

ePM Quick Reference Guide #010

Correspondence

WHAT IS . . .

Communication is a key component of any GSA project. Project participants often send thousands of emails, faxes and letters, and engage in many telephone and verbal conversations. By making a record of these communications, GSA protects its legal rights in the case of any future disputes. ePM automatically saves a copy of all ePM documents, but not telephone conversations or other non-ePM documents. For this reason, using *Correspondence* documents in ePM to track each communication that enters or leaves the office is considered good practice. Consulting these archived documents whenever needed to confirm that a specific communication took place adds value to project documentation.

WHO USES . . .

- Creator: All Roles
- Submitter: All Roles

NEEDED DOCUMENTS . . .

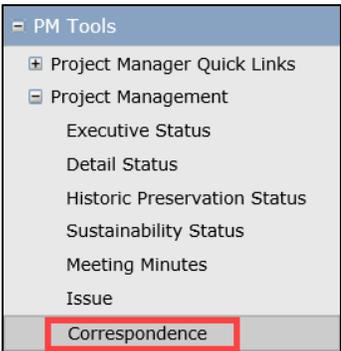
- Any Attachments

HOW TO . . .

See screenshots within this document for additional information.

A. STEPS TO DOCUMENTING CORRESPONDENCE

1. Log into ePM as a user with the Correspondence Creator security role, and then navigate to the appropriate project.
2. Navigate to PM Tools > Project Management > Correspondence. The Correspondence register displays.



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3. Click on the 'New' button in the register view toolbar. The Correspondence document opens in edit mode.
4. To document Correspondence related to an email. Enter the Subject and include details of the email message in the Message section.

The screenshot shows the 'CORRESPONDENCE: New Document' form in edit mode. The 'GENERAL *' section is expanded, showing fields for 'Current State' (Draft), 'Number', 'Subject *', and 'Message'. The 'Subject *' and 'Message' fields are highlighted with red boxes.

5. Document and select the details of the correspondence. Enter the To, From, CC and Date details from the email.

The screenshot shows the 'MORE DETAILS' section of the correspondence form. Fields for 'From', 'To', 'Cc', 'Correspondence Date', 'Priority', and 'Correspondence Type' are visible. The 'From', 'To', 'Cc', and 'Correspondence Date' fields are highlighted with a red box.

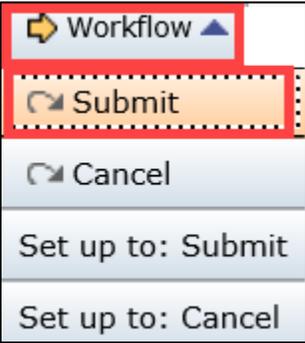
Note: There are two lookups used to classify the Correspondence; Priority and Correspondence Type. Select an item from each lookup.

6. Click Save.

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- 7. Select 'Submit' from the Workflow menu. Then select Execute. If successful, ePM displays a Confirmation message showing who received notifications. User can now return to the Correspondence Document or to the Register.



Note: At this point, the document Number, Subject, and Message can no longer be edited.



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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 02 – Using the ePM Address Book