PBS Customer Forum - GSA 24x7 - Overview of Online / Self-Service Tools

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Customer Dashboard - Speaker

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The PBS Customer Dashboard provides 24/7 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 views information related to GSA-managed occupancies, including Projects, Reimbursable Work Authorizations (RWAs), Occupancy Agreements, Locations, and Rent.

All data in this dashboard can be exported via CSV.
This Dashboard Can Answer Specific Questions

Did the schedule slip on a project?
How much am I spending on design vs. moving for this project?
Who are the POCs for a project?

How many RWAs are open and how much money is associated with the RWAs?
Where has work been complete but the RWA has not been closed?
What does my three years worth of accepted RWAs look like?

Where do I have occupancies close to each other?
When do I need to start planning for a follow-on occupancy?
How many square feet do I occupy in GSA-controlled locations?

What congressional district or CBSA is my occupancy located in?
Who is my facility manager?
What is the building security level?

Where have my rent bills changed month to month and why?
How has my rent and square footage changed over time?
Can I compare full years or months to each other?
How to Access the PBS Customer Dashboard

- All agencies with GSA-managed space have access to the dashboard. Individual access is managed on an agency-by-agency basis and verified by a Access Approver.

- If you would like access to your agency's information, contact pbs.dashboard@gsa.gov to be referred to your agency's Access Approver.

- You **MUST** have a MAX.gov account set up **BEFORE** you can receive access to the Customer Dashboard.

- Once you have access set up, link to the dashboard [https://D2D.gsa.gov/report/pbs-customer-dashboard](https://D2D.gsa.gov/report/pbs-customer-dashboard)
Landing Page

- Easy access to all tabs by using the subject area “button” or by clicking on the tabs across the top.

- PBS Resources including fact sheets, links to PBS National Offices and the User Guide.
General Dashboard Module Layout

Each module has similar layout

5 Module:
My Projects
My RWAs
My Occupancies
My Locations
My Rent

Filters
Agency, Bureau, City, state, federal/leased, size options, date options

Summary
Breakdown of all general information provided in each tab into useful overviews

Statistics
A map, table, or chart visualization

Details
Search by number and review key characteristics of the individual records (Project, RWA, OA, Location, Rent Bill)
My Projects

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.
Dashboard Module - My Projects

Filters
Agency, bureau, location information, federal/lease, lifecycle phase, project type, funding type, date options, square footage, and funding

Projects - National Summary
Breakdown of all project types by count, along with a Project List of relevant information

Project Statistics
A map visualization showing project location and lifecycle phase

Project Details
Includes the project details. Search by Project Name or Project Identifier (ePM ID, Lease #, RWA/PCN #)
My RWAs

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.

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.
Dashboard Module - My RWAs

Filters
GSA Region, Owned/Leased, State, RWA Type, Service Type, State, City, Building, Acceptance Date, Amount

RWAs - National Summary
Dollars and counts by RWA Type and summary table of OAs that are complete but not closed (counts, types, dollars)

RWA Statistics
Table showing RWAs accepted by fiscal quarter and type (count and dollars)

RWA Details
Individual RWA details including location, funding, description of project, dates
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.
Dashboard Module - My Occupancies

Filters
GSA Region, Owned/Leased, State, City, Building, Non Cancelable, FY Expiration, OA Effective Date, OA Expiration Date, Size of OA

Occupancies - National Summary
General overview of portfolio (sq ft, counts, parking) by leased/owned. Also has OA expiration table by GSA Region and Fiscal year.
Dashboard Module - My Occupancies

**Occupancies - Statistics**
A map visualization of all Final OA and breaks out between leased/owned

**Occupancy Agreement Details**
At the OA level, specific occupancy info including location, size, dates, GSA POCs, planning milestone due dates
My Locations

View your agency’s locations, including building details, space types, and lists of OAs for each location.

Identify building type, historic status, CBSA, and other important building/location information.
Dashboard Module - My Locations

Filters
GSA Region, Owned/Leased, State, City, Building Number, Building Name, Facility Number, Facility Name

Locations List
Shows key location information including count of OAs, total sf, historic status, and security level

Building Details
Dropdown to filter for more specifics on an individual building

OA List
Individual OA details including space type

OA Details (next slide)
Individual OA details including space type
Owned buildings will provide more details on space type (in general) than leased, but space records are available in the OA Details for all OAs.
My Rent

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.
## Dashboard Module - My Rent

### Filters
- GSA Region
- Owned/Leased
- State, City
- Building, OA

### Rent - National Summary

**Billed Rent Defaults** to current FY Billed Rent by month and rent component; options to change to prior years.

<table>
<thead>
<tr>
<th>Fiscal Year 2019 Billed Rent</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rentable Square Feet</td>
<td>1,486</td>
<td>1,294,358.071</td>
<td>1,057,005.951</td>
<td>1,057,400.622</td>
<td>1,057,195.979</td>
<td>1,056,782.394</td>
<td>705,669.450</td>
<td>704,011.852</td>
<td>703,457.224</td>
<td>703,520.290</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Usable Square Feet</td>
<td>1,470</td>
<td>864,942.585</td>
<td>871,923.494</td>
<td>871,430.175</td>
<td>871,796.948</td>
<td>872,402.560</td>
<td>882,260.140</td>
<td>880,820.140</td>
<td>880,300.488</td>
<td>880,752.348</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parking Spaces (Structured + Surface)</td>
<td>1,308</td>
<td>2,147,173</td>
<td>2,125,497</td>
<td>2,131,568</td>
<td>2,131,418</td>
<td>2,130,445</td>
<td>2,130,445</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parking Spaces (Structured)</td>
<td>1,259</td>
<td>859,136</td>
<td>879,933</td>
<td>879,240</td>
<td>878,943</td>
<td>878,052</td>
<td>859,276</td>
<td>858,630</td>
<td>857,983</td>
<td>856,654</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parking Spaces (Surface)</td>
<td>1,540</td>
<td>877,977</td>
<td>882,964</td>
<td>879,240</td>
<td>878,943</td>
<td>878,052</td>
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<td></td>
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</table>

### Rent Yearly Summary

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>June</th>
<th>July</th>
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<td>703,520.290</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### National Summary

- **Rentals Summary**
  - Total: 1,486
  - Structure: 1,308
  - Surface: 1,540

- **Rentals per Month**
  - Jan: 1,486
  - Feb: 1,294,358.071
  - Mar: 1,057,005.951
  - Apr: 1,057,400.622
  - May: 1,057,195.979
  - June: 1,056,782.394
  - July: 705,669.450
  - Aug: 704,011.852
  - Sep: 703,457.224
  - Oct: 703,520.290

### Defaults
- **Billed Rent**
  - Defaults to current FY Billed Rent by month and rent component; options to change to prior years.

### Other
- **Antenna**
  - 1,331
- **Biweekly Adjustments & Corrections**
  - 158
- **Impedance Adjustments**
  - 308
- **Total PBLS**
  - 1,162
- **Total PBLS Biweekly**
  - 1,162

### Performance
- **Performance Summary**
  - 2019
  - 1,486
  - 1,294,358.071
  - 1,057,005.951
  - 1,057,400.622
  - 1,057,195.979
  - 1,056,782.394
  - 705,669.450
  - 704,011.852
  - 703,457.224
  - 703,520.290

### Conclusion
- **Conclusion**
  - With the provided data, users can analyze the rent performance and make informed decisions regarding their rental needs.

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Dashboard Module - My Rent

Rent - National Summary
Rent Comparison Tool
Allows user to compare rent by fiscal year or month at the rent component level

Rent Statistics
Bar charts showing billed rsf and billed rent dollars by fiscal year, and leased/owned

Occupancy Agreement Details
At the OA level, specific occupancy info including location, GSA POCs
Resources for the Customer Dashboard

*External* PBS Customer Dashboard page

www.gsa.gov/PBSCustomerDashboard

**User Guide**
- How to Find & Access the Dashboard
- Quick Start Guide
- Data Dictionary

**YouTube Videos**
1) How to Apply Filters, Filtering Tips and Tricks
2) How to Interact with Maps, Charts and Diagrams
3) How to Navigate Dashboard Sections and Footer Buttons

PBS.Dashboard@gsa.gov
PBS Customer Dashboard Entry

TIP! Copy and paste URL in D2D for direct access: https://D2D.gsa.gov/report/pbs-customer-dashboard
eRETA - Speakers

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RETA/eRETA Program Manager
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What is eRETA?

eRETA stands for “external RWA Entry and Tracking Application”

- Customer portal to enter, manage, and review Reimbursable Work Authorization (RWA) with GSA-PBS.
- Provides users real-time access to RWA estimates, project status, financial information, and supporting documentation.
- Federal customers are required to send all RWA and RWA Work Request information to GSA via eRETA including digitally signing RWAs.
What does eRETA allow me to do?

Submit new RWA Work Requests electronically online
- Can no longer get “lost” since requests are saved in the system.
- Keep GSA accountable to responding to your requests!
- eRETA quality checks lots of information instantly - no waiting for GSA!
- Increases efficiencies due to automated routing to all POCs.

Electronically initiate amendments for existing RWAs and submit them into GSA’s database or route them to GSA for acceptance.

Upload documentation into eRETA to maintain an electronic “RWA file”.

Digitally sign RWAs (with trace docs in eRETA)
- No eRETA access required to digitally sign - just need an email address. You can even sign from your phone!
Recently added or upcoming features

April 2021 - RETA version 9.3

- Work Request Progress Tracker
- Linked Estimate Amount Displays on Work Request
- Workflow to assist with updating RWA amount during a CR
- Validation comparing AB Code and Treasury Symbol
- Workflow to assist when changing Period of Performance

Coming Soon

- RETA-Kahua interface
  - Allow customers to view project milestone schedules from eRETA without needing additional Kahua log-in
- G-invoicing integration
How do I gain access to eRETA?

Visit www.gsa.gov/ereta where you can find:

- Link to the PBS External Portal (where you go to login to eRETA)
- Visit the “How do I access eRETA” page which provides detailed steps on applying for eRETA access (3 simple steps)
  1. Complete initial online application (Account Request Form)
  2. Forward completed Account Request Form to your supervisor and have them send directly to eRETA@gsa.gov with a statement affirming your request for access
  3. Receive “Welcome to eRETA” email and follow final instructions
Where can I go to learn more about eRETA?

Visit [www.gsa.gov/ereta](http://www.gsa.gov/ereta) where you can:

- Link to the PBS External Portal (where you go to login to eRETA)
- Visit the “eRETA Training Materials” page
  - Detailed user guides and Quick Tips on how to navigate and use eRETA
  - Video demonstrations and recordings of past training sessions
- Register for the next eRETA Digest training session on August 10th from 1:00-2:30 ET at [www.gsa.gov/rwa](http://www.gsa.gov/rwa) on the “Training” page
eOA Application & OA Tool Replacement Speaker

Lisa McCoy
National Rent Billing Office
Office of Portfolio Management and Customer Engagement
lisa.mccoy@gsa.gov
Key Features

- Search for OAs within your Agency Bureau Code
- Preview rate calculations on the OA
- Preview the complete OA before billing
How to Request Access to eOA

Step 1 Request Form

- **eOA User Account Request Form**
  - **eOA Agency Bureau Codes**
- **GSA IT General Rules of Behavior**
- **IT Rules of Behavior for External Users**
How to Request Access to eOA – Steps 2-3

Step 2 Verify Email

• GSA reviews request
• Once approved, the GSA National Application Helpdesk will send a verification email with instructions

Step 3 Access eOA

• http://extportal.pbs.gsa.gov
• Single Sign On suite located on the external PBS portal
• Questions? COPBSApp@gsa.gov
What’s Next? OA Tool Replacement

Coming October 2022

• New system with a customer self-service portal

Streamlined OA Process

• Receive and Approve OAs directly in the system
• Track OA status and view your OAs
• Ask a question about your bill
• Request a release of space
Data Access

- View your rent data
- Run reports
- Export your rent data

Assignment Drawings/Floor Plans

- View existing plans
- View future scenario plans
- Export your plans
What’s Next? OA Tool Replacement - Training

Updates will be given at future forums

Look for training next summer
- Obtaining system access
- How to approve OAs
- Running reports
- Exporting your rent data
- Viewing and exporting assignment drawings
Lisa McCoy
National Rent Billing Office
Office of Portfolio Management and Customer Engagement
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eOA & OA Tool Replacement

Q & A
Kahua - Speakers

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Valerie Pierre
Kahua Training & Support Lead
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New Project Management & Collaboration Tool

Let’s **kahua**

- Spans multiple business lines
- Captures all project phases
- Fosters collaboration
Kahua Features & Functionality

**Access:**
- Single Interface
- Quicker
- Mobile
- Internal/External

**Usability:**
- Easy to Use
- Easy to Navigate
- Data Integration
- Embedded Dashboards / Reports

**Document Integration:**
- EDMS, CFR, EASi, GREX
- Google Drive
- BIM Mark Up
- Email

**Collaboration:**
- Client Project Agreements
- RFIs and Submittals
- Design Review
- Scheduling
- Punchlist
Kahua Deployment Timeline

Kahua Configuration Complete, Pilot  
August 2021

Begin Regional Deployment - Phase 1:  
Above Prospectus (Owned & Leased)  
Training and Migrations  
October 2021

Phase 2: Under Prospectus (Owned)  
Training and Migrations  
December 2021

Decommission ePM,  
Phase 3: Under Prospectus (Leased)  
Training and Migrations  
(Customers)  
April 2022

Complete Deployment and Training  
June 2022
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Kahua Overview
Q & A