

ePM Quick Reference Guide #127

User Access & Certification Administration

WHAT IS USER ACCESS & CERTIFICATION?

The User Access and Certification (UAC) Tool is a web-based application that allows users with specific security categories the ability to create and process new ePM user accounts. The tool is also used to facilitate ePM's annual recertification requirement.

The User Access tab consists of 3 pages: User Request, User Approval, and Workspace Access.

- User Request: Provides the ability to create/submit new ePM user accounts for licensing
- User Approval: Provides the ability to approve/reject new user accounts, enter/attach clearance documents, process waiver requests and license new user accounts
- Workspace Access: Provides the ability to grant and/or request workspace access

WHO WILL USE THIS?

- Project Manager
- Program Certifiers
- Regional System Administrators
- National System Administrator
- Waiver Reviewer
- Waiver Approver

LICENSED USER REQUEST

Project Certifiers (Project Managers) and Program Certifiers have the ability to request new users. After requests are submitted, they will be routed through an approval and licensing process before activation.

For instructions on adding Contact Only users, refer to [QRG 138: Create a Contact Only User](#).

1. Launch the UAC Tool from the [ePM Portal](#).



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2. Click on the User Access tab.



3. Click on the User Request page. Click 'Add' in the toolbar.



4. In the web grid, provide the following information:
 - Select the Region
 - Enter the Full Legal name: First, middle (if no middle name enter NMN), last
 - Enter the Display Name
 - Select a Title from the drop-down list
 - Select a Company by clicking 'Search'



Enter the company name in the Search box. Select the company and location as displayed below:

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Select Company

GSA Companies Refresh Companies A & R

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Select	Company Name	DUNS #/AB Code			
>	A & R Electric				

If the required company is not found, please contact the ePM Help Desk at epmsupport@gsa.gov or (866) 367-7878 for assistance.

New Location

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Select	Address 1	Address 2	Address 3	City/Town	State
<input type="radio"/>	55555 144 Street			Washington	DC
<input type="radio"/>	2 AR Shippers Way			Cornelius	NC
<input type="radio"/>	AR Shipping Way	Route 1	Port 5	MyCity	NC
>	22222 Park Avenue			Arlington	VA

OK Cancel

Note: When adding a GSA staff member, put a check box in the GSA Companies box to display only GSA office locations.

Select Company

GSA Companies Refresh Companies Search Company

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Select	Company Name	DUNS #/AB Code			
<input type="radio"/>	LMI				
<input type="radio"/>	LPOE SME				
<input type="radio"/>	Michael Sullivan				
<input type="radio"/>	PBS				
<input type="radio"/>	PGE				
<input type="radio"/>	R01				
>	R02				
<input type="radio"/>	R03				
<input type="radio"/>	R04				
<input type="radio"/>	R05				

If the required company is not found, please contact the ePM Help Desk at epmsupport@gsa.gov or (866) 367-7878 for assistance.

New Location

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Select	Address 1	Address 2	Address 3	City/Town	State
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OK Cancel

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- If the location is not displayed, click on the 'New Location'.
- Select location type from the drop-down
 - Enter location name, street address, city, state, and zip code. Click Save.

The 'New Location' dialog box contains the following fields:

- Company Name: A & R Electric
- *Location Type: (dropdown menu)
- *Location Name: (text input)
- *Street Address: (text input)
- *City/Town: (text input)
- *State/Territory: (dropdown menu)
- *Zip Code: (text input)

Buttons: Save, Cancel

- Enter the user's phone number and email address. Select the User Type: Contact Only, Licensed User, or Analytics User.

Phone*	Email*	User Type*	Status	Proceed
212-398-7926	RichardBouchard@gsa.gov	(dropdown menu)	New	
		Contact Only Licensed User Analytics User		

- Click 'Submit' in the toolbar.

The toolbar includes: Add, Remove, Submit, Refresh, Logout, About, UAC NSA, Requests, Actions, System, Logged On.

Region*	First Name*	Middle Name*	Last Name*	Display Name	Title*	Company*	Phone*	Email*	User Type*	Status
R02	William	Francis	Sargus	Bill Sargus	Architect	A & R Electric	410-555-7643	wsargus@arelectric.com	Licensed User	New

The user account will be created and in the Draft workflow state.

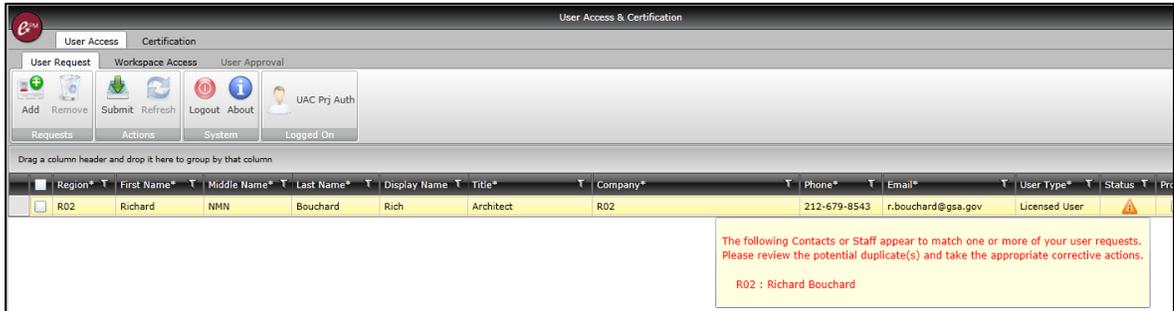
The toolbar is the same as in the previous screenshot.

Region*	First Name*	Middle Name*	Last Name*	Display Name	Title*	Company*	Phone*	Email*	User Type*	Status
R02	William	Francis	Sargus	Bill Sargus	Architect	A & R Electric	410-555-7643	wsargus@arelectric.com	Licensed User	Draft

- If the user currently exists in ePM, the Status column will note an error (to view the details hover over the icon in the Status column) the user record must be validated or removed to continue.

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8. To validate, put a check in the 'Proceed' column.



To remove, select the row and click 'Remove' in the toolbar.



9. When complete click on the Logout icon in the top toolbar.

USER APPROVAL

Once user requests have been submitted, the user approval process must be completed prior to issuing an ePM User License and granting access to programs and/or projects.

The User Approval page is where the:

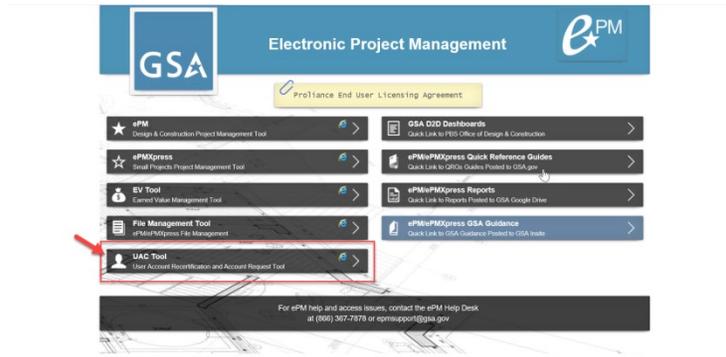
- Capital or Small Program Certifying Authority approves or rejects ePM access
- Regional System Administrator enters clearance information and requests waivers
- Waiver Reviewer validates the waiver request
- Waiver Approver approves or rejects a user
- National System Administrator licenses ePM users

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A. PROGRAM CERTIFYING AUTHORITY APPROVES OR REJECTS EPM ACCESS

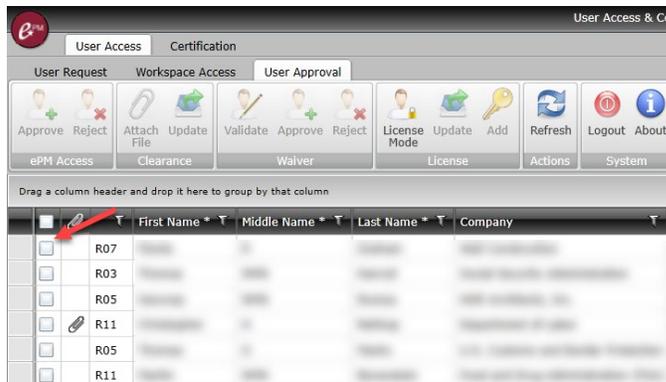
1. Launch the UAC Tool from the ePM Portal.



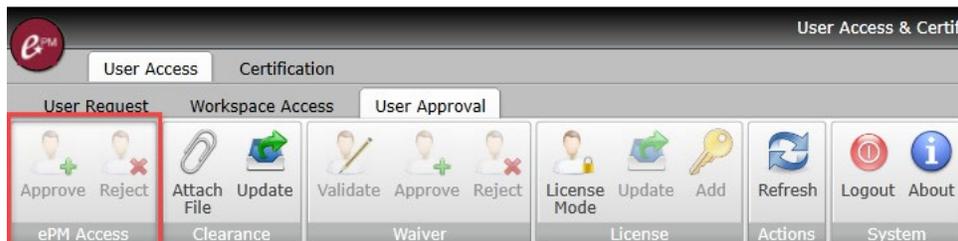
2. At least twice per week, click on the User Access tab and select the User Approval page.



3. Click on the User Approval page. Users requiring approval will display in the web grid. Select user(s) by clicking in the select box in the first column.



4. Select 'Approve' or 'Reject' in the ePM Access section in the toolbar.



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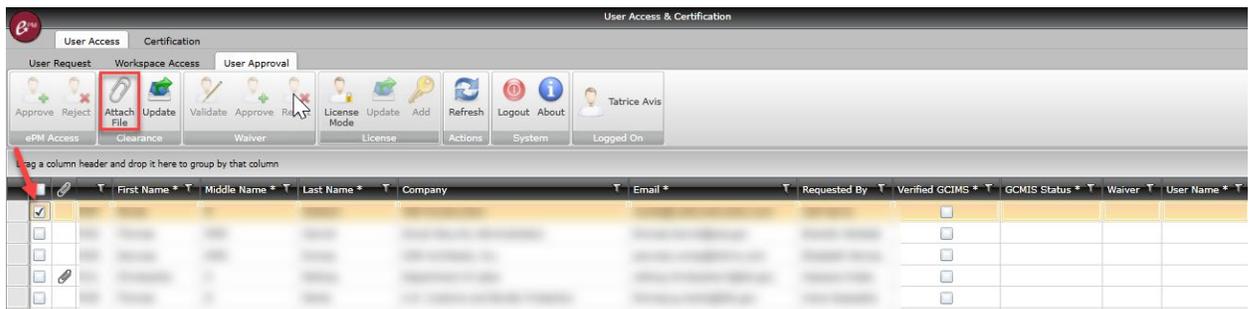
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- Look up the user's status in [GSA Credential and Identity Management System \(GCIMS\)](#).
- In the UAC Tool, make a selection in the Verified GCIMS column.
- Choose the GCIMS Status from the dropdown list. This status will determine what workflow status the user account will transition to once the record is updated.

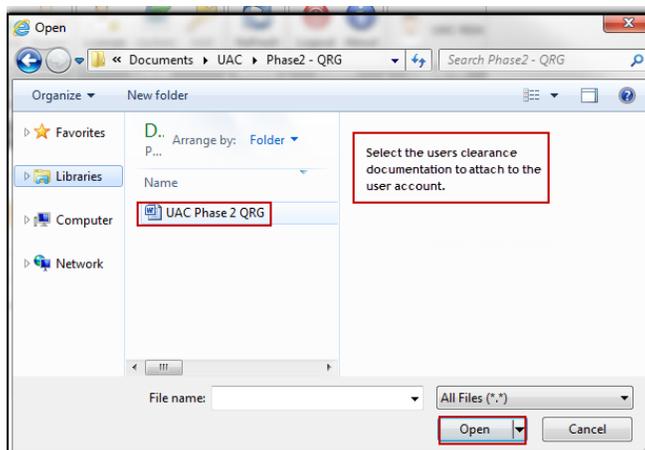
GCIMS Security Status	User Workflow Status	Notes
Full IT Access	Pending License	
Initial IT Access	Pending Waiver	
No IT Access	Active (Contact Only)	GCIMS Status is not applicable
Pending IT Access	Pending Clearance	
Other Federal Agency	Pending License	Attach Other Agency GSA Security Email

Table 1.1 – GCIMS Security Status options, User Security Workflow Status, and Notes

- To attach Other Federal Agency documentation(s) to a user record in ePM, select the row and 'Attach File' in the Clearance section.



- This opens the dialog box. Select the file to upload and click open.



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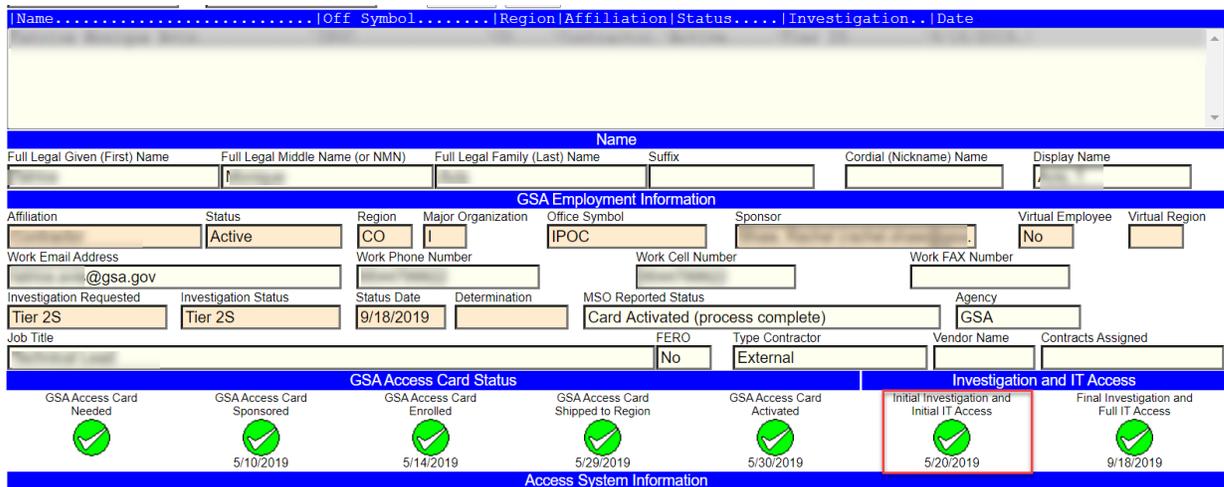
C. WAIVER APPROVER REQUESTS VALIDATION

At least twice per week, the GSA Waiver Reviewer must review and validate the waiver request(s).

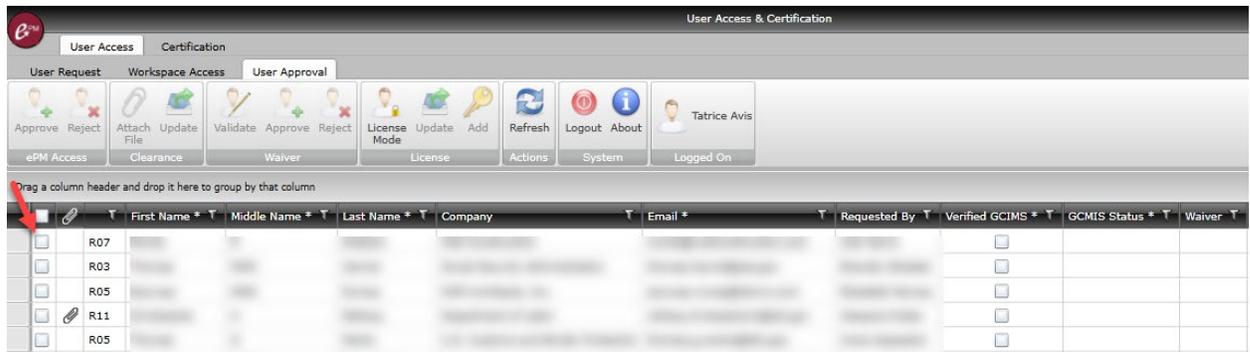
1. Users that require review and approval will be displayed in the web grid located under the toolbar.



2. In GCIMS, validate that the 'Initial Investigation and Initial IT Access' has a green check icon.



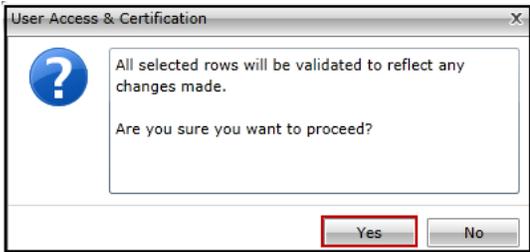
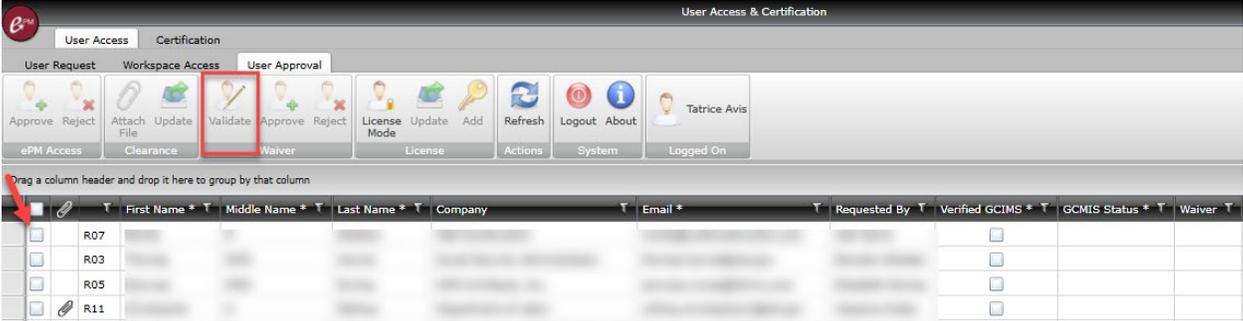
3. In the UAC Tool, select the user or users to validate, by clicking in the select box to the left.



4. Select Validate in the toolbar and confirm selection.

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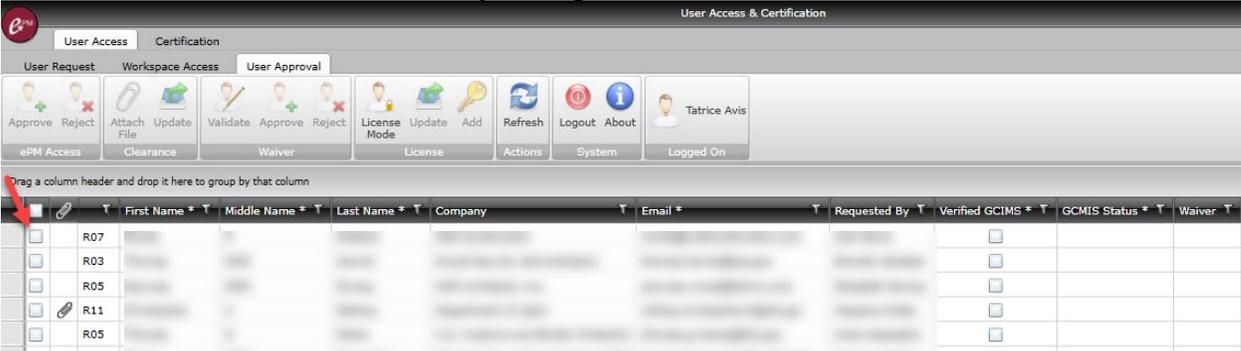


5. Click 'Logout' in the top toolbar.

D. WAIVER APPROVER APPROVES OR REJECTS WAIVER REQUEST

At least twice per week, the GSA Waiver Approver must review and approve or reject waiver request(s).

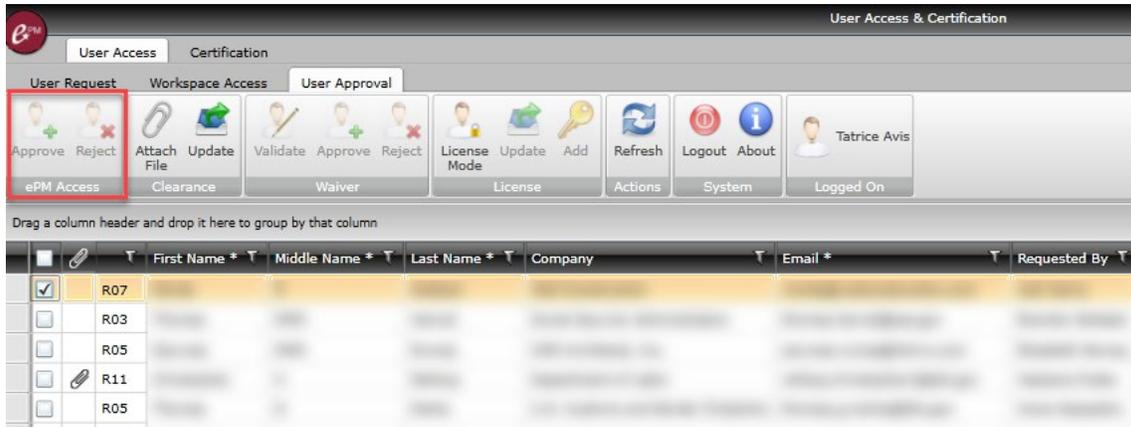
1. Users that require review and approval will be displayed in the web grid located below the toolbar.
2. Select the user or users to validate by clicking in the select box to the left.



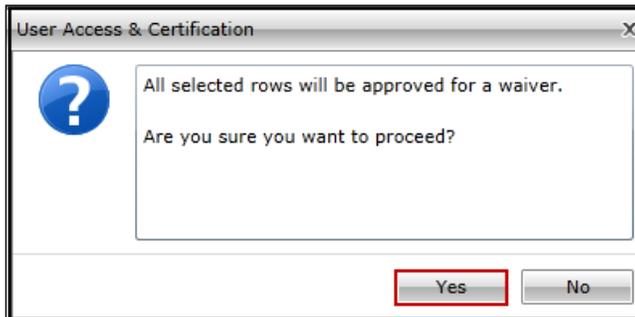
3. Select 'Approve' or 'Reject' in the toolbar.

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4. Confirm the selection.



5. Click 'Logout' in the top toolbar.

E. NATIONAL SYSTEM ADMINISTRATOR LICENSES USER

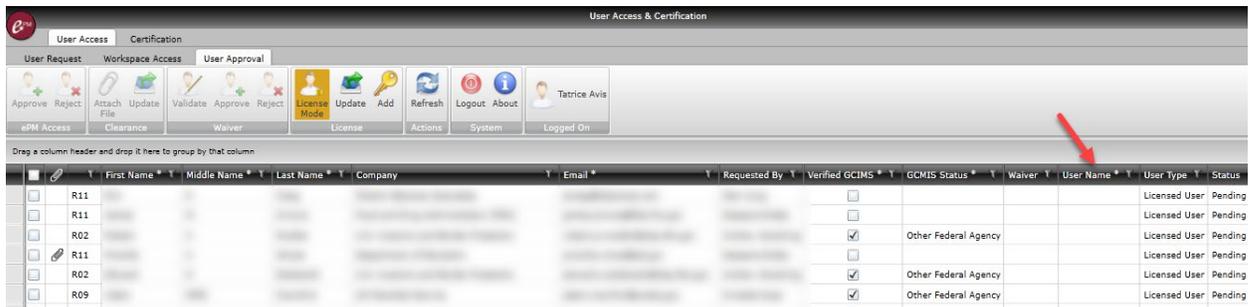
At least twice per week, the National System Administrator (NSA) licenses ePM users.

1. Login to the UAC Tool and select the License Mode.
2. Users ready to be licensed will appear in the web grid. To select a user, click in the box to the left of the row, or select all users by clicking in the box in the top row.
3. Users must be validated in Active Directory (AD). If the user does not exist in AD, the NSA will submit a ServiceNow ticket for the user to be setup.
4. Once confirmation of an active AD account has been received, the AD account name should be entered in the User Name field.

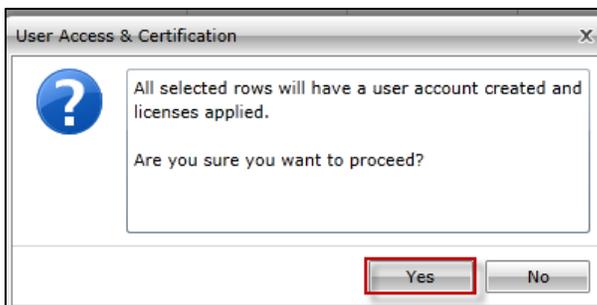
Important: The User Name must match the AD account name.

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5. Select 'Add and Confirm'.



User(s) are moved to the active workflow state.



6. Click 'Logout' icon in the top toolbar.

F. WORKSPACE ACCESS

Project Certifiers (Project Managers) and Program Certifiers are the only ones that can grant users access to their projects or programs.

Administrators can only request Project and Program access, but Project and Program Certifiers are the only ones that can grant user access to their own Projects and Programs.

Note: "Contact Only" user types will be exported to the desired Project or Program with no approval required.

The Workspace access page provides the ability to request, approve, and export ePM users to programs and projects.

1. Click 'User Access'.

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- Click on the Workspace Access page.



- Click 'Add' in the toolbar.



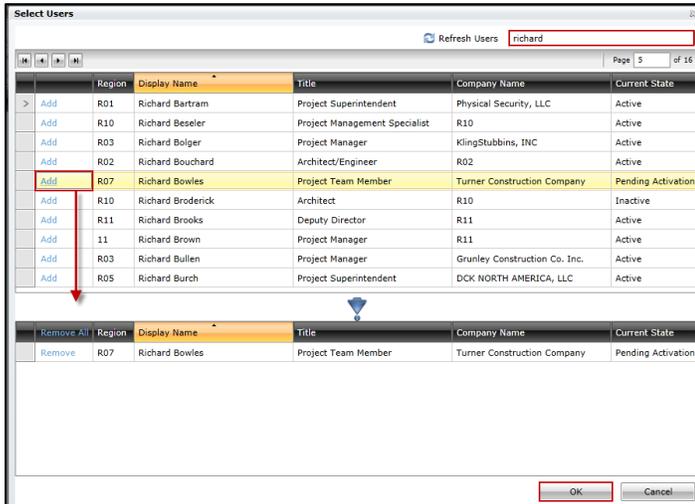
- Select a user. Use the search box in the upper right hand corner or scroll page to page using the arrows on the left.

Note: If a user cannot be found, try searching by last name only, first name only or display name only

- Click 'Add' in the left column to select the user(s) to process. Once selected, the user(s) will be displayed on the bottom half of the screen,
- Click 'OK' to continue.

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User(s) selected will now appear in the grid.



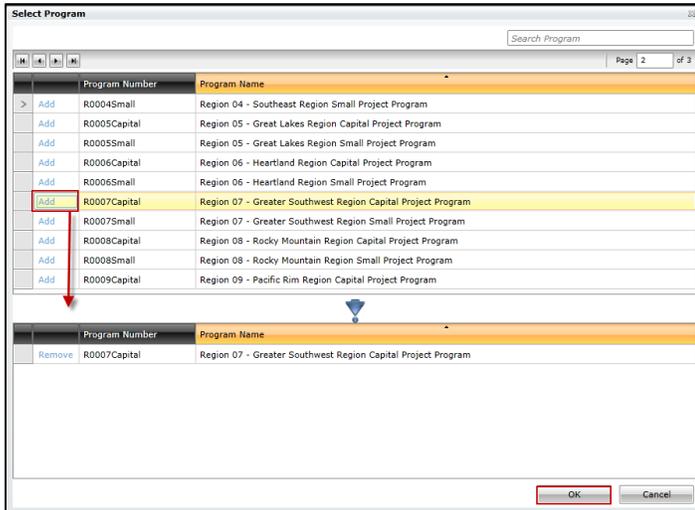
- To request Workspace access; select the user (click in the box in front of Region) and then select the desired workspace (program or project).



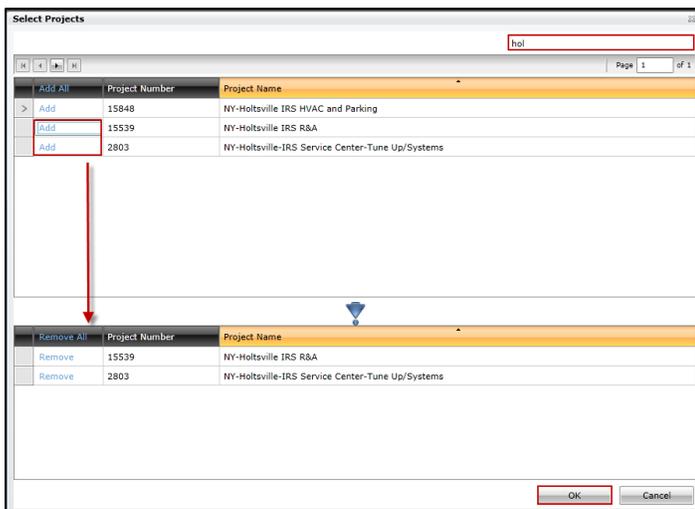
- Select the Region. Click 'Add' (use the search box to narrow selection) for Project Access. Click 'Next' to select project(s).

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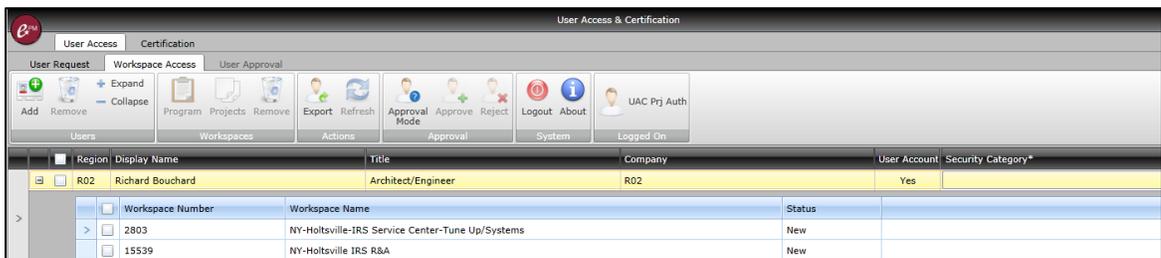
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9. Select the Project(s) click on 'Add' (use the search box to narrow search) and click OK.



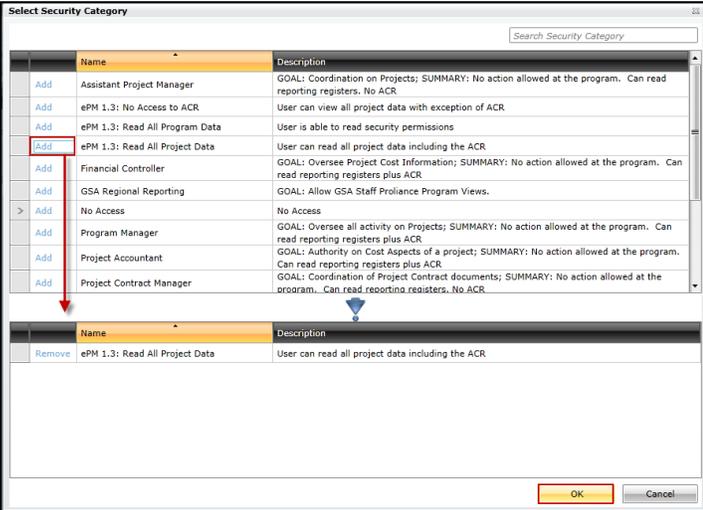
User(s) selected and requested workspace access will now appear in the grid.



10. Select a Security Category by clicking on the magnifying glass icon.

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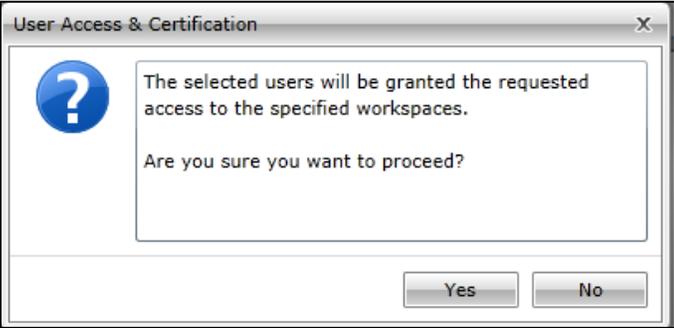
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11. Select Export in the toolbar.



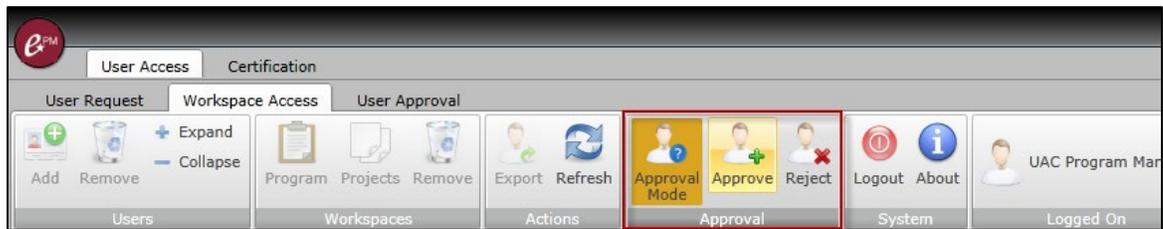
12. Confirm the selection.



The Project or Program Certifier will receive an email notifying them of the requested action.

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13. The Project or Program Certifier will log into UAC Tool approve/reject the selected user's access to a project or program.
14. Click 'Logout' in the top toolbar.

REFERENCES

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

- QRG 02 - Using the ePM Address Book
- QRG 121 - UAC Tool: Project and Program Certification
- QRG 122 - UAC Tool: Internal GSA ePM User
- QRG 123 - UAC Tool: External GSA ePM User
- QRG 138 - Create a Contact Only User
- [GCIMS](#)