

## Register Views

### What are Register Views?

ePM registers contain a list of documents of the same type. For example, the *Notices* register lists all of a project's notices. The *Programs* register lists all of an organization's programs, their names and their statuses. The columns on a register display the basic details of the documents at a glance. A user can also change the register's current view. Registers provide users with tools for sorting and filtering the information that they contain and, also, search for specific information within a register.

### Who Will Use This?

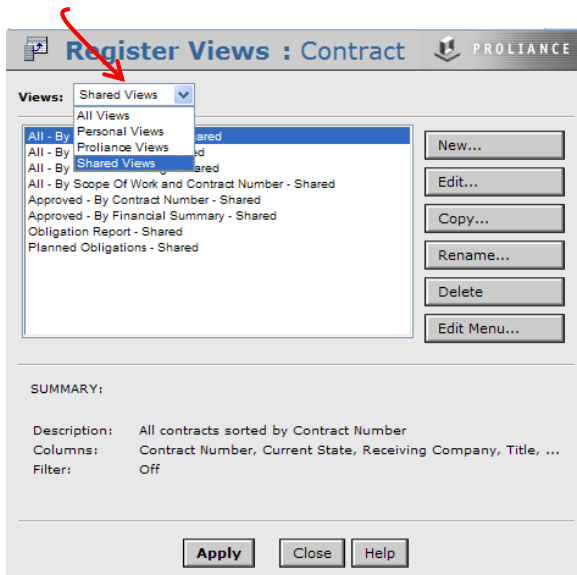
- √ GSA Executive
- √ GSA Contracting Officer
- √ General Contractor
- √ Construction Manager
- √ Architect/Engineer
- √ Project Manager
- √ Owner Representative

## Steps to Access and Use Register Views

1. Log into ePM, navigate to the desired project, and in the left navigation pane, click on the document type to display a register (Funding, Contracts, etc).
2. To change what information is displayed (and how it's displayed), start by clicking the down arrow in the View selection window and then click Manage Views..

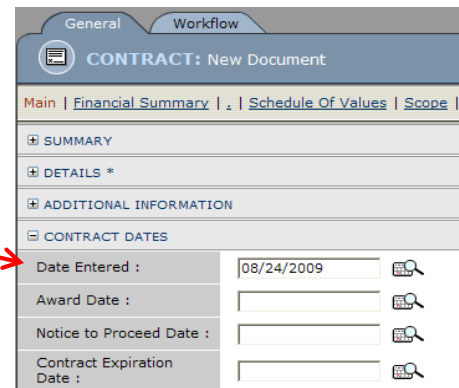
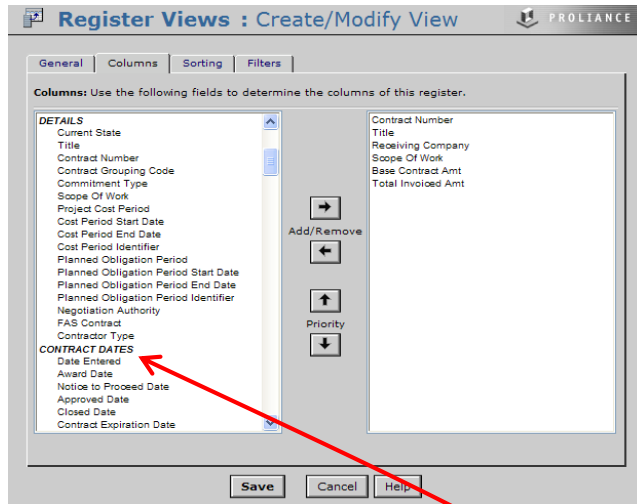
<input type="checkbox"/>	Contract Number	Title
<input type="checkbox"/>	002	Construction Contract
<input type="checkbox"/>	003	Design Contract
<input type="checkbox"/>	001	Expense Log

3. A screen displays showing all the views currently configured for the specific document type (in this case Contracts). Click the 'View's dropdown arrow to view just certain types of views, or all views.



4. Use the control buttons in the following ways:
  - a. New- Create a new view
  - b. Edit- Make a change to an existing view
  - c. Copy- Use this function if you need a new view that is similar to an existing view.
  - d. Rename- Change the name of an existing view

- Editing an existing view shows all the views functionality, so click on the 'Edit' button. The 'Create/Modify View' dialog opens. Click on the 'Columns' tab.

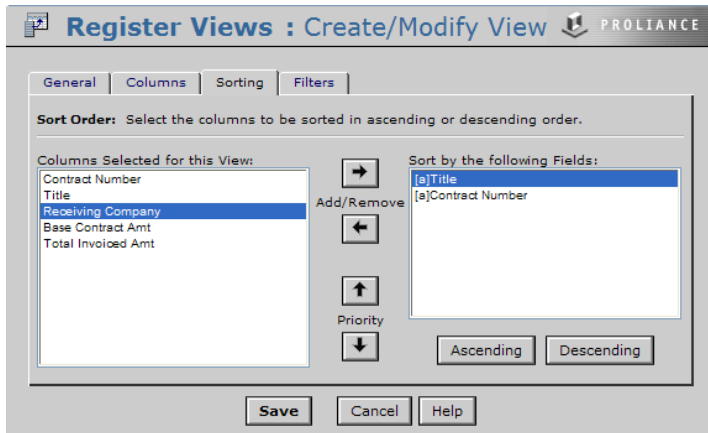


The items in the left pane of the dialog...  
...correspond to the fields on the ePM document

Note: On the General tab, change the name of the view, and also whether it is a Shared or Personal view.

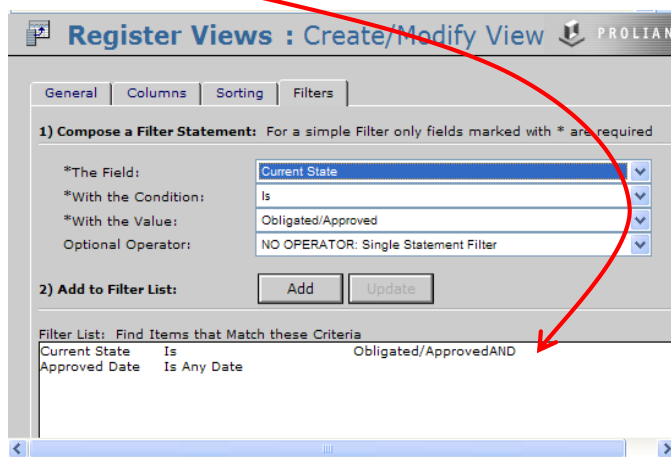
Add or remove columns to a personal view by clicking the Add/Remove arrows. The fields shown top to bottom on the right side of the Create/Modify View dialog will display left to right in the ePM user interface. To change the order of the column headings, simply select a field in the right pane, then use the Priority arrows.

Next, click on the 'Sorting' tab. The left pane displays only those columns which have been selected to display in the personal view. To sort by a particular column, simply highlight it in the left pane, then use the right pointing arrow to move it to the right pane.



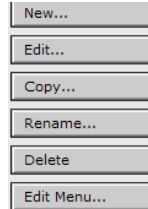
**Note:** you can create a multi-level sort. The example here shows the register will sort first by Title (in ascending order), then by Contract Number (in ascending order).

- Click on the 'Filters' tab. Build either a simple filter statement with a single field, or combine multiple fields using operators (And/Or). Use the 'Add' button to move individual filter statements to the Filter List at the bottom of the dialog.



**Note:** you can filter your register using any field on that document, not just the fields that display in your register view.

- Finally, select which views to see when clicking the 'Views' button (there could potentially be a large number of shared views, only a small number of which a user will need to use). Click the 'Edit Menu' button.




- Then simply check the views to see in the 'Views' drop down, and then click the 'Apply' button.

**Views : Manage View Menu** PROLIANCE

Select the views you want to display in the current register.

View Name	Owner	Displayed
All - By Contract Number	Shared	<input checked="" type="checkbox"/>
All - By Date Tracking	Shared	<input type="checkbox"/>
All - By Invoice Tracking	Shared	<input checked="" type="checkbox"/>
All - By Scope Of Work and Contract Number	Shared	<input checked="" type="checkbox"/>
Approved - By Contract Number	Shared	<input checked="" type="checkbox"/>
Approved - By Financial Summary	Shared	<input type="checkbox"/>
Obligation Report	Shared	<input checked="" type="checkbox"/>
Planned Obligations	Shared	<input type="checkbox"/>
Basic	Proliance	<input checked="" type="checkbox"/>
▶ Standard	Proliance	<input checked="" type="checkbox"/>

## Tips

- ✓ To resize a register column, hold the mouse pointer over one of the column's borders until the pointer looks like this: . Then hold down the mouse button and drag the border to make the column wider or narrower.

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- ✓ A user will not have access to any register views which display document information that the security role prevents from seeing.

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- ✓ The views called 'Basic' and 'Standard' are pre-defined views and cannot be changed.

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- ✓ Appropriate security permissions are required in order to Edit, Copy, Rename or Delete views.

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- ✓ Clicking the online help button provides generic help related to ePM, NOT for GSA specific usage.

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- ✓ Personal views are only viewable by the user who created them. Shared views are viewable by all users.

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- ✓ Notices with yellow icons require action; blue means a document was forwarded; white means the user was cc'd.

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- ✓ For additional help and support, contact the ePM Regional Point of Contact:

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