

## Using ePMXpress Setup & Admin

### What is ePMXpress and the purpose of this QRG?

The ePMXpress alternate interface is intended to be a more intuitive way for you to navigate around the ePM solution, including Reports, OBAs, and the ePM user interface.

For instructions how to use the ePMXpress, reference QRG.068.

The purpose of this QRG is to provide guidance for installation setup, administrative supported security roles, and typical error handling you may potentially experience when you support the GSA end user base.

### Who Will Use This?

- ✓ GSA ePM Regional Admins
- ✓ GSA System Admins
- ✓ GSA Trainers

## Installation & Initial Setup

**ePMXpress web application must be installed on the ePM Web Server; configured using the server setup tool.**

**NOTE: The ePMXpress solution fulfills the following technology requirements:**

- Requires **no** desktop installation to use except for the OBA requirements
- Authenticates through ePM
- Utilizes the ePM security configuration to determine access
- Utilizes ePM's Embedded Registers support to display a register view

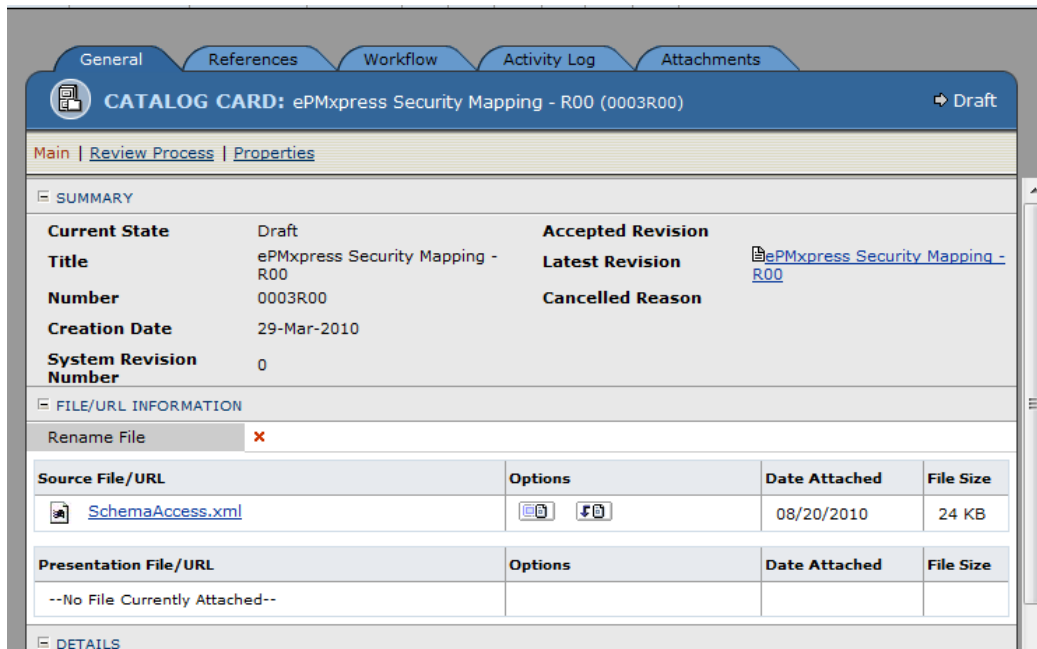
1. Once ePMXpress is successfully deployed. Access ePMXpress application at:

<https://epm.pbs.gsa.gov/Proliance/WebUI/Login.aspx?returnURL=/proliance/epmXpress/login.aspx>

### Additional Setup Notes:

1. This application uses an XML configuration document located in an Org Catalog Card (subtype "Security") to store ePM Security Role and Tool mapping. This Org Catalog Card of subtype "Security" must be created for the ePMXpress application to work properly. The Catalog Card contains a Security Mapping XML file defining Tools and Security role maps.
2. A system user will need to be created to read this Org Catalog Card.

*Reference Technical Specifications and Installation Guide for further details.*



3. To navigate to Reports from the ePMxpress interface:
  - a. User needs access to Cognos and a valid Cognos license.
4. To navigate to an OBA from the ePMxpress interface:
  - a. The OBA will need to be installed on the user's desktop.
  - b. The Meridian Systems Application Launcher must be installed on the user's desktop to support launching of the installed OBAs from the ePMxpress Interface.
5. User must be assigned the proper security roles. See next section. These roles have been assigned to the proper security categories in ePM.

## Security Roles

### Security Roles

The roles noted below allow a user to access ePM documents and tools from the ePMxpress interface. What a user can do with the documents and tools depends on the ePM security and workflow roles assigned to the user account.

If a user does not have the 'ePMxpress: User' role, then that user will not be allowed to use the interface.

If a user does not have specific roles noted below, the user will not see the icon for that item when launching the ePMxpress interface (i.e. if the user does not have the 'ePMxpress: Registers - Daily Report' role, then that user will not see the icon for the link to the Daily Reports register view).



## Security Roles, cont'd.

ePMxpress: OBA - Contract and Modification  
ePMxpress: OBA - Design Review  
ePMxpress: OBA - Invoice  
ePMxpress: OBA - Project Initiation  
ePMxpress: OBA - Punchlist  
ePMxpress: OBA - Submittal  
ePMxpress: Registers - Accident Reports  
ePMxpress: Registers - ACR  
ePMxpress: Registers - CILP  
ePMxpress: Registers - CO Status  
ePMxpress: Registers - Contacts  
ePMxpress: Registers - Contractor Schedules  
ePMxpress: Registers - Contracts  
ePMxpress: Registers - Correspondence  
ePMxpress: Registers - Customer Requirements  
ePMxpress: Registers - Daily Report  
ePMxpress: Registers - Design Documents  
ePMxpress: Registers - Design Review Comments  
ePMxpress: Registers - Design Submissions  
ePMxpress: Registers - Detailed Status  
ePMxpress: Registers - Executive Status  
ePMxpress: Registers - Fire Reports  
ePMxpress: Registers - Funding  
ePMxpress: Registers - Invoices  
ePMxpress: Registers - Issues  
ePMxpress: Registers - Meetings  
ePMxpress: Registers - Milestone Schedule  
ePMxpress: Registers - Misc Expenses  
ePMxpress: Registers - Modifications  
ePMxpress: Registers - Notices  
ePMxpress: Registers - Obligation Variance Explanation  
ePMxpress: Registers - PCOs  
ePMxpress: Registers - Photos  
ePMxpress: Registers - PM Schedule  
ePMxpress: Registers - Procurement





## Security Roles, cont'd.

- ePMxpress: Registers - Project Initiation
- ePMxpress: Registers - Project Properties
- ePMxpress: Registers - Prospectus
- ePMxpress: Registers - Punchlists
- ePMxpress: Registers - RFIs
- ePMxpress: Registers - Safety Notices
- ePMxpress: Registers - Site Acquisitions
- ePMxpress: Registers - Studies
- ePMxpress: Registers - Submittal Packages
- ePMxpress: Registers - Submittals
- ePMxpress: Registers - Transfer
- ePMxpress: Reports - Customer Milestone
- ePMxpress: Reports - Customer Project
- ePMxpress: Reports - Detailed Factsheet
- ePMxpress: Reports - Detailed Status
- ePMxpress: Reports - Executive Factsheet
- ePMxpress: Reports - Planned Obligation
- ePMxpress: User

## Document Register Views

The ePMxpress User Interface launches the last viewed document register in the ePM Web UI or a filtered register view – **Shared Register Views need to be setup in the Program/Managed Projects.**

ePMxpress Icon	Filters	Comments
Notices	n/a	Launches last viewed document register
Project Properties	n/a	Launches last viewed document register
Funding (Scope Documents)	n/a	Launches last viewed document register
Transfer	n/a	Launches last viewed document register
Prospectus (Revenue Contract)	n/a	Launches last viewed document register
Contracts (PreCommit Contract)	n/a	Launches last viewed document register
Modifications (PreCommit Change Order)	n/a	Launches last viewed document register
Invoices	n/a	Launches last viewed document register



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ePMxpress Icon	Filters	Comments
Misc Expenses (AutoCommit Invoices)	n/a	Launches last viewed document register
PCOs (Cost Event)	Filter subtype "PCO"	Launches filtered document register view
Daily Report	Filter Daily Work Journal set subtype "Daily Report"	Launches filtered document register view
Executive Status	Filter Daily Work Journal set name "Executive Status"	Launches filtered document register view
Detailed Status	Filter Daily Work Journal set name "Detailed Status"	Launches filtered document register view
CO Status ePMxpress Document View titled 'Contracting Officer Status'	Filter Daily Work Journal set name "CO Status"	Launches filtered document register view
Issues	Filter subtype "Issue"	Launches filtered document register view
Punchlists	Filter subtype "Punchlist"	Launches filtered document register view
Safety Notices	Filter subtype "Safety Notice"	Launches filtered document register view
Fire Reports	Filter subtype "Fire Report"	Launches filtered document register view
Accident Reports	Filter subtype "Accident Report"	Launches filtered document register view
Obligation Variance Explanation	Filter Daily Work Journal set subtype "Obligation Variance"	Launches filtered document register view
Correspondence	n/a	Launches last viewed document register
Design Documents (Drawing Document )	Filter subtype "Design Document"	Launches filtered document register view
Design Submissions (Drawing Package)	n/a	Launches last viewed document register
Design Review Comment	Filter subtype "Design Review Comment"	Launches filtered document register view
Meeting Minutes	n/a	Launches last viewed document register
RFIs	n/a	Launches last viewed document register
Submittals	n/a	Launches last viewed document register
Submittal Packages	n/a	Launches last viewed document register
Milestone Schedules (Schedule Document)	Filter subtype "Milestone Schedule"	Launches filtered document register view
PM Schedules (Schedule Document )	Filter subtype "PM Schedule"	Launches filtered document register view
Contractor Schedules (Schedule Document )	Filter subtype "Schedule"	Launches filtered document register view
CILP (Catalog Card Document)	Filter subtype "Schedule"	Launches filtered document register view
Customer Requirements (Catalog Card Document )	Filter subtype "Customer Requirements"	Launches filtered document register view



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ePMxpress Icon	Filters	Comments
Photos (Catalog Card Document)	Filter subtype "Photo"	Launches filtered document register view
Procurement (Catalog Card Document)	Filter subtype "Procurement"	Launches filtered document register view
Project Development (Catalog Card Document )	Filter subtype "Project Development"	Launches filtered document register view
Project Initiation (Catalog Card Document )	Filter subtype "Project Initiation"	Launches filtered document register view
Site Acquisition (Catalog Card Document )	Filter subtype "Site Acquisitions"	Launches filtered document register view
Studies (Catalog Card Document )	Filter subtype "Studies"	Launches filtered document register view
Contacts (ProjectCompanyContact Document)	n/a	Launches last viewed document register

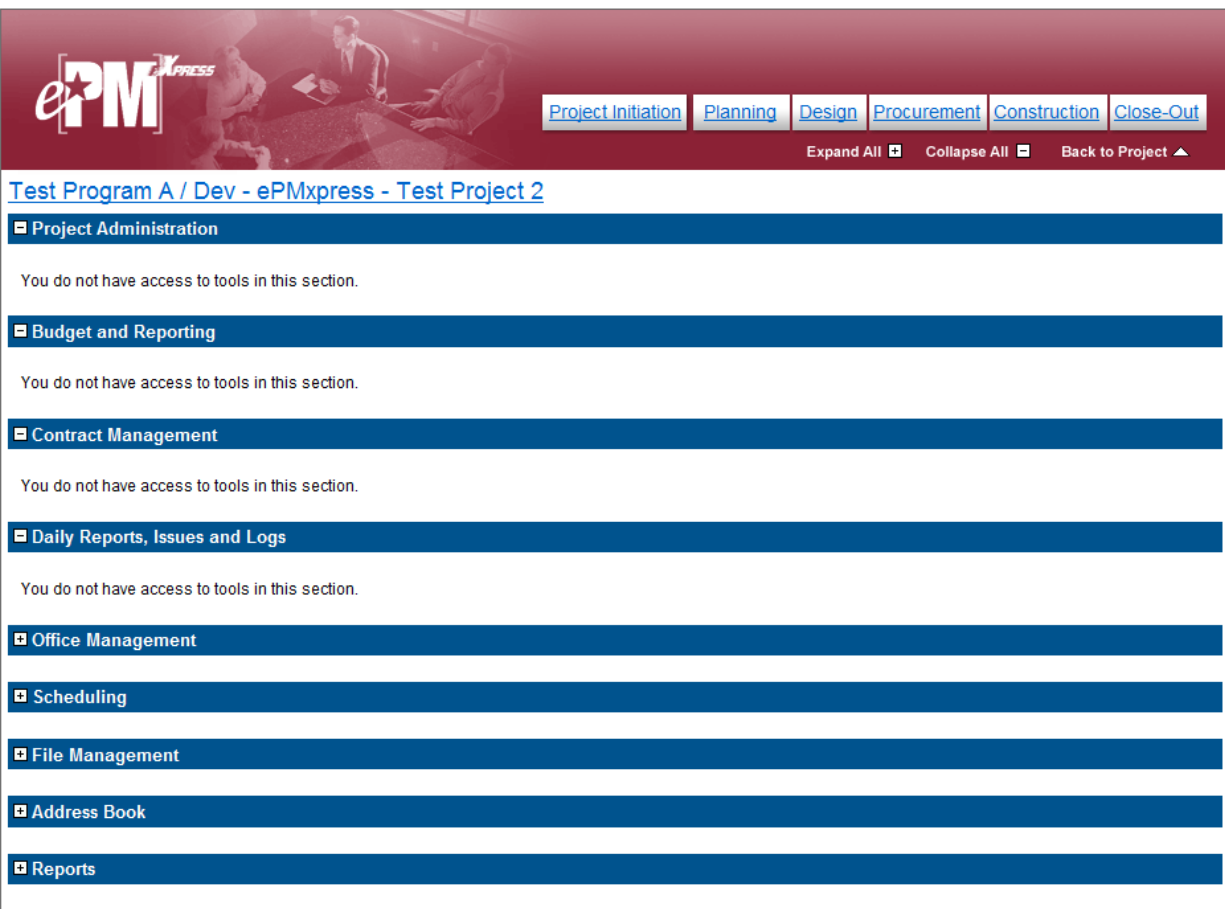
## Error Handling

1. If a user does not have the 'ePMxpress: User' assigned to their account, they will receive the message below **after** log-on and entering a selected project.



The screenshot shows a red header with the ePMxpress logo and a background image of people in a meeting. Below the header is a blue bar with the text "Error occurred." followed by "An application error has occurred." and "Please contact your System Administrator or [Try Again](#)".

2. If the user has the 'ePMxpress: User' role but does not have any other ePMxpress security roles or any roles for a particular section, they will be presented with text 'You do not have access to tools in this section.' **when expanding** that section in the interface.



The screenshot shows the ePMxpress interface with a red header. The header contains the ePMxpress logo, a navigation menu with buttons for "Project Initiation", "Planning", "Design", "Procurement", "Construction", and "Close-Out", and utility links for "Expand All", "Collapse All", and "Back to Project". Below the header is a blue bar with the text "Test Program A / Dev - ePMxpress - Test Project 2". The main content area shows a list of sections, each with a blue bar and a message: "You do not have access to tools in this section." The sections are: Project Administration, Budget and Reporting, Contract Management, Daily Reports, Issues and Logs, Office Management, Scheduling, File Management, Address Book, and Reports.