User Access & Certification
Project and Program Certification

What is User Access & Certification?
The User Access and Certification web based application is a tool to facilitate annual recertification for ePM. The tool allows all ePM Users to certify themselves. In addition, user’s access to programs and projects must also be recertified annually. Users with specific security rights known as Project or Program Certifiers will complete project and program recertification. The Certifiers will verify if users assigned to their programs or projects still require access and if those users have appropriate security roles assigned. While working with program or project recertification, there is the opportunity to:

- Review the list of users in the program or project
- Remove users that no longer require access to the program or project
- Review the security category which grants users rights to various documents and activities
- Adjust security categories for users if required

Who Will Use This?
√ GSA Project Certifiers
√ GSA Program Certifiers
Project & Program Certifier (User)

1. Launch the User Access & Certification application from the ePM Portal

2. Verify user information. The information displayed is from the contact page in ePM.

- The following fields are Read Only:
  - Organization Name
  - First Name
  - Middle Name
  - Last Name

- If any of the information above is incorrect, please contact the local ePM System Administrator.

- The following fields can be updated if necessary:
  - Display Name
  - Title (select from the dropdown list)
  - Email address
  - Telephone Number (to add or remove a telephone number use the icons in the top tool bar), cont.

3. If access to ePM is required, Click in the box in front of "I certify that I require access to ePM"
If Cognos Reporting access is required, put a check in the box in front of “I certify that I require access to Cognos Reporting”

All External (non-GSA) ePM Users must Read and Acknowledge the Rules of Behavior, put a check in the box in front of “I acknowledge and agree to abide by the ePM Rules of Behavior.”

4. When complete click on the Logout icon in the top tool bar.
1. If user is the Project Certifier Authority, in the top tool bar, select Project Certification Tab.

And a pop-up window with the projects to be certified will open

If user is the Program Certifier Authority, select the Program Certification Tab.
And a pop-up window with the programs to be certified will open

<table>
<thead>
<tr>
<th>Program Number</th>
<th>Program Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>R0001 Capital</td>
<td>Region 01 - New England Region Capital Program</td>
</tr>
<tr>
<td>R0007 Capital</td>
<td>Region 07 - Greater Southwest Region Capital Program</td>
</tr>
<tr>
<td>R0007 Small</td>
<td>Region 07 - Greater Southwest Region Small Project Program</td>
</tr>
</tbody>
</table>

a. From within either the Project or Program tab, double-left click on the column heading to Sort by that column

b. Use the icon to filter for a Project Number, Project Title, or Program Title. Place a check in the box in front of the Project or Program to be included for certification within this specific Certification Period process.

2. Users will be displayed by Company and Contact. Click in the Certify or Remove checkbox for each user. Or, click in the Certify All or Remove All checkboxes on the top of each column.
3. To change a user’s Security Category click on the icon within the Project Access or Program Access column. A listing of the available Security Categories will be displayed. Select a security category Name and click OK.

4. To review a list of Security Roles within a Security Category select the icon to the right of the Security Category icon. For more information on Security Categories and Roles contact the local ePM System Administrator.
5. To save click Update in the top tool bar.

6. When complete click Logout in the top tool bar.
Tips

1. Internet Explorer version 9 (or higher) is the recommended web browser.

2. Verify personal email address is correct in ePM so that so that delivery of the certification notices regarding the recertification process is not affected.

3. Certify before the end date as documented in the email notification. ePM Notifications will be sent to users when action is necessary for certification. However, the web application can be accessed at any time to update Name, email, or Phone numbers.

4. If certification is NOT completed by the Certification End date, the user account will be locked. Please contact the local ePM System Administrator.

5. If certification is NOT completed by the Grace Period End Date, user will lose license to use ePM. Please contact the local ePM System Administrator for assistance.

6. When changing Security Categories, if the data does not refresh with the updates after saving, please click the refresh button.

7. If a Program or Project Manager does not certify a user before the Certification ends the user access will be removed.

8. If a user re-certifies and the Project Manager does NOT re-certify the user to have project access, the user will no longer have project access.

Questions/issues please contact epmsupport@gsa.gov