Catalog Cards

What are Catalog Cards?

The **Catalog Cards** document type is one component of the GSA's Document Management solution. **Catalog Cards** manages all electronic documents that were created by applications outside of ePM. For example, you can store photos, sketches, studies, customer requirements, procurement related documentation, site acquisition related documentation, word processor files, representation of physical objects, spreadsheets, or any other electronic documents that are important to track for the project.

GSA has a standard folder list to store the various types of Catalog Cards. Each folder is an individual document sub type. When creating Catalog Cards, please be cognizant of selecting the appropriate GSA Catalog Card standard folder (document sub type).

Catalog Cards documents can also be created by other applications. Please refer to the following QRGs:

QRG.089 Batch File Upload DQA (Desktop Quick Application via an Excel document)

QRG.090 Document Management Batch Creation Wizard

QRG.104 File Manager (Silverlight Application via drag and drop files)

Who Will Use This?

√ General Contractor/CMc

√ Construction Manager (CMa)

√ Architect/Engineer

√ Project Manager

√ Project Management Staff

√ Contracting Officer

√ Contracting Officer Staff

√ Central Office Portfolio

√ Regional CFO

√ Customer User

These Catalog Cards function just like their counterparts in the real world; they provide summary and detailed information about the item being cataloged, and can be forwarded to people for review and feedback. Additionally, Catalog Cards are one of three document types that support Brava! ePM Document Management "Redlining/Markup collaboration. For more information about using Brava! redlining feature functionality, reference the following QRGs:

QRG.091 ePM View & Redlining Document Management

QRG.092 ePM View & Redlining Toolbars & Icon Features

QRG.093 ePM View & Redlining Supported File Formats

Creating a Catalog Card Document

1. Log into ePM as a user with the **File Mgt: Catalog Card- Editor** or **File Mgt: Catalog Card- Approver** security role and select your project.

2. Navigate to **File Management > Catalog Cards**. List of Catalog Cards sub folders are displayed.

3. Determine which type of Catalog Card you need to create.

4. Select **New** from the toolbar and select catalog card document type you wish to create.

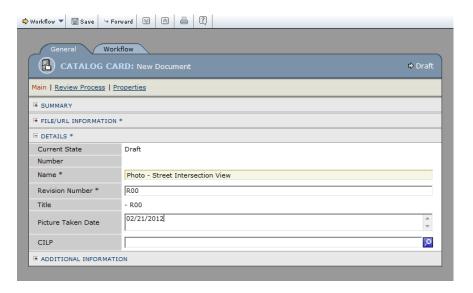   a. For this example, we are creating a **3.1 Photos** document.

5. Enter data or select lookups as required for the catalog card document. Please note: Any fields containing an asterisk mean they are required and must be completed.

   a. For this example, enter **Name** and a date for the **Picture Taken Date**.

6. Select **Save** button from the toolbar.

    NOTE: The initial default revision number is **R00**.

Uploading Files to Catalog Card File/URL

Catalog Cards contain a **File/URL Information *** section within the document unique to supporting uploaded files that can be optionally viewed by either your desktop viewer or with the ePM Document Viewer. The ePM Document Viewer contains redlining markup feature functionality. Follow the steps below to upload a combination of Source or Presentation files.

1. Expand the **FILE/URL INFORMATION *** section by clicking on the "+" sign.

2. Under either the **Source File/URL or Presentation File/URL**, under **Options** section, click icon

      to upload the native file.

What are Source Files?

Source files are normally external files in their original (i.e. dwg, pdf, etc.) formats. Source files can be marked up and redlined through ePM Document Viewer.
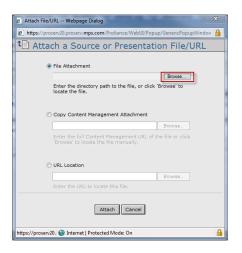
What are Presentation Files?

This is a version of the external file in common file format. For example: a drawing file could be converted to Adobe® Acrobat® PDF format and uploaded as the presentation version. A word processor file could be converted to RTF (Rich Text Format) as the presentation version. You cannot mark up or redline a Presentation File.

The **Attach a Source or Presentation File/URL** dialogue box opens.

3. Select the **Browse** button within the **File Attachment** option to locate a document stored in your network or local drive.

4. Select the file to upload and the **Open** button to complete the attachment selection.

5. Select the **Attach** button to close the **Attach File/URL – Webpage Dialog** box and complete the upload process.

6. File upload process is complete.

7. Click **Save** button in document toolbar.

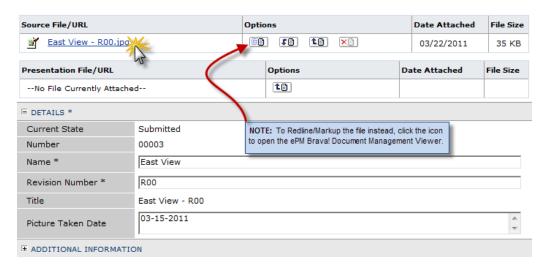# Workflowing Catalog Card Document

There may be several subordinates involved in the process. For instance, a General Contractor may have the Project Engineer on site to upload the Photos. Then, a Project Manager may review them and decide to either Submit or Cancel the document. However, this must be a coordination effort between the parties because both have the same security privileges to create and submit the Catalog Card.

1. Log into ePM as a user.

2. Navigate to **File Management | Catalog Cards** register.

3. Select an existing Catalog Card already created within the register and open document.
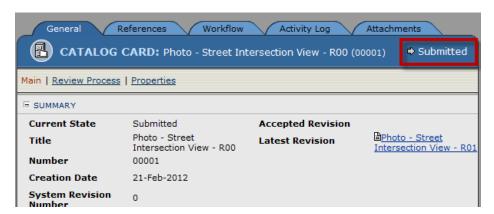
4. Review and markup attachment located in either the Source or Presentation File (refer to redlining QRGs mentioned above on how to markup documents).

You must have a redline license to open in the ePM Document Management Viewer. If you don't have access and need it, contact epmsupport@gsa.gov with a request for a "Redline" license.

5. From the toolbar, select **Workflow** dropdown. Select an option to **Cancel** or **Submit.** Or, if you need a subordinate to further review before submitting the final document, select the **Forward** button from the toolbar and send it to the recipient for further review.

6. Click **Execute**

7. Select **Return to Document**. The document will display the current workflow state.

Viewing Uploaded File/URL documents

1. To open the document using your native applications installed on your desktop, left-click the uploaded file attachment link to open document.
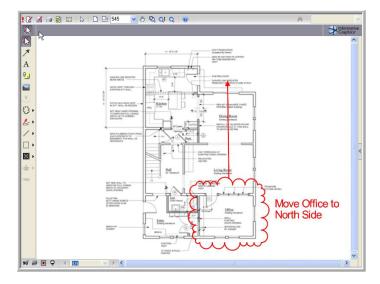

2. To open the document using the ePM viewer, select the Viewer icon under **Options**.

   Viewer dialog box opens.

3. File is opened in viewer to allow markup or redlining with appropriate security.
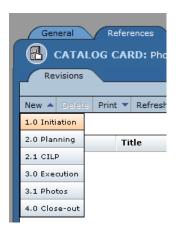
Versioning Catalog Cards Documents

There may be several subordinates involved in the process; one that may perform all of the uploading of photos for example, and another submitting them for the next party to review. For instance, a Construction Manager may have the Site Engineer to upload the Photos. Then, a Construction Manager may Submit them to the GSA Project Manager. Some documents may require a version to the original document.

1. Log into ePM as a user.

2. Navigate to **File Management | Catalog Cards** register.

3. Select an existing Catalog Card already created within the register ready to be versioned. Click **Edit** from the toolbar.

4. Select the **References** tab. A **Revisions** tab appears.

5. Select **New | Catalog Card** type to create version.

   Note: Notice the document **Title** automatically displays the most current version (i.e. R01).

6. Modify the **Picture Taken Date**.

7. Select the Upload icon to replace the current file with the revised file.
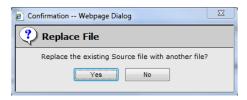
8. Browse to the folder and select the revised file. Then, select **Attach**.

9. A **Confirmation – Webpage Dialog** box appears asking if you want to replace the existing file. Select **Yes**.

10. The File is replaced with the most current version.

11. Select **Save**.

12. Close the document and view the Catalog Card register. You will see the new version document with the same number but different version.

	Number	Title	▲ Creation Date
☐	📄 00001R00	Photo - Street Intersection View - R00	21-Feb-2012 7:37 PM
☐	📄 00001R01	Photo - Street Intersection View - R01	22-Feb-2012 10:28 AM

Tips

√   **Options Icons:**

To...	Click...	Comment
View the file using the ePM Brava! Document Management file viewer	🖥️	The ePM Brava! Document Management file viewer can display most file types. For more information, reference **QRG.093_ ePM View & Redlining Supported File Formats**
View the file using the registered application on your computer	file name	Use this if you do not have the ePM Brava! Document Management file viewer installed on your computer or if it is unable to display the file. You must have an application on your computer that can open this file type.
Download the file to your computer	⬇️	This saves a copy of the file in your computer. Note that any changes to this copy are not reflected in the file still attached to the document revision.
Attach a file or URL to the document revision (edit mode only)	⬆️	This attaches a file or URL to the document revision. If there is already an attachment, it will be replaced. **NOTE:** When you specify a URL, the file contained in the URL is not actually uploaded into ePM. Rather, that file remains in its URL location and is simply referenced by ePM. Changes to the URL location may result in broken links within ePM.
Remove the attached file (edit mode only)	❌	This removes the attached file from the document revision and from ePM. If you still need the file in ePM, you must add it again and attach it to a new revision.

√   Source or Presentation Files can be uploaded in batch to the Catalog Cards register. For more information how to use the Catalog Cards register "Batch File Upload" tool, reference **QRG.090 Document Management Batch Creation Wizard**

√   Catalog Card documents can also be created by using the File Manager Silverlight Application, reference **QRG.104 File Manager**, if you have the appropriate security. This application allows you to create a document by dragging and dropping attachments into the application which creates a document in ePM.

√   The **Name** and **Revision Number** "Required" fields are marked with an asterisk.

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Catalog Cards can be uploaded in batch in a few ways; either by using a Desktop Quick App utility, the Batch Creation Wizard within the user interface (this requires administrative rights to pc to download an active x control) or File Manager Silverlight Application.

To learn more about uploading files in batch with metadata ePM documents associated to them, please review the following QRGs:

QRG.090_Document Management Batch Creation Wizard
QRG.098_FileUploaderDQA
QRG.104_File Manager

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Use the '**Forward**' button if collaboration is required from other users.

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Click on the **Activity Log** tab to view the audit trail of the document.

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Clicking the online help button provides generic help related to Catalog Cards, NOT for the specific uses of GSA's catalog card documents.

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To explode or collapse sections in a document, click on the double headed arrow buttons:

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For additional help and support, contact your GSA Regional Point of Contact.