



U.S. General Services Administration  
Public Buildings Service  
Office of Portfolio Management and Customer Engagement  
PBS Customer Dashboard

# PBS Customer Dashboard User Guide

**The PBS Customer Dashboard** is an interactive site with project and occupancy information for federal agencies with space managed by the Public Buildings Service (PBS) of the U.S. General Services Administration (GSA).

The dashboard provides 24/7 access to current operational views of each agency's GSA-managed occupancies, Reimbursable Work Authorizations (RWA), and projects of all types, with the most recent status and financial information available.

PBS customers can use this dashboard to view the status and details of individual Occupancy Agreements (OA), RWAs, and projects (leased space, repair and alteration, new construction, design, and many more). The dashboard is designed for portfolio and transactional views, with a variety of filtering capabilities (geographic, size, status, and funding levels) for diverse use by a variety of users.

The dashboard resides on GSA's D2D (Data to Decisions) web portal, <https://D2D.gsa.gov>.

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# How to Access and Use the Dashboard

## Gaining Access (non-GSA users)

### 1. Register your .gov/.mil email address with MAX.gov

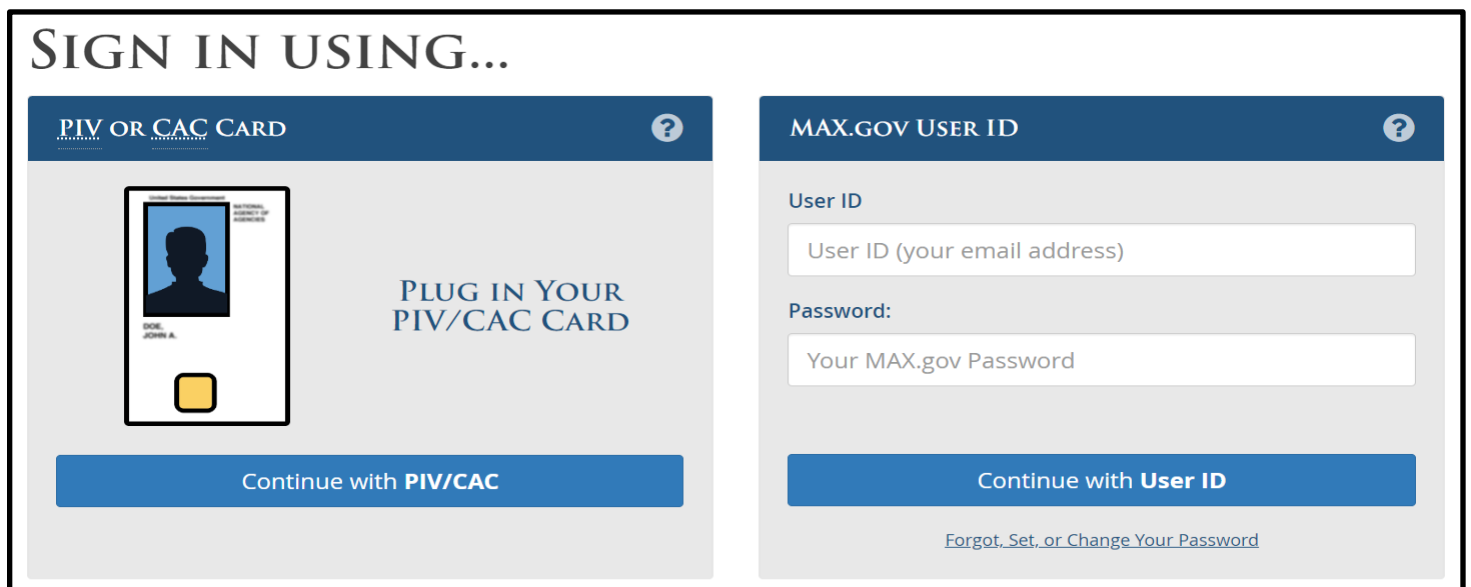
- a. If you're already registered with MAX.gov, no action needed (proceed to Step 2)
- b. If you're not yet registered, visit <https://login.max.gov>
  - i. Click the green Register Now button in the top-right corner
  - ii. Follow the instructions to register with MAX.gov and register your PIV card to enable MAX.gov PIV login



### 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.*



### 3. Email [pbs.dashboard@gsa.gov](mailto: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

The PBS Dashboard Team will verify your access request with your agency. Requests for access are processed on the 15th & 30th of each month.

*Note: this step is not required if you received a welcome email from PBS Dashboard team - you already have access!*

### 4. Once you've received an access approval email from the PBS Dashboard team, login to <https://D2D.gsa.gov/report/pbs-customer-dashboard>

You may also Search for "PBS Customer Dashboard"

*Please do not try and access the dashboard until you receive confirmation that you have been granted access.*

## Gaining Access (GSA users)

### 1. Register your gsa.gov email address with MAX.gov

- If you're already registered with MAX.gov, no action needed (proceed to Step 2)
- If you're not yet registered, visit <https://login.max.gov>
  - Click the green Register Now button in the top-right corner
  - Follow the instructions to register with MAX.gov and register your PIV card to enable MAX.gov PIV login

Don't Have a MAX ID Yet?

**Register Now**

### 2. Log into the D2D Portal using your MAX.gov credentials

- 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



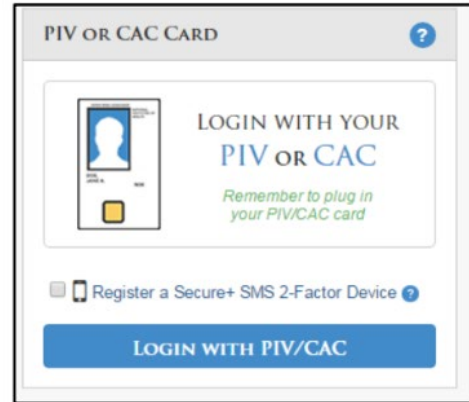
MAX Secure+ SMS TWO-FACTOR

User ID ☐ Set a Personal Username

Password [Forgot, Set, or Change Your Password?](#)

☒ Use MAX Secure+ SMS 2-Factor (BETA) ?

**LOGIN WITH USER ID AND SMS**



PIV OR CAC CARD

LOGIN WITH YOUR  
**PIV OR CAC**

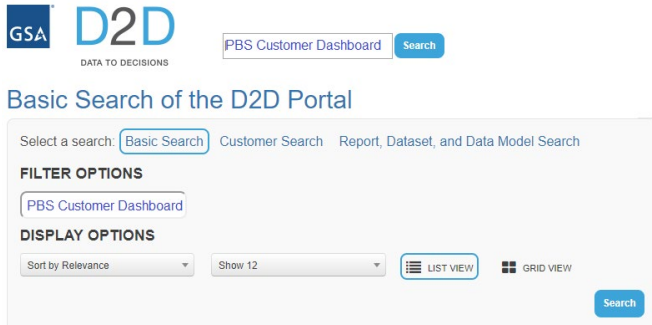
*Remember to plug in  
your PIV/CAC card*

☐ Register a Secure+ SMS 2-Factor Device ?

**LOGIN WITH PIV/CAC**

3. Login using this link: <https://D2D.gsa.gov/report/pbs-customer-dashboard>

You may also Search for “PBS Customer Dashboard”



GSA **D2D**  
DATA TO DECISIONS

PBS Customer Dashboard

Basic Search of the D2D Portal

Select a search:  Customer Search Report, Dataset, and Data Model Search

**FILTER OPTIONS**

**DISPLAY OPTIONS**

Sort by Relevance Show 12



**PBS CUSTOMER DASHBOARD**

The PBS Customer Dashboard is a web-based interactive database with project and occupancy information for federal agencies with space managed by the Public Buildings Service (PBS) of the U.S. General Services Administration (GSA).

Report 

## General User Tips

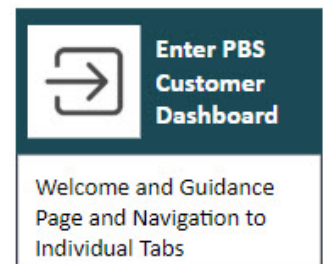
### Browser Choice

- The Dashboard was created and tested using Google Chrome. Most GSA users use Chrome with high levels of success.
- Some agencies have better results with Microsoft Edge if Chrome is not an option. While working to resolve download issues in particular, the team found that Edge performs as well as Chrome.
- Internet Explorer is your final choice. There are several known issues with IE, in particular the GSA team and some customers have reported issues with appearance and functionality, and also download capabilities.
- Any other browsers have not been tested by the GSA team, so performance is not guaranteed nor can we generally troubleshoot issues, since we do not have the ability to use other browsers.

### Logging In

To login to the PBS Customer Dashboard, go to: <https://d2d.gsa.gov/report/pbs-customer-dashboard> and log in to D2D. You will enter the dashboard via the landing page by clicking on the entry image.

Once you enter the dashboard, you will land on the Welcome and Guidance page. This page has two sections, navigation on the top, and Resources on the bottom.



#### 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.



#### PBS Resources

PBS Customer Dashboard: <https://www.gsa.gov/pbscustomerdashboard>

PBS Resource Fact Sheets: <https://www.gsa.gov/pbsfactsheets>

PBS Pricing Desk Guide: <https://www.gsa.gov/rentpricingpolicy>

Reimbursable Services Program: <https://www.gsa.gov/rwa>

#### PBS National Offices

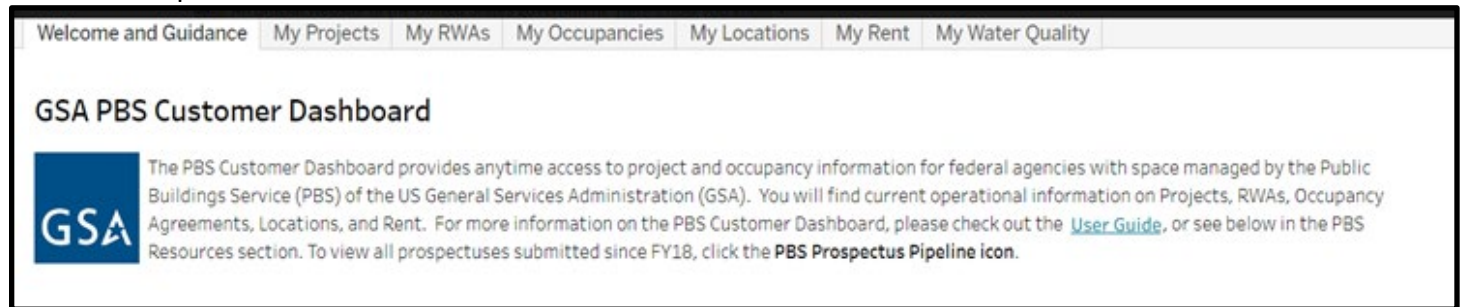
Office of Portfolio Management and Customer Engagement: <https://www.gsa.gov/porfoliomangement>

Office of Design and Construction: <https://www.gsa.gov/newconstruction>

Office of Leasing: <https://www.gsa.gov/leasing>

Office of Facilities Management: <https://www.gsa.gov/facilitiesmanagement>

From the landing page and once in the Dashboard, you can also navigate between sections by using the tabs across the top.

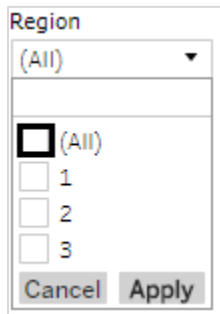


Under the Navigation there are several Resources linked for further information and contact email address.



## Applying Filters

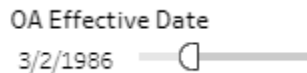
When you open the dashboard, you are looking at *all* of your data, unfiltered. To select the appropriate data, use filters. There are two general kinds of filters: Checkbox filters OR Slider Filters



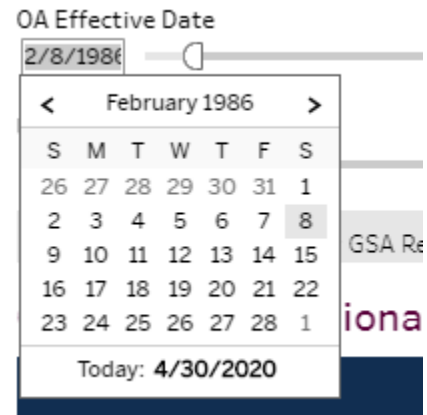
A filter interface for 'Region'. It features a dropdown menu currently set to '(All)'. Below the dropdown are three checkboxes labeled '1', '2', and '3'. At the bottom are 'Cancel' and 'Apply' buttons.

**Checkbox Filters** are multi select and you can choose as many or as few to show the data. Be sure and click "Apply".

**Slider Filters** can be used in two ways: You can click into the ends where the data is, and type in the range or use the calendar to pick a start and/or end. You can also slide the slider right or left to narrow or expand the ranges of data.



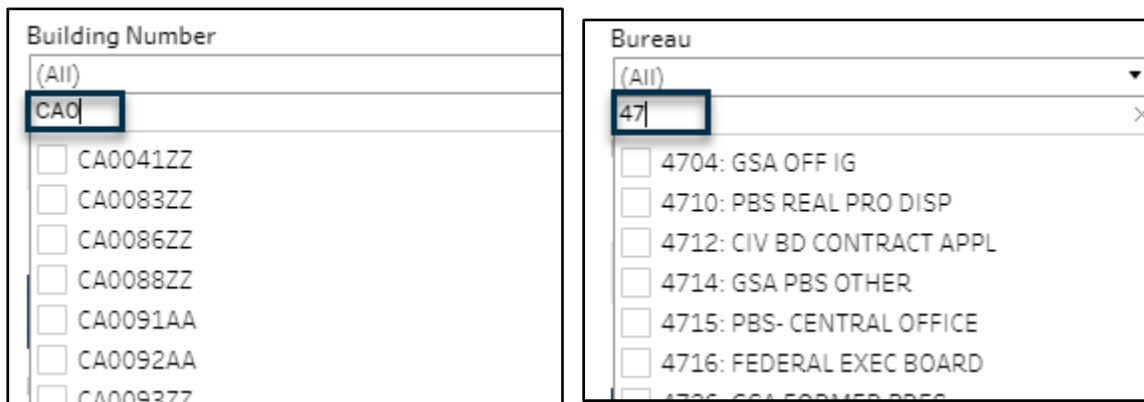
A slider filter for 'OA Effective Date'. The current value is '3/2/1986'. A calendar icon is visible to the right of the slider.



A calendar interface for 'OA Effective Date'. It shows 'February 1986' with a grid of days. The date '2/8/1986' is selected. A 'Today: 4/30/2020' indicator is at the bottom.

### Most Filters Contain a Search Box to Type in Desired Filters (Find a City, Bureau or POC Name)

Directly above the check boxes in all multi-select pick-list filters (like this one below), there is an open text search box where you can type the name of the filter you'd like to apply, such as a bureau, a POC, or a city.

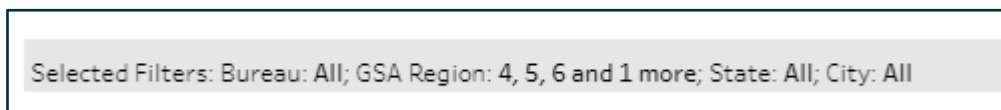


Two filter pick-lists. The 'Building Number' filter has a search box containing 'CA0' and a list of options including CA0041ZZ, CA0083ZZ, CA0086ZZ, CA0088ZZ, CA0091AA, CA0092AA, and CA0093ZZ. The 'Bureau' filter has a search box containing '47' and a list of options including 4704: GSA OFF IG, 4710: PBS REAL PRO DISP, 4712: CIV BD CONTRACT APPL, 4714: GSA PBS OTHER, 4715: PBS- CENTRAL OFFICE, and 4716: FEDERAL EXEC BOARD.

### Filters You've Applied are shown in **Selected Filters** Listed Below the Filters Grouping

To verify other filters you've selected, such as building names or lifecycle phases, you'll need to click on the filter and scroll to see which boxes are checked.

Filters that have been applied show at the bottom of the filters section in the gray bar.



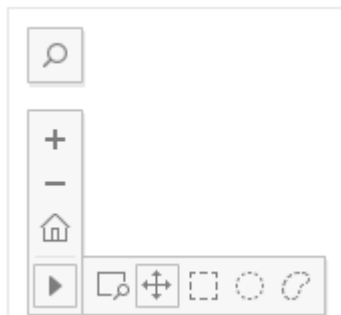
A gray bar displaying the text: 'Selected Filters: Bureau: All; GSA Region: 4, 5, 6 and 1 more; State: All; City: All'.

### If wording is cut off and you see '...', hover over the wording to see the full word or phrase

If you see "... " after a word, phrase, or name, the full text is cut off. To view the additional text, just hover your mouse over the cut-off wording and the full text will appear in a floater box.

1632 - OFFICE OF FEDERAL CONTRACT COMPLIANCE PROG..	1	MA01
1632 - OFFICE OF FEDERAL CONTRACT COMPLIANCE PROGRAMS		

## Map Navigation



Map navigation tools are available when you hover over a map. Click on the bottom right arrow to expand the tools available for use on a map. You can also zoom in and out using the +/- buttons.



**Home Function:** If you have zoomed in, zoomed out, panned, selected or made changes to your view of the map, to reset your view, click on Home.



**Zoom to a Specific Area:** To zoom in to a specific area of the view, click the Zoom Area tool button on the view toolbar, and then drag to create the zoom area. If the view toolbar is hidden, hold down Ctrl + Shift (Command-Shift on Mac) to use the Zoom Area tool.



**Pan Tool:** To Pan, do one of the following. Hold down Shift, and then drag across the view. Or on the view toolbar, hover over the arrow, select the Pan Tool and then click and drag across the view.



**Rectangular Selection Tool:** The Rectangular tool selects marks within a rectangular shape. To use the Rectangular tool, hover over the arrow on the view toolbar, click the Rectangular tool button, and then click and drag across the view.

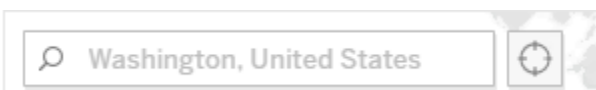


**Radial Selection Tool:** The Radial tool selects marks within a circular area. To use the Radial tool, hover over the arrow on the view toolbar, click the Radial tool button, and then click and drag across the view.



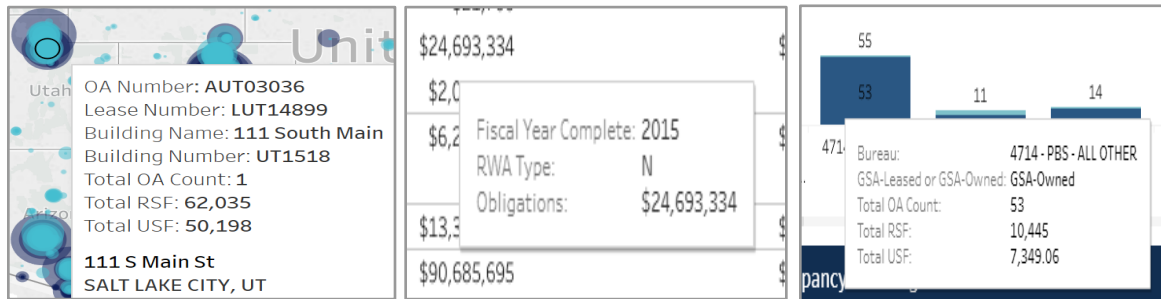
**Lasso Selection Tool:** With the Lasso tool, you can select multiple marks by drawing a freehand shape around them. This tool is useful when you want to include only certain marks, and exclude others around them. To use the Lasso tool, hover over the arrow on the view toolbar, click the Lasso tool button, and then draw a freehand shape around the marks you want to select.

You can also search the map for a specific location using the Search box at the top left of the map. Just type in a city or state and the map will show you that location. From there, you can zoom in and out to find out more details about that area.



## Tooltips

Individual pieces of graphs, maps or diagrams show details when you hover over using a tool tip. If you hover over an element in the dashboard, a tool tip will often show summary and individual details related to that item. This includes maps with details of the location and occupancy; charts will show additional details related to the information, including summary square feet in addition to counts; details from summary tables to make the information easier to read.



## Resetting Session

If the D2D site asks you if you want to reset your session, click Yes - your filters will remain. The filters you've applied will not reset; only the time clock on your login will reset. Any filters you applied will remain when you click Yes to reset.

**D2D Alert** ×

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

# Content Guide

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## Scope of the Dashboard

The dashboard currently has five tabs or views of data available:

<b>Projects</b>	View your agency's current projects with GSA, for leases or construction, to space consolidation or design projects. Compare project counts by type, funding amount, size, location and current project lifecycle phase. Find details of individual projects including team members and POCs, funding obligations and balance, and latest schedule milestones achieved.
<b>RWAs</b>	View your agency's open Reimbursable Work Authorizations (RWAs), types A, B, F, N and R. Find overall obligation amounts and remaining balances per RWA type, see which RWAs are substantially complete but not financially closed, and review trends in RWA acceptance throughout 3 prior fiscal years. View details of individual RWAs including financial and funding information, project descriptions, POCs, and primary worksite.
<b>Occupancies</b>	View your agency's current, final Occupancy Agreements with GSA and filter by size, location, and bureau. Identify upcoming occupancy planning activities based on due dates for strategic and technical requirements for expiring OAs. Explore the details of individual OAs to find parking counts, square footage, cancellation or termination information, OA effective and expiration dates, and POCs.
<b>Locations</b>	View your agency's locations, including building details, space types, and lists of OAs for each location. You can also identify building type, historic status, CBSA, and other important building/location information.
<b>Rent</b>	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.
<b>PBS Prospectus Pipeline</b>	View the approval, funding and project delivery status of all GSA prospectus-level design, construction and lease projects submitted to Congress since FY 2018.
<b>Water Quality</b>	View your agency's scheduled water quality testing dates and results for all federally-owned and leased locations where your agency has occupancy.

If you would like a copy of the full data dictionary, please email [pbs.dashboard@gsa.gov](mailto:pbs.dashboard@gsa.gov) and request a pdf copy.

# Projects

## Project Types

There are 3 major categories of Project Types in the customer dashboard

1. Lease Action Project Types
2. RWA/RETA-only Project Types
3. Kahua Projects Types (all other Projects)

Called *Kahua projects* since they are tracked in PBS' Kahua project management system

- Design Only
- Disaster Supplemental Funding
- Energy/Water Project
- Fire and Life Safety Project
- Furniture, Fixtures and Equipment (FF&E)
- Judicial Security Project
- Lease Procurement
- New Construction
- Non-Space Projects

Defining the relationship between RWAs and Projects

- RWA/RETA-only projects are RWA standalone projects which are tracked only in GSA's RETA system and are not tracked in GSA's Kahua system. The distinction is made in the dashboard due to the availability of some data in the RETA system vs. the Kahua system.
- An RWA can be a standalone project, or it can be a segment of work within a larger Lease Action or Kahua project. Either way, the RWA represents a scope of work, and it also represents a funding mechanism for that scope. RWAs for standalone projects are the primary (only) funding mechanism. RWAs which are a segment of a Lease Action or Kahua project may be one of several funding sources for that project.
- RWA/RETA-only projects in Projects are active, so you will also see them in Reimbursable view. An RWA which is a segment of a Lease Action or an Kahua project will not show in RWAs if it is a completed, closed RWA.

## Project Financials

PBS Projects are often funded through multiple sources, with a Primary Funding Type assigned based on the source of the majority of project funding. GSA uses standard Budget Activity (BA) Codes, a two-character code which represents a program area to which funds are allocated.

- The primary funding type for **Lease Action project types** is Rental of Space (BA53)
- The primary (only) funding type for **RWA only project types** is Reimbursable Work Authorization (BA80)
- **Kahua projects** can be associated with a variety of funding types, and may often be mixed funding projects, GSA funding and RWA funding.

**How to Read the Project Financials Chart** in Project Details section:

Project Financials									
Funding Source	ID	Description	Funding Bureau	Effective Date	Expiration Date	Last Updated	Funding, Authorized Amount	Amount Obligated	Remaining Balance
RWA	N1533987	Rooms 5215 - replace door hard..	04704 : GENERAL SERVICES ADMI..	10/1/2015	9/30/2019	7/7/2017	\$23,834	\$21,162	\$2,672
Grand Total							\$23,834	\$21,162	\$2,672

- **Funding Source:** Budget Activity code or short-description of the source of authorized funding
- **ID:** RWA # for BA80 (RWA) funding, or Project Control Number (PCN) # for BA54/55/61/etc. funding
- **Description:** Brief description of the funding source, type or scope of what is being funded
- **Funding Bureau:** Bureau which is financing the authorized amount on the relevant funding line
- **Last Updated:** Date the funding information was last updated in a source system
- **Funding, Authorized Amount:** Authorized funding amount, either from the customer via RWA or from GSA
- **Amount Obligated:** Dollar amount of funding obligated via contract for specified work
- **Remaining Balance:** Authorized amount unobligated

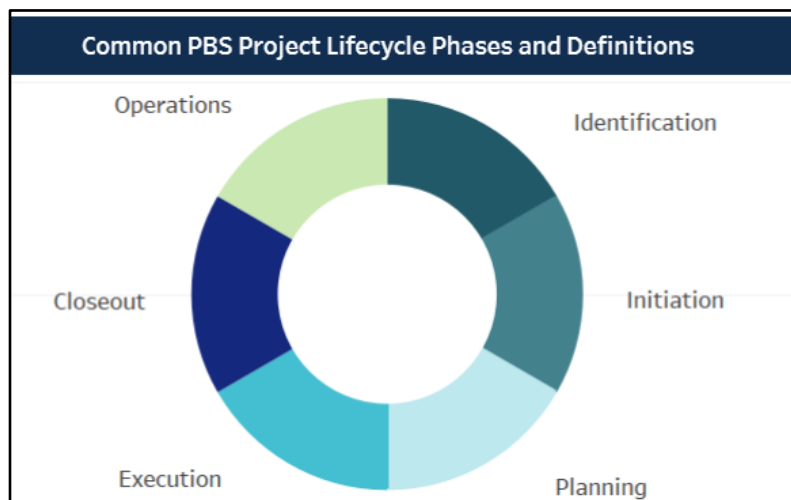
#### Additional Notes: Blank Data Elements

- A blank field typically means the data is not available in the source system
- Obligations may show on multiple lines and may not contain all details available

Project Financials									
Funding Source	ID	Description	Funding Bureau	Effective Date	Expiration Date	Last Updated	Funding, Authorized Amount	Amount Obligated	Remaining Balance
Multiple	RVA00279	-	-	-	-	-		\$247,168	
		2018_BA55_R3_VA0062ZZ_Alt..	4700 : General Services Administr..	-	-	8/24/2018	\$11,677,000		
	RVA00397	-	-	-	-	-		\$372,915	
	RVA00448	-	-	-	-	-		\$111,804	
Grand Total							\$11,677,000	\$731,887	

- Remaining Balance may be blank because of the disassociation described above.
  - To find the Remaining Balance in a chart like the one above, click anywhere in the financial chart, select Download in the footer, followed by Crosstab, to export a .CSV version of the chart. Open the export in Excel and subtract the obligated amounts from authorized amounts to calculate remaining balance.

#### Project Lifecycle Phases



You will see a Current Lifecycle Phase applied to all of your project views to assist with categorizing the status of your information. PBS has established a common set of Lifecycle Phases that all projects types fit into.

A project has entered a specific Lifecycle Phase as soon as the first schedule milestone within that phase has been completed.

**Identification Phase includes** programmatic planning, summary needs interview, summary requirements developed, project parameters defined, utilization rate considered, Client Project Agreement developed, business decision to proceed determined

**Initiation Phase includes** validation of project summary requirements, initial risk determined, project charter developed, project sponsor and manager assigned, preliminary project budget and schedule discussed

**Planning Phase includes** development of project management and communications plans, detailed needs interview, detailed requirements developed, utilization rate decisions, project budget and schedule finalized, Reimbursable Work Authorizations submitted / accepted

**Execution Phase includes** acquisition, design, construction

**Closeout Phase includes** Reimbursable Work Authorization closeout, contract(s) closeout, finalize Occupancy Agreement for rent start, punch list closeout, property management transition

**Operations Phase** indicates project is complete, the space operational and the space and OA are in maintenance phases

## Reimbursable Work Authorizations (RWA)

Reimbursable Work Authorizations (RWAs) are established to capture and bill PBS customers the cost of altering, renovating, repairing, or providing services in spaces managed by GSA over and above the basic operations financed through Rent.

The My RWAs tab contains all RWAs that are Open, and that are Substantially Complete, but NOT financially closed. This data set provides an operational view for current, outstanding financial agreements with PBS.

The Summary section provides a quick overview of the data set, as well as a reference guide to RWA Types.

### RWAs - National Summary

Open RWAs						RWA Type Definitions	
RWA Type	Number of RWAs	Authorized Amount	Obligated	Remaining Balance	Billed to RWA		
A	95	\$131,216,725	\$68,497,534	\$62,719,192	\$51,646,370	A: Standalone project split-funded by PBS and customer (example: Construction and/or design services in federal space)	
B	144	\$864,823,590	\$662,834,462	\$201,989,128	\$603,214,314	B: Project related to PBS prospectus level project that is split funded by PBS and customer (example: Tenant-funded work associated with a PBS prospectus project)	
F	507	\$13,020,430	\$4,926,792	\$8,093,638	\$2,404,349	F: Small, miscellaneous, routine project or service, which cannot exceed \$25,000 per transaction and \$250,000 total (example: changing door knobs or key locks)	
N	8,655	\$5,777,912,536	\$3,499,820,795	\$2,278,091,741	\$2,330,668,660	N: Standalone project or service funded completely by customer (examples: space changes, overtime utilities in leased space)	
R	2,415	\$161,082,405	\$60,346,958	\$100,735,447	\$132,812,840	R: Recurring services or overtime utilities in owned space	
Total	11,816	\$6,948,055,687	\$4,296,426,541	\$2,651,629,146	\$3,120,746,533		

\*This chart includes all RWAs that are open, including those that are substantially complete, but not financially closed.

The following two sections contain lists of RWAs based on RWA status (Open and RWAs that are Substantially Complete, but not Financially Closed).

In addition to operational data, the RWA Statistics section shows the prior three fiscal years worth of RWAs that GSA accepted. The information is shown by year and by quarter, by RWA type. The information shown in a heat map format, details dollars and counts.

### RWA Statistics

This RWA Acceptance data is updated annually

RWA Acceptance by Fiscal Year Quarter																	
Total Authorized Amount								Total Count									
FY Accepted	FY Qtr Accepted	RWA Type						Grand Total	FY Accepted	FY Qtr Accepted	RWA Type						Grand Total
		A	B	F	N	R	A				B	F	N	R			
2017	2016 Q4	\$2,591,175	\$4,239,510	\$10,152,283	\$89,510,659	\$142,949,762	\$249,443,389	2017	2016 Q4	6	4	445	1,301	2,080	3,836		
	2017 Q1	\$3,877,448	\$156,411,919	\$2,730,916	\$300,566,740	\$28,229,341	\$491,816,364		2017 Q1	9	11	166	1,201	331	1,718		
	2017 Q2	\$4,950,031	\$17,343,472	\$772,653	\$126,522,560	\$2,445,040	\$152,033,756		2017 Q2	8	13	89	1,249	153	1,512		
	2017 Q3	\$19,360,682	\$50,087,626	\$200,295	\$947,949,244	\$1,151,083	\$1,018,748,929		2017 Q3	18	27	35	3,213	125	3,418		
	Total	\$30,779,336	\$228,082,527	\$13,856,147	\$1,464,549,203	\$174,775,225	\$1,912,042,438		Total	41	55	735	6,964	2,689	10,484		
2018	2017 Q4	\$872,538	\$9,783,601	\$8,726,890	\$124,774,863	\$158,702,240	\$302,860,132	2018	2017 Q4	2	7	357	1,286	2,308	3,960		
	2018 Q1	\$3,301,425	\$5,550,068	\$1,297,226	\$146,479,432	\$5,327,740	\$161,955,891		2018 Q1	3	14	110	1,023	164	1,314		
	2018 Q2	\$2,323,442	\$16,327,221	\$867,514	\$319,124,111	\$2,255,794	\$340,898,082		2018 Q2	4	13	81	1,282	133	1,513		
	2018 Q3	\$38,294,990	\$18,346,594	\$182,301	\$983,972,051	\$1,051,645	\$1,041,847,581		2018 Q3	25	25	28	2,906	119	3,103		
	Total	\$44,792,396	\$50,007,484	\$11,073,931	\$1,574,350,457	\$167,337,419	\$1,847,561,686		Total	34	59	576	6,497	2,724	9,890		
2019	2018 Q4	\$421,305		\$9,604,839	\$104,829,185	\$142,067,714	\$256,923,042	2019	2018 Q4	4		370	1,330	2,174	3,878		
	2019 Q1	\$2,930,538	\$4,393,063	\$1,930,664	\$127,635,392	\$4,037,558	\$140,927,214		2019 Q1	7	2	76	777	242	1,104		
	2019 Q2	\$6,363,658	\$38,570,930	\$737,611	\$263,824,323	\$22,090,163	\$331,586,684		2019 Q2	6	10	71	1,334	134	1,555		
	2019 Q3	\$18,331,376	\$57,006,503	\$958,375	\$978,563,275	\$651,287	\$1,055,510,815		2019 Q3	14	23	31	2,826	88	2,982		
	Total	\$28,046,876	\$99,970,495	\$13,231,489	\$1,474,852,174	\$168,846,721	\$1,784,947,756		Total	31	35	548	6,267	2,638	9,519		

The RWA Details section provides details for an individual RWA, including project description, location details, GSA POC, key financial data, and customer funding information.



## Occupancy Agreements

The Occupancy Agreement (OA) is a complete, concise statement of the business terms governing the relationship between PBS and the tenant agency for a specific space assignment. The OA serves as the billing document on which subsequent Rent payments are based. Every space assignment in the PBS portfolio must have its own OA. Each assignment is recorded in the PBS inventory system.

The PBS Customer Dashboard only contains your occupancies in GSA-Controlled spaces (GSA-Owned or GSA-Leased), and DOES NOT include any space managed, owned, or directly leased by your agency. The OAs and associated summary information in this dashboard are the most current final, billing versions.

The Dashboard contains summary information of your occupancies, with a variety of filters to view information on based on selections. You can also view information based on OA expiration, such as when OAs expire by Fiscal Year, when planning milestones are due, and details on individual OAs. You can also apply filters to see your occupancy information on a map.

Occupancies - National Summary													
Portfolio Summary													
	OA USF	OA RSF	Count of Personnel	% of Space	OA Count	Number of Buildings	Non-Cancelable OA	Non-Cancelable OA RSF	ROI OA	ROI OA RSF	Surface Parking	Structured Parking	Total Parking
GSA-Leased	166,344	196,610	910	6.84%	69	52	5	6,368	0	0	325	234	559
GSA-Owned	1,836,261	2,676,023	6,630	93.16%	808	538	27	11,726	54	0	649	931	1,580
Total All Building Types	2,002,605	2,872,633	7,540	100.00%	877	590	32	18,094	54	0	974	1,165	2,139

The OA Details section allows a user to see specific information on one OA at a time.

Occupancy Agreement Details								OA Number	AWA00161		
IDENTIFIERS	OA Current Version	OA Effective Date	OA Expiration Date	FY Expiration	Bureau			Agency Tracking Number			
	79	4/1/1997	3/31/2029	2029	4746: PUBLIC BUILDINGS SERVICE (REGIONAL OFFICE)						
	Previous OA		Non-Cancelable	ROI Priced							
			No	No							
LOCATION	Building Name				Building Number		GSA Region				
	ADMINISTRATION BUILDING				WA0811		10				
	Address				City		State				
	400 15TH ST SW				AUBURN		WA				
GSA POC	Responsible Government Associate				Alternate Billing Contact						
	ola.belmonte@gsa.gov										
SIZE	OA USF	OA RSF	R/U Factor	Count of Personnel	Surface Parking	Structured Parking	Total Parking				
	22,570	28,613	1.267750	123	0	0	0				
LEASE INFO	Lease Number	Lease Effective Date		Lease Expiration Date							
	Termination Rights	Date Termination Rights Begin		Days to Terminate All Space		Days to Terminate Partial Space					
OCCUPANCY AGREEMENT LIFECYCLE	Project Lifecycle Phase		Milestone		Milestone Target Date						
	Identification		Initial Engagement to Discuss CPA		3/31/2026						
	Initiation		Strategic Requirements Finalized, CPA signed		9/30/2026						
	Planning		Technical Requirements Finalized		3/31/2027						

## **Locations**

My Locations is a unique mix of information, combining information from the GSA Portfolio, with customer specific information. Unlike other tabs, the My Locations does not follow the same organizational pattern, but rather puts the focus on lists and details, with no summary information. The data contained in this tab are only those buildings where there are Final Occupancy Agreements (so only those buildings a customer resides in).

There are 4 sections to My Locations:

- Locations List
- Building Details
- OA List
- Occupancy Agreement and Space Details

### **Locations List**

Provides quick over details about a building, and a customer status in the building. This includes Building Number, Name, GSA Region, Number of Customer OAs (Count of OAs), USF/RSF occupied by customer, and percent of building occupied, and then building information, including total USF/RSF/ Parking, Historical Status and Security Level.

### **Building Details**

The Building Number drop down can be used to view additional building information, including address, more building details, and also, a concise view of the building, including Facility Manager email.

### **OA List**

A quick overview of the OAs, listed by location.

### **OA Details**

This section of the dashboard provides details about a single occupancy agreement, and expands on information that is also in the My Occupancy tab. The expanded information includes additional information on GSA-Leased locations and also Space Type details.

## Rent

My Rent is unique in that the data set is not only current operational data, but contains multiple years worth of billed rent and square feet. The data set is all billed OAs for current year, minus 3 (4 years total, ie. 2020 partial year, and full years for 2019, 2018, and 2017).

The tab contains summary information at the rent component level, as well as the ability to view billed rent by year, a rent comparison tool (by year and by month) as well as a chart showing rent trends over multiple years.



In addition, data can be downloaded to the lowest level, meaning by OA by month, for all years.

The Rent Comparison Tool allows a user to select to compare billed rent by Fiscal Year or Month, and then do also download the results.

To Use the Rent Comparison Tool

Step 1: Apply a Bureau or OA Filter (neither is required to use the tool)

Bureau	OA Number
(All) ▼	(All) ▼

Step 2: Choose to compare Rent by Fiscal Year or Month

Compare Rent By

Fiscal Year ▼

Fiscal Year

Month

*... be active for the rent comparison that is chosen (i.e. if Month is chosen, only the Month filters will be active)*

Rentable Square Feet
Usable Square Feet
Parking Spaces (Structured + Sur
Parking Spaces (Structured)
Parking Spaces (Surface)
1. Shell Rental Rate
2. Amortized Tenant Improveme
3. Operating Costs
4. Real Estate Taxes
5. Amortized Tenant Improveme
6. GSA-Installed Building Improv

## PBS Prospectus Pipeline

The PBS Prospectus Pipeline shows the approval, funding and project delivery status of all GSA [prospectus-level](https://d2d.gsa.gov/report/pbs-prospectus-pipeline) design, construction and lease projects submitted to Congress since FY 2018. This is a publicly available dashboard that one can access without a username or password at <https://d2d.gsa.gov/report/pbs-prospectus-pipeline>.



The Capital Investment tab consists of four parts:

1. Original Funding by Fiscal Year
2. Authorization by Fiscal Year
3. Nationwide Search
4. Prospectus and Resolution Documents

### ***Original Funding by Fiscal Year***

This shows the original funding by fiscal year. Click on each point to see Funding Requested vs Funding Received and either the GSA Congressional Justification or the Public Law.

### ***Authorization by Fiscal Year***

Prospectus-level projects require authorization from the Senate Committee on Environment and Public Works and the House Committee on Transportation and Infrastructure. This shows the status of projects in their latest year of submission.

### ***Nationwide Search***

You can filter the map by GSA region, location, project, agency and/or fiscal year. You can get basic project information and if you click on a location, you can get a Google Map of the site.

### ***Prospectus and Resolution Documents***

You can retrieve prospectuses and House and Senate resolutions.

## **Leasing**

The Leasing Investment tab consists of three parts:

1. Authorization by Fiscal Year
2. Nationwide Search
3. Prospectus and Resolution Documents

### ***Authorization by Fiscal Year***

Prospectus-level projects require authorization from the Senate Committee on Environment and Public Works and the House Committee on Transportation and Infrastructure. This shows the status of projects in their latest year of submission. It also shows the expiration of the current lease if applicable.

### ***Nationwide Search***

You can filter the map by GSA region, location, project, agency and/or fiscal year. You can get basic project information and if you click on a location, you can get a Google Map of the site.

### ***Prospectus and Resolution Documents***

You can retrieve prospectuses and House and Senate resolutions.

# Downloading from the Dashboard

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

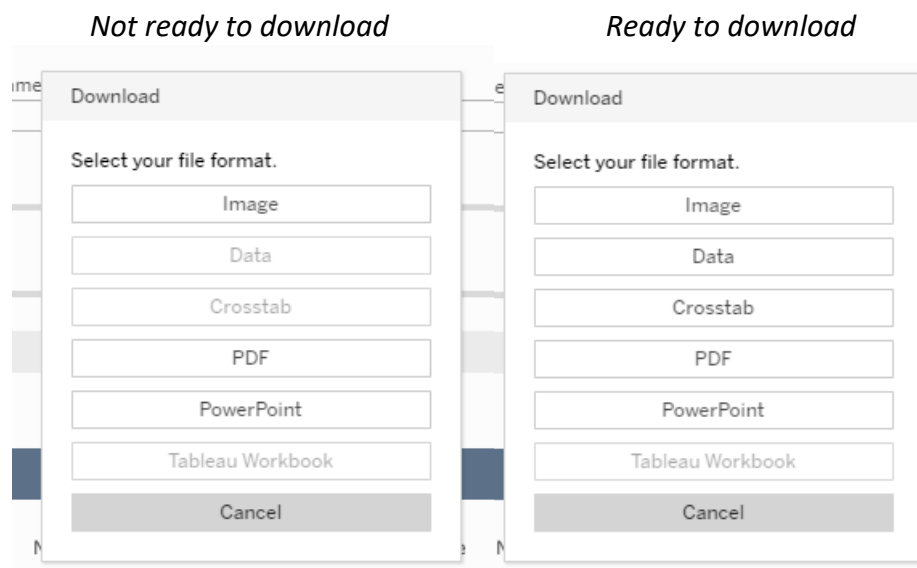
Each dashboard view (Projects, RWAs, Occupancies, Locations, Rent) has a **Full Dataset Export** which can be downloaded by following the instructions at the top-right of the view. Selected filters will apply to the export.



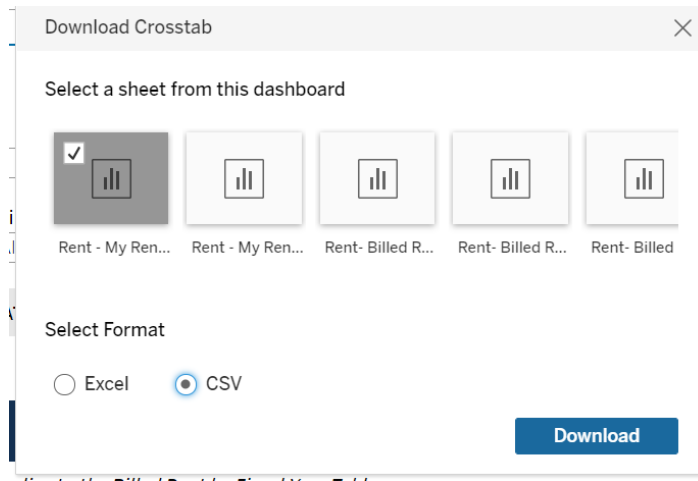
#### Instructions to create Rent Standard Export (supporting data file)

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.



Next, you will select the specific sheet which you would like to download. You can download sections of the dashboard for specific uses. Under "Select Format" click CSV and Download which will download to Excel.



As an example, you can download the list of RWAs from the substantially complete, but not financially closed section. You can download most sections from each tab by scrolling across the options and clicking on the specific sheet you wish to download, once the sheet is selected a check will appear indicating the sheet you have selected and may download by clicking on the Download button to obtain your excel sheet.

Welcome and Guidance
My Projects
My RWAs
My Occupancies
My Locations
My Rent

My RWAs

Agency: DEPARTMENT OF JUSTICE

Filters
Reset All Filters

Bureau: (All)
GSA Region: (All)

Building Number: (All)

Selected Filters: Bureau: All; GSA Region: All; State: All; City: All

Download Crosstab

Select a sheet from this dashboard

RWA Selected...
RWA Total Aut...
RWA Total Co...
RWAs Comple...
RWAs Com

Download

Service Type:
State: (All)

Authorized Amount:
7/9/2020 \$268

RWAs - National Summary

Open RWAs

RWA Type	Number of RWAs	Authorized Amount	Obligated	Remaining Balance	Billed to RWA
A	19	\$21,427,511	\$14,688,082	\$6,739,429	\$13,126,535
R	11	\$117,670,077	\$110,096,271	\$7,573,805	\$92,172,758

RWA Type Definitions

A: Standalone project split-funded by PBS and customer (example: Const federal space)

B: Project related to PBS prospectus level project that is split funded by f Tenant-funded work associated with a PBS prospectus project)

Undo Redo Revert Refresh Pause Ask Data Share Download Full Screen



## Downloading a section of the Dashboard

In addition to the data file, you can download sections of the dashboard for specific uses. As an example, you can download the list of RWAs from the substantially complete, but not financially closed section. Most sections of the dashboard have this as an option.

RWAs that are Substantially		
Count of RWAs		
		45
		3
		44
		2
		143

To download the summary table and list of RWAs, follow these steps.

- 1) Click the column Count of RWAs so the column is highlighted
- 2) If you want to download this summary table, go to Download, and select Crosstab. This will download the summary table.

Fiscal Year	RWA Type	Count of RWAs	Authorized Amount	Obligations	Remaining Balance
2013	A	1	\$6,022,809	\$2,443,301	\$3,579,508
2013	N	30	\$29,135,089	\$28,442,473	\$692,616
2013	R	1	\$10,194	\$0	\$10,194
2014	N	27	\$5,500,675	\$4,400,089	\$1,100,586
2014	R	8	\$6,151,498	\$5,918,510	\$232,988
2015	A	1	\$3,887,441	\$3,738,126	\$149,315
2015	B	1	\$20,866	\$21,700	(\$835)
2015	N	34	\$28,294,955	\$24,693,334	\$3,601,620
2015	R	3	\$2,131,060	\$2,068,085	\$62,975
2016	N	45	\$12,278,261	\$6,206,684	\$6,071,577
2016	R	3	\$18,426	\$0	\$18,426
2017	N	44	\$17,676,095	\$17,024,997	\$651,098

City	State	Authorized Amount	Remaining Balance
Tucson	AZ	\$613,375	\$93,751
Laredo	TX	\$1,780,000	\$10
Chicago	IL	\$179,013	\$39,701
Philadelphia	PA	\$328,818	\$8,317
Cincinnati	OH	\$841,981	\$4,163
Chicago	IL	\$2,103,496	\$79,785
San Francisco	CA	\$75,825	\$1,008
Des Moines	IA	\$384,884	\$288,239
Des Moines	IA	\$504,633	\$360,030

3) If you would like to download a list of RWAs that are summarized in the table, move to the list and click on the first row of the data.

4) Once the first row is selected, go to Download, and select Crosstab. This will download a list of all RWAs supporting the summary table. The download from this section is an abbreviated report with just the RWA Number, Substantial Completion Date, Project Description, Service Type, AB Code, City, State, Authorized Amount and Balance.

RWA Number	Actual Completion Date	Project Description	Service Type	AB Code	City	State	Authorized Amount	Remaining Balance
	11/30/2013	Wall repair at warehouse	Non-Severable				\$648	\$648
	11/30/2013	ELECTRICAL WORK IN CBC	Non-Severable				\$4,724	\$0
	11/30/2013	INSTALLATION OF A TEMP	Non-Severable				\$4,843	\$0
	6/20/2019	JPF17-070/R3 Green Fedel	Non-Severable				\$328,818	\$8,317
	3/9/2015	JPF-024-14 Furnish and ins	Non-Severable				\$3,659	\$24
	3/22/2016	Replace carpet and paint i	Non-Severable				\$4,579	\$1,758
	12/21/2016	JPF-013-15 CO Rooms 521	Non-Severable				\$3,323	\$106
	12/30/2018	JPF18-021/CO-FY18-RIC G	Severable				\$17,256	\$664
	7/31/2018	Furniture for the JCKLife+	Non-Severable				\$894,663	\$420
	5/4/2018	JCKLife+ Construction Cos	Non-Severable				\$440,410	\$1,335
	11/19/2018	Collocation of FAS (2 emp	Non-Severable				\$15,212	\$15,212
	2/22/2018	TN FEMA coordination	Severable				\$5,000	\$5,000
	7/12/2019	NO TRAVEL IS AUTHORIZED	Non-Severable				\$6,250	(\$439)
	5/31/2019	NO TRAVEL IS AUTHORIZED	Non-Severable				\$5,000	\$4,949
	7/31/2019	NO TRAVEL IS AUTHORIZED	Non-Severable				\$5,000	\$1,881

(You will note that the RWA Number, AB Code, and city have been removed from this table to limit sharing of customers information)

## Examples of Other Sections that can be downloaded

*Occupancies* - To download each section, click on a column header, go to Download, and select Crosstab

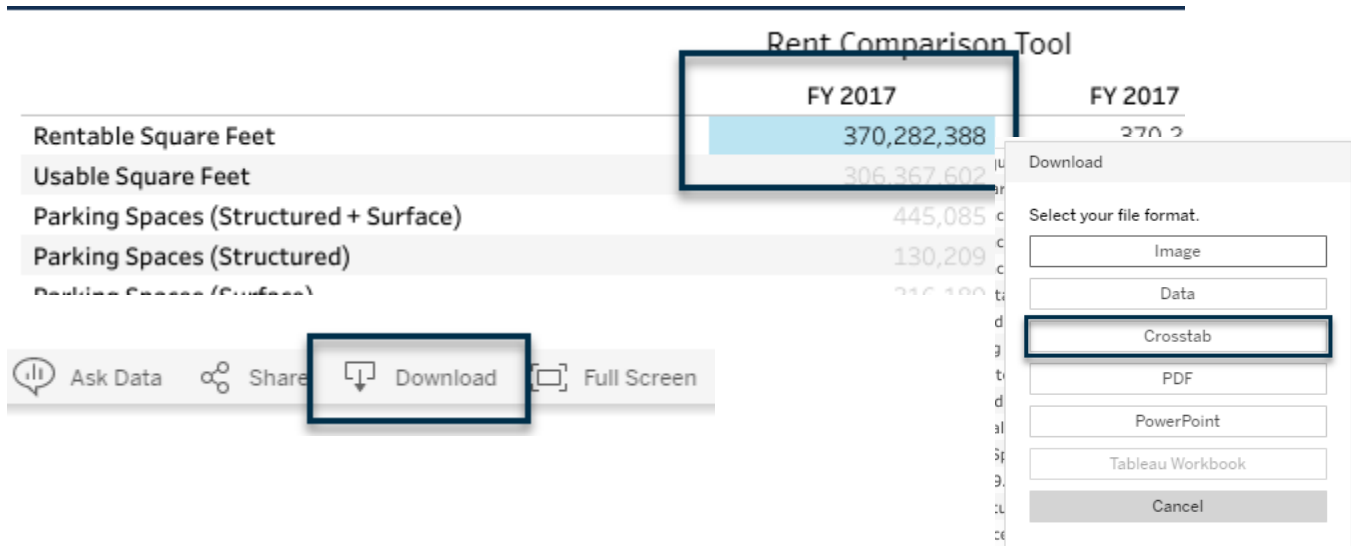
- 1) OAs by FY Expiration - Summary Table
- 2) OA List (abbreviated data set) - List
- 3) Occupancy Planning Milestones due in 12 Months - List

*Rent* - To download each section, click on a column header, go to Download, and select Crosstab

- 1) Billed Rent by Fiscal Year - Summary Table (shows current FY, Year to Date by Default, but you can change FY to compare across years.
- 2) Billed Rent for over Multiple Fiscal years. You can download the full data set for multiple fiscal years by using the Fiscal Year filter and selecting All. Go to the Instructions at the top right of the tab, and follow the data file instructions. You can also apply multiple filters (City, State, Region, Leased/Owned, OA, Building, etc) and obtain a data file for all years based on selected filters.

The screenshot shows a web interface titled "Rent - National Summary". Below the title is a dark blue header bar. The main content area has a table-like structure. On the left, there are labels for "Fiscal Year", "Rentable Square", "Usable Square", "Parking Spaces", "Parking Spac", and "Parking Spaces (Surface)". A dropdown menu is open for "Fiscal Year", showing options: (All), 2017, 2018, 2019, and 2020. To the right of the dropdown, there is a note "\*Note:". Below the dropdown, there are buttons labeled "Ca..." and "Ap...". At the bottom, there is a section labeled "1. Shell Rental Rate".

- 3) Full Year or All Months comparison from Rent Comparison Tool. Choose to Compare Rent by Year (default) or by Month. Once you choose the view, click on the first column showing data. Go to the bottom right side, and select Download, and then crosstab.



	A	B	C	D	E
1		FY 2017	FY 2018	FY 2019	FY 2020 (YTD)
2	Rentable Square Feet	370,282,388	367,948,565	370,269,274	367,263,190
3	Usable Square Feet	306,367,602	304,335,261	306,035,596	303,545,318
4	Parking Spaces (Structured + Surface)	445,085	447,348	442,606	436,410
5	Parking Spaces (Structured)	130,209	130,747	132,709	130,722
6	Parking Spaces (Surface)	316,189	317,978	311,258	307,038
7	1. Shell Rental Rate	\$6,295,290,594	\$6,359,813,991	\$6,453,418,424	\$4,425,650,556
8	2. Amortized Tenant Improvement Used/General	\$319,014,483	\$306,876,460	\$306,922,781	\$229,629,098
9	3. Operating Costs	\$2,286,630,178	\$2,324,820,008	\$2,321,465,092	\$1,576,348,119
10	4. Real Estate Taxes	\$248,314,082	\$242,514,553	\$241,993,221	\$162,863,588
11	5. Amortized Tenant Improvement Used/Customization	\$127,408,256	\$130,864,073	\$129,265,490	\$89,478,361
12	6. GSA Installed Building Improvements	\$501,510	\$517,416	\$517,517	\$308,303

This is what your downloaded report will look like in Excel.

- 4) RSF and Billed Rent Summary by Leased and Owned over time (the table at the bottom of the bar charts)

	2017	2018	2019	2020
GSA-Leased	189,222,135	185,537,581	186,600,864	186,927,279
GSA-Owned	165,829,744	165,430,980	167,013,648	168,179,895
Total	355,051,879	350,968,561	353,614,512	355,107,175

Projects - To download each section, click on a column header, go to Download, and select Crosstab

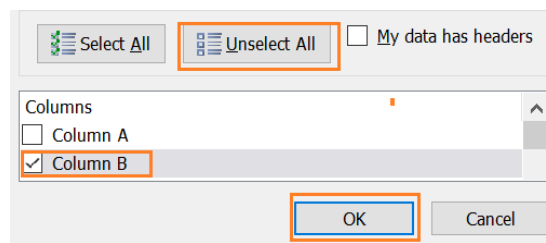
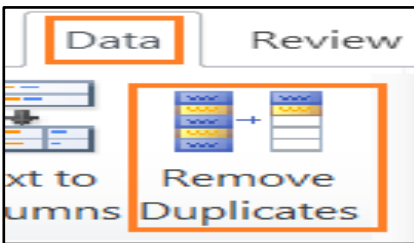
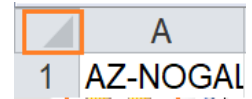
- 1) Projects Summary table

- 2) Project List (list of projects, but abbreviated columns) - Project Number, RWA/Project Control Number (PCN), Lease Number, OA Number, Bureau, Project Name, Project Type, Funding Type, Current Phase, Sub-Phase, Date Awarded, RWA Funding, Total Funding, Total Obligations

#### *Eliminate Duplicate Projects In Your Export Using Excel Remove Duplicates Function*

If you use the **Full Dataset Report** to export agency-level data from *Projects*, projects which are associated with multiple bureaus may produce duplicate rows in the export. *Note that if you export bureau-level data, you will not see this duplication.* To eliminate any duplicate rows in Excel:

- 1) Open the exported report in your Excel workbook.
- 2) Select the grey box in the top-left corner of the dataset, between row 1 and column A.
- 3) In the Data Tab of your Excel workbook, select 'Remove Duplicates'.
- 4) Apply these settings - unselect all, check column B, select 'OK'.



- 5) You can verify that duplicates are eliminated by highlighting column B, select *Conditional Formatting* -> *Highlight Cell Rules* -> *Duplicate Values* -> *OK*. If duplicates have been eliminated, no cells in column B will highlight.

#### **You can also download visuals of the Dashboard**

In addition to downloading tables and lists, you can download images from the Dashboard. You can download a pdf, an image, or a Powerpoint. These three options capture the view of the whole tab, as is. You can apply filters to change the content, but the download of the images from any of the three options, will produce only one long image. This image downloaded as a png (image) can be cropped into parts to aid in presenting the information in handouts and presentations.

### Example of Cropped Image

# Resources

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## **General Dashboard Support**

There are many self service tools available on the [PBS Customer Dashboard](#) gsa.gov site. This includes access instructions and training materials, including this user guide.

In general, customers should contact their GSA/PBS point of contact, or contact the PBS Customer Dashboard help email address at [pbs.dashboard@gsa.gov](mailto:pbs.dashboard@gsa.gov).

For Regional Customer Engagement points of contact, please go [here](#).

## **National Client Executive, National Planning Manager, and National Client Analysts**

They serve as the Primary Point of Contact for national customer POCs regarding training and access to the PBS Customer Dashboard. Their responsibilities include:

- Provide training to customers in national meetings and on an ad hoc basis on how to access, navigate, and what content is available in the PBS Customer Dashboard
- Work with customers to define who has access and who will be assigned the access approval role. Ensures that updates or changes to the access approval role are documented; follow ups with customers and Customer Dashboard Team to ensure customers have the right access.
- Help customers understand and define levels of access to data (agency bureau code, email domains).
- Work with the Customer Dashboard Team to provide feedback on the Customer Dashboard.

## **Regional Business Analyst and Regional Customer Lead**

- Use national training presentation and resources to support regional customer training requests from assigned customer with the support of the Regional SME
- Respond to customer questions about dashboard
- Incorporate reports into standing meetings and ad-hoc as needed

## **Policy, Process and Training**

- [Pricing Desk Guide](#)
- [Managing Customer Requirements Fact Sheet](#)
  - Includes a list of deliverables by the customer during each Occupancy Planning phase
- [Electronic Occupancy Agreement - eOA](#)
  - Search OAs within designated Agency Bureau codes
  - Select and run report(s) tabulating financial and clause information
  - See history of all rates that apply to the OA including USF, RSF and Parking
- [Inventory and Vacant Space in GSA-Owned and GSA-Leased buildings](#)

## **Billing and Rent Resources**

- [GSA Rent Overview Website](#)

## GSA Billing and Payment Website

- [Paying Reimbursable Services through the Rent Bill](#)

## PBS Pricing Policy Website

- [Pricing Desk Guide 5th Edition](#)
- [PBS Order 7025.1A - Rent Exemption Procedures](#)

## Rent on the Web (ROW) allows PBS customer agencies to view their monthly bills online

- [Rent on the Web FAQs](#)

## Project Resource Links

### Design and Construction Delivery Process

GSA PBS Design and Construction website describes the process and expectations for your architecture and construction projects, including community planning, prospectus development, project authorization, and project management steps and deliverables. Relevant sub-pages include:

- [Space Assignment process and policy](#)
- [Construction Excellence program](#)
- [Design Excellent program and design library](#)
- [Accessible Facility Design](#)
- [Urban Development](#)

### Commercial Lease Projects

- [GSA Leasing Desk Guide](#)  
Contains authorities, policies, technical and procedural guides, and administrative limitations governing the acquisition by lease of real property. Download the searchable PDF or browse chapters such as source selection, lease construction, renewals and extensions, accessibility standards, parking acquisition, sustainability considerations, security, and lease file checklists.
- [GSA.gov/Leasing](#)  
GSA.gov Leasing Website links to security standards for leased buildings, green lease policies, lease delegation information, lease inventory information, and publicly available lease documents.

## New to Working with GSA

- [Real Estate for Federal Agencies Overview](#)
  - [Pricing Desk Guide, 5th Edition](#) (Revised August 2020)
  - [Using GSA Schedules](#)

## Looking for Space

- [Inventory of Owned and Leased Properties](#)  
Use the IOLP map tool to view data for GSA owned and leased properties. View specific information on each of GSA's properties such as: Vacant space, Physical location, Square footage, Lease expiration, and Congressional District

## **RWA Resources**

Visit the national **RWA website** at <https://www.gsa.gov/real-estate/real-estate-services/reimbursable-services-program> for a wealth of RWA-related info, including:

- **RWA Overview:** Overview information regarding RWAs, including a list of RWA Managers
- **Billing & Payment:** RWA billing and payment information and resources for customers
- **Policy & Guidance:** *Featuring* the National Policy Document for RWAs
- **Year-End Customer Letters**
- **Training & FAQs**
  - *Featuring* RWA Training Modules
  - Q&A on RWA Policy, Process, eRETA, RWA Types, Fees and Billing, and Estimates

Also visit the national **eRETA website** at <https://www.gsa.gov/real-estate/real-estate-services/reimbursable-services-program/ereta-rwa-customer-portal> to learn about the external RWA Entry and Tracking Application (eRETA), which allows customers to:

- Electronically submit new work requests
- Enter information directly into the system
- Make edits and create amendments to any RWAs associated with your Agency Bureau Code
- Upload documentation into eRETA to maintain an electronic RWA file
- Search and download information for single or multiple RWAs; view related RWA estimates, backup documents, and financial data- how much has been spent, etc.