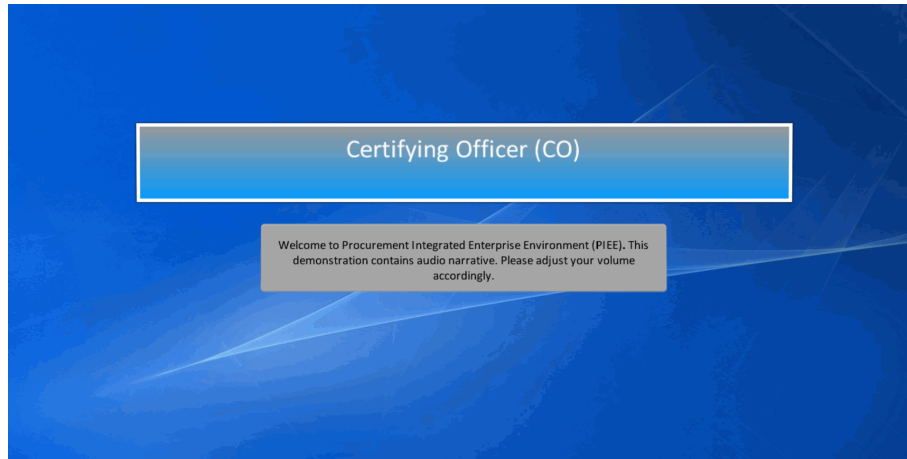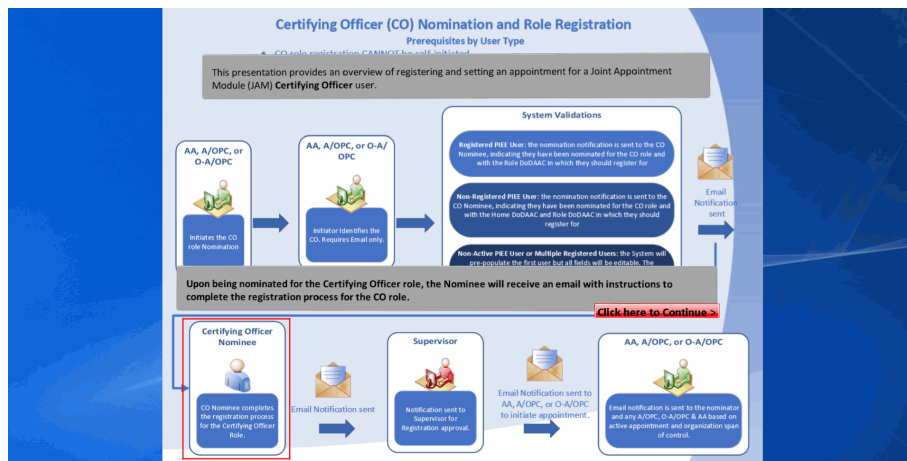Intro

Certifying Officer (CO) Welcome to Procurement Integrated Enterprise Environment (PIEE). This demonstration contains audio narrative. Please adjust your volume accordingly.

Step 1

Upon being nominated for the Certifying Officer role, the Nominee will receive an email with instructions to complete the registration process for the CO role.This presentation provides an overview of registering and setting an appointment for a Joint Appointment Module (JAM) Certifying Officer user.
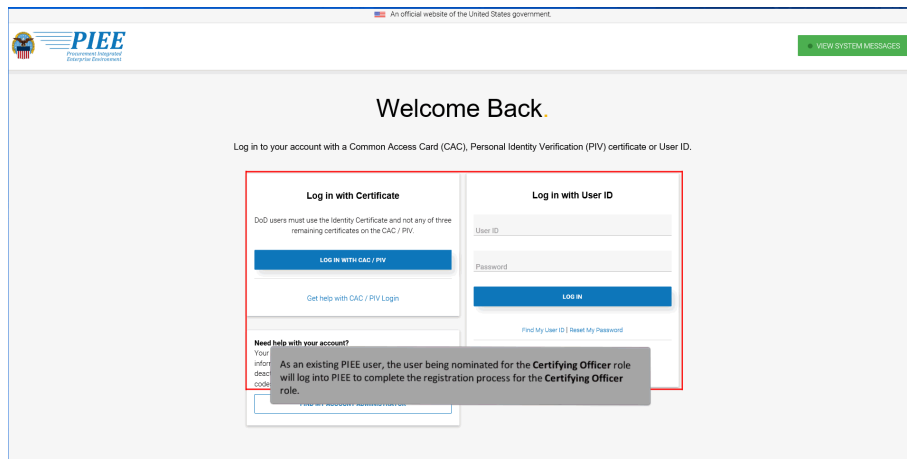
Step 2
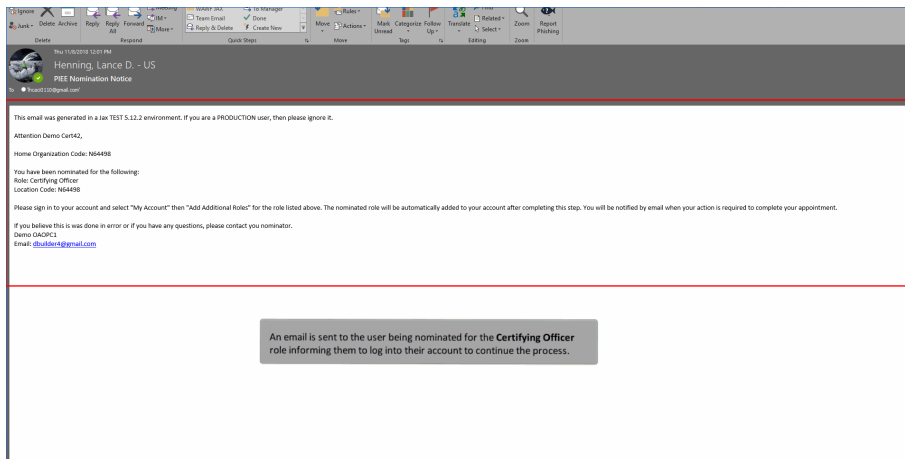
An email is sent to the user being nominated for the Certifying Officer role informing them to log into their account to continue the process.
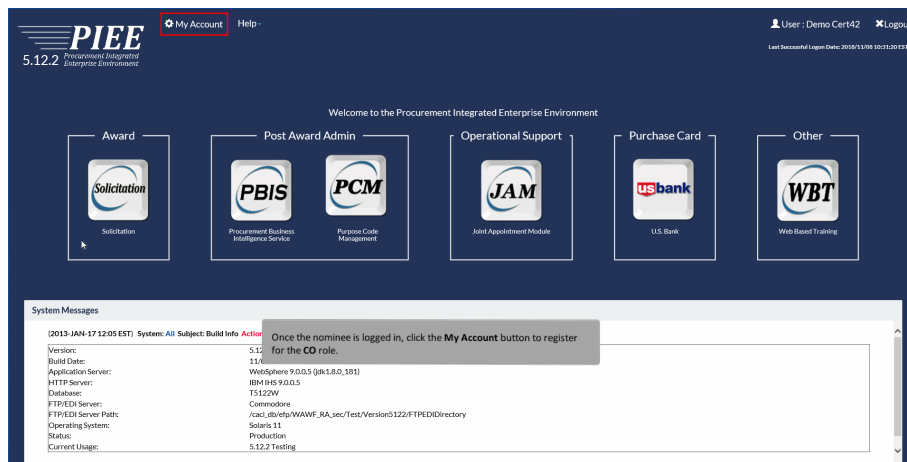
Step 3
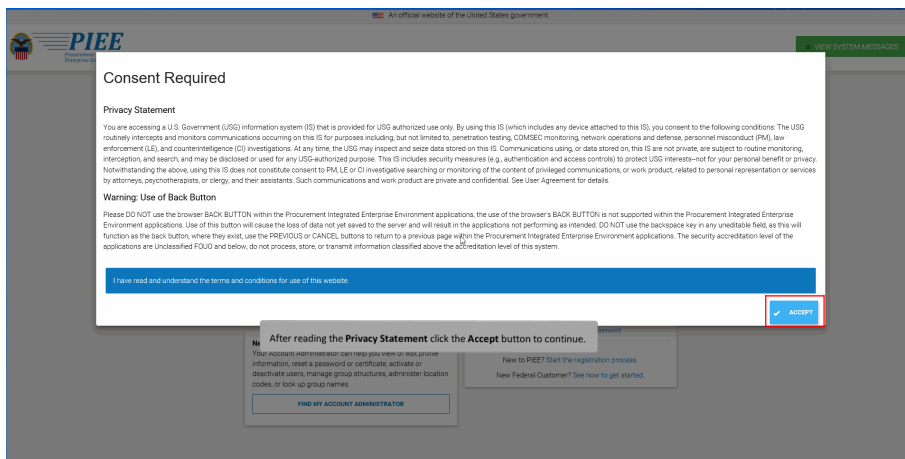
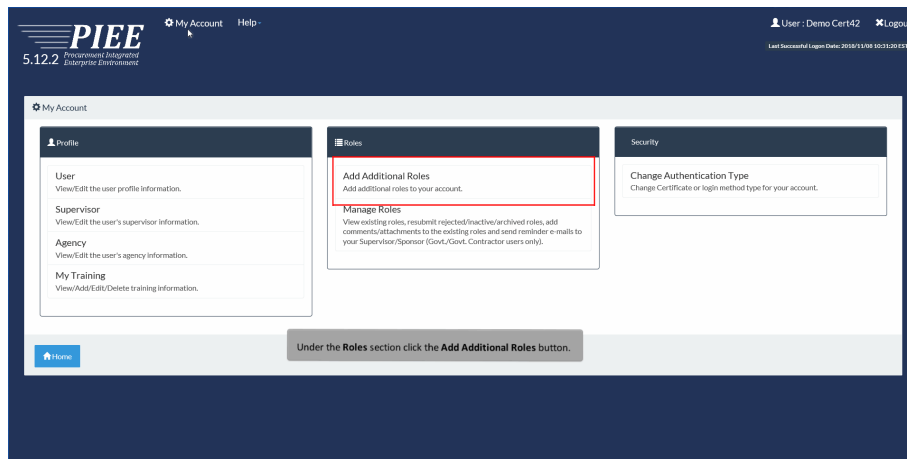After reading the Privacy Statement click the Accept button to continue.

Step 4

As an existing PIEE user, the user being nominated for the Certifying Officer role will log into PIEE to complete the registration process for the Certifying Officer role.
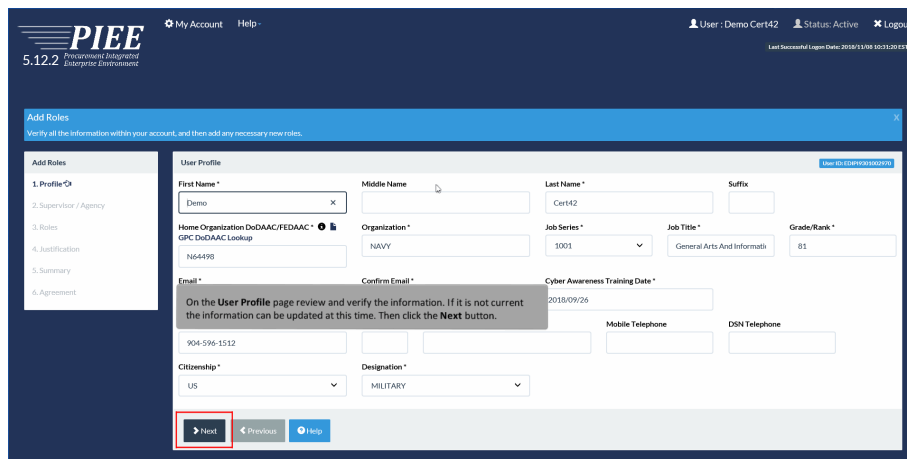
Step 5

Once the nominee is logged in, click the My Account button to register for the CO role.

Step 6

Under the Roles section click the Add Additional Roles button.

Step 7

On the User Profile page review and verify the information. If it is not current the information can be updated at this time. Then click the Next button.

Step 8

On the Additional Profile Information page verify the information and update as necessary. Then click the Next button.
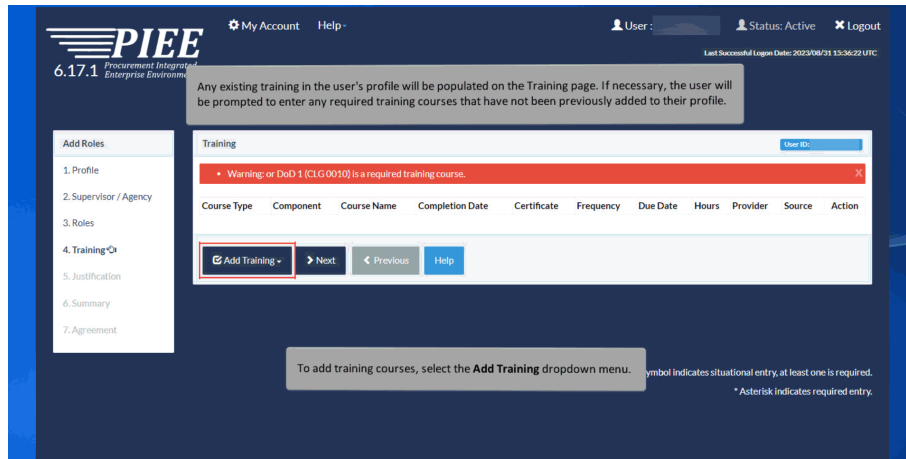
Step 9

On the Roles page the CO role will be auto populated. Click the Next button.
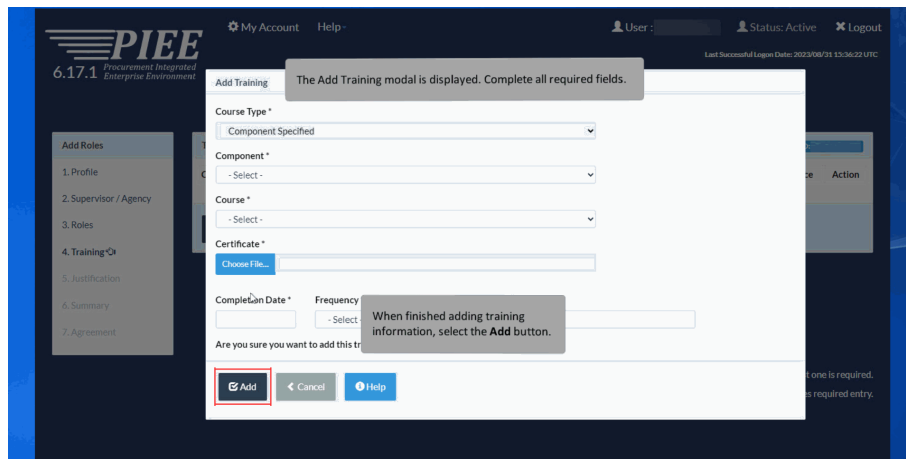
Step 10

Any existing training in the user's profile will be populated on the Training page. If necessary, the user will be prompted to enter any required training courses that have not been previously added to their profile. To add training courses, select the Add Training dropdown menu.
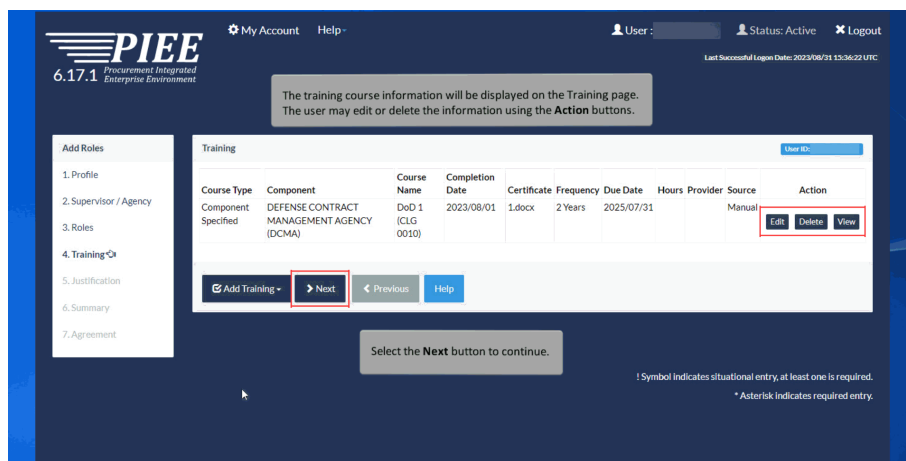
Step 11
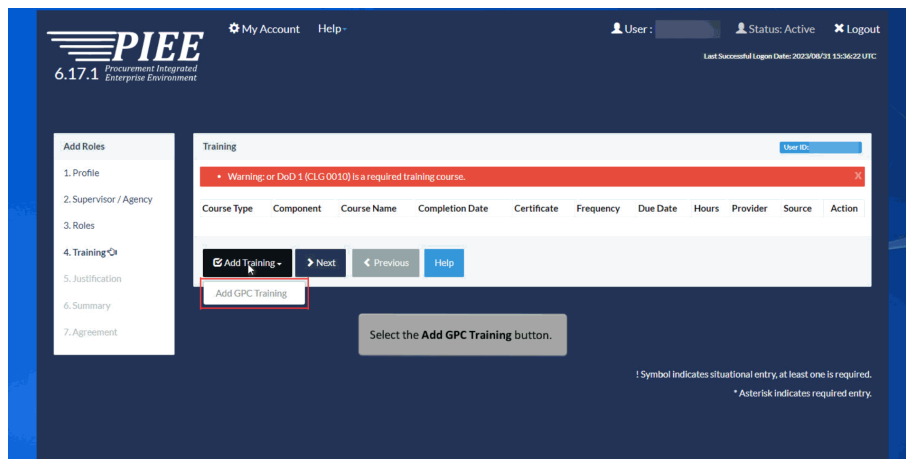


Select the Add GPC Training button.

Step 12

The Add Training modal is displayed. Complete all required fields. When finished adding training information, select the Add button.
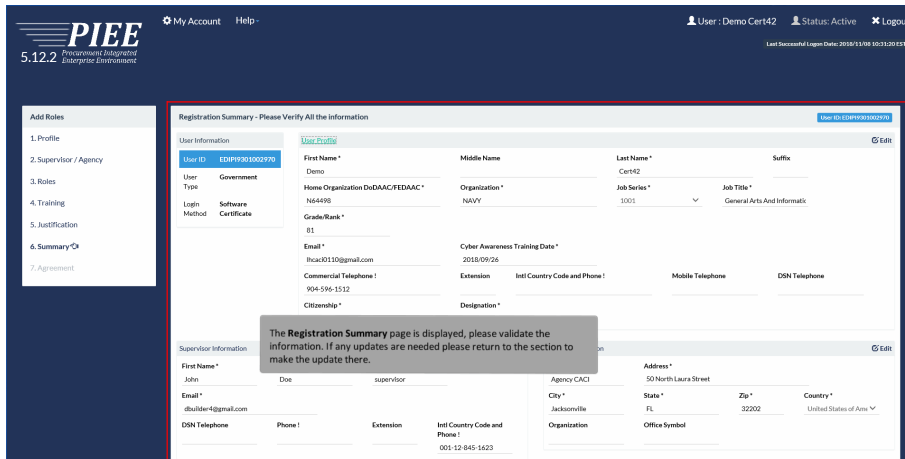
Step 13

The training course information will be displayed on the Training page. The user may edit or delete the information using the Action buttons. Select the Next button to continue.

Step 14
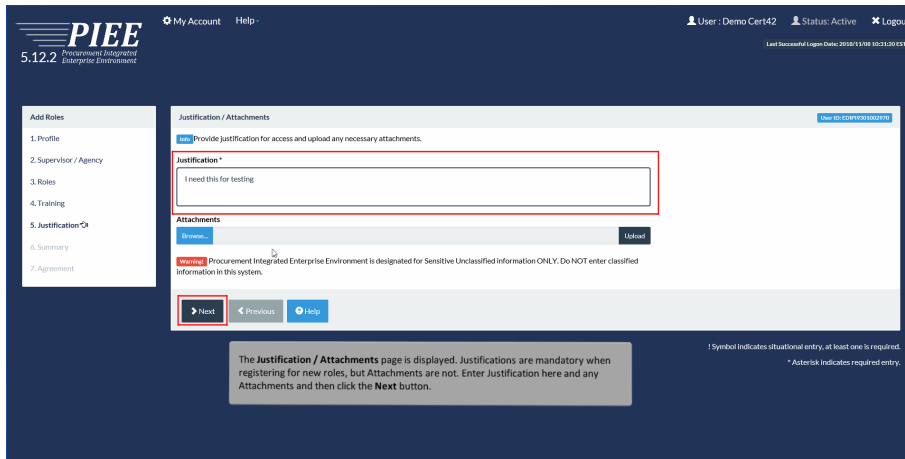
The Justification / Attachments page is displayed. Justifications are mandatory when registering for new roles, but Attachments are not. Enter Justification here and any Attachments and then click the Next button.

Step 15

The Registration Summary page is displayed, please validate the information. If any updates are needed please return to the section to make the update there.

Step 16

After verifying the information, click the Next button to continue.

Step 17

The Agreement page is displayed please review the Statement of Accountability Agreement. The Home Organization DoDAAC will be automatically populated in the Government Organization field: PIEESSO-SSOAC-1518 - When self-registering in PIEE the system will populate the 'Government Organization' field on the Statement of Accountability page with the Home Organization Location DoDAAC from the User Profile. Click the Signature button to sign the document indicating you have read and agree.

Step 18
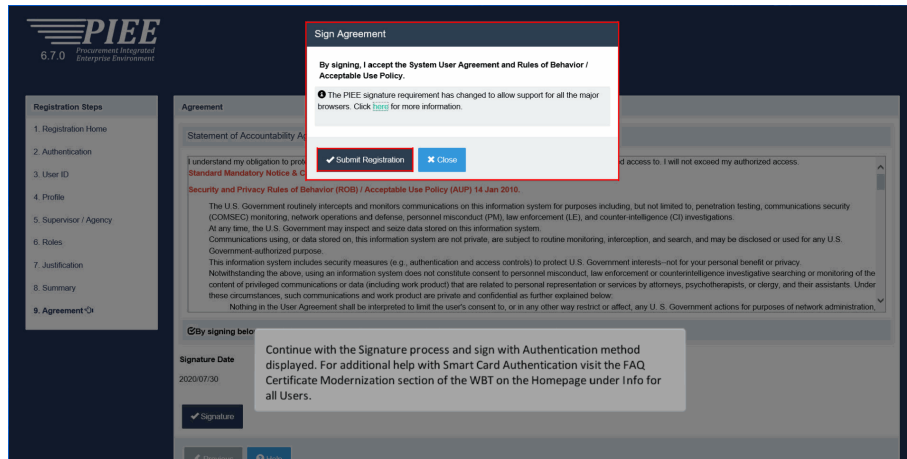
Continue with the Signature process and sign with Authentication method displayed. For additional help with Smart Card Authentication visit the FAQ Certificate Modernization section of the WBT on the Homepage under Info for all Users.
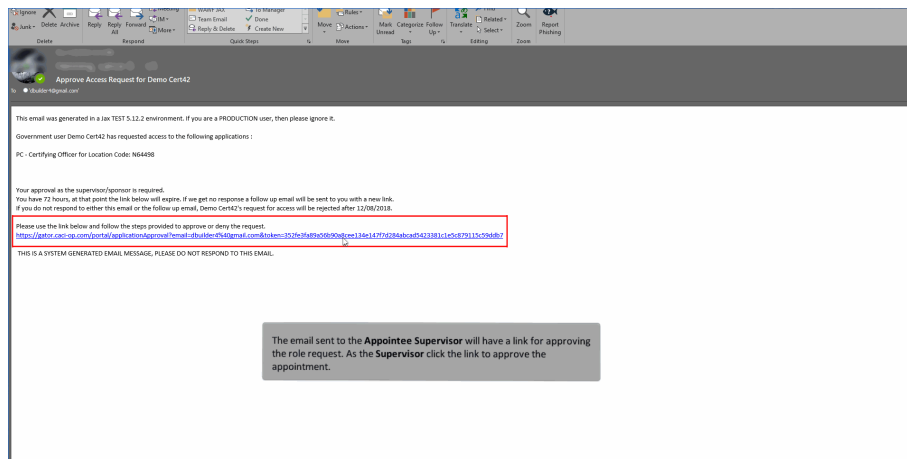
Step 19
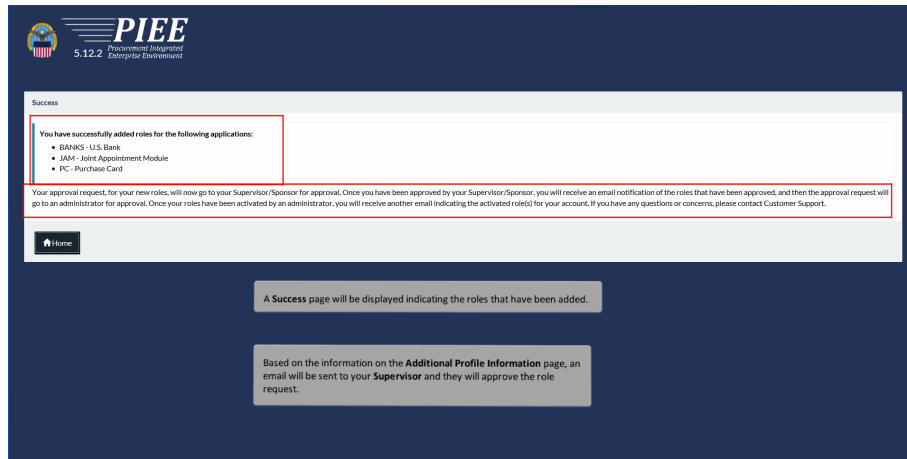
A Success page will be displayed indicating the roles that have been added. Based on the information on the Additional Profile Information page, an email will be sent to your Supervisor and they will approve the role request.

Step 20
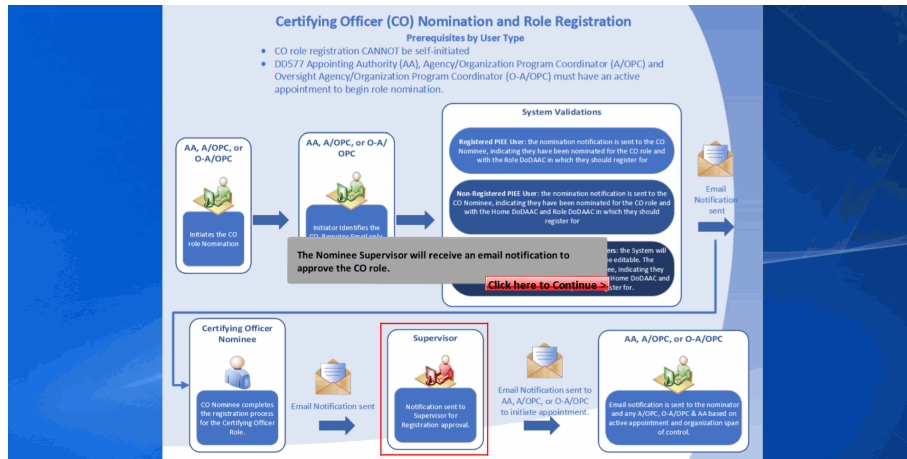
The Nominee Supervisor will receive an email notification to approve the CO role.

Step 21

The email sent to the Appointee Supervisor will have a link for approving the role request. As the Supervisor click the link to approve the appointment.

Step 22

The Approval/Denial for Application Request page is displayed with information regarding the registering user and their information. The Supervisor/Sponsor will review the information.

Step 23

After reviewing the information, the Supervisor/Sponsor will select Approve or Deny from the action dropdown. Enter Additional Justifications as needed and check the check box indicating that you have read the user's Justifications. Click the Submit button.

Step 24
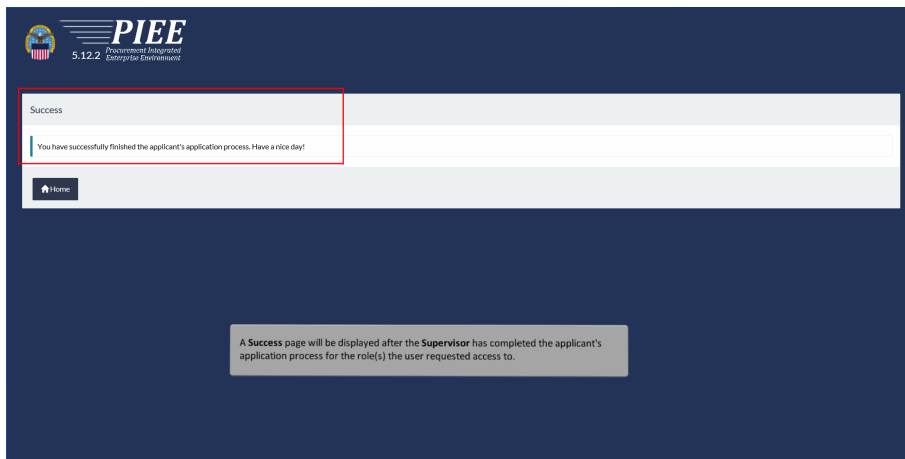
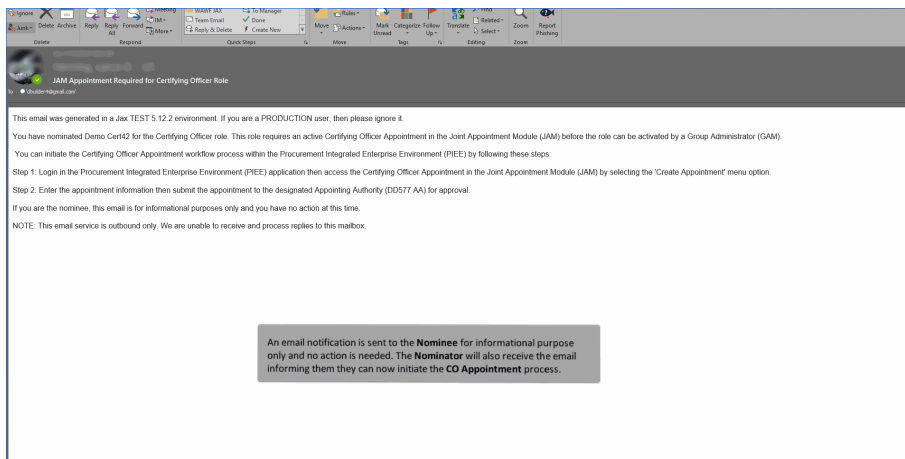A Success page will be displayed after the Supervisor has completed the applicant's application process for the role(s) the user requested access to.
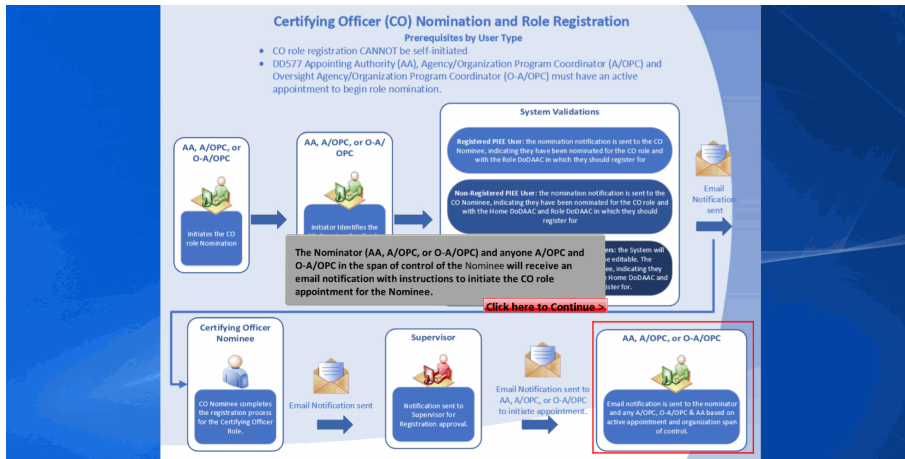
Step 25

An email notification is sent to the Nominee for informational purpose only and no action is needed. The Nominator will also receive the email informing them they can now initiate the CO Appointment process.
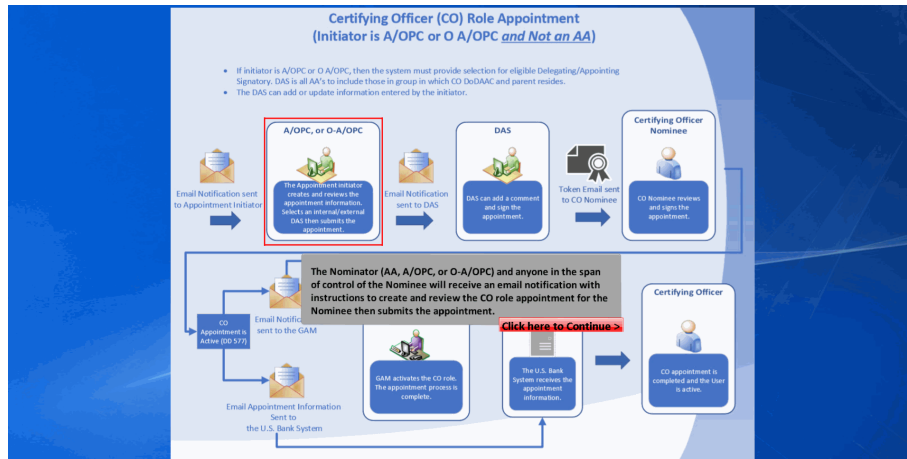
Step 26
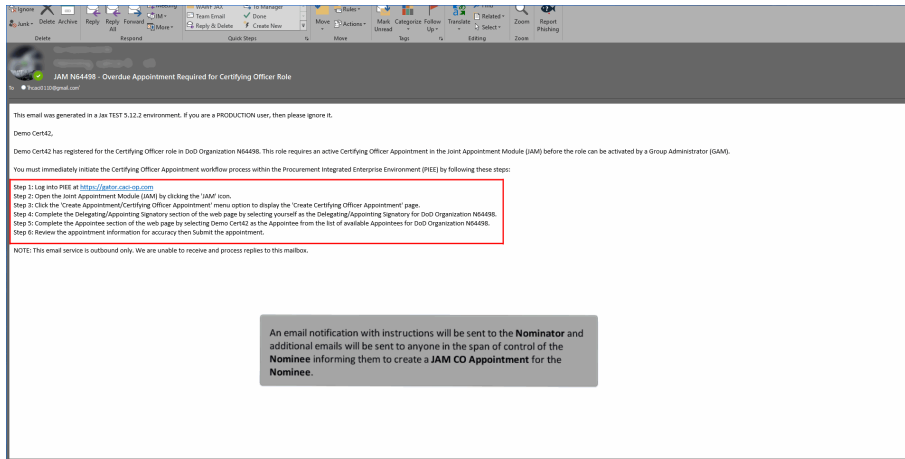
An email notification with instructions will be sent to the Nominator and additional emails will be sent to anyone in the span of control of the Nominee informing them to create a JAM CO Appointment for the Nominee.

Step 27

The Nominator (AA, A/OPC, or O-A/OPC) and anyone A/OPC and O-A/OPC in the span of control of the Nominee will receive an email notification with instructions to initiate the CO role appointment for the Nominee.

Step 28

The Nominator (AA, A/OPC, or O-A/OPC) and anyone in the span of control of the Nominee will receive an email notification with instructions to create and review the CO role appointment for the Nominee then submits the appointment.
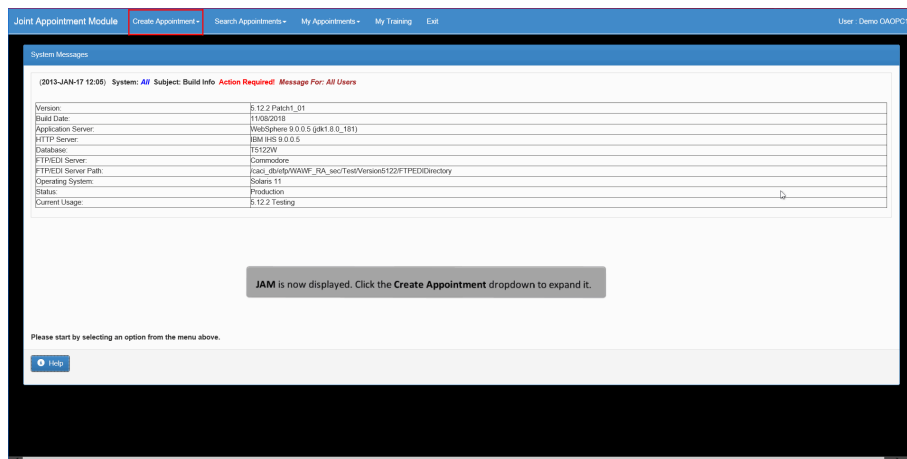
Step 29
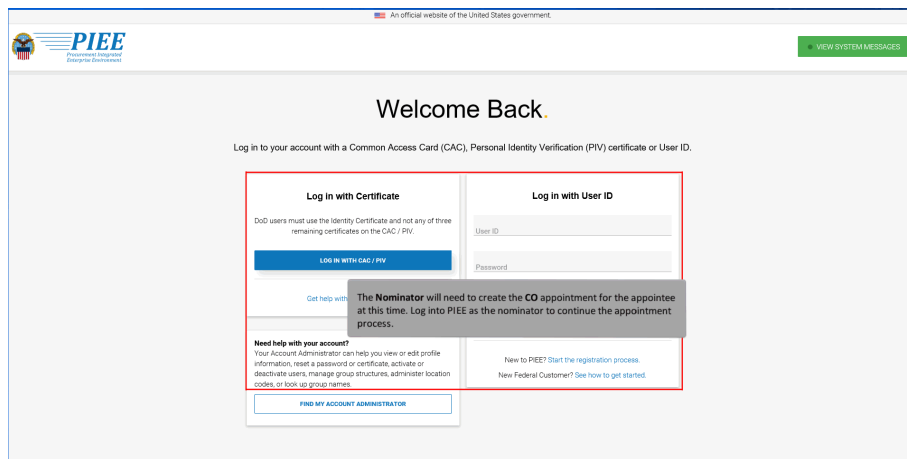
The Nominator will need to create the CO appointment for the appointee at this time. Log into PIEE as the nominator to continue the appointment process.
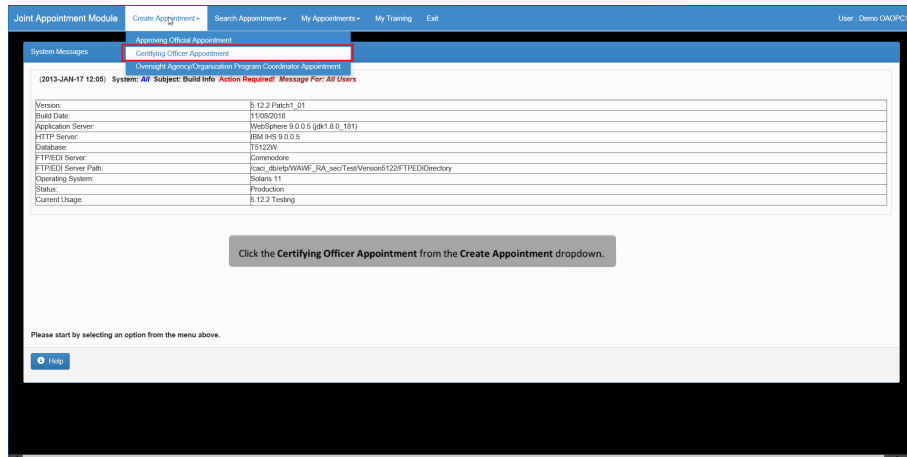
Step 30

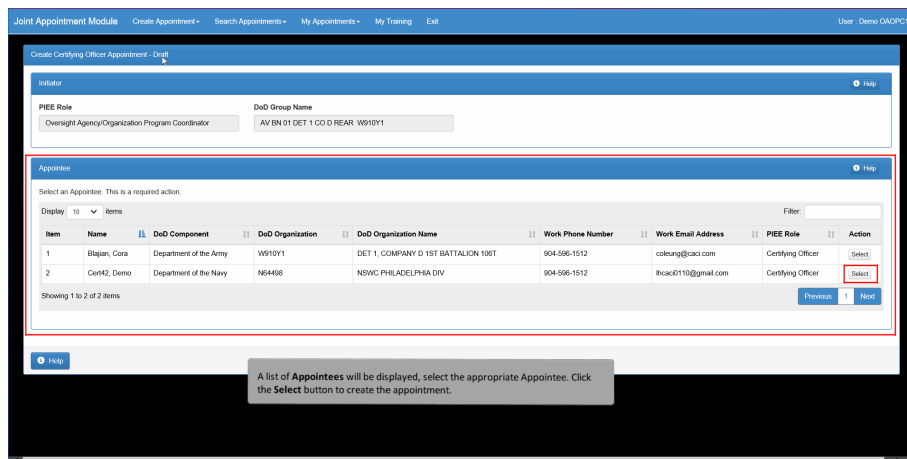Click the JAM icon to create the CO appointment.

Step 31

JAM is now displayed. Click the Create Appointment dropdown to expand it.
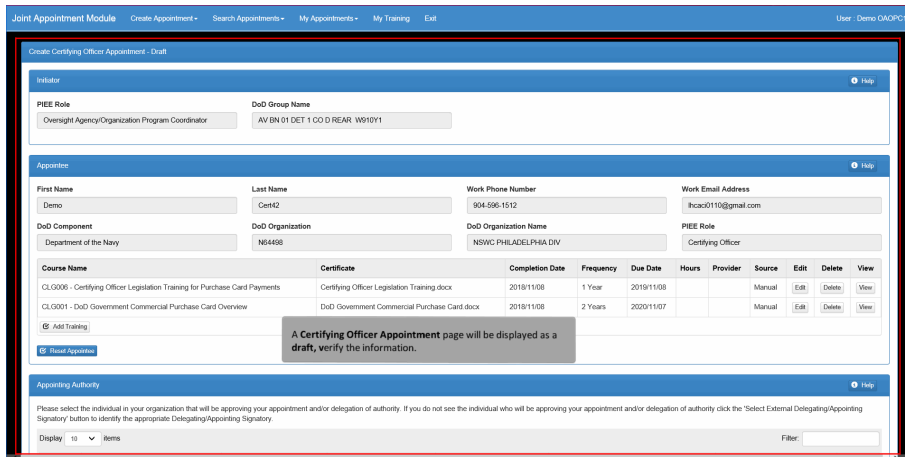
Step 32

Click the Certifying Officer Appointment from the Create Appointment dropdown.
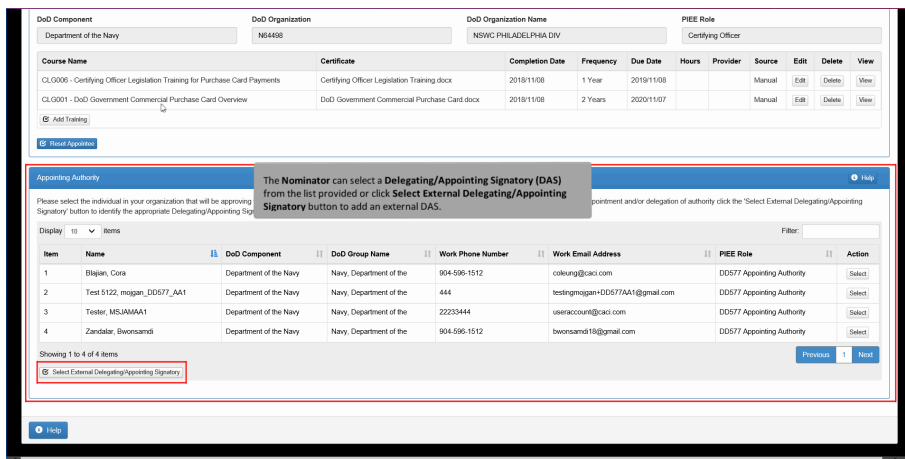
Step 33

A list of Appointees will be displayed, select the appropriate Appointee. Click the Select button to create the appointment.
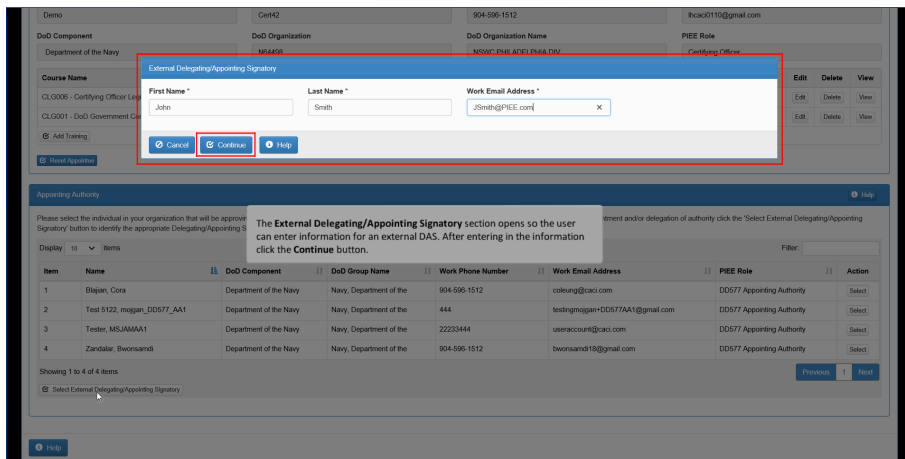
Step 34

A Certifying Officer Appointment page will be displayed as a draft, verify the information.
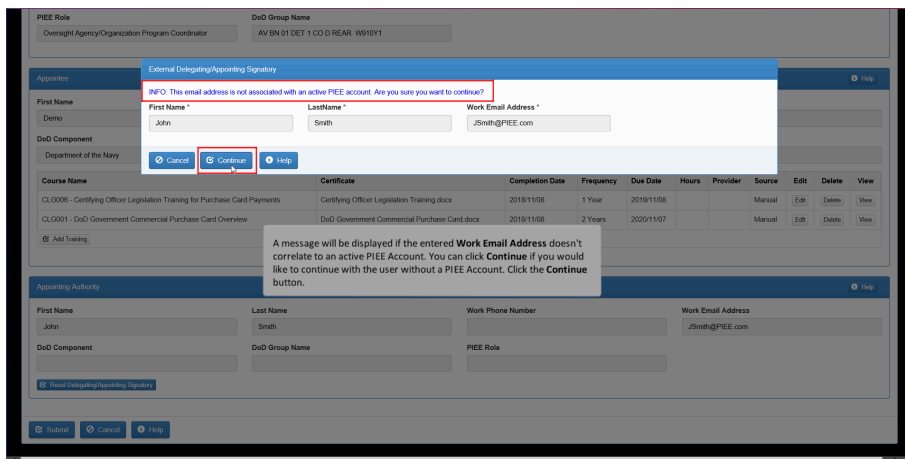
Step 35

The Nominator can select a Delegating/Appointing Signatory (DAS) from the list provided or click Select External Delegating/Appointing Signatory button to add an external DAS.

Step 36

The External Delegating/Appointing Signatory section opens so the user can enter information for an external DAS. After entering in the information click the Continue button.

Step 37

A message will be displayed if the entered Work Email Address doesn't correlate to an active PIEE Account. You can click Continue if you would like to continue with the user without a PIEE Account. Click the Continue button.

Step 38

The external DAS will now be displayed on the page. If the user has made a mistake or wants to change the currently selected DAS, they can click Reset Delegating/Appointing Signatory button to remove the selected DAS. Click the Reset Delegating/Appointing Signatory button to continue.

Step 39

The DAS section has reset, and the user can now select or enter a new DAS.

Step 40

Click the Select button next to the DAS that will be given the privileges to activate the appointment.

Step 41

The DAS that was selected from the list is now displayed.

Step 42

After verifying the information click the Submit button to continue, please update as necessary.

Step 43

Comments can be entered with the appointment.

Step 44
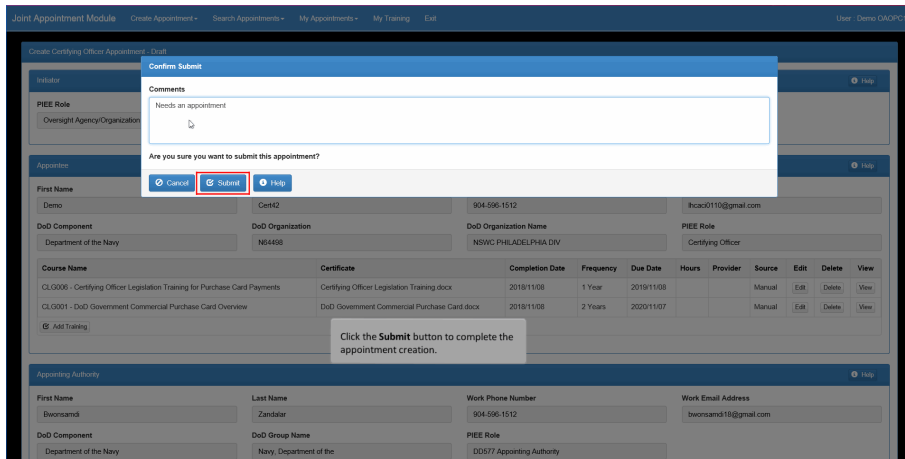
Click the Submit button to complete the appointment creation.

Step 45
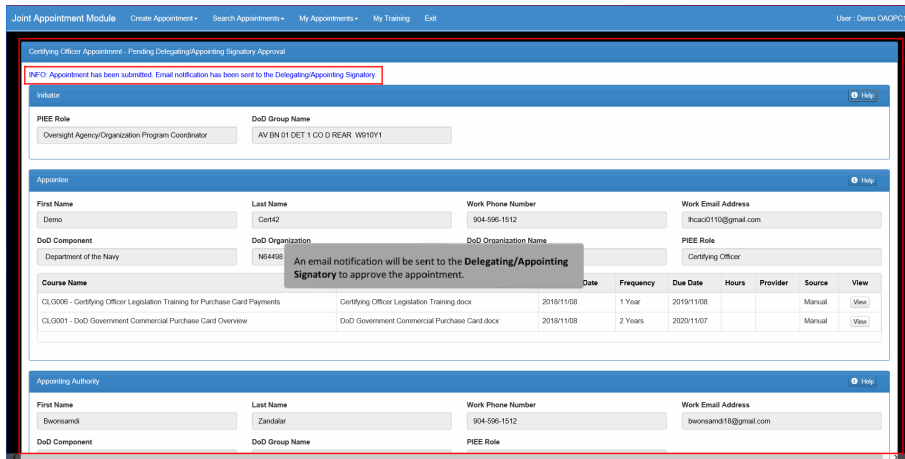
A Success page and message will be displayed. An email notification will be sent to the Delegating/Appointing Signatory to approve the appointment.

Step 46
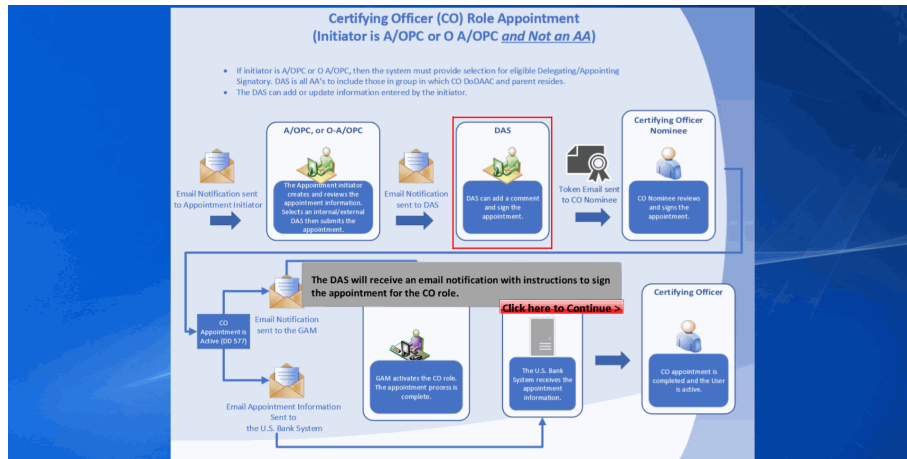
The DAS will receive an email notification with instructions to sign the appointment for the CO role.

Step 47
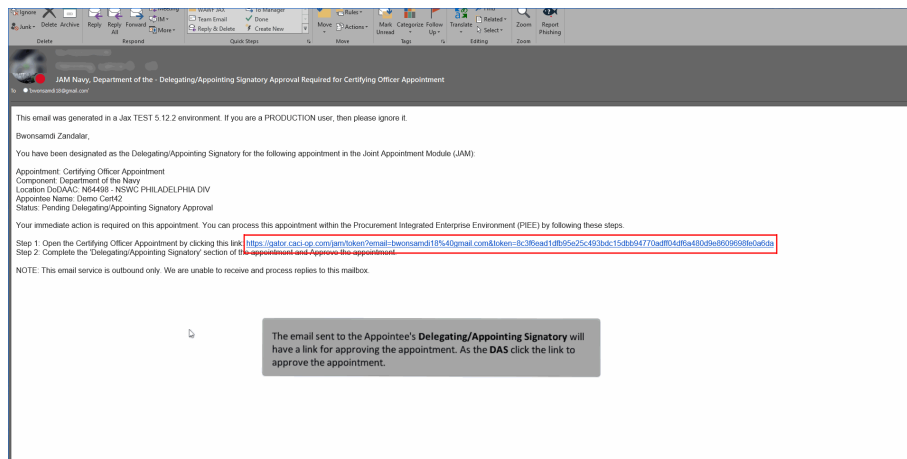
The email sent to the Appointee's Delegating/Appointing Signatory will have a link for approving the appointment. As the DAS click the link to approve the appointment.

Step 48

As the Delegating/Appointing Signatory review the information for the appointment created by the nominator.

Step 49

If the information is correct click the Approve button for the appointment.

Step 50
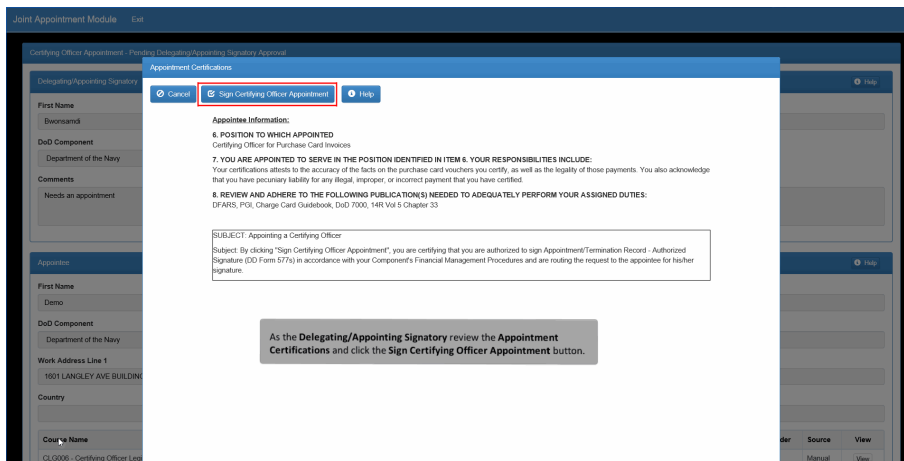
As the Delegating/Appointing Signatory review the Appointment Certifications and click the Sign Certifying Officer Appointment button.

Step 51
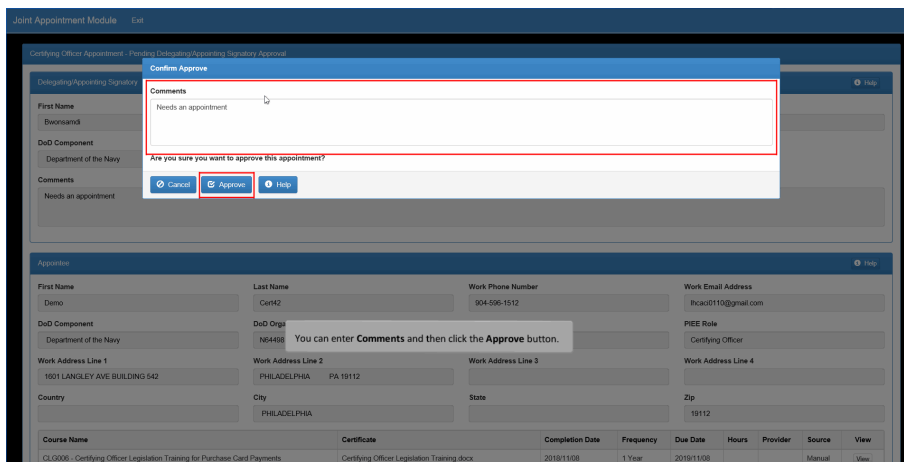
You can enter Comments and then click the Approve button.

Step 52
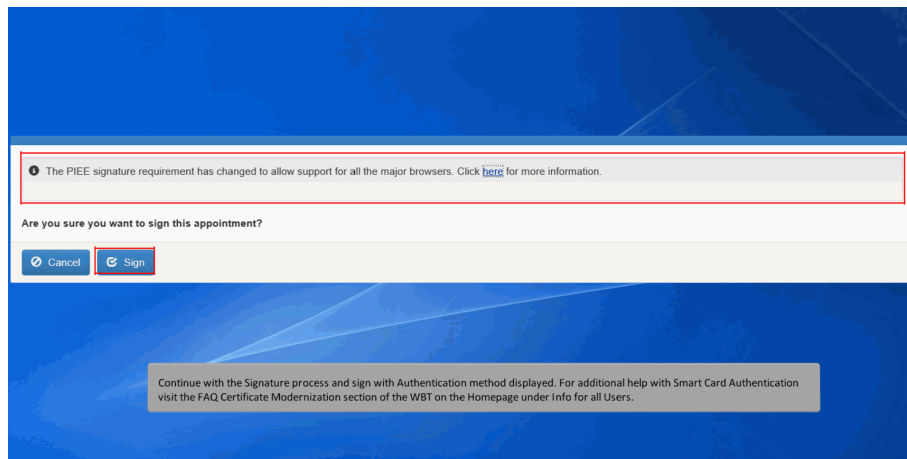
Continue with the Signature process and sign with Authentication method displayed. For additional help with Smart Card Authentication visit the FAQ Certificate Modernization section of the WBT on the Homepage under Info for all Users.

Step 53

A Success page and message will be displayed. An email notification will be sent to the Appointee.

Step 54

The Nominee Certifying Officer will receive an email notification with instructions to sign the appointment for the CO role.

Step 55

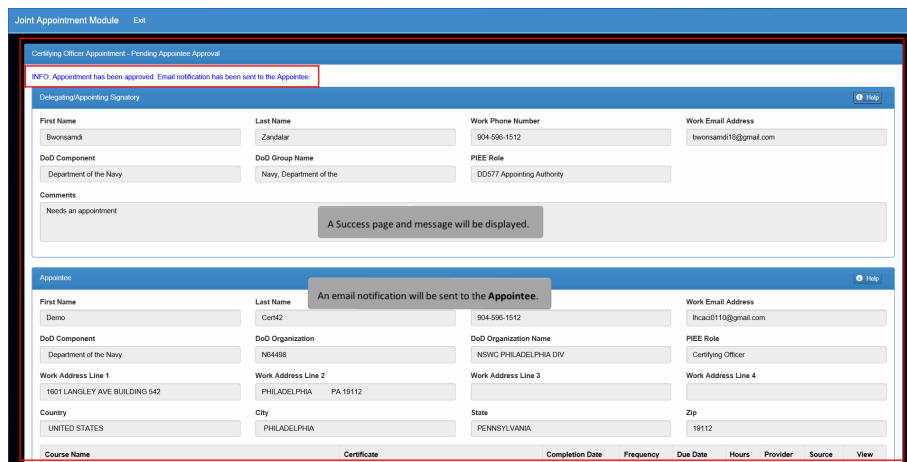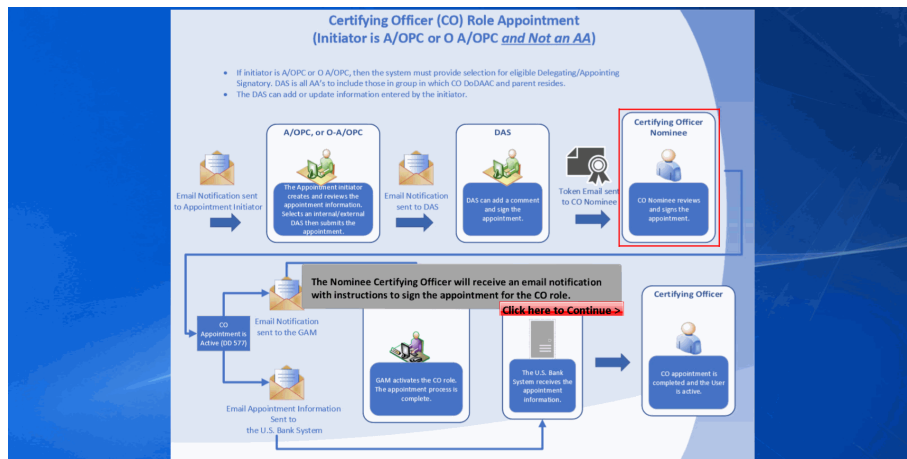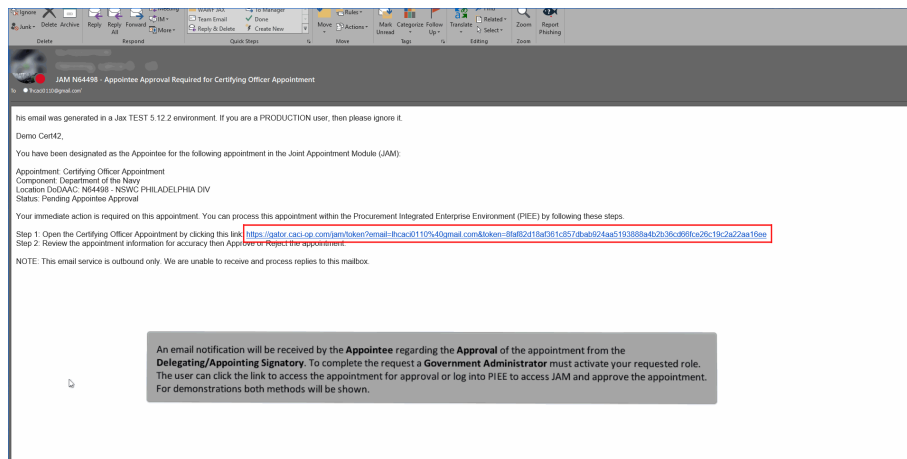An email notification will be received by the Appointee regarding the Approval of the appointment from the Delegating/Appointing Signatory. To complete the request a Government Administrator must activate your requested role. The user can click the link to access the appointment for approval or log into PIEE to access JAM and approve the appointment. For demonstrations both methods will be shown.

Step 56
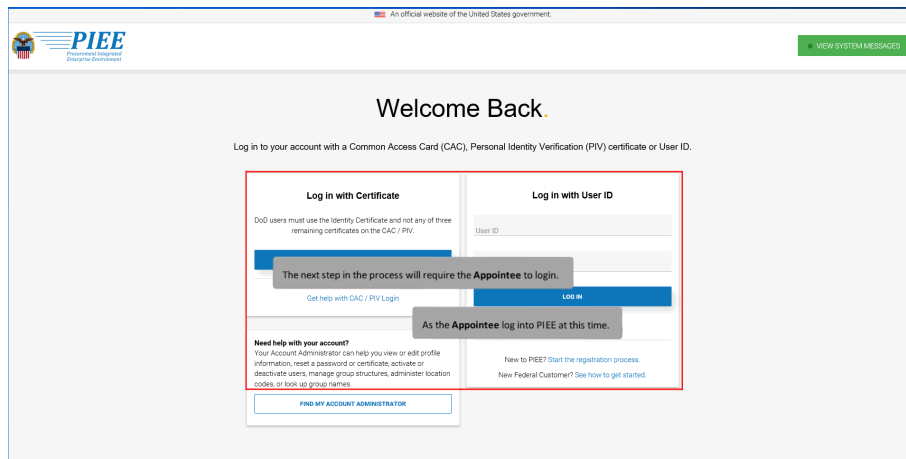
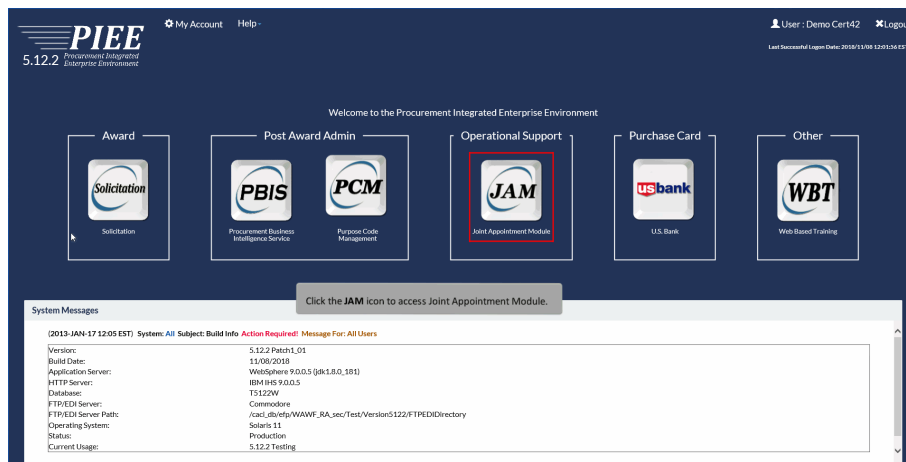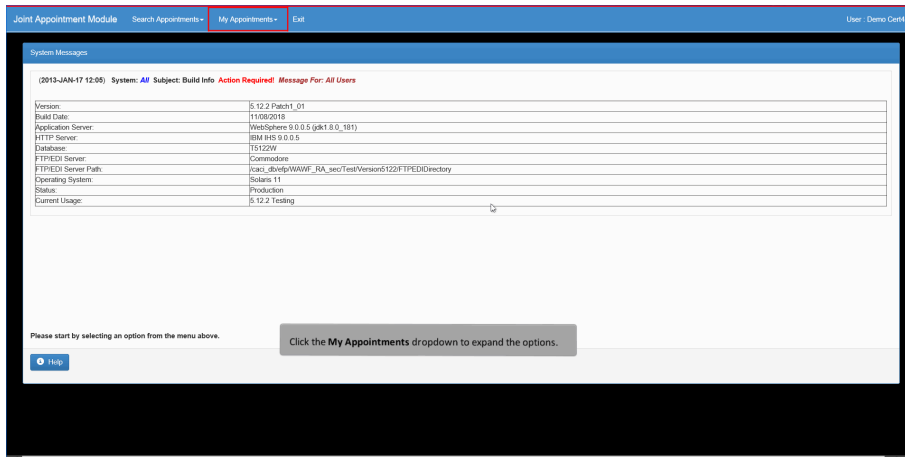The next step in the process will require the Appointee to login. As the Appointee log into PIEE at this time.
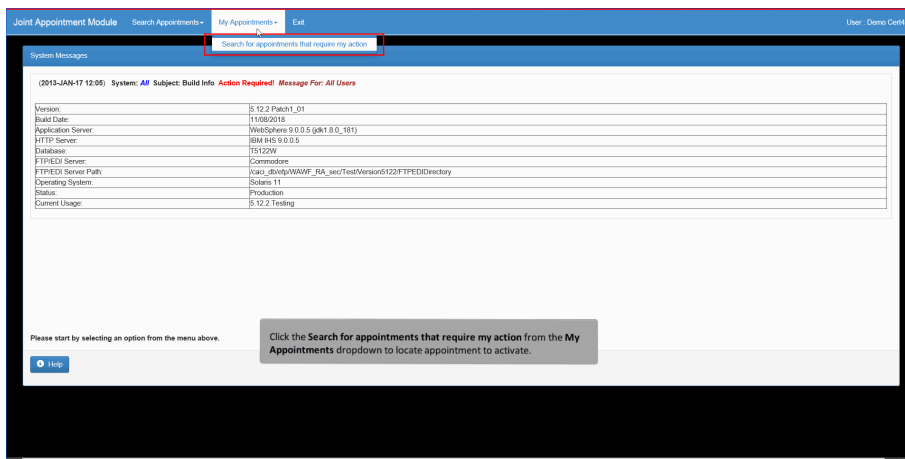
Step 57

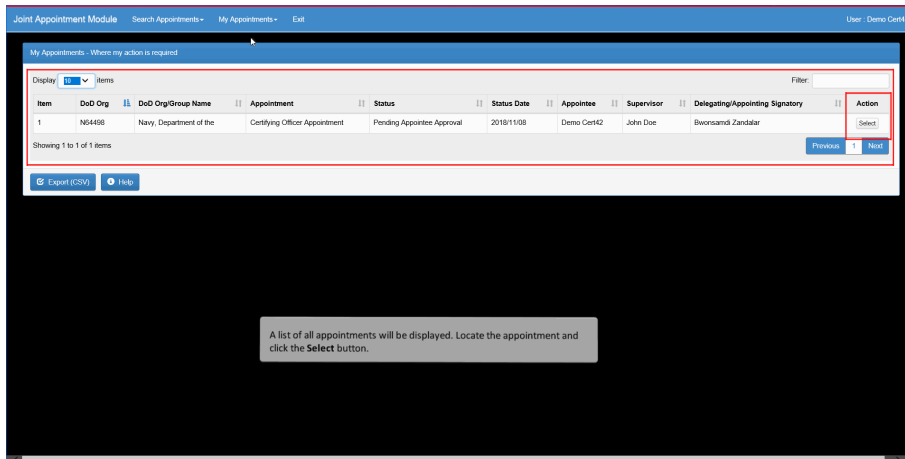Click the JAM icon to access Joint Appointment Module.

Step 58

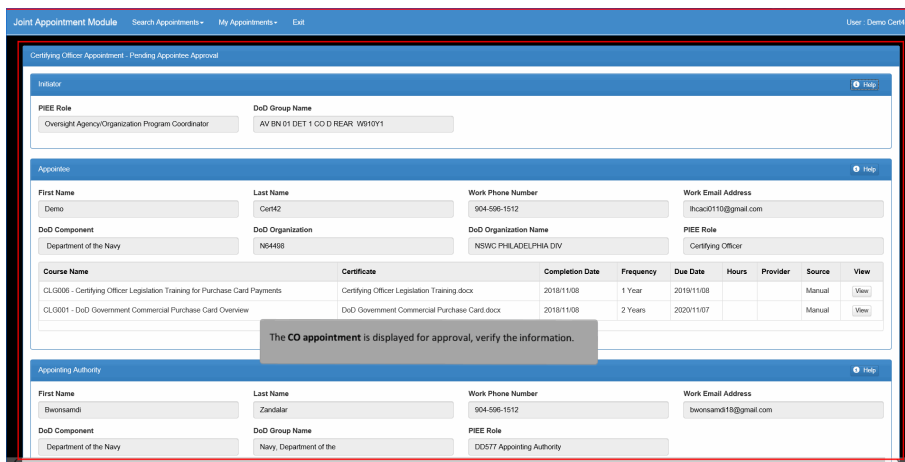Click the My Appointments dropdown to expand the options.

Step 59

Click the Search for appointments that require my action from the My Appointments dropdown to locate appointment to activate.
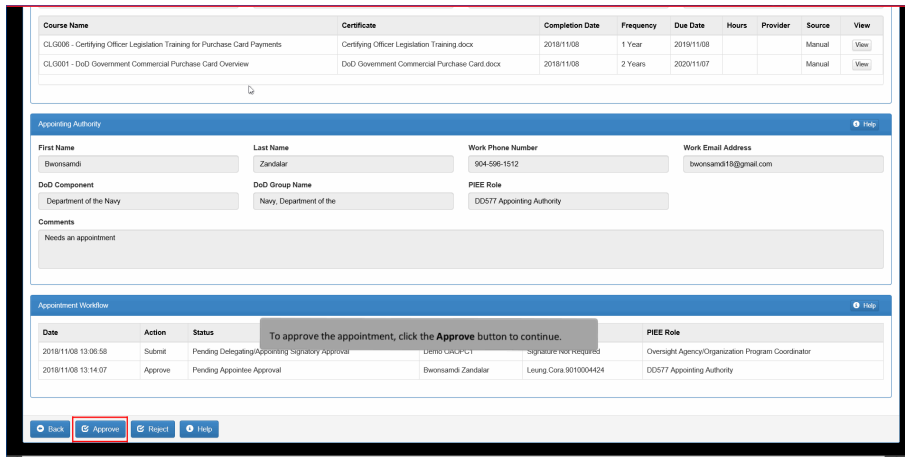
Step 60

A list of all appointments will be displayed. Locate the appointment and click the Select button.
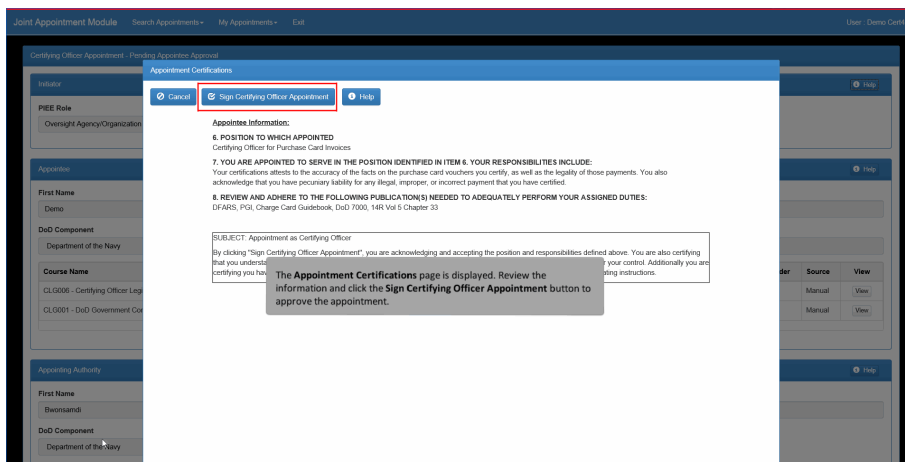
Step 61

The CO appointment is displayed for approval, verify the information.
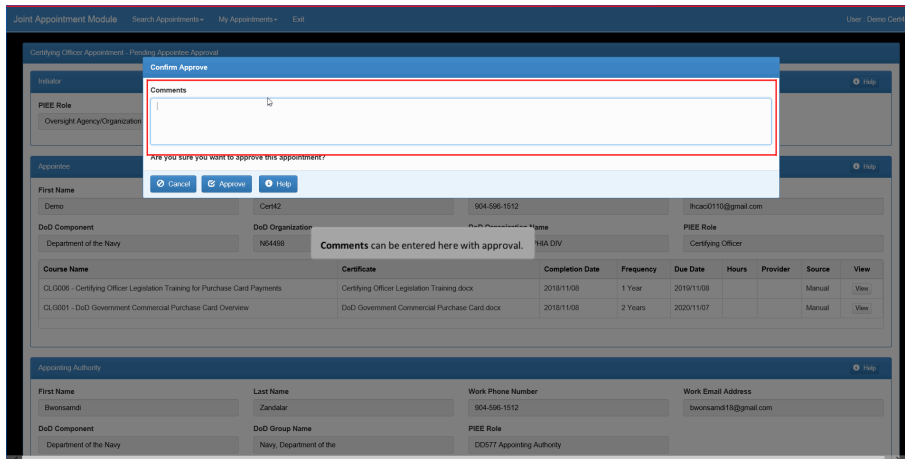
Step 62

To approve the appointment, click the Approve button to continue.
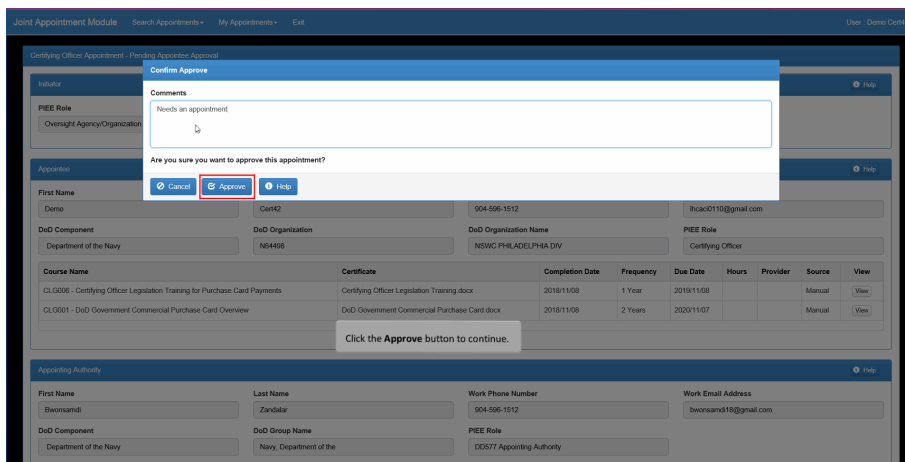
Step 63

The Appointment Certifications page is displayed. Review the information and click the Sign Certifying Officer Appointment button to approve the appointment.
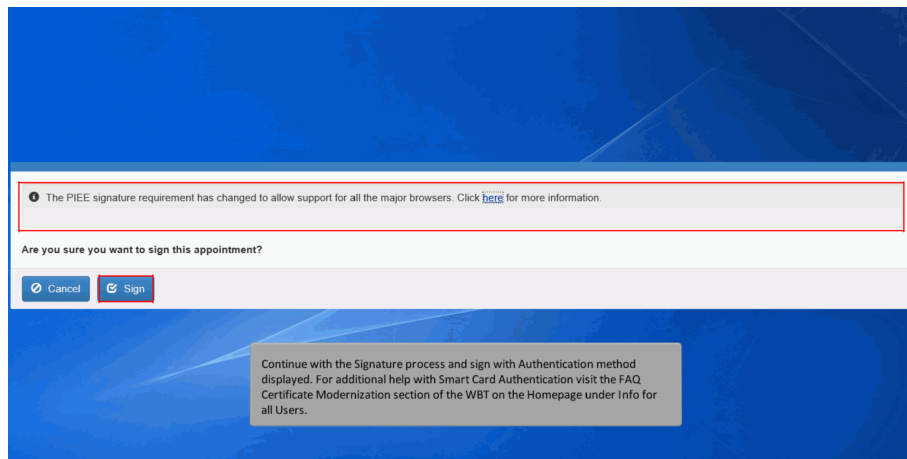
Step 64

Comments can be entered here with approval.
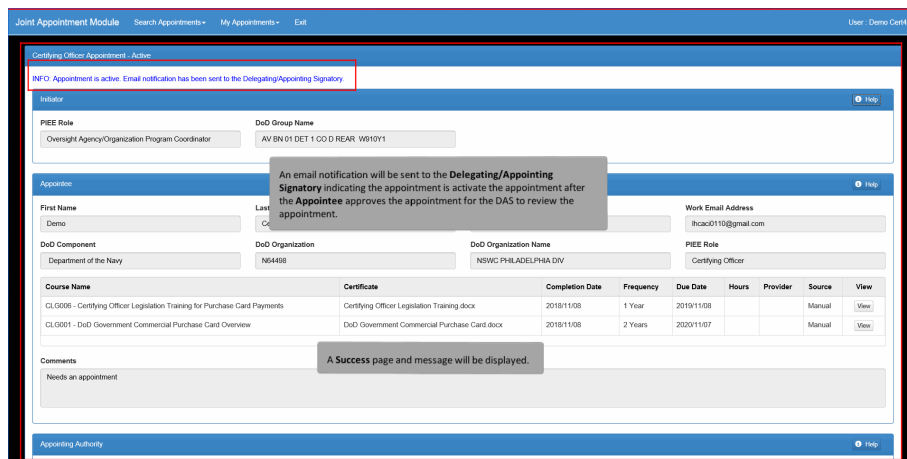
Step 65

Click the Approve button to continue.

Step 66

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 67

A Success page and message will be displayed. An email notification will be sent to the Delegating/Appointing Signatory indicating the appointment is activate the appointment after the Appointee approves the appointment for the DAS to review the appointment.

Step 68
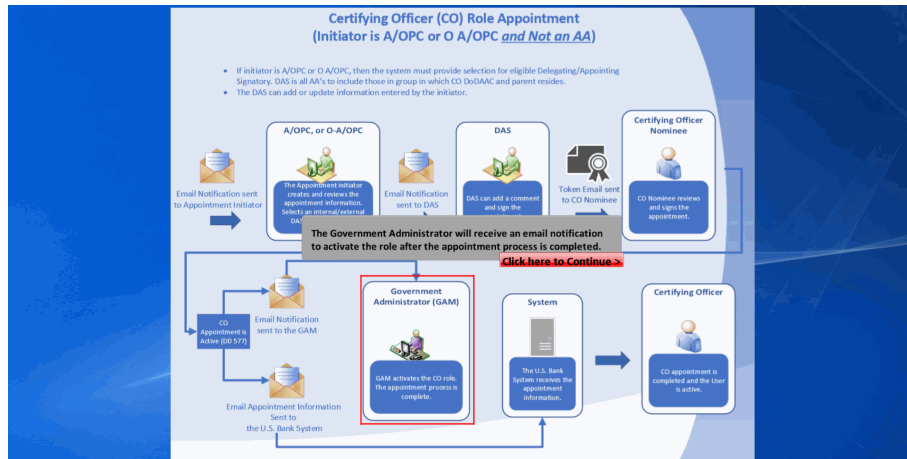
The Government Administrator will receive an email notification to activate the role after the appointment process is completed.

Step 69
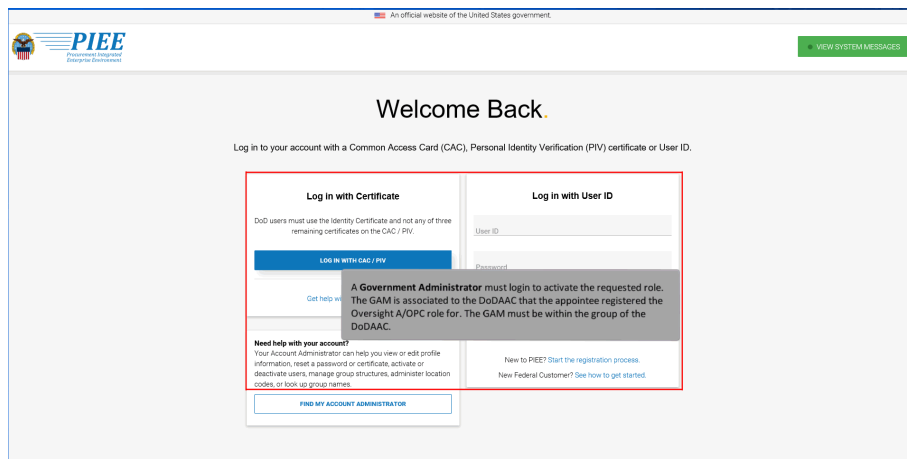
A Government Administrator must login to activate the requested role. The GAM is associated to the DoDAAC that the appointee registered the Oversight A/OPC role for. The GAM must be within the group of the DoDAAC.
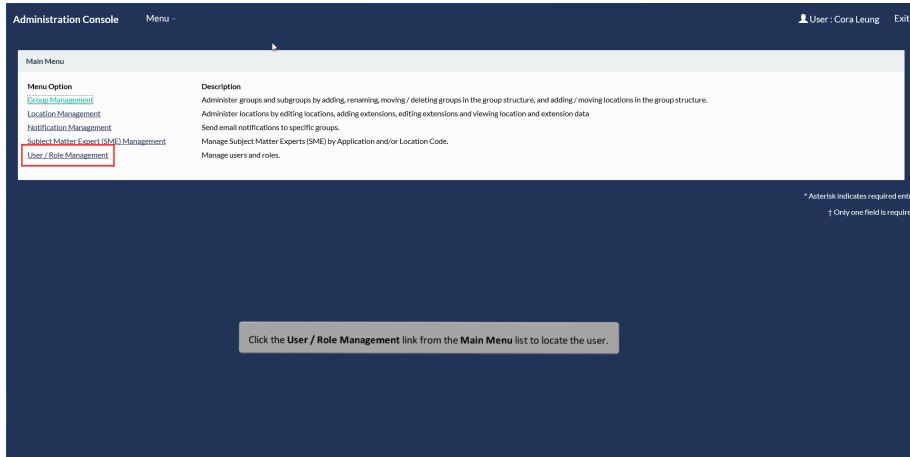
Step 70
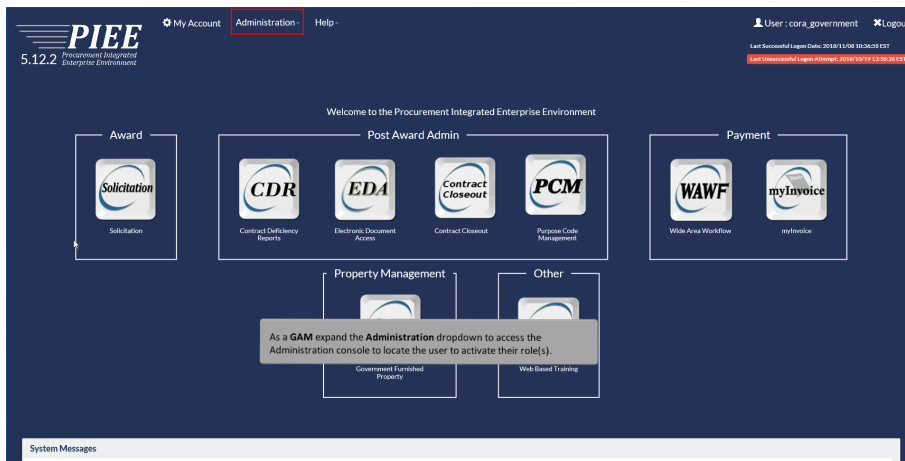
As a GAM expand the Administration dropdown to access the Administration console to locate the user to activate their role(s).
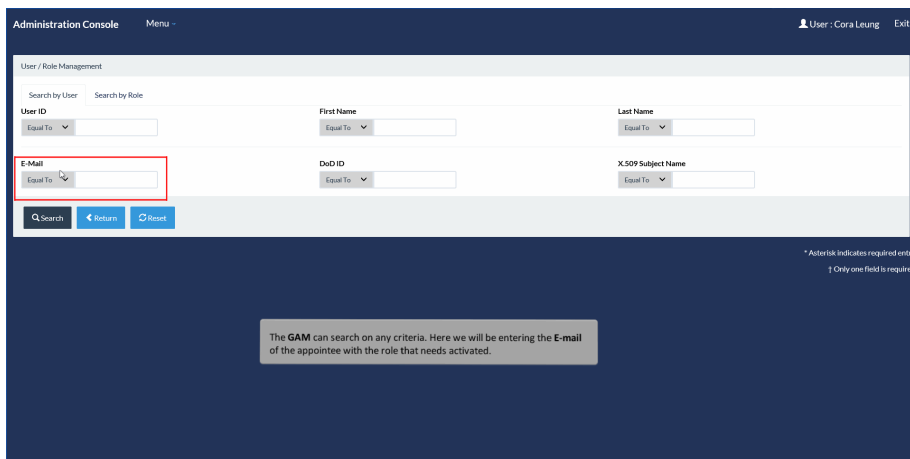
Step 71

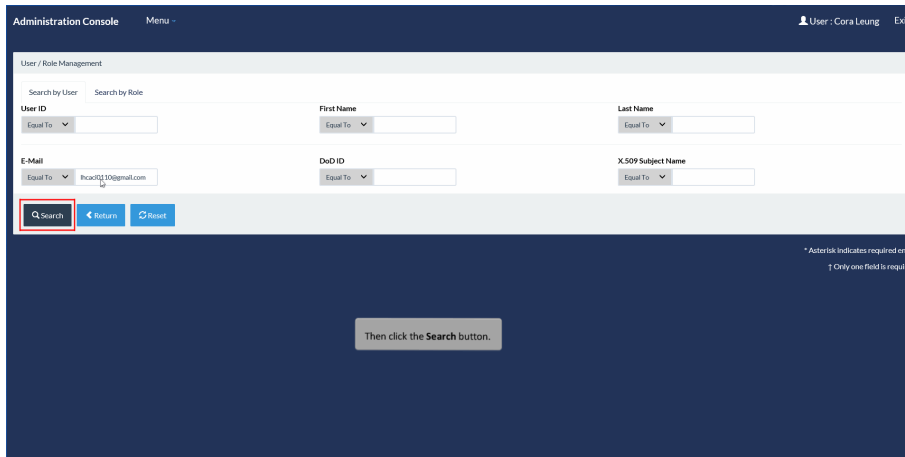Select PIEE Administration from the dropdown.

Step 72

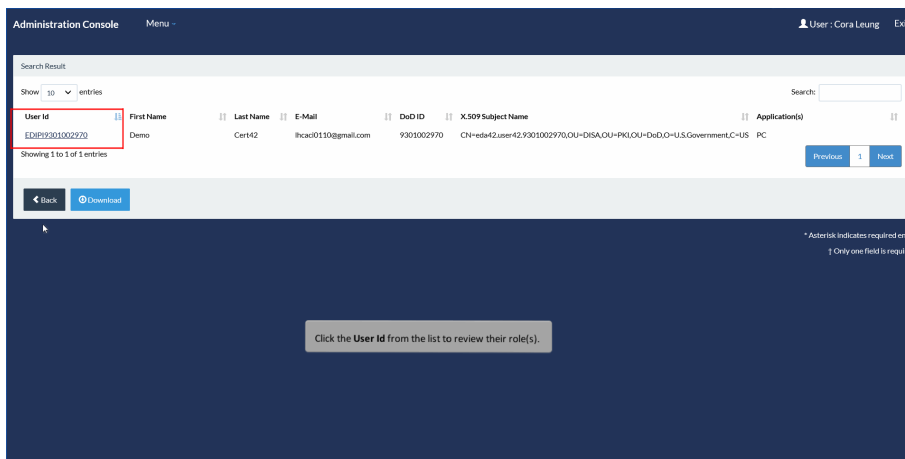Click the User / Role Management link from the Main Menu list to locate the user.

Step 73

The GAM can search on any criteria. Here we will be entering the E-mail of the appointee with the role that needs activated.
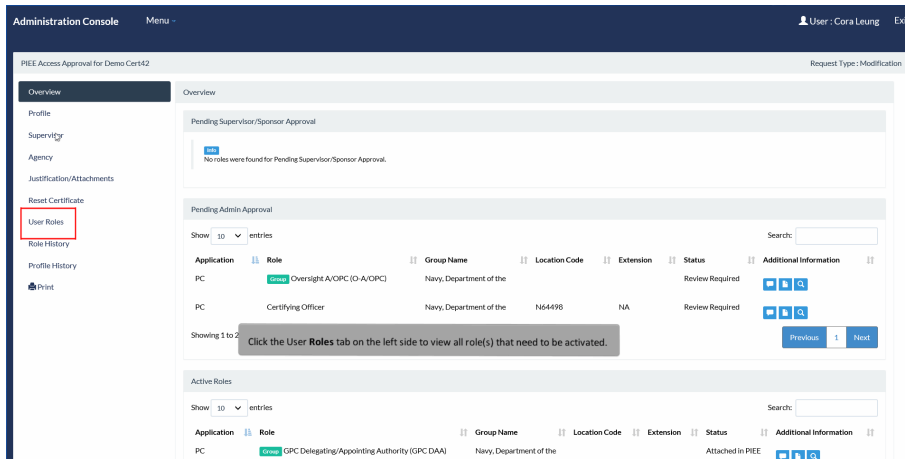
Step 74

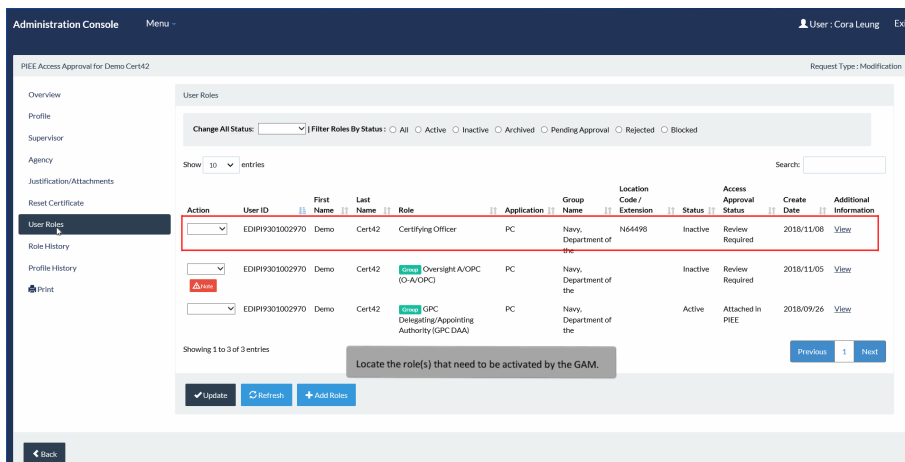Then click the Search button.

Step 75

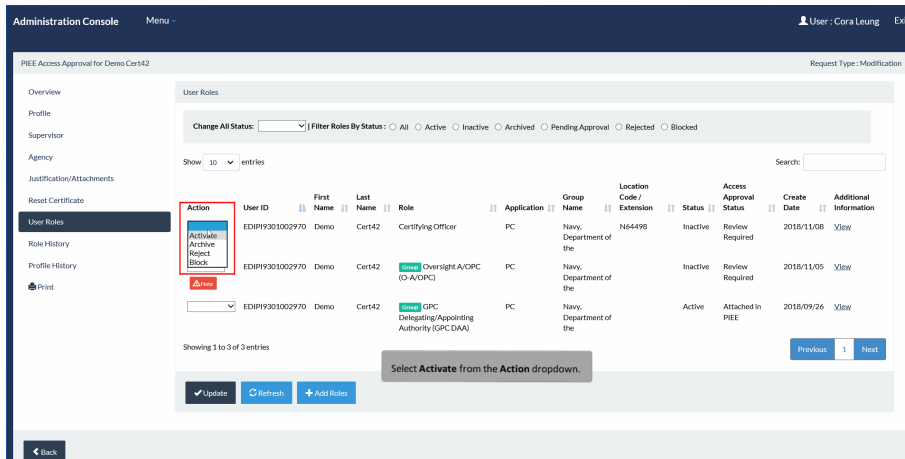Click the User Id from the list to review their role(s).

Step 76

Click the User Roles tab on the left side to view all role(s) that need to be activated.
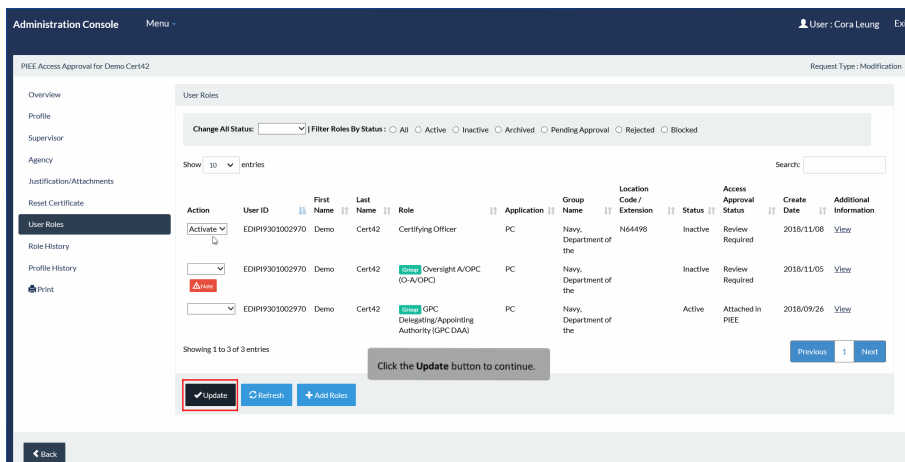
Step 77

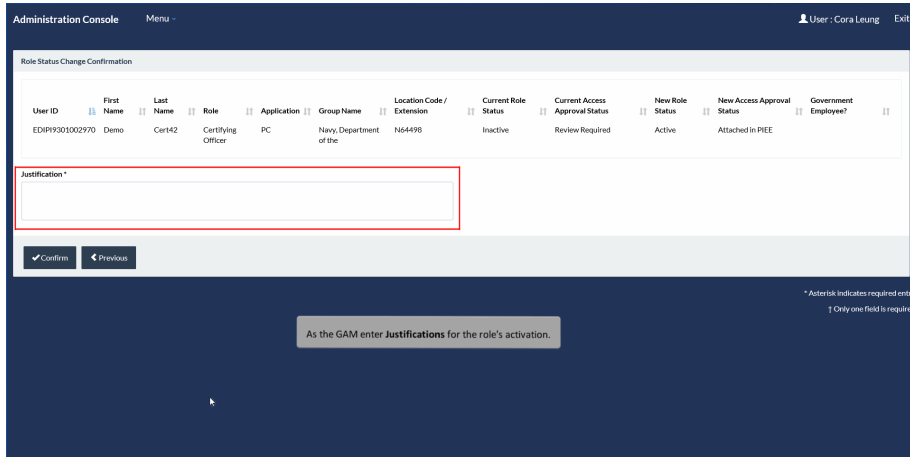Locate the role(s) that need to be activated by the GAM.

Step 78

Select Activate from the Action dropdown.
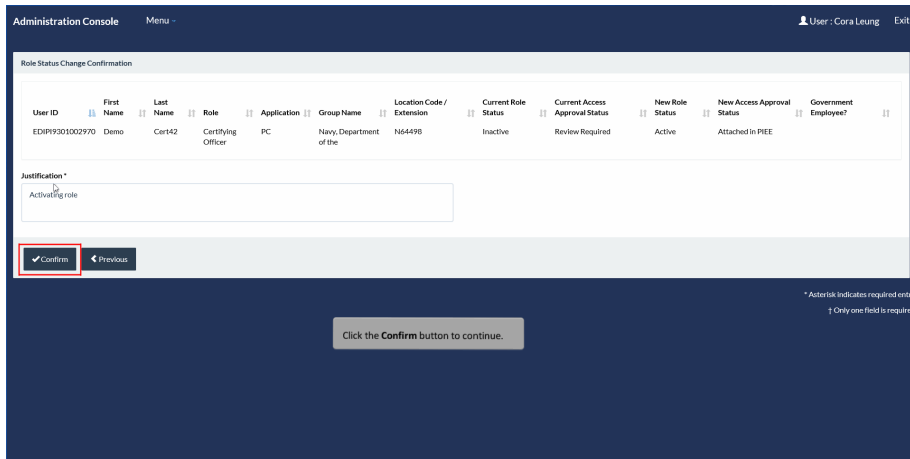
Step 79

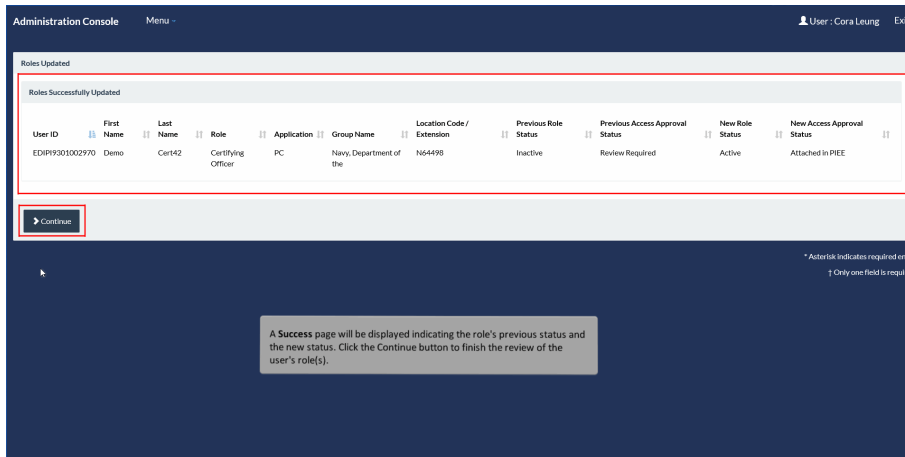
Click the Update button to continue.

Step 80

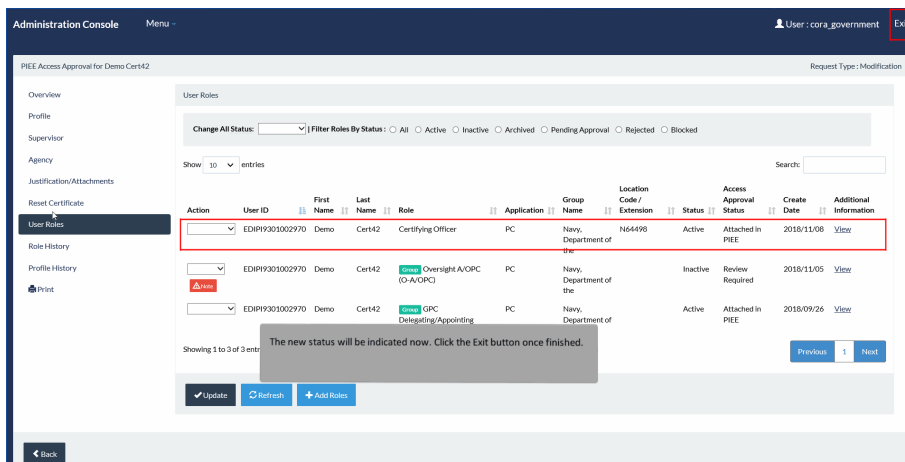As the GAM enter Justifications for the role's activation.

Step 81

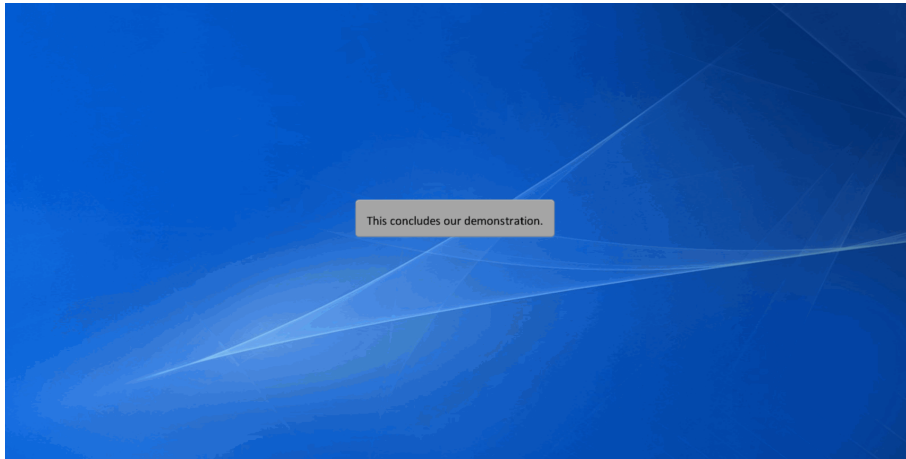Click the Confirm button to continue.

Step 82

A Success page will be displayed indicating the role's previous status and the new status. Click the Continue button to finish the review of the user's role(s).

Step 83

The new status will be indicated now. Click the Exit button once finished.

End

This concludes our demonstration.