What is User Access & Certification?
The User Access & Certification web based application allows users with specific security categories the ability to create and process new ePM user accounts.

The User Access tab consists of three (3) pages, User Request, User Approval and Workspace Access:

1. **User Request** page provides the ability to create/submit new ePM user accounts for licensing.
2. **User Approval** page provides the ability to approve/reject new user accounts, enter/attach clearance documents, process waiver requests and license new user accounts.
3. **Workspace Access** page provides the ability to grant and/or request workspace access.

Who Will Use This?

- GSA Project Manager
- GSA Program Certifiers
- GSA ePM National System Administrator
- GSA Waiver Reviewer
- GSA Waiver Approver

The application also facilitates the annual User and Project certification process (See QRG.124 for more information on Creating a Certification Period)

To perform the operations listed in this QRG

Log into the User Access & Certification application using your ePM credentials.

https://epm.pbs.gsa.gov/useraccesscertification

Note: Log into the User Access & Certification application using your ePM User Credentials (password is case sensitive)
User Request

Project Certifiers (Project Managers) and Program Certifiers have the ability to request new users. After requests are submitted, they will be routed through an approval and licensing process before getting activated.

Note: Contact only users will be activated and ready to be added to workspaces immediately

1. Click on the User Access tab.

2. Click on the User Request page, click on the Add icon in the tool bar.

3. In the web grid enter the following information:
   - Select the Region
   - Users Full Legal name; First, Middle (if no middle name enter NMN), Last Name
   - Enter the Display Name
   - Select a Title from the drop down list
   - Select a Company by clicking on the Search icon
Enter the company name in the Search box; select the company and location as displayed below:

If the required company is not found, please contact the ePM Help Desk at ems-support@gsa.gov or (866) 367-7878 for assistance.
NOTE: When adding a staff member put a check box in the GSA Companies to display only GSA locations.

If the location is not displayed, click on the New location icon.

a. Select location type from the dropdown
b. Enter location name, street address, city, state and zip code and save.

4. Enter the phone number, email address and select the User type
User Types include: Contact Only, Licensed ePM User, Licensed ePM user with Proliance Analytics.
5. Click the Submit icon in the tool bar.

The user account will be created and in the Draft workflow state:

6. If the user currently exists in ePM, the Status column will note an error (to view the details hover over the icon in the Status column) the user record must be validated or removed to continue.

7. To validate put a check in the Proceed column.
To remove, select the row and click on the Remove icon in the toolbar.

8. When complete click on the Logout icon in the top tool bar.
User Approval

Once User Requests have been submitted, the User Approval process must be completed prior to issuing an ePM User License and granting access to Programs and/or Projects.

The User Approval page is where the:

- Capital or Small Program Certifying Authority Approves or Rejects ePM Access
- ePM Regional System Administrators enter Clearance Information, and Request a waiver
- Waiver Reviewer validates the waiver request
- Waiver Approver approves or rejects a user
- National System Administrator licenses ePM Users

Approve or Reject ePM Access – Program Certifying Authority Approval

1. At least twice per week, click on the User Access tab and select the User Approval page.

2. Click on the User Approval page, users requiring approval will display in the web grid. Select user(s) by clicking in the select box in the first column.

3. Select Approve or Reject in ePM Access in the tool bar and then confirm selection.
4. User Status will be updated to Pending Activation.

5. When complete click on the Logout icon in the top tool bar.
1. At least twice per week, enter the UPN # from GAMS.

2. Choose the GAMS Security Status from the dropdown list, this status will determine what workflow status the user account will transition to once the record is updated.

<table>
<thead>
<tr>
<th>GAMS Security Status</th>
<th>User Workflow Status</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full IT Access</td>
<td>Pending License</td>
<td></td>
</tr>
<tr>
<td>Initial IT Access</td>
<td>Pending Waiver</td>
<td></td>
</tr>
<tr>
<td>No IT Access</td>
<td>Active (Contact Only)</td>
<td>GAMS Status is not applicable</td>
</tr>
<tr>
<td>Pending IT Access</td>
<td>Pending Clearance</td>
<td></td>
</tr>
<tr>
<td>Other Federal Agency</td>
<td>Pending License</td>
<td>Attach Other Agency GSA Security Email</td>
</tr>
</tbody>
</table>

Table 1.1 – GAMS Security Status options, User Security Workflow Status and Notes

3. To attach Other Federal Agency documentation(s) to a user record in ePM, Select the row and ‘Attach File’ in the Clearance section.

Dialog box will open, select the file to upload and click open.
Waiver Request Validation – Waiver Approver

At least twice per week, the GSA Waiver Reviewer Team must review and validate the waiver request(s).

1. Users that require review and approval will be displayed in the web grid located under the tool bar.

2. In the GAMS System, validate:
   a. UPN Number
   b. Initial Investigation and Initial IT Access must be a “Green” check icon
   c. Investigation Requested – no longer required
      i. NOTE: All GAMS Contacts, GSA and External, with an “Initial Investigation and Initial IT Access” status of “Green,” have applied for a NACI security clearance or higher
3. Select the user or users to validate, by clicking in the select box to the left.

4. Select Validate in the tool bar and confirm selection.
5. When complete click on the Logout icon in the top tool bar.
Waiver Request - Approve or Reject - Waiver Approver

At least twice per week, the GSA Waiver Approver must review and approve or Reject waiver request(s).

1. Users that require review and approval will be displayed in the web grid located under the tool bar.

2. Select the user or users to validate, by clicking in the select box to the left.

3. Select Approve or Reject in the tool bar and confirm selection.

4. When complete click on the Logout icon in the top tool bar.
License an ePM user – National System Administrator

At least twice per week, the National System Administrator licenses ePM users.

1. Select the License Mode

2. Users ready to be licensed will appear in the web grid, to select a user click in the box to the left of the row, or select all users by clicking in the box in the top row.

3. Users must be validated in Active Directory. If the user does not exist in active directory then the National System Administrator will submit a help desk ticket for the user to be setup.

4. Once confirmation of an active AD account has been received the AD account name should be entered in the User Name field.

*Important: User Name must match the AD account name.

5. Select Add and Confirm

6. Users (s) are moved to the Active workflow state.

7. When complete click on the Logout icon in the top tool bar.
Workspace Access

Project Certifiers (Project Managers) and Program Certifiers are the only ones that can grant users access to their Projects or Programs.

Administrators can only request Project and Program access but Project and Program Certifiers are the only ones that can grant user access to their own Projects and Programs.

Note: “Contact Only” user types will be exported to the desired Project or Program with no approval required.

The Workspace access page provides the ability to request, approve and export ePM users to Programs and Project workspaces.

1. Click on the User Access tab.

2. Click on the Workspace Access page

3. Click on the Add icon in the tool bar.
4. Select a user, use the search box in the upper right hand corner or scroll page to page using the arrows on the left.

   **Note:** If a User cannot be found, try searching by last name only, first name only or nickname only

5. Click Add in the left column to select the user(s) to process.

6. Once selected, the user(s) will be displayed on the bottom half of the screen, click OK to continue.

User(s) selected will now appear in the grid

7. To request Workspace access; select the user (click in the box in front of Region) and then select requested Workspace (Program or Project)

   **Note:** Only “Contact Only” and “Active Licensed” ePM users that have been approved by the Program or Project Authority can be exported to Program or Project workspaces.
8. Select the Region click on the Add button (use the search box to narrow selection) for Project Access 
click the Next button to select project(s)

Select the Project(s) click on the Add button (use the search box to narrow search), click OK

User(s) selected and requested workspace access will now appear in the grid
9. Select a Security Category, by clicking on the

![Select Security Category]

10. Select Export in the tool bar and confirm

![User Access & Certification]

The selected users will be granted the requested access to the specified workspaces.

Are you sure you want to proceed?
NOTE: When a User Request is submitted the Project or Program Certifier must process the approval before the user account can be exported.

The Project or Program Certifier will receive an email notifying them of the action requested.

11. The Project or Program Certifier will log into UAC and Approve or reject the selected user's access to a Project or Program.

12. When complete click on the Logout icon in the top tool bar.
Tips

1. Internet Explorer version 9 (or higher) is the recommended web browser
2. Verify that the correct email address has been entered into ePM
3. When performing any action for a user in UAC be sure to check in the select box for the user(s) account
4. Only Project Certifiers (Project Managers) and Program Certifiers can request a new user account
5. Only Program Certifiers can Approve or a Reject a new user request
6. Only the Waiver Reviewer can Validate a waiver request
7. Only the Waiver Approver can Approve or Reject a waiver request
8. Only an ePM Regional System Administrator or National System Administrator can update clearance information
9. Attached files can be located in ePM on the user’s attachment tab of the user’s record
10. Only the National System Administrator has the authority for providing an ePM License
11. For information on Security Categories and roles contact the Regional ePM System Administrator

Questions/issues please contact epmsupport@gsa.gov