



SPOTLIGHT

MARCH 2004

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Bringing Efficiency & Consistency to R&D Management

Spotlight is the official newsletter for the DOE E-Government Corporate R&D Portfolio Management Environment (ePME) project. *Spotlight* is published quarterly for federal government employees and contractors interested in ePME activities.

Welcome from the Project Manager

On behalf of the ePME team, I would like to express a heartfelt thank you to everyone who has participated in the many ePME activities to date! It is your continued dedication and support that makes ePME a success. We look forward to deploying our first module, entitled Electronic Receipt and Review, by the end of fiscal year 2004. As a result, the Department will soon have the capability to accept electronic proposals from its national laboratories! Currently, a pilot is being deployed to test 60% out-of-the-box functionality of a commercial-off-the-shelf (COTS) product. The sites participating in the pilot are the Fermi National Accelerator Laboratory, National Renewable Energy Laboratory, Oak Ridge National Laboratory, Sandia National Laboratories, Fermi Area Office, Golden Field Office, Sandia Site Office, Oak Ridge Operations Office and headquarters staff from the Office of Energy Efficiency and Renewable Energy and the Office of Science. The targeted pilot completion date is April 30. Please read more detail in the Electronic Receipt and Review article.

The ePME and I-MANAGE Executive Steering Committee (ESC) met on February 17, and as a result of its decisions, the ePME project is undergoing exciting changes as noted in the ESC article. In addition, several changes, pertaining to membership, have occurred on the ePME Executive Steering Committee, Senior Management Group, and core project team. Again, we welcome new participants and thank existing and prior participants for all of their hard work, guidance, and continued support in helping us to improve the R&D management and administration processes within the Department and deliver a solution to support those processes.

Cheers!
Kimberly Rasar



Kimberly Rasar,
ePME Project Manager

March Pilot Deployment

We are ready to deploy the first release of ePME in March! ePME will release the Electronic Receipt and Review of laboratory proposals for new and ongoing R&D activities module as a limited pilot deployment on March 15, and will release Electronic Receipt and Review as a fully-functional module by the end of September.

Electronic Receipt and Review will allow laboratories to electronically submit proposals for new and ongoing research and development using their

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ESC Makes Key Decisions

The Executive Steering Committee met on February 17. The purpose of the meeting was to inform the committee on external project drivers, request guidance and approval on a new project plan, and request approval for an alternatives analysis recommendation, and present a project status update.

External Drivers

Two external drivers have caused significant impact to the ePME project. The first was a substantial reduction in

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existing systems or through a Web-based ePME interface, and for DOE program offices to electronically receive, review and respond.

From March 9 to April 2, ePME will be conducting pilot training at DOE Headquarters and at selected sites. Testing of the pilot release is scheduled to occur from March 15 to April 2.

The training will include exercises in various scenarios to test the system's functionality and applicability to DOE's business needs, and will enable users in the chain of workflow for Field Work Proposals and Annual Operating Plans to test the system together and to help shape this module prior to its full deployment.

Oak Ridge National Laboratory and the Oak Ridge Operations Office, Sandia National Laboratories and the Sandia Site Office, National Renewable Energy Laboratory and the Golden Site Office, and Fermi National Accelerator Laboratory and the Fermi Area Office, were selected to participate in the pilot training and testing, along with headquarters staff from the Office of Science and the Office of Energy Efficiency and Renewable Energy.

Objectives of the pilot testing are to:

- Confirm that the system meets the national laboratories' and DOE's business needs
- Identify any fatal flaws that would preclude user acceptance
- Determine any revisions necessary for full deployment

The scope of the pilot includes:

- Testing of a single program per pilot laboratory
- Testing various Field Work Proposals or Annual Operating Plans per laboratory
- Testing of the complete workflow for FWPs and AOPs
- Automated status changes and an e-mail approval process
- Creating FWPs and AOPs via data entry
- The use of test data only; no operational proposals or plans

ePME will deliver the Pilot Evaluation Report on April 16, following an evaluation and a post release quality assurance review. At the Executive Steering Committee meeting in March, we will seek the ESC's approval for the module's full deployment in September.

To develop the Electronic Receipt and Review module, the ePME team conducted an alternatives analysis to determine if a commercial-off-the-shelf (COTS) or government-off-the-shelf (GOTS) product existed that could serve as part, if not all, of the functionality needed for the module. The team recommended PDMLink, a PTC software product, as the best option based on the alternatives analysis, which determined:

- PDMLink, a COTS package, can be deployed sooner than the alternatives;

- PDMLink is a commercially-proven software package;
- PTC software is already used in the Department and in other federal agencies;
- PDMLink is programmer-friendly, both for code configuration and integration with other software packages; and,
- PDMLink has a lower project life-cycle cost.

In June, ePME plans to deploy an electronic interface development tool kit (eIDK) and XML schema, which will enable laboratories to submit proposals via a single ePME batch interface. The Systems of Lab's Computing Coordinating Committee (SLCCC) received the draft schema at its February meeting and will distribute the schema and solicit comments from the laboratories.

To help prepare the larger DOE community for full deployment and use of the Electronic Receipt and Review module in September, we will share products and plans with SLCCC and will post the eIDK and other products and updates on the project Web site (<http://epme.doe.gov>).

For more information about the pilot deployment, please contact Jim Fremont, ePME Communications Manager, at james.fremont@ee.doe.gov or 202-586-5735.

Exciting Project Changes!

Technical advances have enabled ePME to combine the remaining two modules and submodules into one second module, Electronic Portfolio Management, which will enable more effective R&D portfolio management and significantly improve project execution time. This action gains efficiencies and helps ensure that the entire project can be completed and deployed by the end of FISCAL YEAR 2006.

Electronic Portfolio Management will provide for electronic:

- Receipt of financial assistance award data
- Merit review
- Project tracking and reporting
- Portfolio management
- Generation and distribution of work authorizations
- Program planning, analysis and evaluation
- Generation and distribution of program guidance
- Planning data transmission

ePME is in the process of identifying and forming a Federal Requirements Team to complete the requirements for Electronic Portfolio Management by the first quarter of FISCAL YEAR05. We invite you to join the team and help develop this combined module!

For information about joining the Requirements Team or the Electronic Portfolio Management module, contact Jim Fremont, ePME Communications Manager, at james.fremont@ee.doe.gov or 202-586-5735.

fiscal year 2005 funding, coupled with an accelerated schedule requirement to deploy the Electronic Receipt and Review module within fiscal year 2004.

Alternative Project Plan

ePME presented an alternative plan, which includes a new project scope, schedule, budget, and management and acquisition strategy. This plan enables ePME to competitively respond to the funding reduction and accelerated schedule, while gaining efficiencies and maintaining momentum.

To gain efficiencies, the ePME project team proposed combining the two remaining modules, Electronic Portfolio Management and Electronic Program Guidance, into one module, Electronic Portfolio Management. In addition, the ePME project team proposed including all planning data within ePME's scope along with program planning, analysis, and evaluation capabilities. These recommendations were based on the results of the team's business case analysis of program planning, analysis and evaluation and a problem statement definition for the inclusion of non-R&D data in ePME.

According to the proposed schedule, full deployment of Electronic Receipt and Review occurs by the end of fiscal year 2004, and Electronic Portfolio Management by the end of fiscal year 2006.

In the proposed management and acquisition strategy, the ePME team advises initiating a new integration contract, with heavy federal involvement, by first quarter fiscal year 2005. The integration contract is for completing Electronic Portfolio Management system requirements. The proposed strategy also calls for a new deployment contract for Electronic Portfolio Management by the second quarter of fiscal year 2005. This incentive based deployment contract will reflect detailed requirements and delivery dates in its Statement of Work.

The committee approved the alternative plan with the caveat that the project scope will be finalized at the March joint ePME and I-MANAGE Executive Steering Committee meeting.

Alternatives Analysis

The next item on the committee's agenda was the Electronic Receipt and Review Alternatives Analysis. Kimberly Rasar and Joe Malinovsky put forth the analysis results and recommendation of purchasing PTC's Windchill PDMLink software for the Electronic Receipt and Review module. According to the analysis, this commercial-off-the-shelf software package fulfills approximately 60% of the module's functional requirements out-of-the-box. Windchill PDMLink is also approximately \$1.8 million more cost effective versus a custom build solution per the analysis. Based on the information presented, the committee approved the alternatives analysis and subse-

quent use of Windchill PDMLink software for the Electronic Receipt and Review module.

Project Status

ePME's Earned Value Management System reports were presented to the committee. The reports state the ePME project is within 10% of cost and schedule, based on initial project plans and milestones presented at the October 8, 2003 Executive Steering Committee meeting.

Next Steps

Based upon the success of the meeting, the Executive Steering Committee, Kimberly Rasar and Joe Malinovsky agreed that the next steps for the ePME project are to:

- Finalize plans to present at the March Executive Steering Committee meeting;
- Prepare a presentation and schedule a meeting to brief OMB on ePME
- Update fiscal year 2005 Exhibit 300 to reflect the committee's decisions
- Office of Engineering and Construction Management review of the Master Schedule for CD2 (Conceptual Design) compliance
- Approve sunk costs and update Earned Value Management System reports to align with the new project plan
- Develop the Field Budget Call policy and iterate with Management, Budget and Evaluation
- Complete and evaluate the Electronic Receipt and Review pilot deployment
- Establish Core Team members for the Electronic Portfolio Management system requirements

We thank the committee members for their continued support and guidance.

Web Site Update

If you haven't visited the ePME Web site (<http://epme.doe.gov>) in a while, now is the time! We have been updating content and adding new features, including a project glossary, all to help give you a better understanding of the ePME project.

If you have comments as you search the site, please let us know. This Web site is for you – so we want to make sure it is informative for you. Please forward all comments to Jim Fremont, Communications Manager, at james.fremont@ee.doe.gov.

Web site updates will continue, so be sure to check back on a regular basis to see the exciting changes!

ePME Overachieving in FY04

Every day ePME project team members are working hard along with members of multiple organizations, all in an effort to bring efficiency and consistency to R&D management. Working together we can realize the vision of ePME: simplify and unify the Department's R&D tracking, management, and reporting processes; enable portfolio management capabilities to facilitate more strategic investment decisions; and implement the technology solution to support those processes in an electronic, distributed information environment.

It was a busy first fiscal quarter for the ePME project team. The project continues to move forward with new energy as deployment of the first phase of ePME is realized. The following are some highlights of the last three months.

- The ePME project team was challenged with deploying a fully functional release of Electronic Receipt and Review by the end of fiscal year 2004. The ePME project team responded by drafting and now executing

an aggressive and creative deployment strategy. The strategy incorporates an iterative deployment cycle, on-site hands-on training, user scenario testing of the system, and user acceptance/evaluation.

- Established a deployment team and plan for Electronic Receipt and Review pilot release.
- Completed a comprehensive alternatives analysis for the Electronic Receipt and Review module of ePME.
- Developed a position paper on the Field Budget Call
- Conducted a business case analysis for the inclusion of program planning, analysis, and evaluation functionality within ePME.
- In light of various external impacts to the project, the ePME project team drafted a new and innovative management and acquisition strategy in order to maintain project momentum.

We look forward to pushing ahead and working with you. Thank you to all who have helped us accomplish much this first quarter.

ePME Membership Changes

Executive Steering Committee

Karen Evans, the former CIO for DOE, has left the Department to join the Office of Management and Budget. Ms. Evans served on the ePME Executive Steering Committee as the Vice Chair and worked hard to support ePME. We thank Ms. Evans for her guidance and wish her the best of luck at OMB.

Ms. Rosita Parkes has been appointed the new CIO of DOE and has not missed a beat. She has agreed to also serve as the Vice Chair on the Executive Steering Committee and has already met with the ePME team a number of times. We are very excited to be working with Ms. Parkes and look forward to her guidance as we begin to implement ePME.

Senior Management Group

ePME welcomes Mark Frei, Director of the Office of Environmental Management's Office of Cleanup Technologies, as a new member of the Senior Management Group (SMG). He replaces Mark Gilbertson as EM's representative on the SMG.

As part of EM's recent reorganization, Mark Gilbertson has been named the Associate Deputy Assistant Secretary for Environmental Cleanup and Acceleration, and is responsible for assisting in the accelerated risk reduction and environmental cleanup of former nuclear weapons sites.

"We are delighted to have Mark Frei on our team, and look forward to working with him as we design and deploy ePME," said Kimberly Rasar, ePME Project Manager. "And we really appreciate the services of Mark Gilbertson, who served on the SMG, and its predecessor, since the project's inception in fiscal year 2002 and who provided valuable guidance for the Strategic Information Management study."

ePME Project Core Team

Ms. Carolyn Murphy has accepted a detail to work in SC-40 for Dr. Walt Polansky. Ms. Murphy has worked on the ePME team as the Officer Manager for over a year. Her vast knowledge of DOE and all of her hard work has been truly valuable to ePME. Carolyn, thank you very much. We wish you the best of luck.

Feedback Wanted!

- We want to hear from you. Help promote ePME by telling others about the project or pointing them to the project Web site: <http://epme.doe.gov>.
- Suggest or submit an article for future editions of *Spotlight*.
- Tell us what you think about ePME. We need your input to successfully develop and implement this first-of-a-kind system.

Contact Jim Fremont at james.fremont@ee.doe.gov