



Client Enrichment Series – Q & A



Topic: PBS Customer Dashboard - Reporting Made Easy

Date of Presentation: July 11, 2024

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PBS Customer Dashboard Resources:

View our [July 11 Session Recording](#) Passcode: a1&%6J8t

Visit [PBS Customer Dashboard website](#)

Contact us at pbs.dashboard@gsa.gov

Q1. If I'm already registered with MAX.gov, how do I request access to the Dashboard?

A. If you **do** have a MAX.gov account, just send an email to pbs.dashboard@gsa.gov to request access to your agency's view of the Dashboard and including the following information:

- Full Name
- Your federal agency and bureau name
- Government email address used to create the MAX.gov account in Step 1
- Verify (state) that you have registered your .gov/.mil email address with MAX.gov
- State whether you are a federal government employee or a contractor

If you **do not** have a MAX.gov account:

- Visit <https://login.max.gov>, hit the Register Now button and follow the instructions
- Then Log into the D2D Portal using your MAX.gov credentials at <https://d2d.gsa.gov>
- You must log into the D2D Portal at least once before emailing us at pbs.dashboard@gsa.gov in order for your access credentials to work.

Q2. Does the dashboard limit access to records based on our agency? Or do we have access to ALL information?

A. It limits access based on your email address - so each individual can only view their



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specific information. Example: a user with ssa.gov as their email address, then they will only see SSA information, not IRS, or Courts, or DHS, and so on.

Q3. Our agency has utilized the PBS Customer Dashboard since October to feed active/billing lease data into our internal systems through an ETL data exchange. However, the Dashboard does not show draft or planned leases. Can this data be fed from OASIS into PBS Dashboard?

A. We currently do not provide draft or planning information on the PBS Customer Dashboard - only operational data. We are evaluating including the Client Project Agreement, but that is still in the early planning phase.

Q4. What if our agency is not currently listed in a filter dropdown for a Dashboard tab?

A. It may depend on the tab. Tabs represented on the Dashboard include Prospectus Pipeline, Projects, RWAs, Locations, Occupancy Agreements, Rent and Water Quality. If your agency does not have any prospectus projects in the pipeline, for instance, then no information can be displayed, and your agency will not be listed in the filter drop down.

Q5. If we use a password to log into max.gov for OASIS, can you switch for the dashboard and use a PIV card?

A. Here are the steps provided by OMB Max (maxsupport@max.gov)

Please follow the steps below using Google Chrome or Microsoft Edge to associate your PIV/CAC Card with your MAX account:

1. Close all browsers.
2. Insert your PIV/CAC card in the reader.
3. Open your internet browser and go to <https://login.max.gov/update-piv>
4. Enter your MAX ID (email address) and click Send Validation Code.

Note: Depending on your firewall/network, it may take 20 minutes to receive this email.

5. You will receive a token number to enter in the next window.
6. Type the PIV certificate validation code from the bottom of the PIV Certificate Registration email into the space below your MAX ID.
7. Click the Submit button.

Q6. Is the Dashboard RWA search similar to ones you can do in eRETA?

A. The Dashboard not only provides detailed information at the RWA level, but it provides



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summary details. eRETA is not showing any kind of summary table as it is not a reporting system, but a system designed to enter, modify, approve, and close out the financial aspects of an RWA.

Q7. How do we get access to the various dashboards? I do not seem to have access by default.

- A. PBS Customer Dashboard users must take several steps ([outlined here](#)) to gain access. Access to information will be based on your particular email address and you will only see your agencies/bureau information.

Q8. Do we need to request specific types of access? I've already sent an email but did we need to request certain reports? My focus would be on leasing...

- A. While many types of reports are available on the D2D site - this training session only covers the information on the PBS Customer Dashboard. The tabs on this report only cover:

- Prospectus Pipeline (public information)
- PBS Projects
- RWAs
- Locations
- Occupancy Agreements
- Rent
- Water Quality

You would need to contact the other dashboard owners for more information about other dashboards/reports that you are viewing in your D2D site.

Q9. Why can't OASIS use the expiration of the shell as the expiration date, which could flow over to the dashboard?

- A. We are evaluating the use of the shell rate expiration in the 10 year cycles to report and engage customers on continuing space needs. This is why we are going to separate out the GSA-Leased and GSA-Owned expiration tables into two vs the single table.

Q10. Where do you get your headcount and how many times a year is it updated

- A. The headcount information (personnel count) is taken from OASIS for each OA. The data that migrated from OA Tool to OASIS is still associated with the OA. Going forward it will be the responsibility of the Ordering Official/Non-Approver to update or enter the personnel count. The count can not be updated outside of the OA Approval process. For more information about entering and maintaining the personnel count, please contact



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pbs.oasis@gsa.gov.

Q11. How is the Dashboard Rent tab different from Rent on the Web?

- A. The rent information is similar to Rent on the Web (ROW), but does not require a separate system login. By using the Dashboard, you can have access to more than rent information in an easy to use format. It does not have some of the information available on ROW, including detailed billing adjustment information, FPS Security Charges, preview bill information, and Rent Estimate information.

Q12. Why were the clauses removed from the OAs in OASIS? (It was very useful to know what our BSAC and TI amounts were at the beginning of the occupancy).

- A. For questions about OASIS, please contact pbs.oasis@gsa.gov for more information.

Q13. Does the rent tab only show up to the current fiscal year, or does it show future years for planning/budgeting purposes?

- A. The Dashboard shows the current year, -3 (so right now, 2021, 2022, 2023, and partial year 2024). It does not include any future rental information.

Q14. Will there be a follow up training session, after we have access?

- A. You can find training resources on our PBS Customer Dashboard website - at: <https://www.gsa.gov/pbscustomerdashboard>.

Q15. Where does GSA get the information for "Count of Personnel" and how many times a year is it updated?

- A. The headcount information (personnel count) is taken from OASIS for each OA. The data that migrated from OA Tool to OASIS is still associated with the OA. Going forward, it will be the responsibility of the Ordering Official/Non-Approver to update or enter the personnel count. The count can not be updated outside of the OA Approval process. For more information about entering and maintaining the personnel count, please contact pbs.oasis@gsa.gov.

Q16. For the Rentable Square Feet in OASIS, is the dashboard pulling from location or financial area? The location RSF is not calculating correctly as the RU factor is rounding to 2 decimal places. The financial area under payments has the correct RSF.

- A. We have separated the billing RSF (there is no longer a billing USF) from the assigned square feet (both USF and RSF). The information we are reporting on tabs like location, occupancy, is moving toward the assigned sq ft, and not the billing RSF. For more



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information about the R/U factor and rounding, please contact: pbs.oasis@gsa.gov.

Q17. What is the source of the water quality data?

- A.** The WQ data is sourced from the master water quality tracking sheet provided by the Office of Facilities Management. We use the information provided from FM in the dashboard.

[Q&A File](#)