

Correspondence

What is a Correspondence Document?

Communication is a key component of any GSA project. Project participants often send thousands of emails, faxes and letters, and engage in many telephone and verbal conversations. By making a record of these communications, GSA protects its legal rights in the case of any future disputes. ePM automatically saves a copy of all ePM documents, but not telephone conversations or other non-ePM documents. For this reason, using *Correspondence* documents in ePM to track each communication that enters or leaves the office is considered good practice. Consulting these archived documents whenever needed to confirm that a specific communication took place adds value to project documentation.

Who Will Use This?

- ✓ Creator: All Roles
- ✓ Submitter: All Roles

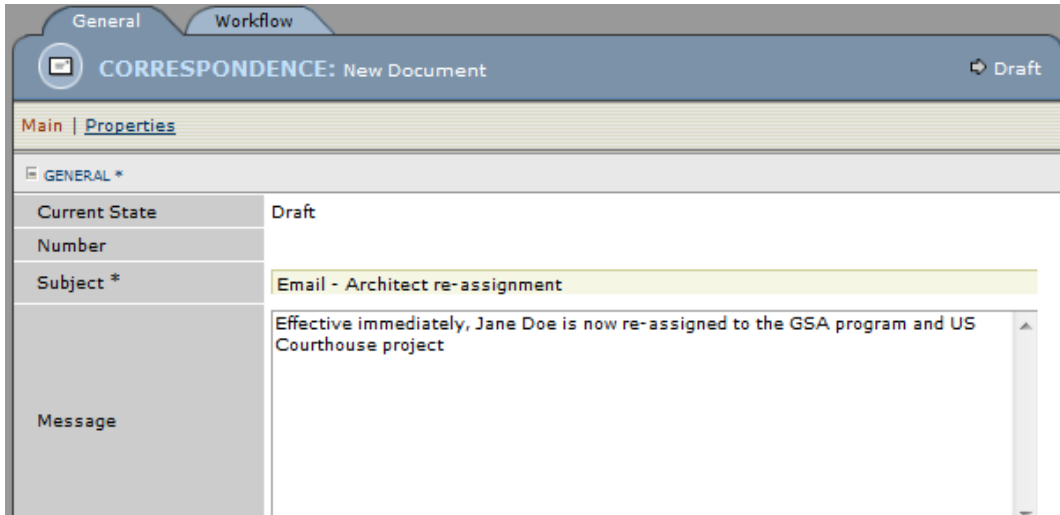
Steps to Documenting Correspondence

1. Log into ePM as a user with the Correspondence Creator security role, and then navigate to the appropriate project.
2. Navigate to PM Tools > Project Management > Correspondence. The Correspondence register displays.
3. Click on the 'New' button in the register view toolbar.

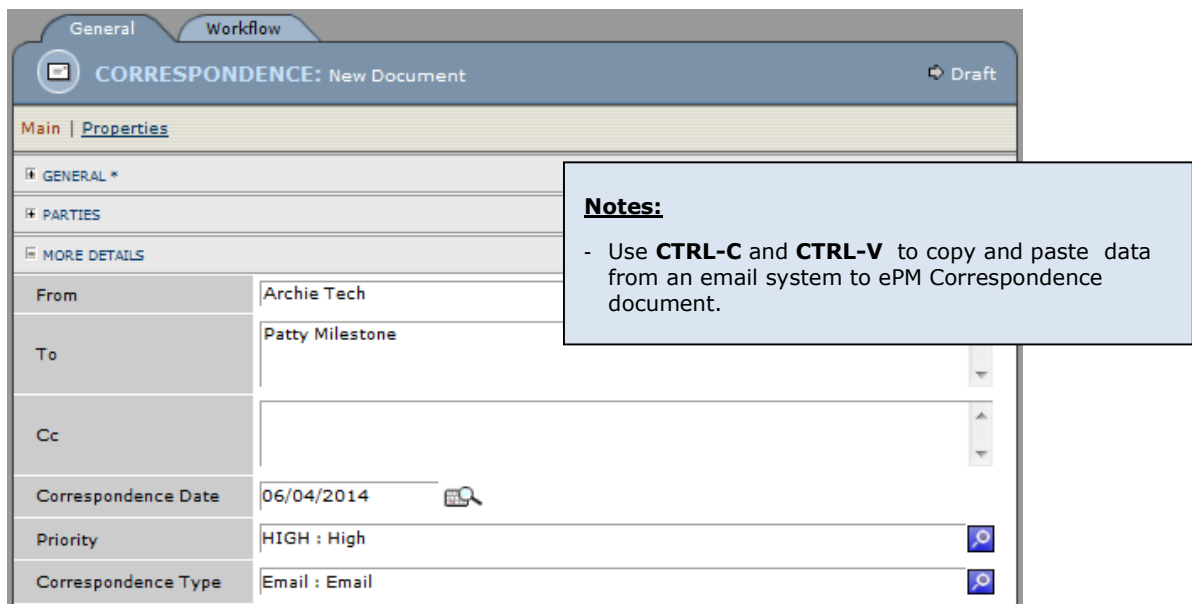
| | | | | | | |
|--------------------------|------------------|---------|----------------|----------------------|-----------------------|------|
| New | Delete | Sharing | Print ▼ | Export | Refresh | Help |
| View | All- By Number ▼ | | | | | |
| <input type="checkbox"/> | Number | ▲ | Subject | Creation Date | Source Company | |

The Correspondence document opens in edit mode.

- To document Correspondence related to an email. Enter the Subject and include details of the email message in the Message section.



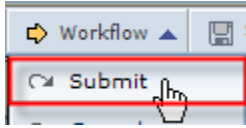
- Document and select the details of the correspondence. Enter the To, From, CC and Date details from the email.



Important: There are two lookups used to classify the Correspondence; Priority and Correspondence Type. Select an item from each lookup.

- Click Save.

7. Select 'Submit' from the Workflow menu. Then select Execute. If successful, ePM displays a Confirmation message showing who received notifications. User can now return to the Correspondence Document or to the Register.



At this point, the document Number, Subject, and Message can no longer be edited.

Tips

- ✓ Required fields are marked with an asterisk.

 - ✓ Use the **'Forward'** button if collaboration is required from other users.

 - ✓ Click on the **Activity Log** tab to view the audit trail of the document.

 - ✓ Clicking the online help button provides generic help related to correspondence, NOT for the specific uses of GSA's Correspondence documents.
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- ✓ To explode or collapse sections in a document, click on the double headed arrow buttons:
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- ✓ Notices with yellow icons require action; blue means a document was forwarded; white means user was cc'd.

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

 - ✓ Correspondence is primarily a "one way" method of communication or documented record. Use RFIs for a more efficient and versatile means to record questions and answers about project information.

 - ✓ Enter a GSA Initiative as necessary.

