this report” dropdown and make your selection.



Tips, cont.

- ✓ **Data Mapping**

Report Section	ePM Document
Project Details	
Project Name	ProjectProperties Document
Agency Name	LookLists/ReportingCode3
General Information	
Project Manager	ProjectCompanyContact Document
Region	ProjectProperties Document
Service Center	ProjectProperties Document
Project Type	ProjectProperties Document
Program Area	ProjectProperties Document
Delivery Method	ProjectProperties Document
Description	ProjectProperties Document

Tips, cont.

✓ Data Mapping

Report Section	ePM Document
General Information, Cont.	
Project Image URL	ProjectProperties Document
Location	
Building Number	ProjectProperties Document
Building Name	ProjectProperties Document
Address	ProjectProperties Document
Congressional District	ProjectProperties Document
Status	
Executive Status	DailyWorkJournal Document
Detailed Status	DailyWorkJournal Document
Scope	
Total Gross Area	ProjectProperties Document
Inside Parking Area	ProjectProperties Document
Gross Area w/o Parking	Calculated
Usable Area	ProjectProperties Document
Inside Parking Spaces	ProjectProperties Document
Outside Parking Spaces	ProjectProperties Document

Tips, cont.

✓ **Data Mapping**

Report Section	ePM Document
Scope, cont.	
Number of Occupants	ProjectProperties Document
Total Rentable Area	ProjectProperties Document
ARRA related Area	ProjectProperties Document
Schedule	
Milestone	Schedule Document
Baseline□Completion Date	Schedule Document
Current Completion Date	Schedule Document
Financial (RWA Funding)	
RWA #	Scope Document
RWA Fiscal Year	Calculated
RWA Expires	Calculated
Total Funding	Scope Document
Obligated to Date	ExpensePreCommitContract Document / ExpenseChangeOrder Document
Balance to Date	Calculated

Tips, cont.

✓ **Data Mapping**

Report Section	ePM Document
Issues/Actions	
Category	Daily Reports, Issues, and Logs
Condition	Daily Reports, Issues, and Logs
Issue Description	Daily Reports, Issues, and Logs
Action Description	Daily Reports, Issues, and Logs
Assigned To Contact	Daily Reports, Issues, and Logs
Assigned To Company	Daily Reports, Issues, and Logs
Status	Daily Reports, Issues, and Logs
Gallery	
Image Source	Project Properties
Key Partners	
Organization	ProjectCompanyContact Document
Partner Website	ProjectCompanyContact Document