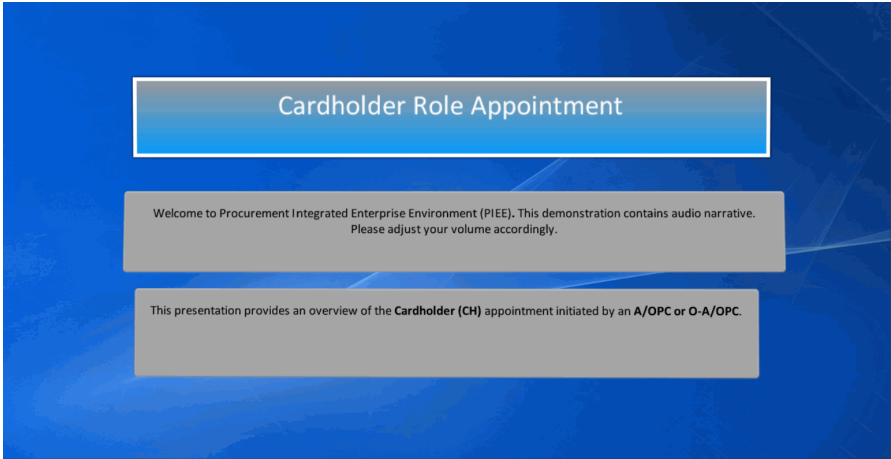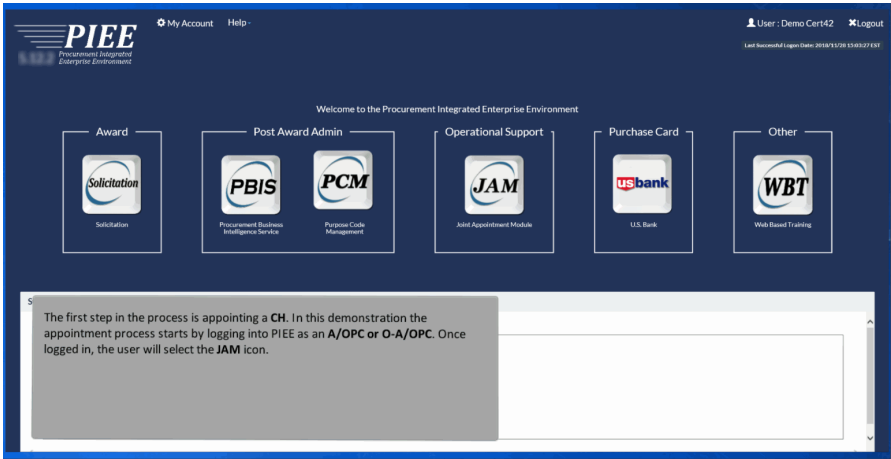## Intro

Cardholder Role Appointment

Welcome to Procurement Integrated Enterprise Environment (PIEE). This demonstration contains audio narrative. Please adjust your volume accordingly. This presentation provides an overview of the Cardholder (CH) appointment initiated by an A/OPC or O-A/OPC.

Step 1

The first step in the process is appointing a CH. In this demonstration the appointment process starts by logging into PIEE as an A/OPC or O-A/OPC. Once logged in, the user will select the JAM icon.

Step 2
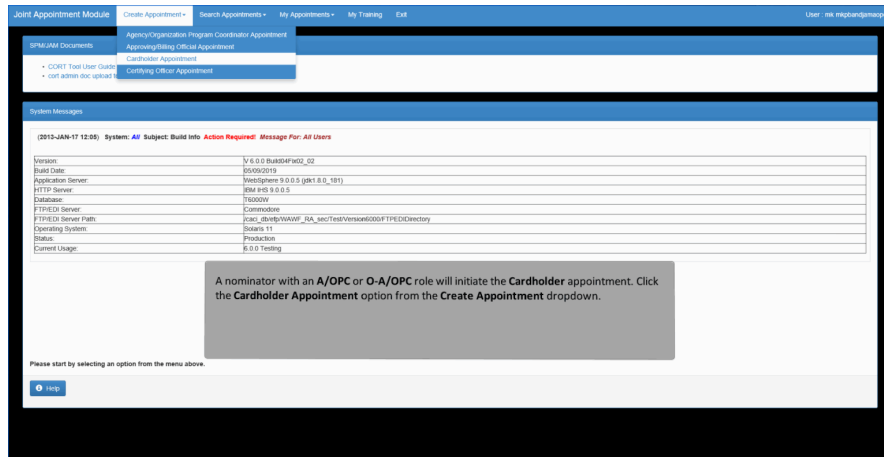
A nominator with an A/OPC or O-A/OPC role will initiate the Cardholder appointment. Click the Cardholder Appointment option from the Create Appointment dropdown.

Step 3
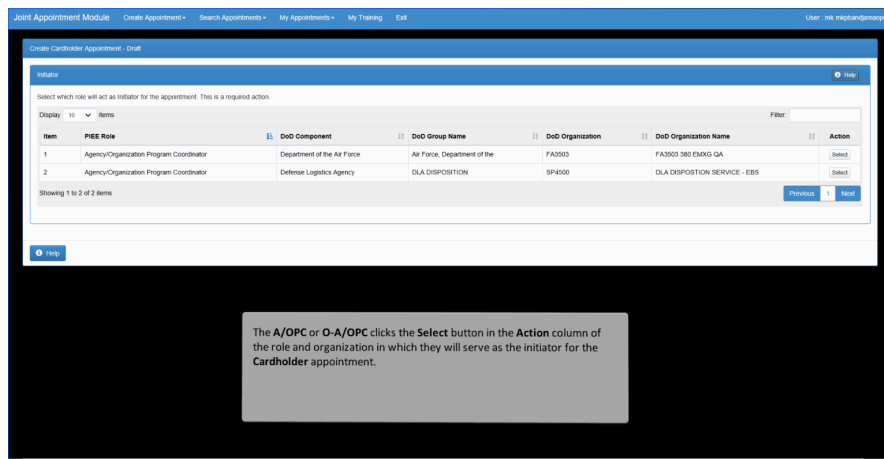
The A/OPC or O-A/OPC clicks the Select button in the Action column of the role and organization in which they will serve as the initiator for the Cardholder appointment.

Step 4

A list of available appointees under the span of control of the selected organization will be displayed. The A/OPC or O-A/OPC clicks the Select button in the Action column for the corresponding appointee.

Step 5

The A/OPC or O-A/OPC will then enter all the required information. Required fields are indicated with an asterisk. To add any relevant training which has been completed, select the Add Training button.

Step 6

Click the Add button after entering Training information.

Step 7

Click the Add Special Designation button. An Add Special Designation window will appear. Select a Special Designation from the dropdown, then fill in any mandatory fields and click the Add button.

Step 8

Enter an Email Address, then click the Lookup Direct Oversight A/OPC button. Select a user who will act as the direct Oversight A/OPC for the appointment by clicking the select button in the Action column. This is a required action.

Step 9

After all mandatory information has been entered, click the Next button.

Step 10

If the initiator does not have Delegating/Appointing Signatory a Delegating/Appointing Signatory can be selected from the available list.

Step 11

An External DAS can be entered as well. Click Select External Delegating/Appointing Signatory button.

Step 12

Enter the External Designating/Signatory information and then click the Continue button.

Step 13

Once the correct information has been entered in the Designating/Appointing Signatory section, click the Submit button.

Step 14
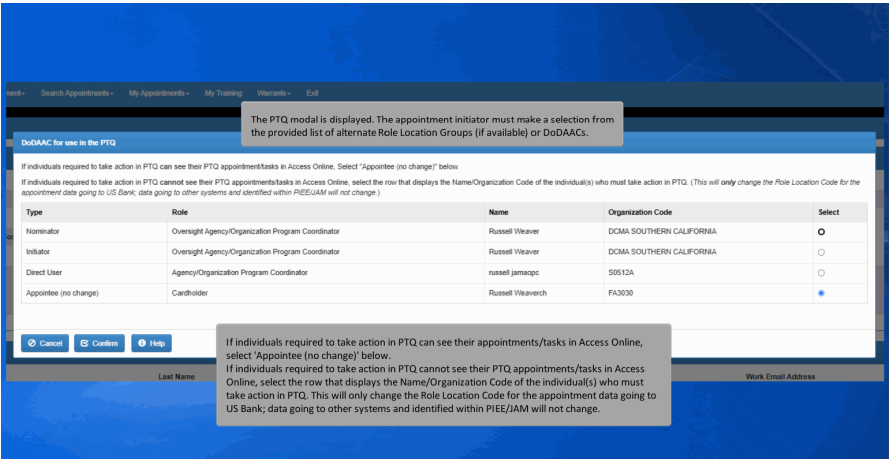
The PTQ modal is displayed. The appointment initiator must make a selection from the provided list of alternate Role Location Groups (if available) or DoDAACs. If individuals required to take action in PTQ can see their appointments/tasks in Access Online, select 'Appointee (no change)' below.

If individuals required to take action in PTQ cannot see their PTQ appointments/tasks in Access Online, select the row that displays the Name/Organization Code of the individual(s) who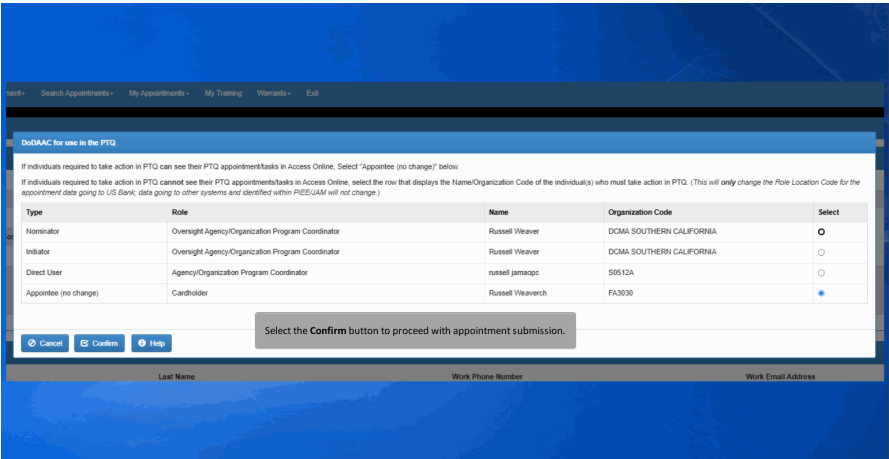 must take action in PTQ. This will only change the Role Location Code for the appointment data going to US Bank; data going to other systems and identified within PIEE/JAM will not change.

Step 15

Select the Confirm button to proceed with appointment submission.

Step 16

Click the I concur with the Appointment Certifications button.

Step 17

Enter Comments if needed and click the Submit button.

Step 18

 An email notification will be sent to the Delegating/Appointing Signatory to approve the appointment. In the event the PIEE user profile is updated, the appointment will automatically be updated with the new administrative information and a new XML will be generated and signed.

Step 19

The Delegating/Appointing Signatory receives an email with instructions and a link to approve the appointment.

Step 20

Click the Affirm button.

Step 21

Review the information and click the Approve button at the bottom of the screen.

Step 22
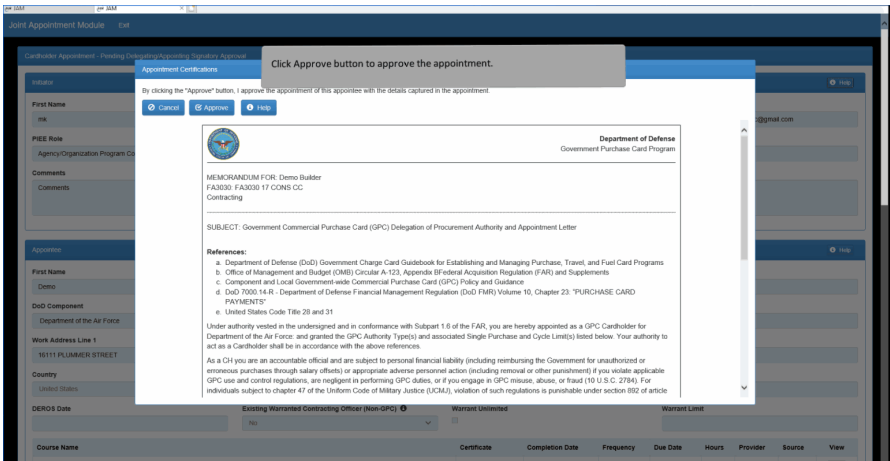
Click Approve button to approve the appointment.

Step 23

Enter Comments if needed and click the Approve button.

Step 24

Continue with the Signature process and sign with Authentication method displayed. For additional help with Smart Card Authentication visit the FAQ Certificate Modernization section of the WBT on the Homepage under Info for all Users.

Step 25

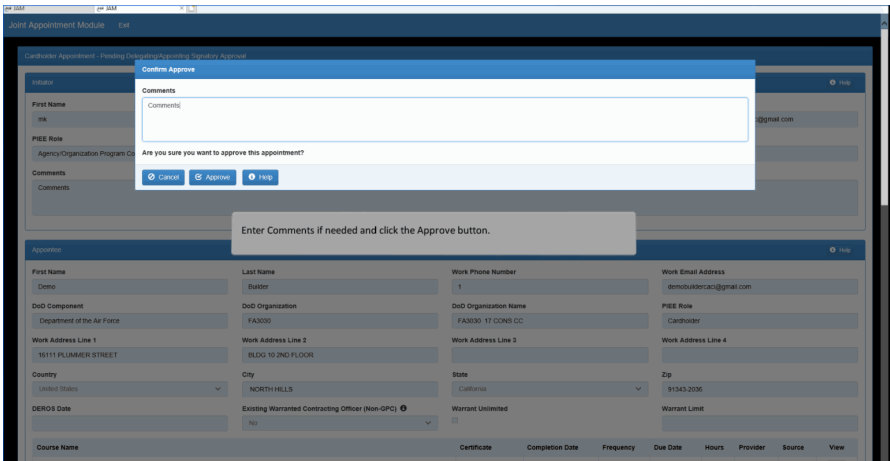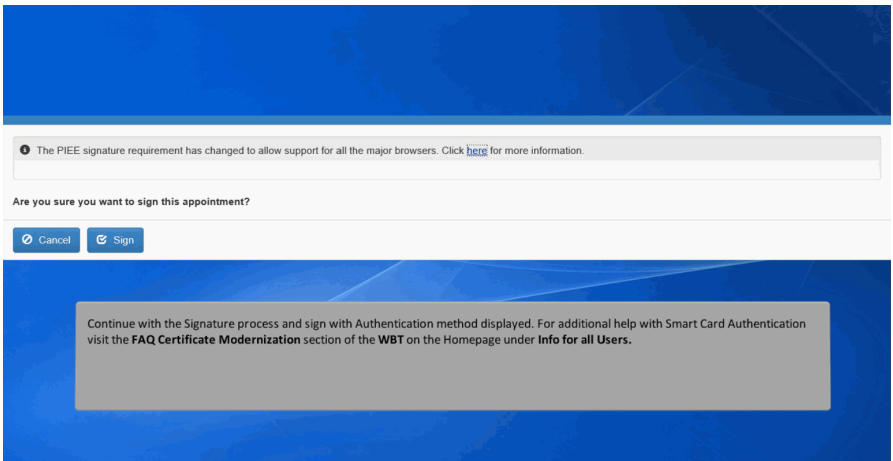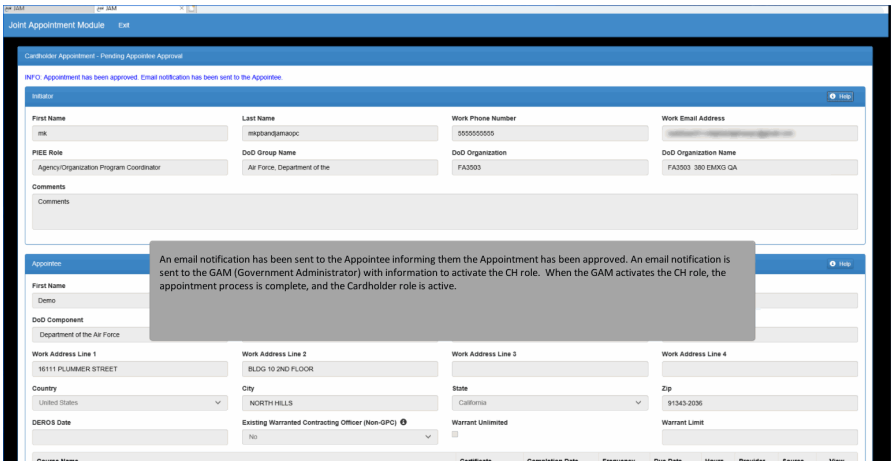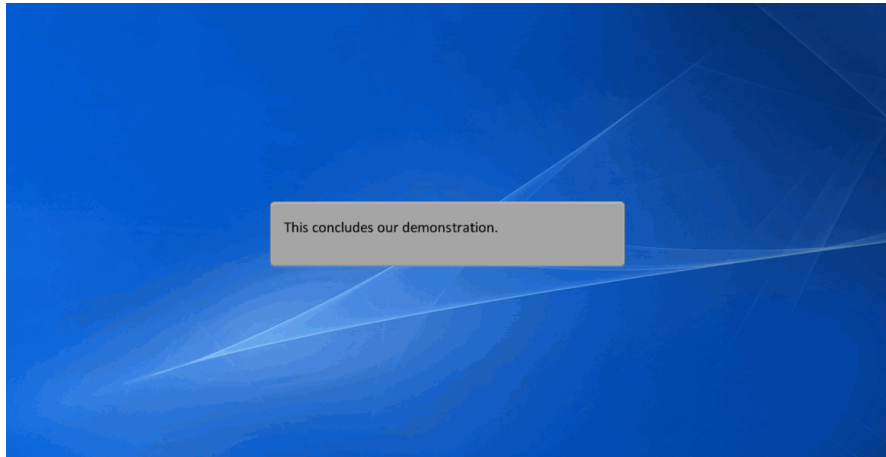An email notification has been sent to the Appointee informing them the Appointment has been approved. An email notification is sent to the GAM (Government Administrator) with information to activate the CH role. When the GAM activates the CH role, the appointment process is complete, and the Cardholder role is active.

End

This concludes our demonstration.