

ePM Quick Reference Guide #001

Navigating in ePM



HOW TO...

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

A. LOG INTO EPM FROM INSIDE THE GSA NETWORK (INCLUDING VPN)

1. Using Internet Explorer 9 or higher, go to <https://epm.pbs.gsa.gov>
2. Click on ePM

B. LOG INTO EPM FROM OUTSIDE THE GSA NETWORK

1. Using Internet Explorer 9 or higher, go to <https://epm.pbs.gsa.gov>
2. Click on ePM.
3. Enter your GSA User ID (Example Format: firstmlast).
4. Click Submit.
5. Select the delivery method for your temporary registration code.
6. Click Submit.
7. Enter the four digit registration code provided.
8. Click Submit
9. Enter your Active Directory password.
10. Click Submit.

C. LOG BACK IN AFTER A TIMED OUT SESSION

1. If prompted for an "Organization" perform steps a-c, otherwise go to step 2.
 - a. Enter "pbs" in the Organization field.
 - b. Check the "Remember Organization" box.
 - c. Click Continue.
2. Click anywhere inside the large ePM logo.
3. If outside of the GSA Network complete steps B3 – B10 above.

D. NAVIGATE WORKSPACES

1. Based on a user's functional role in ePM the following workspaces could be available. Most users will only see the Project Workspace.
 - a. Organization: Accessed by Administrators to manage users and project setup.
 - b. Programs: Organized by region and program (Capital and Small). Accessible by Administrators, Regional Executives, and Central Office Oversight.
 - c. Projects: Provides users with a list of all projects that they have been granted access to.
 - d. Analytics: ePM reporting, see QRGs #070 - #085 for more information.
2. Click on the name of the workspace to enter that workspace.

E. ENTER A PROJECT WORKSPACE

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1. From the Home screen, click on Projects.
2. Find the appropriate project using the following methods.
 - a. Scroll up or down the list using the scroll wheel on your mouse or the scroll bar on the right side of the browser window.
 - b. Page forward or backward using the arrows in the upper right of the screen.
 - c. Change the view of the register. See QRG #003 for more information.
 - d. Enter a value in the search box in the upper right and click Find.
3. Once the project has been located, click "Enter Project" in the row of that project.

F. NAVIGATE IN A PROJECT WORKSPACE

1. The project workspace is broken up into three areas.
 - a. Header
 1. Navigation Trail: Allows user to back up to the project list of home screen.
 2. Go To Program Button: If user's security allows, changes the view from the project workspace to the program workspace.
 3. My Preferences Button: Allows user to set the following personal preferences.
 - a. General
 - i. Default page to open after login: "Workspace Navigator" is recommended.
 - ii. Number of Items displayed in register: For better performance it is recommended that this number be set lower.
 - iii. Enable screen reader enhancements: Check this box if using assistive technologies such as text-to-speech audio interfaces.
 - iv. Enable ACR stationary header: Freezes the header in the ACR.
 - b. Product Language: English is the only supported language in ePM.
 - c. Content Formatting
 - i. Format Locale: Leave set to English (United States)
 - ii. Preferred Calendar: Gregorian
 - iii. Date Entry: Choose preferred format.
 - iv. Date Display: Choose preferred format.
 - v. Time: Choose preferred format.
 4. Help Button: Contains generic help for the Commercial "Off The Shelf" (COTS) product that is the platform for ePM. Use the ePM QRGs for help.
 5. Log Off Button: Logs the user out of ePM
 - b. Menu: Contains a list of the applications available to the user.

- c. Register: Once an application in the menu is selected, this area of the screen provides a list or register view of all the documents the user has access to.

G. WORK WITH NOTICES

1. In the Project Workspace menu, navigate to Notices > My Notices > Received.
2. Find the appropriate notice using the following methods.
 - a. Scroll up or down the list using the scroll wheel on your mouse or the scroll bar on the right side of the browser window.
 - b. Page forward or backward using the arrows in the upper right of the screen.
 - c. Change the view of the register. See QRG #003 for more information.
 - d. Enter a value in the search box in the upper right and click Find.
3. Once the notice has been located, click anywhere in the row to open the document that triggered the notice. The details of the notice will appear on the right of the document.

TIP: The icon to the left of the number in the notices register represents the following.

- Yellow: You are expected to collaborate on the document.
- Blue: Document is for review, contribute if needed.
- White: FYI, you are not expected to perform any action.

H. OPEN AN EXISTING DOCUMENT

1. Click on the menu option for the type of document you are looking for. (i.e. Submittals)
2. Find the appropriate document using the following methods.
 - a. Scroll up or down the list using the scroll wheel on your mouse or the scroll bar on the right side of the browser window.
 - b. Page forward or backward using the arrows in the upper right of the screen.
 - c. Change the view of the register. See QRG #003 for more information.
 - d. Enter a value in the search box in the upper right and click Find.
3. Once the document has been located, click anywhere in the row to open the document.

I. CREATE A NEW DOCUMENT

1. Click on the menu option for the type of document you want to create. (i.e. Submittals)
2. Click New in the register toolbar.
3. **Optionally**, if different types of that document are available, click the down arrow next to New in the register toolbar and select the appropriate type.

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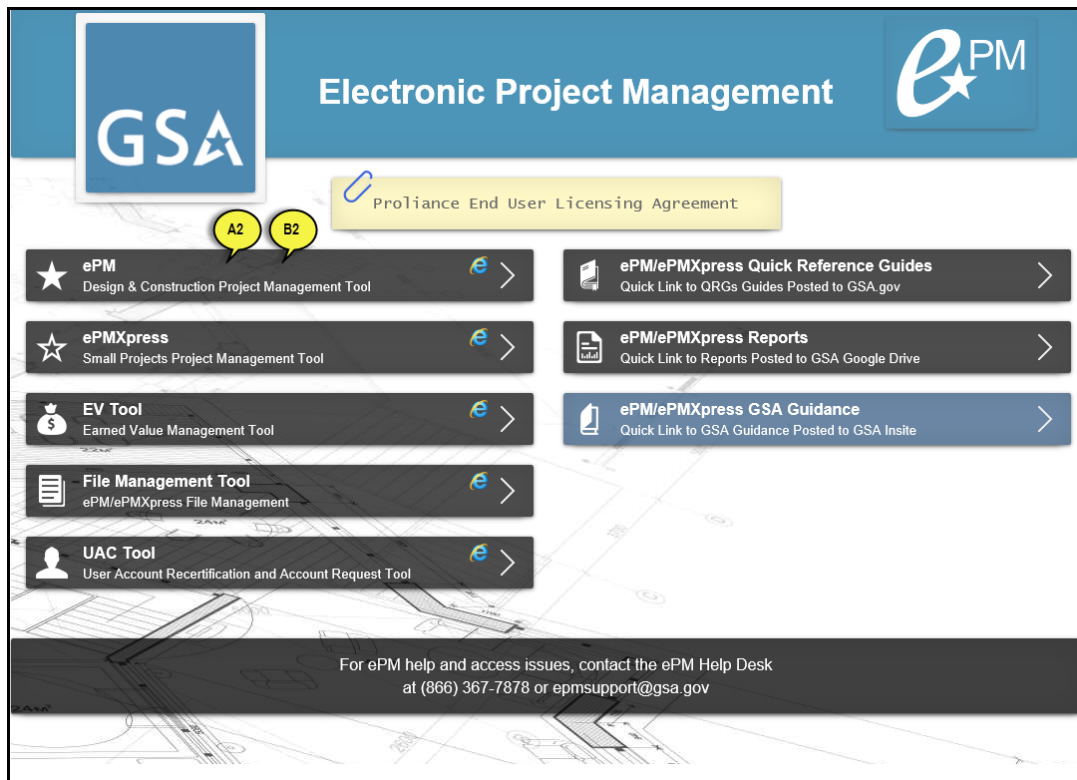
WHAT IS...

ePM is a web-based application. With appropriate security permissions, ePM can be accessed from any computer with connection to the internet. ePM features customized screens and tools to make navigating to information quick and easy. The ePM user interface is tailored to match the licensing and security requirements. This tailoring is reflected in the way menus, buttons and cross-references are displayed.

WHO USES...

- GSA Executive
- Construction Manager
- Project Manager & Staff
- Contracting Officer & Staff
- Architect/Engineer & Staff
- General Contractor
- Customers

SCREENSHOTS



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Please enter your UserID below

GSA User ID: firstlast x

Submit

Forgot Password
Restart Login

Powered by SECUREAUTH

Choose the delivery method for your Registration Code.

Email xxxxx@gsa.gov

Phone/Mobile xxx-3755 Voice SMS/Text

Submit

Forgot Password
Restart Login

Powered by SECUREAUTH

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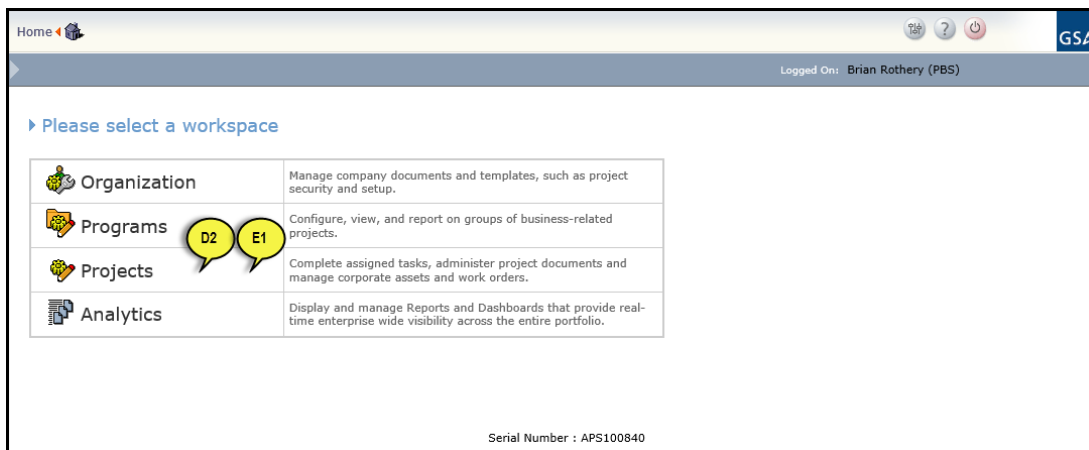
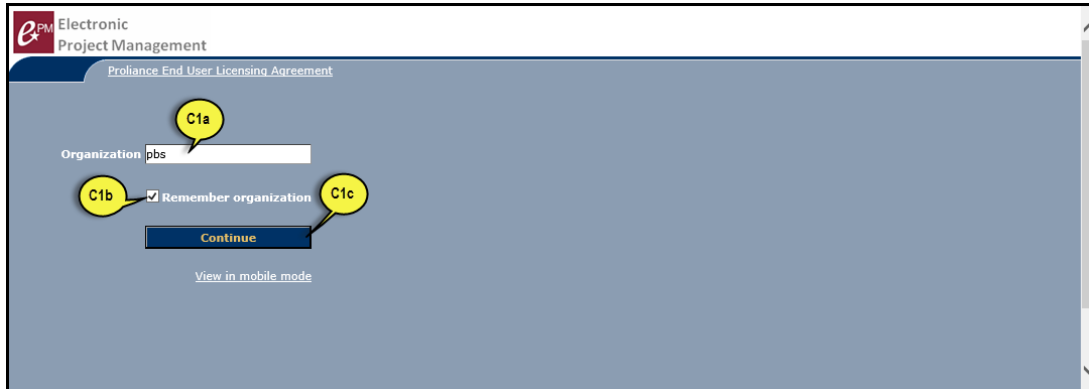


The screenshot shows the '2-Factor to PBS ePM Application' page. At the top left is the GSA logo. Below it, the title '2-Factor to PBS ePM Application' is displayed. The main content area contains the instruction 'Enter the code that you just received by email.' Below this is a label 'Re: B7 Code:' with a yellow callout bubble 'B7' pointing to it. A text input field contains the code '3899'. Below the input field is a numeric keypad with buttons for digits 1-9, 0, and a 'C' button. A yellow callout bubble 'B8' points to the 'C' button. Below the keypad is a 'Submit' button. At the bottom of the main content area, there is a link: 'Please click here to use an alternate registration method.' In the bottom left corner, there are links for 'Forgot Password' and 'Restart Login'. In the bottom right corner, there is a logo for 'Powered by SECUREAUTH'.

The screenshot shows the '2-Factor to PBS ePM Application' page. At the top left is the GSA logo. Below it, the title '2-Factor to PBS ePM Application' is displayed. The main content area contains the instruction 'Please enter the password associated with your User ID.' Below this is a label 'GSA User ID:' followed by a text input field containing 'brianmrothery'. A yellow callout bubble 'B9' points to the 'GSA User ID:' label. Below the 'GSA User ID' field is a 'Password:' label followed by a password input field with masked characters. A yellow callout bubble 'B10' points to the 'Password:' label. Below the password field is a 'Submit' button. In the bottom left corner, there are links for 'Forgot Password' and 'Restart Login'. In the bottom right corner, there is a logo for 'Powered by SECUREAUTH'.

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Home Projects Logged On: Brian Rothery (PBS)

Print Export Refresh Help Items 1 to 50 of 23 1 Find Reset

View account name

Project Workspace	Project Document	Number	Project Name	Proliance Account Name
Enter Project	Open document	2721	CA-Calexico-BS Main Bldg-Calexico West I	pgmprj://pbs/r9pgm/calexicowestlpo
Enter Project	Open document	3431	GA-Savannah-Savannah FB-CH-Annex	pgmprj://pbs/r4pgm/gasavannahfb-courtl
Enter Project	Open document	4797	JN PIP and RAHD Project	pgmprj://pbs/r11pgm/piprahdttestproject
Enter Project	Open document	14835	Test Proj with 20 Milestone Sched	pgmprj://pbs/cosmall/allenstest
Enter Project	Open document	15486	SC-Greenville-Campbell FB CH	pgmprj://pbs/r4pgm/scgreenvilles
Enter Project	Open document	16707	DC-Washington-Lafayette-Modernization (pgmprj://pbs/r11pgm/lafayettephase1fin
Enter Project	Open document	18308	AR-Little Rock FB R&A	pgmprj://pbs/r7pgm/ar_littlerock_fb_ra
Enter Project	Open document	21707	MI-DETROIT-THEODORE LEVIN US CO-R&	pgmprj://pbs/r5pgm/raprospectus
Enter Project	Open document	22161	MA-BOSTON-CPT JF WILLIAMS CG B-Limit	pgmprj://pbs/region1-newenglandregionp
Enter Project	Open document	23921	R5-File Manager Test Project	pgmprj://pbs/region_5-great_lakes_regio
Enter Project	Open document	24131	FAS-DeCA Sample Building - Use Case Te	pgmprj://pbs/cosmall/fasusecastesting2
Enter Project	Open document	24221	File Manager Test Project	pgmprj://pbs/region_5-great_lakes_regio

Home Projects R5-File Manager Test Project GSA

Project Home

Workspace and Sub-Project Info

Project Properties

Notices

Notices Summary

My Notices

PM Tools

Project Manager Quick Links

- Project Management
- Schedules
- Financial Management
- Contract Management
- Portfolio Planning
- Design Management
- Construction Management
- Reports (GSA Internal Only)
- Support Resources
- File Manager

File Management

Reports

Address Book

Administration

R5-File Manager Test Project

Notices By Priority

	Mine
Urgent	0
High	0
Normal	3
Low	0

Notices By Date

	Mine
Overdue	2
Due Today	0
Due Next 7 Days	0
Due Beyond 7 Days	0

Notices By Type

	Mine
Review	2
Process	1
FYI	0
Error	0

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Home Projects R5-File Manager Test Project

Logged On: Brian Rothery (PBS)

My Notices: Received

Tools Sharing Print Export Refresh Help

View Standard

Number	Action	Notice Des...	Subject	Document ...	Sent By	To	Message	Sent	Due
GS-02P-07	Read	Review	GC-Primary-C Contract		John Bunch	Brian Rothery	Hey Brian, Ma	18-Jun-2015	
23921	Set to	Process	R5-File Manag Project Proper	Admin Versio	Brian Rothery	Project Proper	24-Jun-2015	24-Jun-2015	
23921	Read and Rev	Review	R5-File Manag Project Proper	Admin Versio	Brian Rothery			19-Oct-2015	19-Oct-2015
000004	Start Review	Process	QRG.110 - eP Submittal		Brian Rothery	Brian Rothery		01-Dec-2015	01-Dec-2015

Home Projects R5-File Manager Test Project

Logged On: Brian Rothery (PBS)

Office Management: Submittals

New Delete Tools Sharing Print Export Refr Help

View Standard Open As Document

Title	Current State	Purpose
April 2014 Online Class Schedule - April 2014	Rejected	
April 2014 Online Class Schedule - April 2014	Submitted	
Chrysanthemum - R00	Draft	
Desert - R00	Draft	
Hydrangeas - R00	Draft	
Jellyfish - R00	Draft	
Koala - R00	Draft	
Lighthouse - R00	Draft	
Patrick_GSA RSA Administration Test.docx - R	Accepted	
Penguins - R00	Draft	
QRG.042 Scheduling.doc - R00	Rejected	
QRG.042 Scheduling.doc - R01	In Review	
QRG.110 - ePM Utilization KPI Reports Version	Revise and Resubmit	
QRG.110 - ePM Utilization KPI Reports Version	Draft	
QRG.110 - ePM Utilization KPI Reports Version	Submitted	
R6 ePM Meeting Agenda.docx - R00	Draft	
test - R00	Draft	
Tulips - R00	Draft	