Client Enrichment Series

PBS Customer Dashboard

Thursday, July 11, 2024

Welcome

PBS Customer Dashboard
July 11, 2024

The presentation will start at 1:00 pm EDT

Note

Phones are automatically muted during the presentation. Submit questions to our presentation team via your Q&A pane and we'll answer as many questions as possible during the presentation.

All questions will be responded to in writing in a formal Q&A document, posted along with the slide deck and session recording, on our website, http://www.gsa.gov/ces

Introductions

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Agenda

01 Introduction

Introducing the Dashboard

- The PBS Customer Dashboard provides access to project and occupancy information for federal agencies with space managed by the Public Buildings Service (PBS) of the GSA.

- Here you'll find current operational information related to GSA-managed occupancies.

- Data in this dashboard can be exported.

What You Will Receive

- Daily data updates

- Reduced manual reporting

- Access to some data points that were hard to obtain in the past

- Consistent, reliable, self-service access to data

- MAX.gov registration for additional security

Current Status

- GSA has recently changed two key systems that provide information to the Dashboard - we moved from ePM to Kahua and from OA Tool to OASIS

- These changes necessitate re-mapping of some data elements. We are in the process of completing this work in the coming weeks

- We will post on the Dashboard when all of the updates have been made

Dashboard can help answer specific questions

Module	Questions it can help answer
PBS Prospectus Pipeline	● Has the capital project been authorized and funded? ● Where can I find the prospectus for a prospectus-level lease?
Projects	● How much am I spending on design vs. moving for this project? ● Who are my PICs for this project?
RWAs	● What are the dollar amounts that have been authorized, obligated, and/or remaining for an RWA? ● Where has work been completed but the finances have not been closed out?
Locations	● Who is my Facility Manager for a specific building? ● What is my Space Type breakout for an Occupancy Agreement?
Occupancies	● How much space do I occupy at the portfolio level, state or city level? ● What are the planning milestone dates for OA Expirations?
Rent	● Where have my rent bills changed month to month and why? ● How has my rent and square footage changed over time?
NEW BONUS CONTENT Water Quality	● *Which buildings that my agency occupies have had testing dates scheduled?* ● *What percent of my buildings have been tested?* *Note: Temporary tab on the DB to share status of GSA's Water Quality Management program status*

02 How to Access and Use the Dashboard

How to Access the Dashboard – Step 1

1. **Register your .gov/.mil email address with MAX.gov**
   a. If you're already registered with MAX.gov, no action needed (proceed to Step 2)
   b. If you're not yet registered, visit https://login.max.gov
      i. Click the green Register Now button in the top-right corner
      ii. Follow the instructions to register with MAX.gov and register your PIV
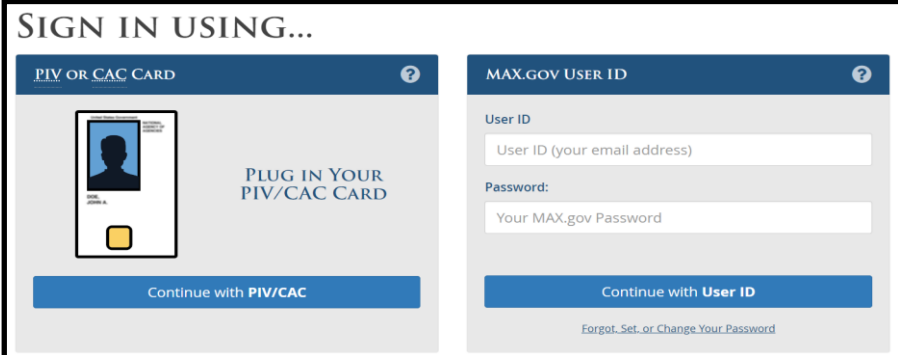
| Login | Manage Your Password | | Don't Have a MAX ID Yet? | Register Now |

OMB MAX.GOV HOMEPAGE

How to Access the Dashboard – Step 2

2. **Log into the D2D Portal using your MAX.gov credentials**
   a. Go to: https://d2d.gsa.gov and click Login at the top right
      i. Option A: Login with PIV/CAC (you may need to enter your PIN)
      ii. Option B: Login with MAX Secure+ SMS Two-Factor with User ID and Password.

   Note: you have to log into the D2D Portal at least once before moving to step 3 in order for access credentials to work.

How to Access the Dashboard – Step 3

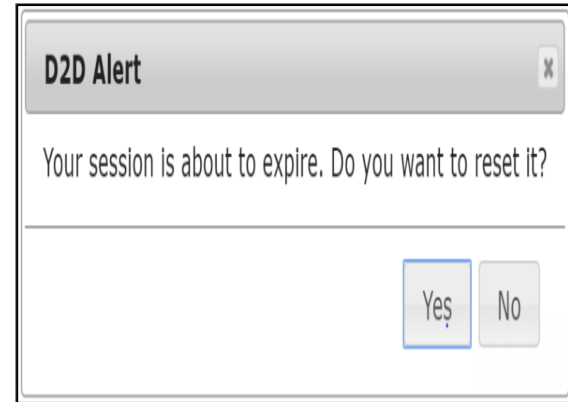3. **Email pbs.dashboard@gsa.gov to request access to your agency's view of the PBS Customer Dashboard**
Your email must include:
   - Full Name
   - Your federal agency and bureau name
   - Government email address used to create the MAX.gov account in Step 1
   - Verify (state) that you have registered your .gov/.mil email address with MAX.gov
   - State whether you are a federal government employee or a contractor

General User Tips

- **Browser Choice**
- **Applying Filters**
- **Map Navigation**
- **Tooltips**
- **Resetting Session**
- **Scroll Bars**

D2D Alert ✕

Your session is about to expire. Do you want to reset it?

Yes   No

03 Dashboard Content

| Welcome and Guidance | Projects | RWAs | Locations | Occupancies | Rent | Water Quality |

GSA PBS Customer Dashboard

The PBS Customer Dashboard provides anytime access to project and occupancy information for federal agencies with space managed by the Public Buildings Service (PBS) of the US General Services Administration (GSA). You will find current operational information on Projects, RWAs, Occupancy Agreements, Locations, and Rent. For more information on the PBS Customer Dashboard, please check out the User Guide, or see below in the PBS Resources section. To view all prospectuses submitted since FY18, click the **PBS Prospectus Pipeline icon**.

PBS Prospectus Pipeline	**Projects**	**RWAs**	**Locations**	**Occupancy Agreements**	**Rent**	**Water Quality**
Summary of Capital Investment and Leasing	Summary and detailed project information	Reimbursable Work Authorizations	Information on your GSA-controlled locations	Final Occupancy Agreements	Multiple years billed rent and square feet	GSAs Water Quality Management

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PBS Prospectus Pipeline

- Original Funding by Fiscal Year

- Authorization by Fiscal Year

- Project Delivery

- Prospectus and Resolution Documents
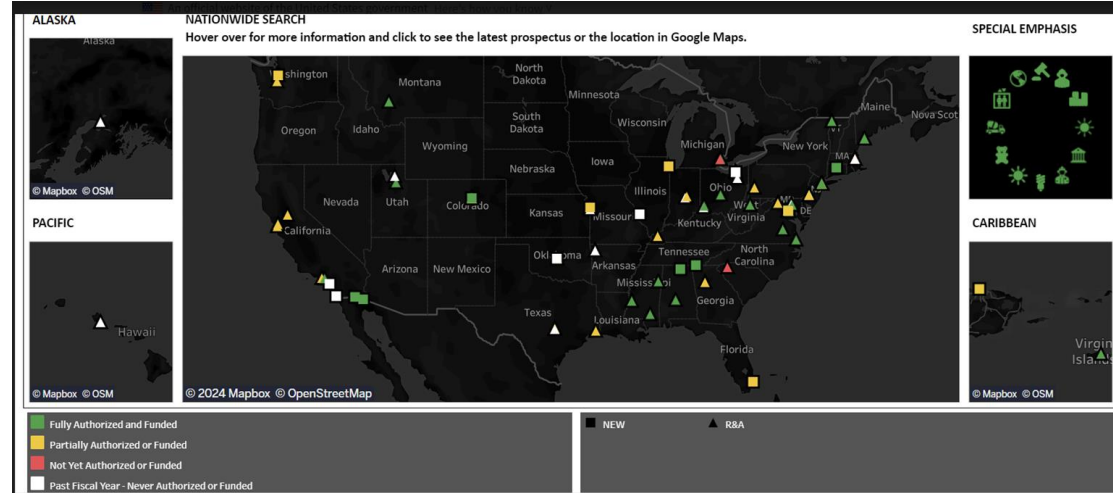
Projects - GSA-Leased and GSA-Owned

Projects

Summary and detailed project information

- View your agency's current projects with GSA
    - Design
    - New Construction
    - Leases
    - Repair & Alteration
    - Special Emphasis Programs
    - RWAs
- Find details of individual projects
    - Project Description
    - Latest Schedule Milestones Achieved
    - Funding

Reimbursable Work Authorizations

RWAs
Reimbursable Work Authorizations

- View your agency's open Reimbursable Work Authorizations
  - A: Standalone project split-funded by PBS and customer
  - B: Project related to PBS prospectus level project
  - F: Small, miscellaneous, routine project or service under $25,000
  - N: Standalone project or service funded completely by customer
  - R: Recurring services or overtime utilities in owned space
- Find description, schedule information, and obligation amounts

Locations (Buildings)

Locations
Information on your GSA-controlled locations

- View your agency's locations
  - Building Details
  - Space Types
  - Occupancy Agreements
- Identify other details
  - Building Type
  - Historic Status
  - CBSA

Occupancy Agreements

Final Occupancy Agreements

- Review a summary of your portfolio with GSA

- View your agency's current, final Occupancy Agreements with GSA and filter by size, location, and bureau.

- Explore the details of individual OAs to find parking counts, square footage, cancellation or termination information, OA effective and expiration dates, and PICs.

Rent

Rent

Multiple years billed rent and square feet

- View your agency's annual or monthly rent by bureau, building, city, state, or by individual OA.

- Compare your agency's rent by month, or by calendar or fiscal year.

- Examine yearly trends in square footage and rent.

GSA's Water Quality Management Program

- View the water quality testing status of all buildings that the customer occupies provided by our Facilities Management branch and our regional facilities managers.

- Download the data for your own use. Sort and filter data to meet your needs.

- For more information about the Water Quality Program please visit gsa.gov/waterquality

- This is a temporary dashboard and will be removed once the program is complete (~December 2024)

04 Downloading from the Dashboard

How to Download from the Dashboard

- Most data in the dashboard can be downloaded as a PDF or .CSV file

- Each dashboard view (Projects, RWAs, Occupancies, Locations, Rent, Water Quality) has a full dataset export which can be downloaded by following the instructions at the top-right of the view. Selected filters will apply to the export.

Instructions to create Rent Standard Export (supporting data file)
1. Apply filters below, if desired (they will apply to the generated report).
2. Click on this box (within the gray dotted lines) to activate the export sheet.
3. Select 'Download' located at footer of the page, followed by 'Crosstab' for an Excel/CSV file.
4. You will know the export sheet has been selected when there are options available to download.
Access the User Guide (from Welcome/Guidance tab) for more export options.

- It is important to note that when you click on the instruction box, nothing will happen. Click the box, and go to the Download button at the bottom right and select Crosstab. If the Crosstab selection is grayed out, just wait a few more seconds, and try again.

Downloading from the Dashboard, con't

- Other sections of the dashboard are available for download including summary tables, lists of specific types of information (ie. RWAs that are substantially complete, but not closed, billed rent by fiscal year, visuals of the dashboard
- Detailed instructions are available in the user guide

05 Resources

Resources and Support

1

User Guide
Available at gsa.gov/pbscustomerdashboard this guide provides details of the content and general how to in regards to navigation, download of data, and use. It also provides a great many links to general PBS information including links to pricing policy, fact sheets, information on the planning and requirements process, so on and on.

2

Client Enrichment Series
Our Client Enrichment Series provides two CES sessions - this one (will be posted within 7 days of this session) and also the prior session from December 2019 and a follow up session on October of 2020.

3

National Account Lead
Your national account lead can assist in providing a general overview, but can also request an individual training session. These sessions are generally set up with specific questions and can be tailored to meet your needs. They are not generally just general overviews.

4

Regional Account Lead
Much like our national account leads, your regional account leads can assist with resources and training. Each region generally has a POC to assist with the dashboard and can answer specific questions.

5

Water Quality Specific User Guide
Since the WQ tab is a temporary and has a few specific instructions, we have a separate quick reference guide available on the gsa.gov/pbscustomerdashboard site.

What questions do you have…please use the Q&A Pod

Thank You

Join us for these upcoming Client Enrichment Series events…

Take Charge With GSA's EVSE Solutions
Tuesday, July 30th 1pm-2:30pm EDT
Register Today!

Water Quality Management in GSA Facilities
Tuesday, August 6th 11am-12:30pm EDT
Register Today!

**Workplace Innovation Lab -
Insights and Applications**
Thursday, August 15th 1pm-2:30pm EDT
Register Today!

Watch ▶ YouTube **class recordings**
visit **www.gsa.gov/ces**
email **client enrichment series@gsa.gov**