

ePM Quick Reference Guide #002

Using the ePM Address Book

WHAT IS...

ePM can record detailed information about companies and contacts. Each GSA region has been set up as a company in ePM. These companies, as well as vendor companies, appear in the same register in a project. Similarly, both GSA staff and vendor contacts appear in the same register on a project. Since companies and contacts are created and managed at the ePM organization workspace, in a project the Address Book is used mainly for viewing information about a company or contact.

WHO USES...

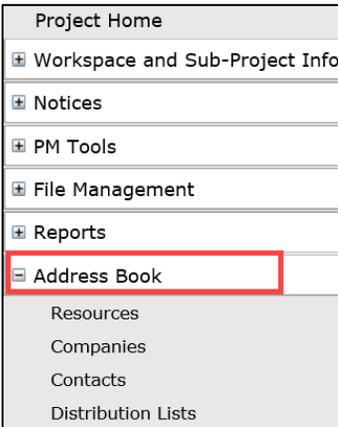
- GSA Project Manager
- Construction Manager
- General Contractor/Design-Build Contractor
- Contracting Officer and Staff
- Owner Representation
- GSA Executive
- Architect / Engineer

HOW TO...

See screenshots within this document for additional information.

VIEWING INFORMATION AT A COMPANY LEVEL

1. Log into ePM, and navigate to the desired project. Click the plus sign beside the Address book to expand the module.

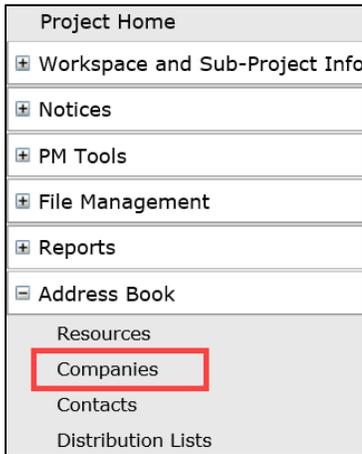


2. The Address Book has four sections: Resources, Companies, Contacts and Distribution Lists.

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3. Click on the 'Companies' section to view the list of companies assigned to this project. Notice that there is no 'New' button on the toolbar. Companies (and also Contacts) can only be created by an ePM System Administrator at the organization workspace of ePM.



Note: Company documents are designed so that vendor company numbers always include the prefix 'Vendor', for easy filtering and reporting. Prefix 'Vendor' is assigned to those companies that provide a service to GSA. The prefix 'Customer' will go to those companies GSA provides a service to.

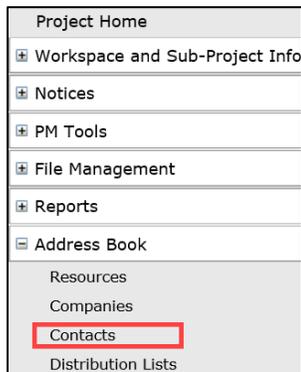
4. Click on any of the hyperlinks for a company to see more details about the company. Depending on the security permissions assigned, the 'Edit' button may or may not be active. However, even in 'Edit' mode, most of the fields on the document are read only. Changes can only be made by an ePM System Administrator in the Organization workspace of ePM.
5. Click on the 'References' tab, and then on the sub-tabs such as 'Locations' or 'Contacts' to view more information about the company, like locations of the company, contacts within the company, etc.
6. If the assigned security permissions allow it, it is possible to deactivate a company. Deactivating a company does not delete it from ePM; it just removes it from any lookup lists where the user would select a company (ex. in the Contracts and Mods module). Deactivating a company only applies to the project that is currently open. The company remains active in all other projects it has been associated with.

VIEWING CONTACT INFORMATION AT THE PROJECT LEVEL

1. Click on the 'Contacts' section to view the list of contacts assigned to this project. Notice that there is no 'New' button on the toolbar. Contacts can only be created by an ePM System Administrator at the Organization workspace of ePM.

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Note: Contact documents are designed so that vendor contact numbers always include the prefix 'Vendor', for easy filtering and reporting.

'Vendor' – non GSA personnel

'Staff' – GSA personnel

2. Click on any of the hyperlinks to see more details. Depending on the security permissions assigned, the 'Edit' button may or may not be active. However, even in 'Edit' mode, nearly all fields are read only. Changes can only be made by an ePM System Administrator in the Organization workspace of ePM.
3. The Contact document has an 'Account' page which, if visible based on the security permissions assigned, allows the user to see the security category and roles for the user on this project.
4. If the security permissions assigned allow it, it is possible to deactivate a contact. Deactivating a contact does not delete it from ePM; it just removes it from any lookup lists where the user would select a contact (Contracts for example). Deactivating a contact only applies to the project currently open. The contact remains active in all other projects it's been associated with.

REFERENCE

Reference the following ePM Quick Reference Guides (QRGs) for additional information. QRGs can be accessed through the [ePM Portal](#).

- QRG 01 – Navigating ePM
- QRG 127 – User Access & Certification Administration