

ePM Quick Reference Guide #003

Register Views

WHAT IS . . .

ePM registers contain a list of documents of the same type. For example, the *Notices* register lists all of a project’s notices. The *Programs* register lists all of an organization’s programs, their names and their statuses. The columns on a register display the basic details of the documents at a glance. A user can also change the register’s current view. Registers provide users with tools for sorting and filtering the information that they contain and, also, search for specific information within a register.

WHO USES . . .

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

HOW TO . . .

See screenshots within this document for additional information.

A. STEPS TO ACCESS AND USE REGISTER VIEWS

1. Log into ePM, navigate to the desired project and in the left navigation pane, click the document type to display a register (Funding, Contracts, etc.).
2. To change the information displayed (and how it is displayed), start by clicking the down arrow in the View selection window and click Manage Views.

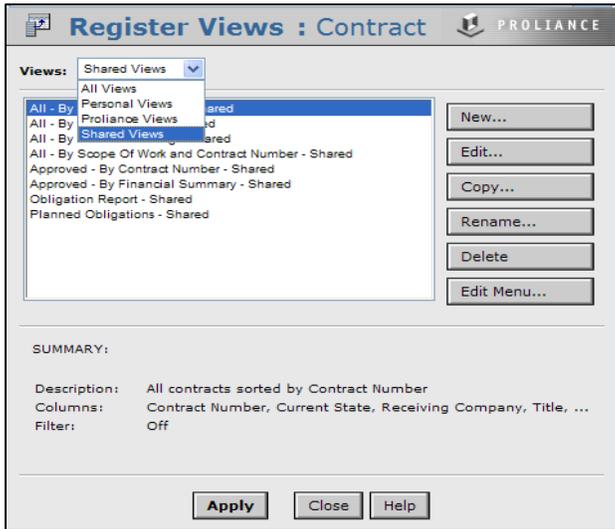


ePM Quick Reference Guide #003

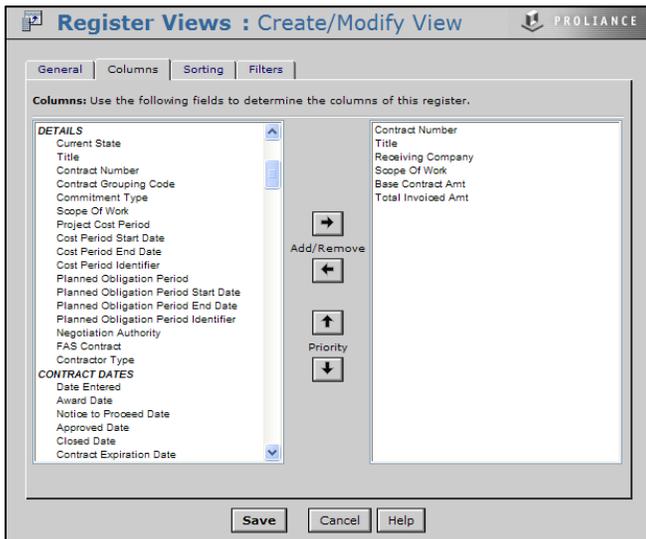
Register Views



3. A screen displays showing all the views currently configured for the specific document type (in this case Contract). Click the 'View's dropdown arrow to view just certain types of views, or all views.



4. Use the control buttons in the following ways:
 - a. New- Create a new view
 - b. Edit- Make a change to an existing view
 - c. Copy- Use this function if you need a new view that is similar to an existing view.
 - d. Rename- Change the name of an existing view
5. Editing an existing view shows all the views functionality, so click on the 'Edit' button. The 'Create/Modify View' dialog opens. Click on the 'Columns' tab.



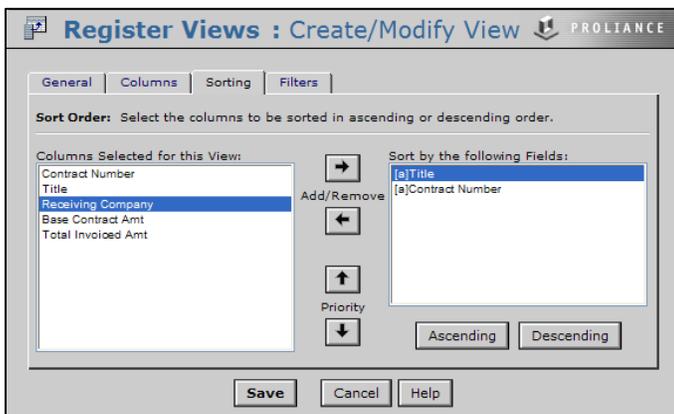
ePM Quick Reference Guide #003

Register Views



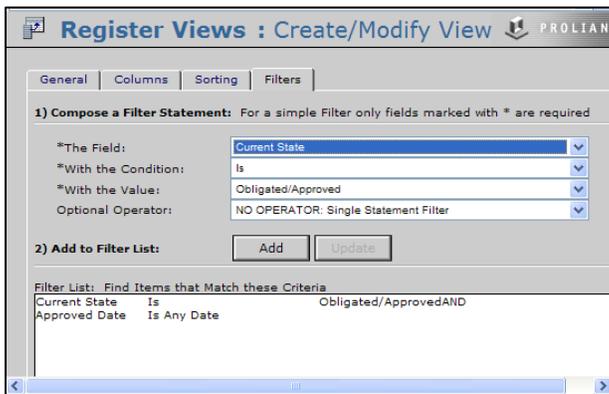
Note: On the General tab, change the name of the view, and also whether it is a Shared or Personal view.

Add or remove columns to a personal view by clicking the Add/Remove arrows. The fields shown top to bottom on the right side of the Create/Modify View dialog will display left to right in the ePM user interface. To change the order of the column headings, simply select a field in the right pane, then use the Priority arrows. Next, click on the 'Sorting' tab. The left pane displays only those columns which have been selected to display in the personal view. To sort by a particular column, simply highlight it in the left pane, and then use the right pointing arrow to move it to the right pane.



Note: you can create a multi-level sort. The example here shows the register will sort first by Title (in ascending order), then by Contract Number (in ascending order).

6. Click on the 'Filters' tab. Build either a simple filter statement with a single field, or combine multiple fields using operators (And/Or). Use the 'Add' button to move individual filter statements to the Filter List at the bottom of the dialog.



Note: you can filter your register using any field on that document, not just the fields that display in your register view.

ePM Quick Reference Guide #003

Register Views



REFERENCES

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

- QRG 01 - Navigating ePM
- QRG 02 - Using the ePM Address Book