

## ePM Quick Reference Guide #090

# Using the Document Management Batch Creation Wizard with Submittals, Design Documents, or Catalog Cards

### WHAT IS...

The wizard contains a File Uploader tool located within the document register toolbar. This enables the user to upload a batch of files from the local computer (or network mapped drive) creating multiple catalog cards, submittals, or design documents based on those set of files.

**Note:** The wizard is named after its document type EXAMPLE: Catalog Card Creation Wizard Submittal Creation Wizard Design Document Creation Wizard Important: This wizard requires a desktop utility to be installed on the local PC. See “Tips” section for more details and ensure local administrative rights when installing the desktop client are available.

**DQA Alternatives:** Also, there is a File Upload Desktop Quick App (DQA) that can be used for Catalog Cards, Submittals, and Design Documents. This DQA uses an Excel workbook containing a template worksheet. The worksheet has all related ePM fields that exist on the ePM “Document Management” supported documents. Additionally, there are **Source** and **Presentation** File/URL fields.

The worksheet and DQA rules dictate that all files to be uploaded in batch reside in the same folder where the Excel Workbook template resides. The DQA validates the names of those files to the metadata name listed in the Source and Presentation fields of the template.

### Who Uses...

- General Contractor/CMc
- Construction Manager (CMa)
- Architect/Engineer
- Project Manager
- Project Management Staff
- Contracting Officer
- Contracting Officer Staff
- Customer: User

### How To...

#### A. UPLOAD FILES TO THE BATCH UPLOADER QUEUE

1. Log into ePM via the ePM Portal.
2. Navigate to one of the following:

**File Management > Catalog Cards.** A list of Catalog Cards sub folders are displayed.

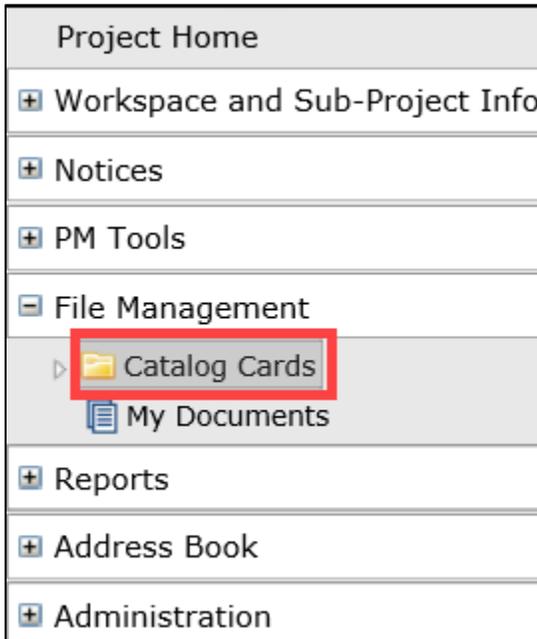
**Design Management > Design Documents.** The Design Documents register is displayed.

**Construction Management > Submittals.** The Submittals register is displayed.

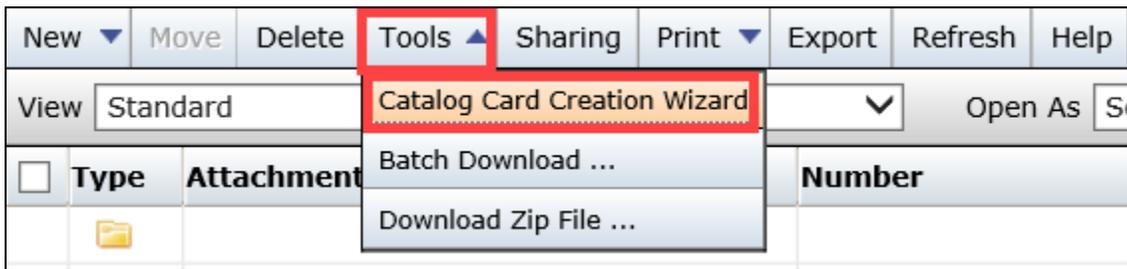
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In this example, we will use File Management > Catalog Cards



- From the register toolbar, select the document type wizard under the Tools dropdown option

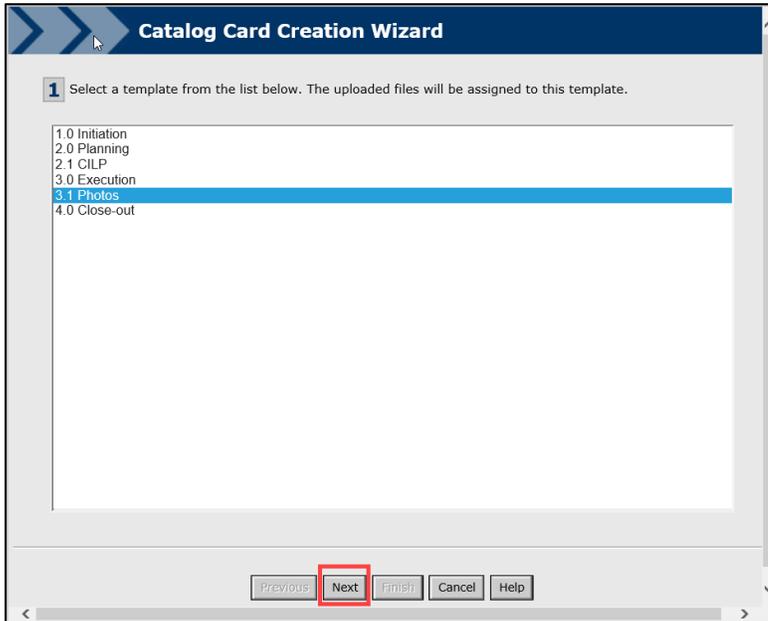


**NOTE:** Some documents types may have more options under Tools. Be sure to select the Creation Wizard option.

- Catalog Cards - Step 1 diagram will differ than of Design Documents or Submittals. The first screen of the wizard contains a list of sub folders that are specific to just Catalog Cards.

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5. Select the appropriate sub folder (such as Photos) and click Next when using Catalog Cards.
6. The FILES IN BATCH dialog window appears in the Creation Wizard screen.

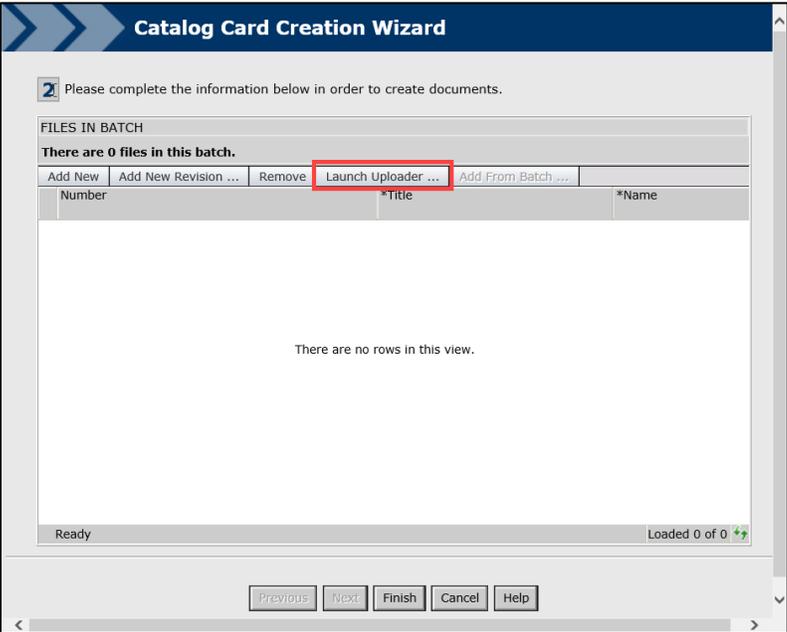
**NOTE:** If this is the first time using the Creation Wizard, the system will require Active X desktop client be installed. GSA will push these out to their user base automatically. If user is a GSA employee and still cannot function using the Creation Wizard, please contact [epmsupport@gsa.gov](mailto:epmsupport@gsa.gov). If user is an external employee and having issues with the Creation Wizard, please contact the IT Administrator representative and ensure that administrative rights to the PC are granted, this is required to install the desktop client. Select the “click here to configure client permissions.”

<<Insert Image>>

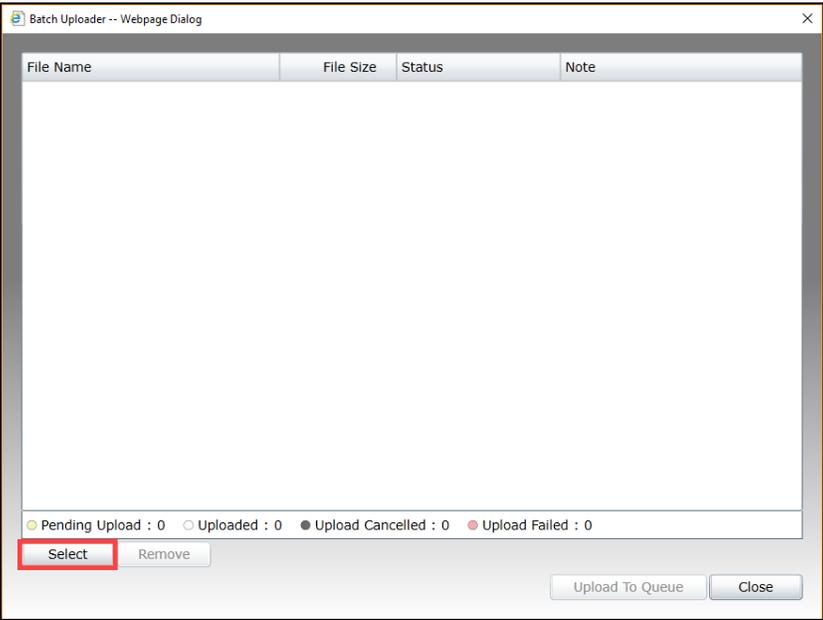
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7. Select the Launch Uploader button.



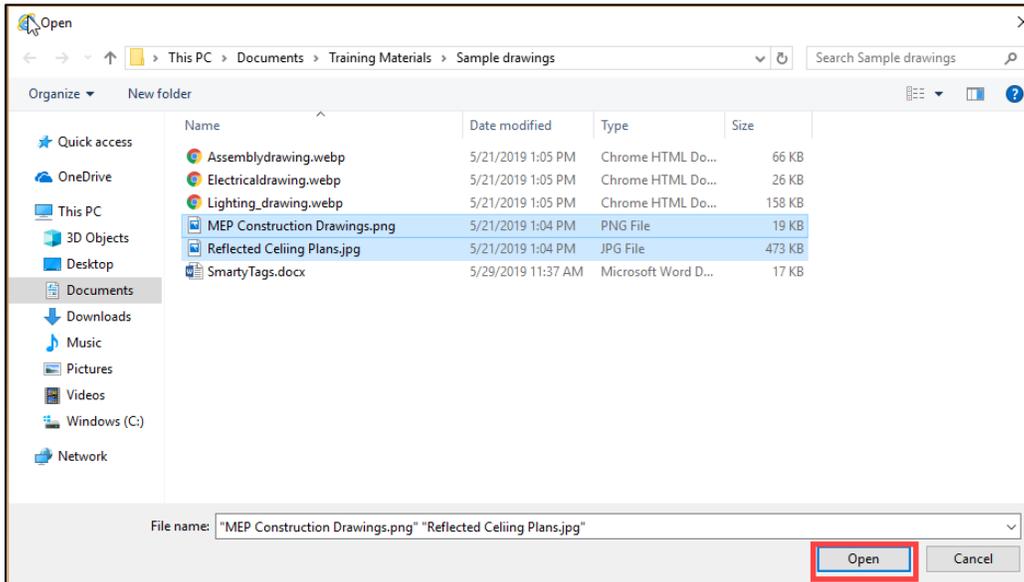
8. The Batch Uploader – Webpage Dialog appears. Click the Select button to browse and select a batch set of files to upload into the queue.



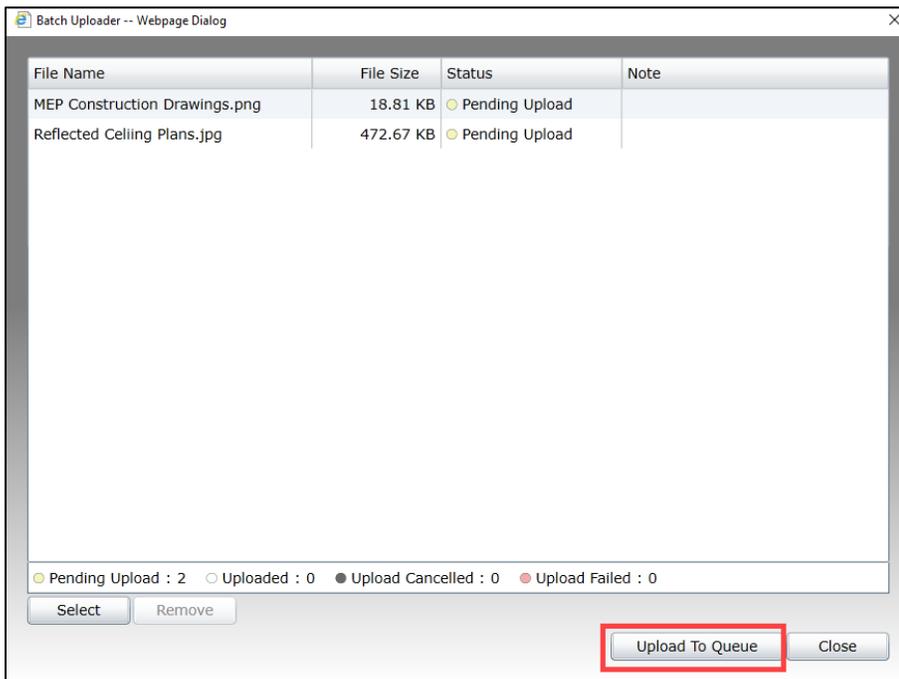
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9. Browse to the desired path and select all files to be uploaded in batch. Select Open to complete the selection set.



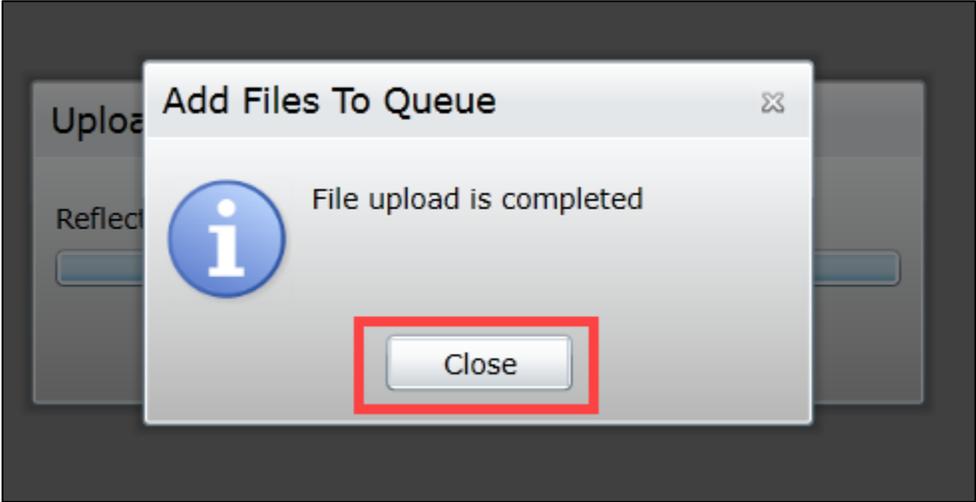
10. Select the Upload to Queue button. The Batch Uploader – Webpage Dialog displays the progress of each uploading file under the Status column. Once all files are added to the queue, the Status will read, "Complete".



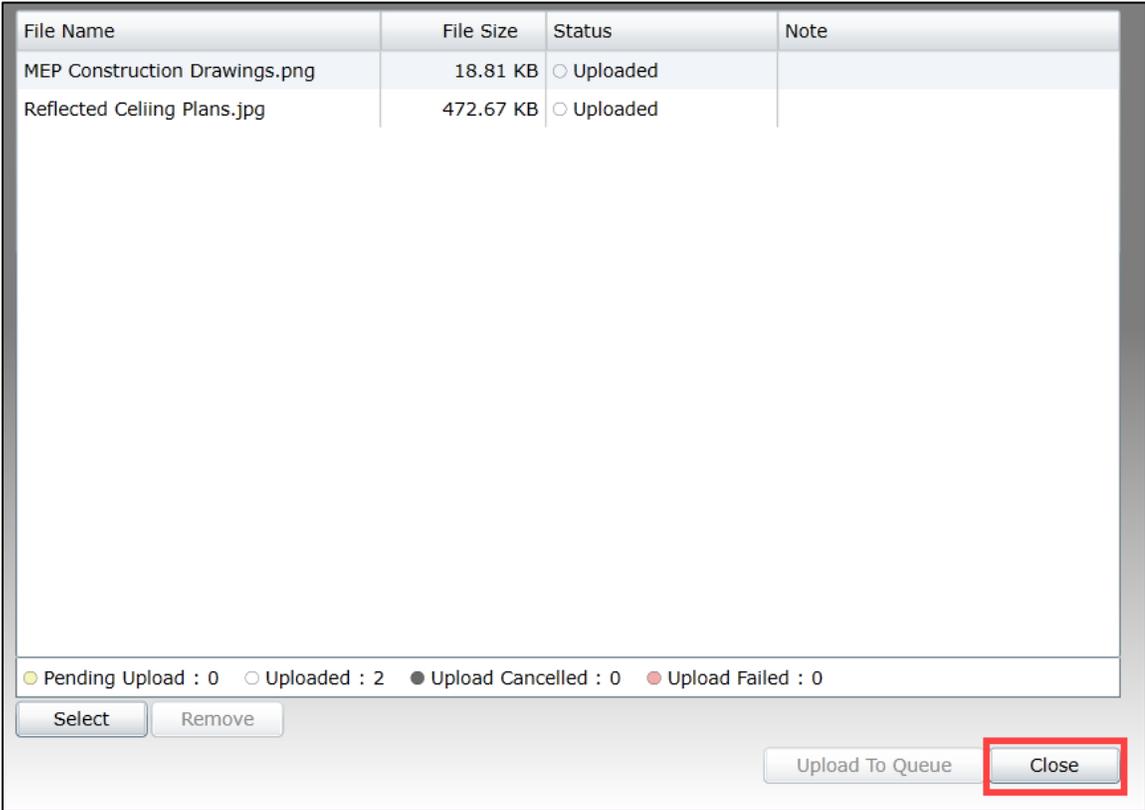
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11. Select the Close button to close the Add Files to Queue window.



12. Click the Close button on the bottom of the Batch Uploader window.

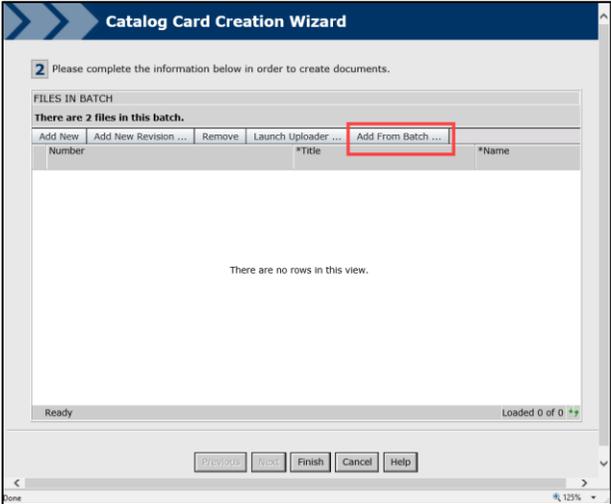


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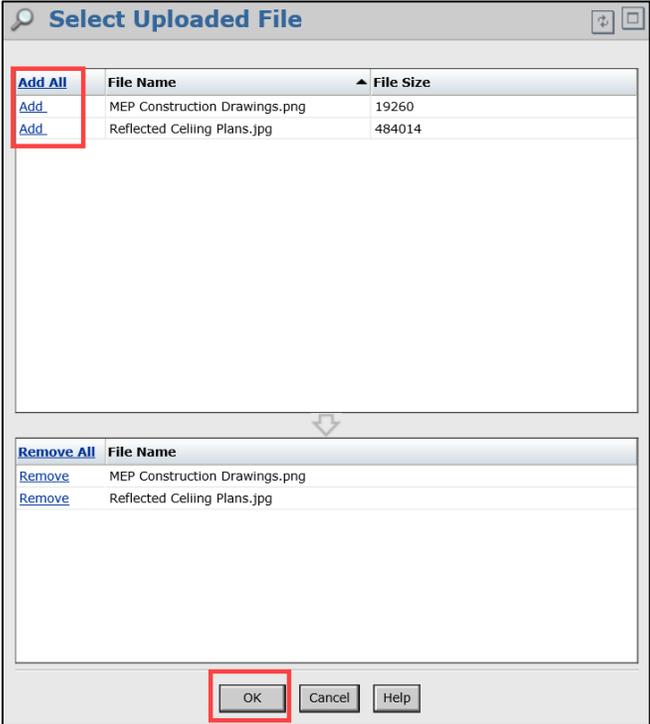
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### B. BATCH UPLOAD FROM QUEUE WITH METADATA

- 1. Select the newly activated button, "Add From Batch".



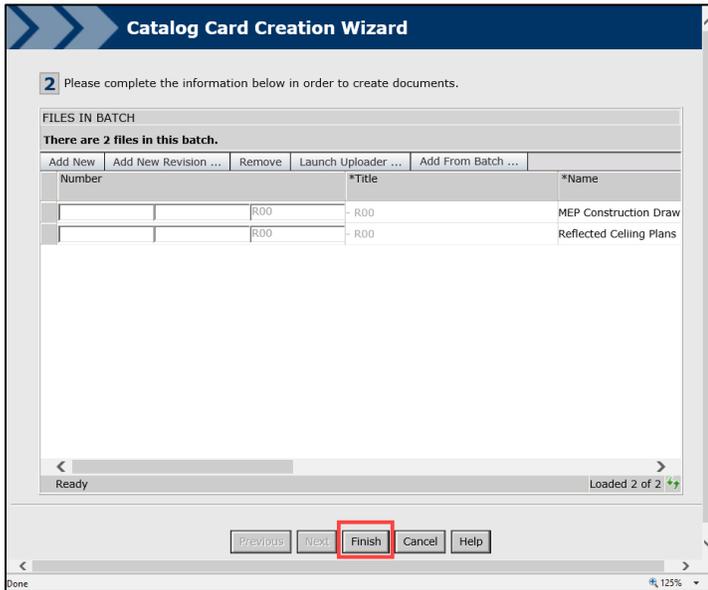
- 2. The Picklist Dialog is launched displaying all files previously uploaded to the queue. Determine what option is best, select all or only batch upload a few at a time from the queue. In this example, select the Add All button and OK.



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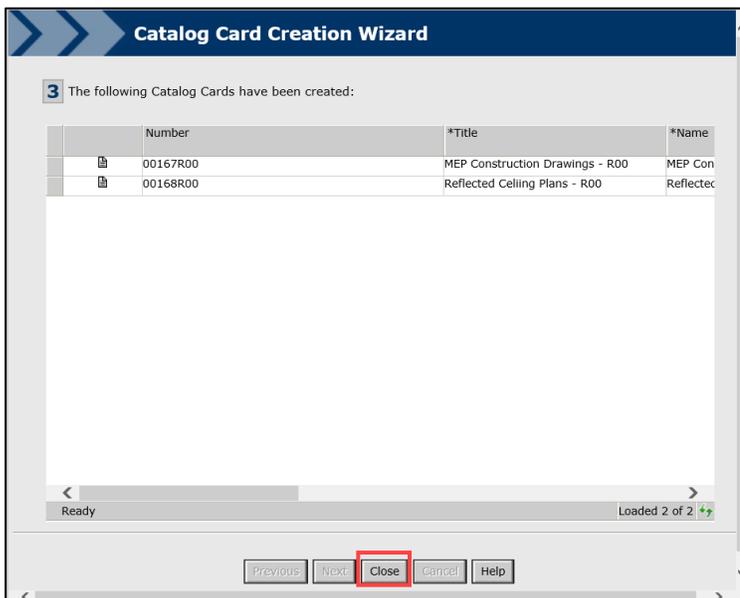
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- All files are prepared to be assigned to ePM documents with the metadata data fields. Click the Finish button to complete this process.



**NOTE:** The Titles and/or Name fields are automatically filled out based on the uploaded file name. These fields are editable in case user elects to change the Title/Name metadata names to be different than the uploaded file names.

- Select Close to complete the batch upload process with metadata





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5. All files are batch uploaded with metadata assigned to ePM documents.

### C. VIEWING BATCH UPLOADED DOCUMENTS FROM EPM

1. Open the document using native applications installed on the desktop, or with the ePM Document Management Viewer. Browse to either Catalog Cards, Submittal, or Design Documents register where the files have been previously uploaded.
2. Launch an ePM document from the register.
3. To launch the file from a native associated desktop application, left-click the file listed under the Source or Presentation field where it was uploaded.

The file will open from the native associated desktop application.

4. To open the document using the ePM Document Management viewer, select the Document Management viewer icon under Options.

## REFERENCES

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

- QRG.089 BatchFileUploaderDQA
- QRG.091\_Brava! View & Redlining Document Management
- QRG.092\_Brava! View & Redlining Toolbars & Icon Features
- QRG.093\_Brava! Supported File Formats