



GSA Public Buildings Service

# OASIS Customer Approval Workflow

Customer Training

Thursday, June 13, 2024

# Introductions



## **Deann Salazar**

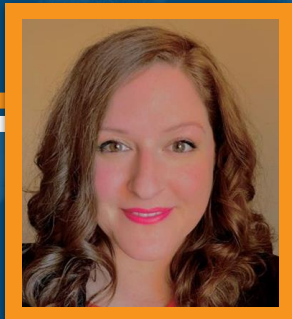
National Rent Billing Lead

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

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Email Address<sup>1</sup>:

Name:

Agency:

Agency Bureau Code(s)<sup>2</sup>:

#### Requested Role (required)

- Ordering Official
- Non-Approver

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

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

<sup>2</sup>Agency 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

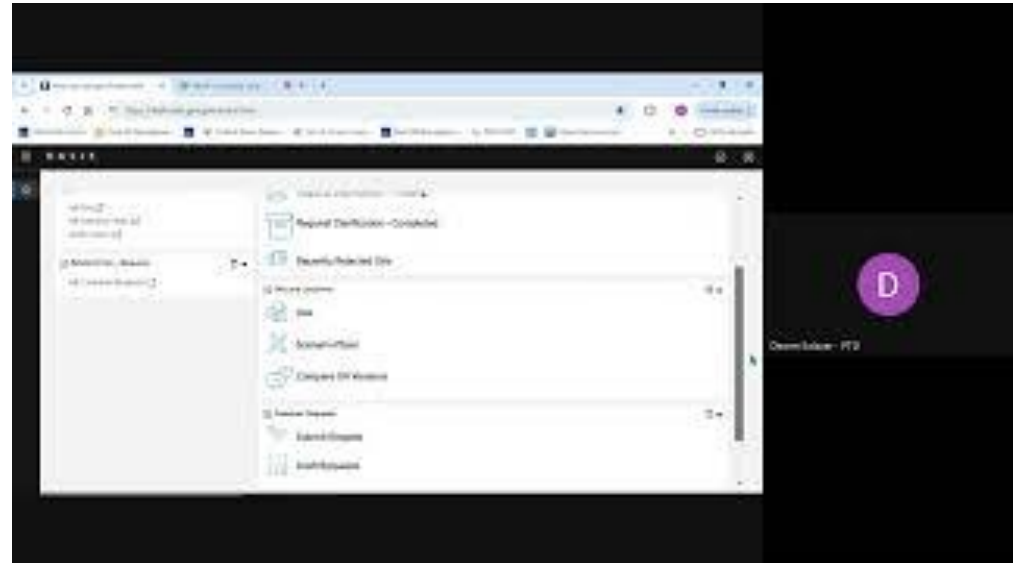
- Must log in every 90 days or account will be deactivated
- Deactivated users can email [pbsoasisaccounts@gsa.gov](mailto:pbsoasisaccounts@gsa.gov) and request reinstatement
- Active User Query (Added to Customer Portal)

# **02** Navigating the Customer Portal and Working with Queries

# OASIS

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## Navigating the Customer Portal

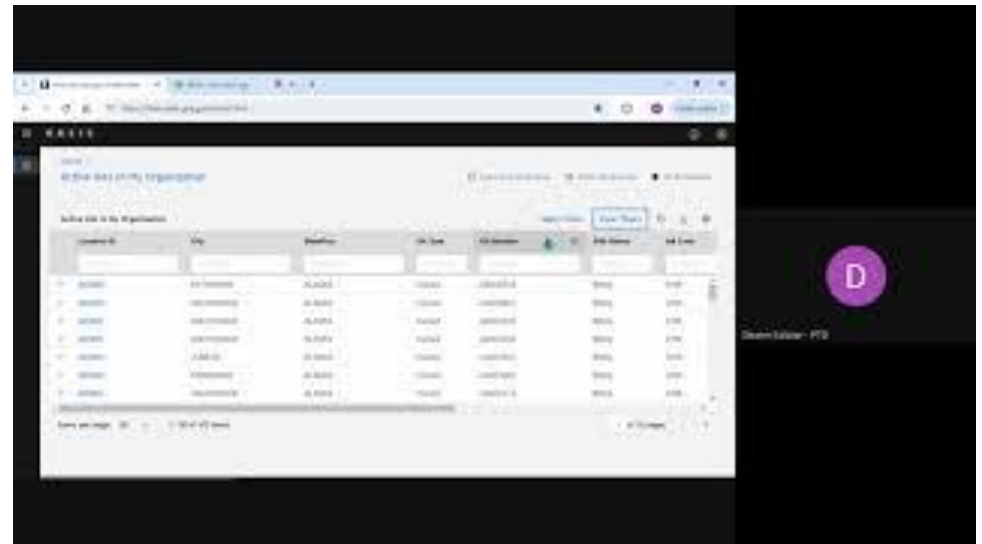


[Watch the Customer Portal Overview Video](#)

# OASIS

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## Working with Queries



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

# Navigating the Customer Portal and Working with Queries Q&A

## *Pause for Questions*

UNITED STATES COURTHOUSE

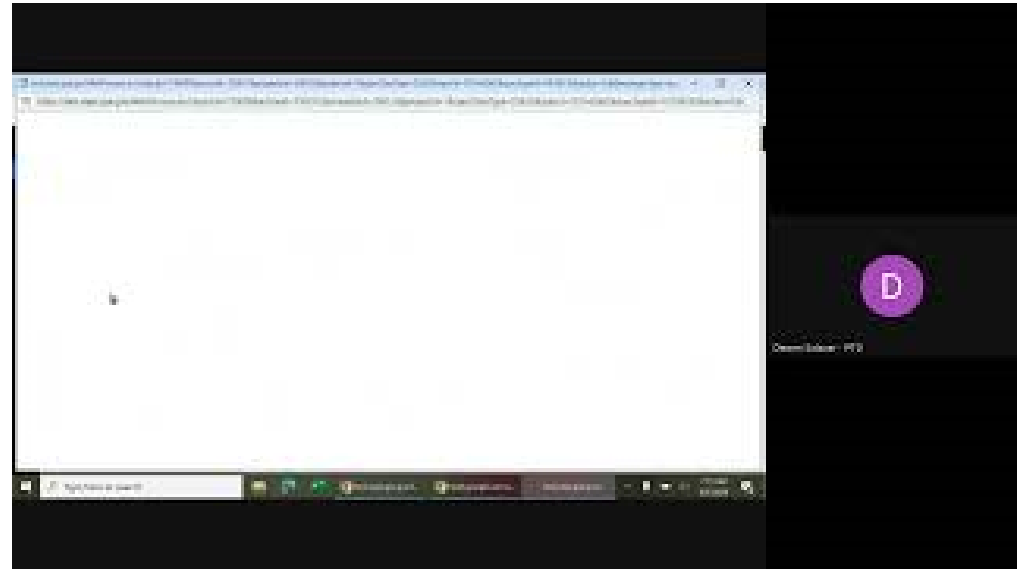
# 03

## How to Approve or Reject OAs

# OASIS

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## How to Approve OAs Part 1



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

# OASIS

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## 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 window, 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

The image shows a Zoom meeting participant card for Deann Salazar - PTD. It features a purple circular profile picture with the letter 'D' in white.



# *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

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## Support, Self-Service Tools and FAQs

- Website: [www.gsa.gov/pbsoasis](http://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](mailto:pbsoasisaccounts@gsa.gov)
- General OASIS System Questions  
Email: [PBSOasis@gsa.gov](mailto:PBSOasis@gsa.gov)
- Customer Communication  
[OASIS Bulletin](#)

