

HOW TO...

See screenshots at the end of this document for additional information.

A. LAUNCH FILE MANAGER FROM THE EPM PORTAL

1. Click 'File Management Tool' on the ePM Portal Page.
2. Check the box next to the appropriate project(s).
3. Click the select and close icon in the top left corner.
4. To add project to the left sidebar in the future click the select icon in the top of the sidebar and repeat steps 2-3.

B. LAUNCH FILE MANAGER FROM EPMXPRESS

1. With a project open in ePMXpress, click on the 'File Manager' tab.
2. If needed, follow steps A2-A4 to add a project to the sidebar.

C. ADD A FOLDER

1. Click on a project name to expand the root folder list. (Additional root folders cannot be created, just subfolders)
2. Select the appropriate root or subfolder to add a new folder to.
3. Click on the icon to the right of the folder name.
4. Click on 'Add Folder'.
5. Enter a name for the folder.
6. Click 'Create'.

D. DELETE A FOLDER

1. Select the appropriate subfolder to remove.
2. Click on the icon to the right of the folder name.
3. Click on 'Remove Folder'.
4. Click 'Yes' to confirm.

E. RENAME A FOLDER

1. Select the appropriate subfolder to rename.
2. Click on the icon to the right of the folder name.
3. Click on 'Rename Folder'.
4. Enter a new name for the folder.
5. Click 'Save'.

F. ADD FILES

1. Select the appropriate folder for the file(s).



2. Click the upload file(s) icon in the toolbar.
3. Drag and drop, paste, or browse for file(s) from the pop-up window.
4. Close the pop-up window when complete.

G. DELETE FILES

1. Select the appropriate folder.
2. Check the box next to the file(s) to be deleted.
3. Click the delete icon in the toolbar.
4. Click 'Yes' to confirm.

H. OPEN IN EPM

1. Select the appropriate folder.
2. Check the box next to the file to be opened.
3. Click the open in ePM icon in the toolbar.

I. VIEW AND REDLINE FILES

1. Select the appropriate folder.
2. Check the box next to the file to be opened.
3. Click the view & redline icon in the toolbar.

J. DOWNLOAD FILES

1. Select the appropriate folder.
2. Check the box next to the file(s) to be opened.
3. Click the download document(s) icon in the toolbar.

K. UPDATE DATA FOR A FILE

1. Select the appropriate folder.
2. Update data fields in the row or rows of the appropriate file(s).
3. Click the update icon in the toolbar.

WHAT IS...

File Manager is an ePM application that will allow ePM users the ability to drag and drop files into Submittals, Catalog Cards and Design Documents to the source file; it will allow mass downloading of files to a zip file from the source file only; view and redline documents; and allows users with the proper security to create folders to manage files. This application will inherit ePM instance based security.

WHO USES...

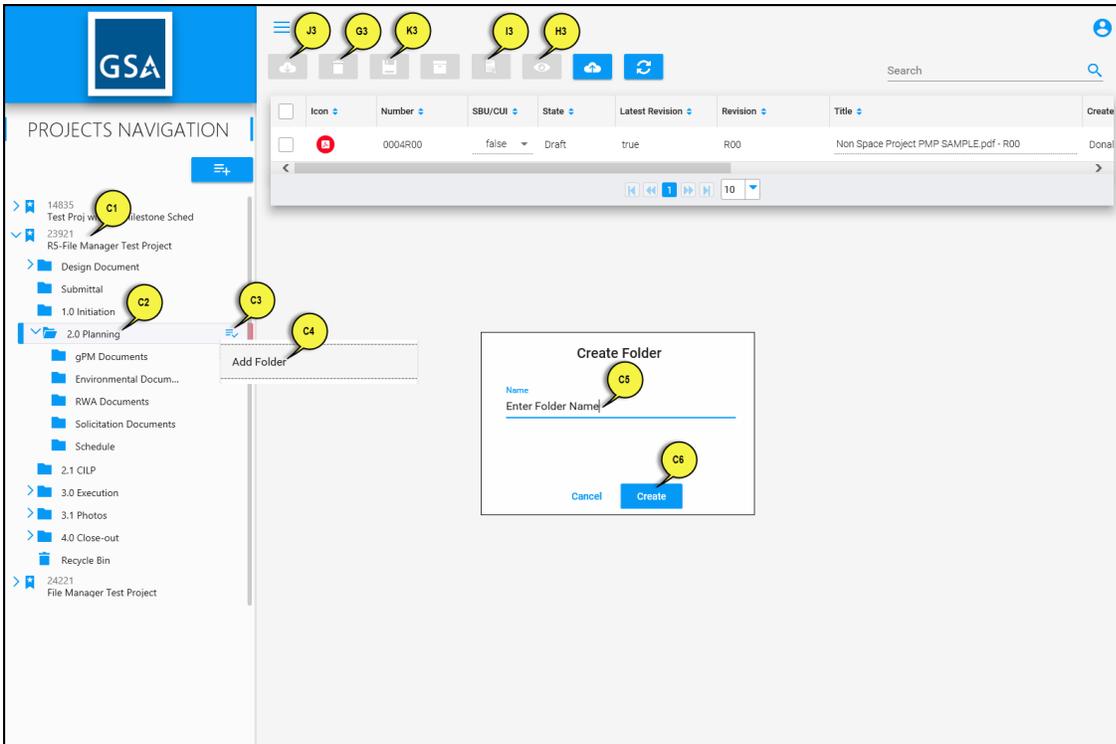
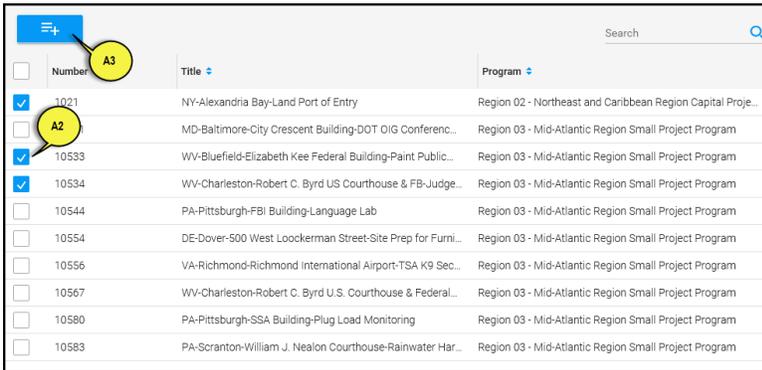
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File Manager



- General Contractor
- Construction Manager
- Architect/Engineer
- Project Manager & Staff
- Contracting Officer & Staff
- GSA Executives
- Owner Representative

SCREENSHOTS



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File Manager

