



GSA Public Buildings Service

OASIS Customer Approval Workflow

Customer Training

Thursday, June 13, 2024

Introductions



Deann Salazar

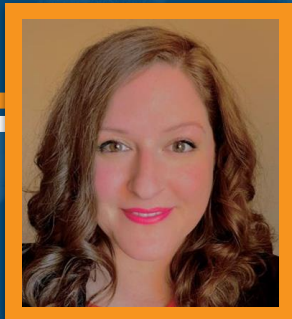
National Rent Billing Lead

OASIS Project Manager

Pricing Policy and Tools Division

Office of Portfolio Management and Customer Engagement

GSA Public Buildings Service - National Office



Arissa Soper

National Rent Billing Office

OASIS Deputy Project Manager

Pricing Policy and Tools Division

Office of Portfolio Management and Customer Engagement

GSA Public Buildings Service - National Office

OASIS Reconfiguration

*The presentation will start
at 10:30 am EDT*

Please Note

Phones are automatically muted during the presentation.

Please submit your questions via the Q&A pod and our team will answer as many questions as possible during the presentation.

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, [PBS OASIS](#)

Audience Poll Question 1

What is your role in the PBS OASIS program?

(include pending role assignment)

- A. Agency CIAO (Customer Internal Authorizing Official)
- B. OASIS Ordering Official
- C. OASIS Non-Approver (new role)
- D. I'm not quite sure??
- E. I'm just here for general knowledge

If you can not see the poll pop-up, please respond in the "Chat" pane

Agenda

01 Customer User Roles

02 Navigating the Customer Portal and Working with Queries

03 How to Approve or Reject an OA Parts 1 and 2

04 Viewing the OA Approval and OA Summary Report Changes

05 General Q&A



01

Customer User Roles Explained

Customer Roles – Ordering Official and Non-Approver

- **Ordering Official**

- **Review all OA data associated with assigned AB Code(s)**
 - **OAs that are Billing or with the Agency for Approval**
- **Submit a Billing Question**
- **Submit a Release of Space**
- **Request Clarification on an OA Approval**
- **Approve or Reject an OA**

- **Non-Approver**

- **Everything above EXCEPT approve or reject an OA**

Customer User Roles

— Designated by Each Agency

- Determined by Agency's Customer Internal Authorizing Official (CIAO)

— Changes to Roles or New Users

- One role allowed per user
- Follow the System Access process



GSA PBS Occupancy Agreement Space Inventory System (OASIS)

Customer Access Request Form

Please Note - before an individual can access OASIS, they must have a valid account in MAX.GOV.

- Complete sections 1, 2, & 3 and send to pbsOASISaccounts@gsa.gov.
- If you need to verify your CIAO for section 3, email pbsOASISaccounts@gsa.gov.

1) Requester

Email Address¹:

Name:

Agency:

Agency Bureau Code(s)²:

Requested Role (required)

Ordering Official

Non-Approver

Ordering officials can approve or reject OAs.
Non-approvers can not approve or reject.

¹Email must end in .gov or .mil, and must match your max.gov email address.

²Agency Bureau code is a 4 digit numerical code associated with an agency bureau. An inclusive list of active codes can be found [here](#)

By signing below, I acknowledge that I have read, understood and agree to abide by all GSA security policies, standards and procedures specified [here](#). Should I leave my agency or transfer to another department, I agree to immediately notify pbsOASISaccounts@gsa.gov.

Requester Signature:

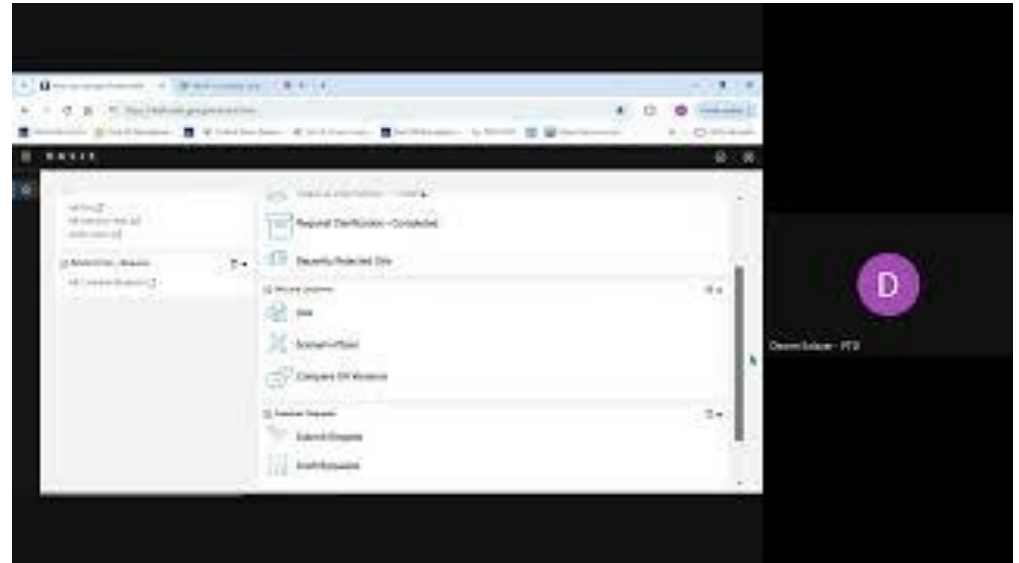
System Access

- Must log in every 90 days or account will be deactivated
- Deactivated users can email pbsoasisaccounts@gsa.gov and request reinstatement
- Active User Query (Added to Customer Portal)

02 Navigating the Customer Portal and Working with Queries

OASIS

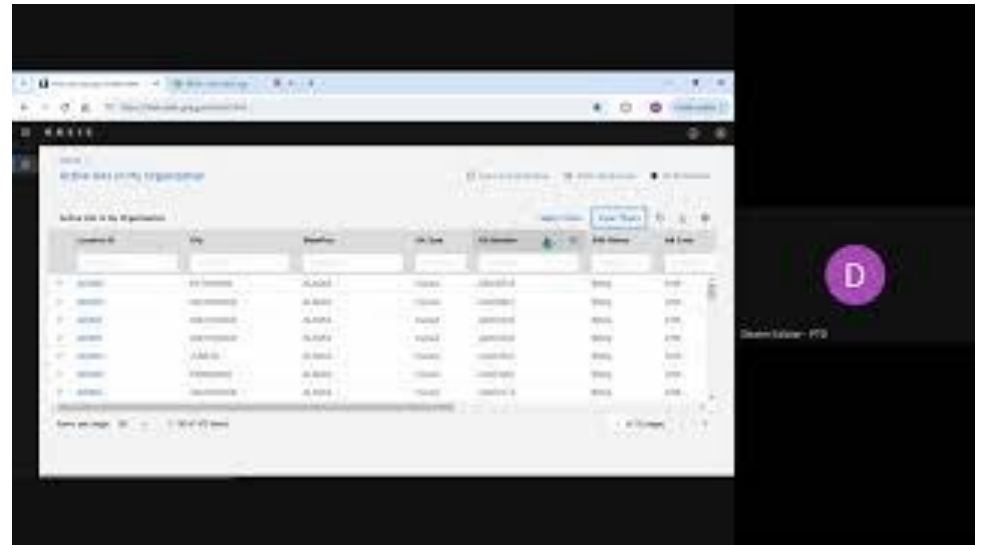
Navigating the Customer Portal



[Watch the Customer Portal Overview Video](#)

OASIS

Working with Queries



[Watch the Working With Queries in OASIS video](#)

Navigating the Customer Portal and Working with Queries Q&A

Pause for Questions

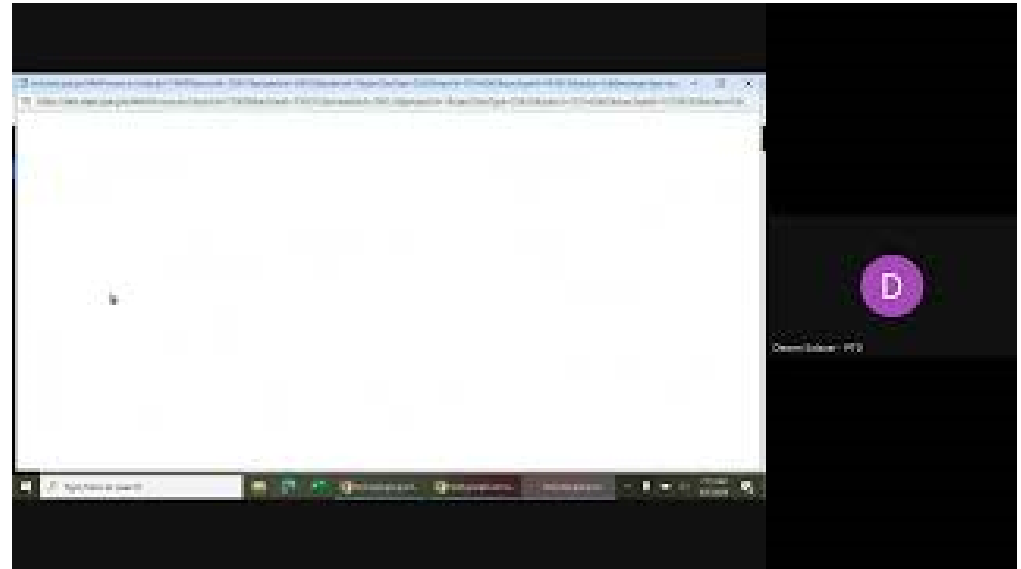
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03

How to Approve or Reject OAs

OASIS

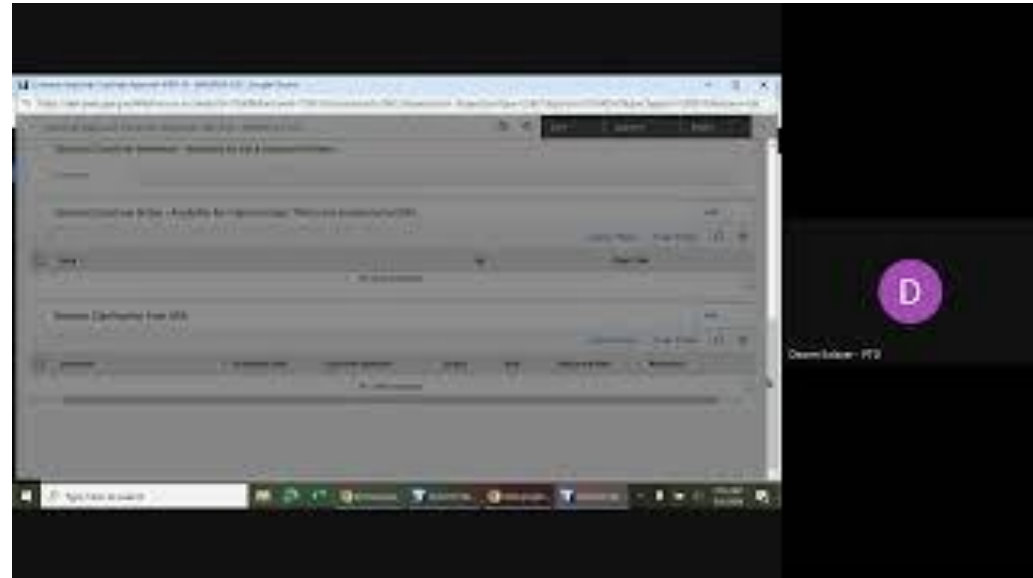
How to Approve OAs Part 1



[Watch the How to Approve or Reject OAs Part 1 video](#)

OASIS

How to Approve OAs Part 2



[Watch the How to Approve or Reject OAs Part 2 video](#)

Notification Emails

- **Ordering Officials will receive emails alerting them to the following actions:**
 - **An OA is ready for approval**
 - **An OA has been rejected**
 - **A Request for Clarification has been completed by GSA**
- **Your agency firewall may block these emails**
 - **Contact your local IT support if you do not receive an email under the above circumstances**
- **Inactive users will not receive emails**

How to Approve or Reject OAs Q&A

Pause for Questions

UNITED STATES COURTHOUSE

04 Viewing OA Approvals and Changes to the OA Summary Report

Viewing an OA Approval in the OA Notification Tab

- An OA Approval (or rejection) viewable for each OA record
 - Notifications Tab
 - Upper Section shows post June 10
 - Previous Approvals archived at bottom of screen
- Notes and Document Tabs will have the Approved OA Summary Report

OA Summary Report Improvements

— 2 NEW fields added to Payment Schedules

- Pending End Date- Date a payment line will terminate if ending prematurely
- Status- Current state of payment schedule
 - Scheduled Billing or Finalized for Billing
 - Pending- Proposed Billing Line

Viewing the Approval and OA Summary

The screenshot displays the OASIS web application interface. The browser address bar shows the URL <https://test.oasis.gsa.gov/index.html>. The application header includes the OASIS logo and navigation icons. The main content area is titled "Home" and features several sections:

- Reminders - Customer:** Leased OAs Expiring in 18 Months, Owned OAs Vacate Date in 18 Months, All OA Customer Reviews.
- Related Links - OAs and Locations:** All OAs, All Scenario Plans, Active Users.
- Related Links - Requests:** All Customer Requests.
- Security Notation**
- Approval Requests:**
 - OAs Needing Approval
 - Request Clarification - Pending
 - Request Clarification - Completed
 - Recently Rejected OAs
- OAs and Locations:**
 - OAs
 - Scenario Plans
 - Compare OA Versions

A Google Chrome notification is visible in the bottom right corner of the application area, stating: "You're presenting to everyone. Click here to return to the video call when you're ready to stop presenting. meet.google.com".

Deann Salazar - PTD



General Q&A

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Directing Questions

- **Request Clarification- Question about OA with you for review**
- **Submit a Billing Change- Question about OA/Billing for a specific OA**
- **PBS OASIS Inbox- General OASIS system question**
- **Contact your regional project teams with questions prior to OA creation**

Audience Poll Question 2

After attending today's session, how much more comfortable do you feel about navigating the new Customer Approval Workflow in PBS OASIS?

- A. Significantly more comfortable
- B. Somewhat more comfortable
- C. Not much more comfortable, I still have many unanswered questions...

If you can not see the poll pop-up, please respond in the "Chat" pane

OASIS Resources

Support, Self-Service Tools and FAQs

- Website: www.gsa.gov/pbsoasis

Training Videos (New)

- OA Module Overview
- Approve or Reject OAs
- Submit Billing Questions
- Compare OA Versions
- Working with Queries

User Guide v 2.0

- Requesting OASIS Access
[Customer Access Form](#)
- User Account Reactivation
Email: pbsoasisaccounts@gsa.gov
- General OASIS System Questions
Email: PBSOasis@gsa.gov
- Customer Communication
[OASIS Bulletin](#)

