ePM Quick Reference Guide #001
Intro to ePM

WHAT IS…

ePM is a web-based application. With appropriate security permissions, ePM can be accessed from any computer with connection to the internet. ePM features customized screens and tools to make navigating to information quick and easy. The ePM user interface is tailored to match the licensing and security requirements. This tailoring is reflected in the way menus, buttons and cross-references are displayed.

WHO USES…

- GSA Executive
- Construction Manager
- Project Manager & Staff
- Contracting Officer & Staff
- Architect/Engineer & Staff
- General Contractor
- Customers

HOW TO…

A. LOG INTO EPM FROM INSIDE THE GSA NETWORK (INCLUDING VPN)

1. Using Internet Explorer 9 or higher, go to the ePM Portal.
2. Click on ePM.

![ePM Portal Image]
B. LOG INTO EPM FROM OUTSIDE THE GSA NETWORK

1. Using Internet Explorer 9 or higher, go to the ePM Portal.
2. Click on ePM.
3. Enter your GSA User ID (Example Format: firstmlast).
4. Click Submit.
5. Select the delivery method for your temporary registration code.
6. Click ‘Submit’.
7. Enter the four digit registration code provided.

8. Click ‘Submit’.
9. Enter your Active Directory password.

![Image of ePM login screen]

10. Click Submit.

C. LOG BACK IN AFTER A TIMED OUT SESSION

1. If prompted for an “Organization” perform steps a-c, otherwise go to step 2.
   a. Enter “pbs” in the Organization field.
   b. Check the “Remember Organization” box.
   c. Click Continue.
2. Click anywhere inside the large ePM logo.
3. If outside of the GSA network complete steps B3 – B10 above.
D. NAVIGATE WORKSPACES

1. Based on a user’s functional role in ePM the following workspaces could be available. Most users will only see the Project Workspace.
   b. Programs: Organized by region and program (Capital and Small). Accessible by Administrators, Regional Executives, and Central Office Oversight.
   c. Projects: Provides users with a list of all projects that they have been granted access to.
d. Analytics: ePM reporting, see QRGs #070 - #085 for more information.

2. Click on the name of the workspace to enter that workspace.

E. ENTER A PROJECT WORKSPACE

1. From the Home screen, click on Projects.

2. Find the appropriate project using the following methods.
   a. Scroll up or down the list using the scroll wheel on your mouse or the scroll bar on the right side of the browser window.
   b. Page forward or backward using the arrows in the upper right of the screen.
   c. Change the view of the register. See QRG 003: Register Views for more information.
   d. Enter a value in the search box in the upper right and click Find.

3. Once the project has been located, click “Enter Project” in the row of that project.
F. NAVIGATE IN A PROJECT WORKSPACE

1. The project workspace is broken up into three areas.
   a. Header
      1. Navigation Trail: Allows user to back up to the project list of home screen.
      2. Go To Program Button: If user’s security allows, changes the view from the project workspace to the program workspace.
      3. My Preferences Button: Allows user to set the following personal preferences.
         a. General
            i. Default page to open after login: “Workspace Navigator” is recommended.
            ii. Number of Items displayed in register: For better performance it is recommended that this number be set lower.
            iii. Enable screen reader enhancements: Check this box if using assistive technologies such as text-to-speech audio interfaces.
            iv. Enable ACR stationary header: Freezes the header in the ACR.
         b. Product Language: English is the only supported language in ePM.
         c. Content Formatting
            i. Format Locale: Leave set to English (United States)
            ii. Preferred Calendar: Gregorian
            iii. Date Entry: Choose preferred format.
            iv. Date Display: Choose preferred format.
            v. Time: Choose preferred format.
      4. Help Button: Contains generic help for the Commercial “Off The Shelf” (COTS) product that is the platform for ePM. Use the ePM QRGs for help.
      5. Log Off Button: Logs the user out of ePM
   b. Menu: Contains a list of the applications available to the user.
   c. Register: Once an application in the menu is selected, this area of the screen provides a list or register view of all the documents the user has access to.
G. WORK WITH NOTICES

1. In the Project Workspace menu, navigate to Notices > My Notices > Received.
2. Find the appropriate notice using the following methods.
   a. Scroll up or down the list using the scroll wheel on your mouse or the scroll bar on the right side of the browser window.
   b. Page forward or backward using the arrows in the upper right of the screen.
   c. Change the view of the register. See QRG #003 for more information.
   d. Enter a value in the search box in the upper right and click Find.
3. Once the notice has been located, click anywhere in the row to open the document that triggered the notice. The details of the notice will appear on the right of the document.
   TIP: The icon to the left of the number in the notices register represents the following.
   • Yellow: You are expected to collaborate on the document.
   • Blue: Document is for review, contribute if needed.
   • White: FYI, you are not expected to perform any action.
H. OPEN AN EXISTING DOCUMENT

1. Click on the menu option for the type of document you are looking for. (i.e. Submittals)
2. Find the appropriate document using the following methods.
   a. Scroll up or down the list using the scroll wheel on your mouse or the scroll bar on the right side of the browser window.
   b. Page forward or backward using the arrows in the upper right of the screen.
   c. Change the view of the register. See QRG 003: Register Views for more information.
   d. Enter a value in the search box in the upper right and click Find.
3. Once the document has been located, click anywhere in the row to open the document.
I. CREATE A NEW DOCUMENT

1. Click on the menu option for the type of document you want to create. (i.e. Submittals)
2. Click New in the register toolbar.
3. Optionally, if different types of that document are available, click the down arrow next to New in the register toolbar and select the appropriate type.

J. EDITING PROJECT PROPERTIES

1. In the Project Workspace menu, navigate to Workspace and Sub-Project Info > Project Properties
2. Click on the only document in the register.
3. Click Edit in the toolbar.
4. Change fields as needed.
5. Click Save in the toolbar.