

ePM Quick Reference Guide 086

Catalog Cards



WHAT IS...

The **Catalog Cards** document type is one component of the GSA's Document Management solution. **Catalog Cards** manages all electronic documents that were created by applications outside of ePM. For example, store photos, sketches, studies, customer requirements, procurement related documentation, site acquisition related documentation, word processor files, representation of physical objects, spreadsheets, or any other electronic documents that are important to track for the project.

GSA has a standard folder list to store the various types of Catalog Cards. Each folder is an individual document subtype. When creating Catalog Cards, please be cognizant of selecting the appropriate GSA Catalog Card standard folder (document subtype).

Catalog Cards documents can also be created by other applications. Please review the QRGs under 'Reference' below.

These Catalog Cards function just like their counterparts in the real world; they provide summary and detailed information about the item being cataloged, and can be forwarded to people for review and feedback. Additionally, Catalog Cards are one of three document types that support Brava! ePM Document Management "Redlining/Markup collaboration. For more information about using Brava! redlining feature functionality, please review the QRGs under 'Reference' below.

WHO USES...

- General Contractor/CMc
- Construction Manager (CMA)
- Architect/Engineer
- Project Manager
- Project Management Staff
- Contracting Officer
- Contracting Officer Staff
- Central Office Portfolio
- Regional CFO
- Customer User

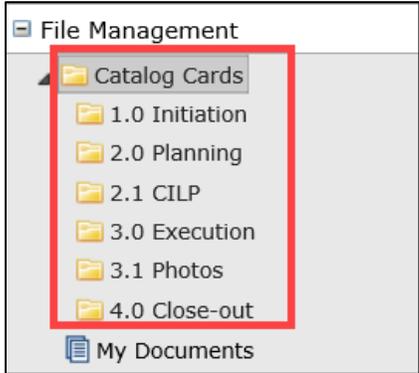
HOW TO...

A. CREATE A CATALOG CARD DOCUMENT

1. Log into ePM as a user and open a project.
2. Navigate to File Management > Catalog Cards. List of Catalog Cards sub folders are displayed.

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3. In the Catalog Card register, click the dropdown arrow next to the New button.



4. Select catalog card document type to be created.
a. For this example, we are creating a 3.1 Photos document.



5. Enter data or select lookups as required for the catalog card document. Please note: Any fields containing an asterisk mean they are required and must be completed.

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- a. For this example, enter Name and a date for the Picture Taken Date.

The screenshot shows the 'CATALOG CARD: New Document' interface. The 'DETAILS *' section is expanded, showing the following fields:

- Current State: Draft
- Number: [] - [] - R00
- Name *: []
- Revision Number *: R00
- Title: - R00
- Brief Description: []
- Comments: []
- Picture Taken Date: []
- Due Date: []
- Received Date: []
- CILP: []

- 6. Select Save button from the toolbar.

NOTE: The initial default revision number is R00.

B. UPLOAD FILES TO CATALOG CARD FILE/URL

Catalog Cards contain a File/URL Information * section within the document unique to supporting uploaded files that can be optionally viewed by either a desktop viewer or with the ePM Document Viewer. The ePM Document Viewer contains redlining markup feature functionality. Follow the steps below to upload a combination of Source or Presentation files.

- 1. Expand the FILE/URL INFORMATION * section by clicking on the “+” sign.
- 2. Under either the Source File/URL or Presentation File/URL, under Options section, click icon to upload the native file.

The screenshot shows the 'FILE/URL INFORMATION *' section with the following structure:

Source File/URL	Options	Date Attached	File Size
--No File Currently Attached--			
Presentation File/URL	Options	Date Attached	File Size
--No File Currently Attached--			

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What are Source Files?

Source files are normally external files in their original (i.e. dwg, pdf, etc.) formats. Source files can be marked up and redlined through ePM Document Viewer.

What are Presentation Files?

This is a version of the external file in common file format. For example: a drawing file could be converted to Adobe® Acrobat® PDF format and uploaded as the presentation version. A word processor file could be converted to RTF (Rich Text Format) as the presentation version. A user cannot mark up or redline a Presentation File.

Table 1.1 Definitions of Source and Presentation Files

The Attach a Source or Presentation File/URL dialogue box opens.

3. Select the Browse button within the File Attachment option to locate a document stored in a network or local drive.
4. Select the file to upload and the Open button to complete the attachment selection.
5. Select the Attach button to close the Attach File/URL – Webpage Dialog box and complete the upload process.
6. File upload process is complete.
7. Click the Save button in document toolbar.

C. WORKFLOW A CATALOG CARD DOCUMENT

There may be several subordinates involved in the process. For instance, a General Contractor may have the Project Engineer on site to upload the Photos. Then, a Project Manager may review them and decide to either Submit or Cancel the document. However, this must be a coordination effort between the parties because both have the same security privileges to create and submit the Catalog Card.

1. Log into ePM as a user.
2. Navigate to File Management > Catalog Cards register.
3. Select an existing Catalog Card already created within the register and open document.
4. Review and markup attachment located in either the Source or Presentation File (refer to redlining QRGs mentioned above on how to markup documents).

User must have a redline license to open in the ePM Document Management Viewer. If a user encounters a denied access and needs it, contact epmsupport@gsa.gov with a request for a "Redline" license.

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5. From the toolbar, select Workflow dropdown. Select an option to Cancel or Submit. Or, if need a subordinate to further review before submitting the final document, select the Forward button from the toolbar and send it to the recipient for further review.
6. Click Execute
7. Select Return to Document. The document will display the current workflow state.

D. VIEW UPLOADED FILE/URL DOCUMENTS

1. To open the document using the native applications installed on the desktop, left-click the uploaded file attachment link to open document.
2. To open the document using the ePM viewer, select the Viewer icon under Options.
Viewer dialog box opens.
3. File is opened in viewer to allow markup or redlining with appropriate security.

E. VERSION A CATALOG CARDS DOCUMENTS

There may be several subordinates involved in the process; one that may perform all of the uploading of photos for example, and another submitting them for the next party to review. For instance, a Construction Manager may have the Site Engineer to upload the Photos. Then, a Construction Manager may Submit them to the GSA Project Manager. Some documents may require a version to the original document.

1. Log into ePM as a user.
2. Navigate to File Management > Catalog Cards register.
3. Select an existing Catalog Card already created within the register ready to be versioned. Click Edit from the toolbar.
4. Select the References tab. A Revisions tab appears.
5. Select New > Catalog Card type to create version.

Note: Notice the document Title automatically displays the most current version (i.e. R01)

6. Modify the Picture Taken Date.
7. Select the Upload icon to replace the current file with the revised file.
8. Browse to the folder and select the revised file. Then, select Attach.
9. A Confirmation – Webpage Dialog box appears asking if want to replace the existing file. Select Yes.



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10. The File is replaced with the most current version.
11. Select Save.
12. Close the document and view the Catalog Card register to see the new version of the document with the same number but different version.

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REFERENCES

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

<<add QRG reference(s)>>

- QRG.089 Batch File Upload DQA (Desktop Quick Application via an Excel document)
- QRG.090 Document Management Batch Creation Wizard
- QRG.104 File Manager (Silverlight Application via drag and drop files)
- QRG.091 ePM View & Redlining Document Management
- QRG.092 ePM View & Redlining Toolbars & Icon Features
- QRG.093 ePM View & Redlining Supported File Format