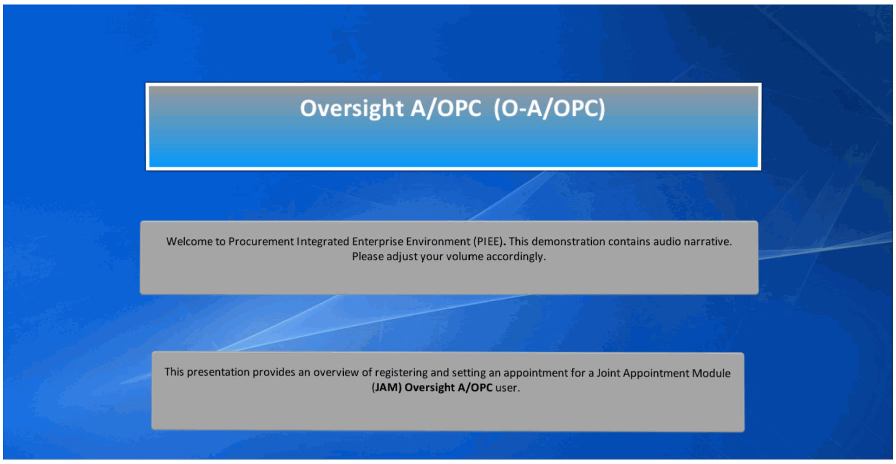
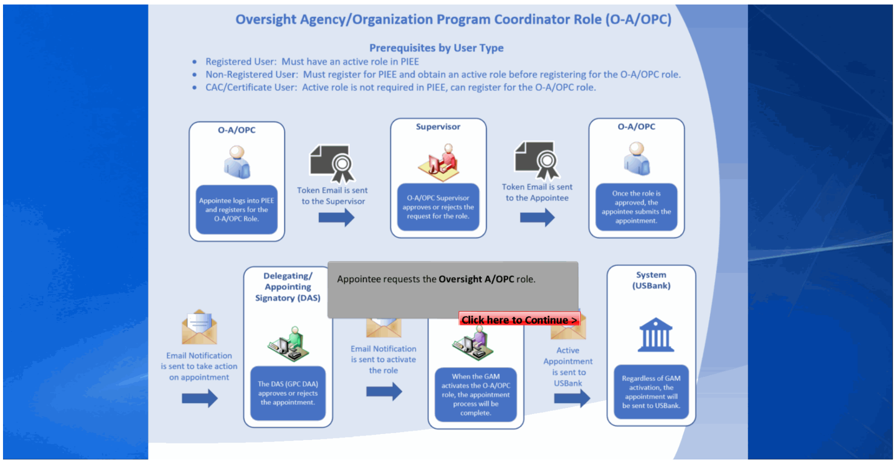
Intro



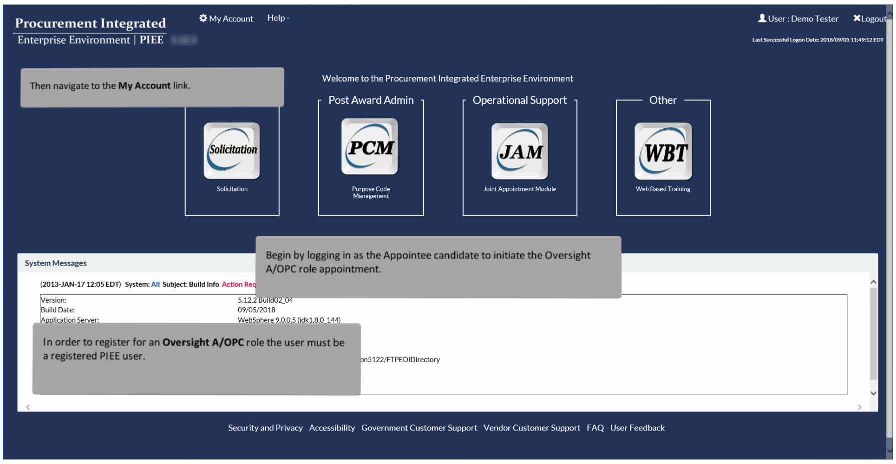
Oversight A/OPC (O-A/OPC) Welcome to Procurement Integrated Enterprise Environment (PIEE). This demonstration contains audio narrative. Please adjust your volume accordingly. This presentation provides an overview of registering and setting an appointment for a Joint Appointment Module (JAM) Oversight A/OPC user.

Step 1



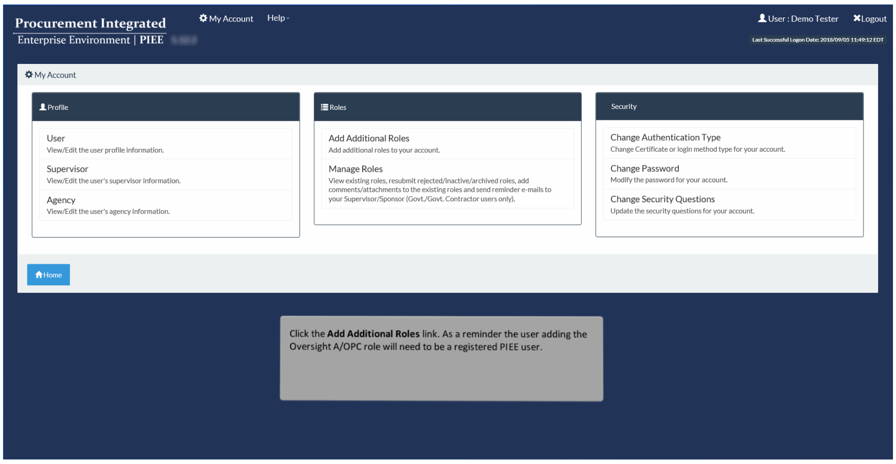
Appointee requests the Oversight A/OPC role.

Step 2



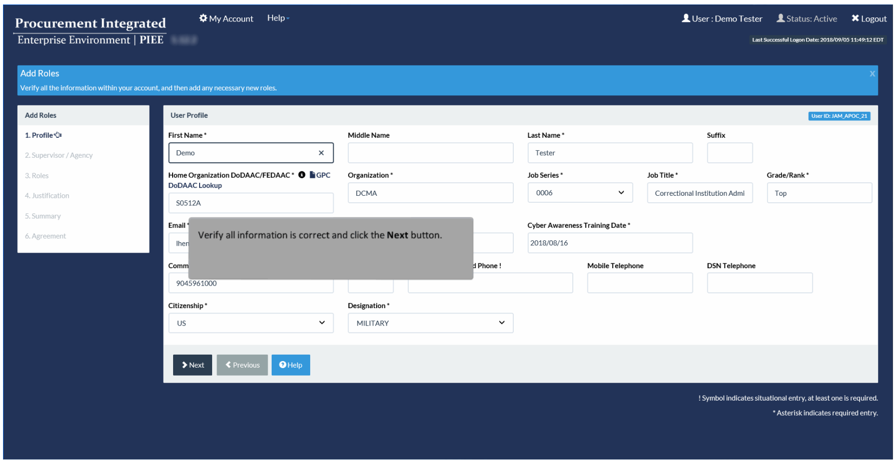
In order to register for an Oversight A/OPC role the user must be a registered PIEE user. Begin by logging in as the Appointee candidate to initiate the Oversight A/OPC role appointment. Then navigate to the My Account link.

Step 3



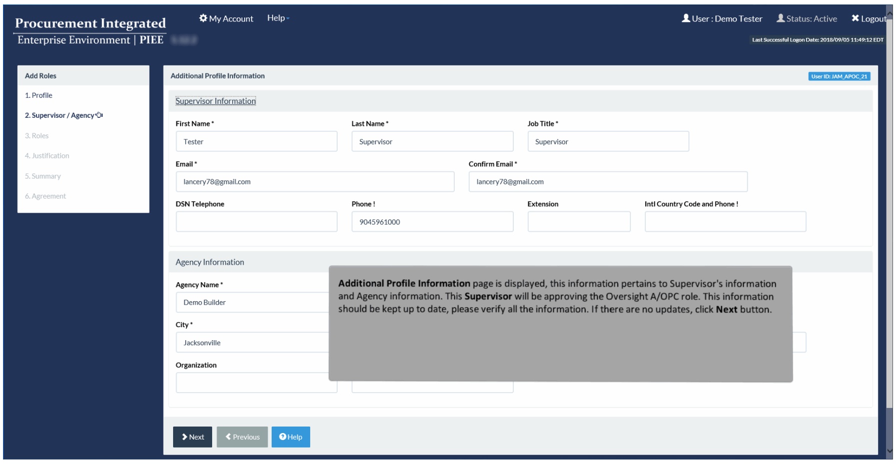
Click the Add Additional Roles link. As a reminder the user adding the Oversight A/OPC role will need to be a registered PIEE user.

Step 4



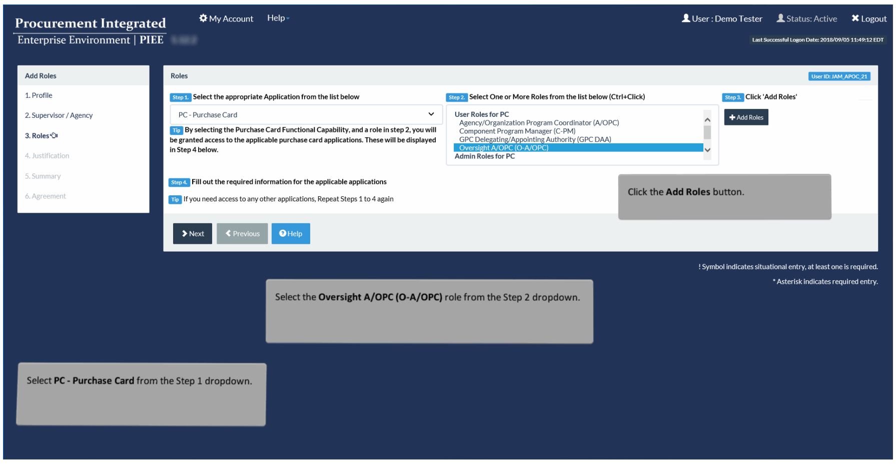
Verify all information is correct and click the Next button.

Step 5



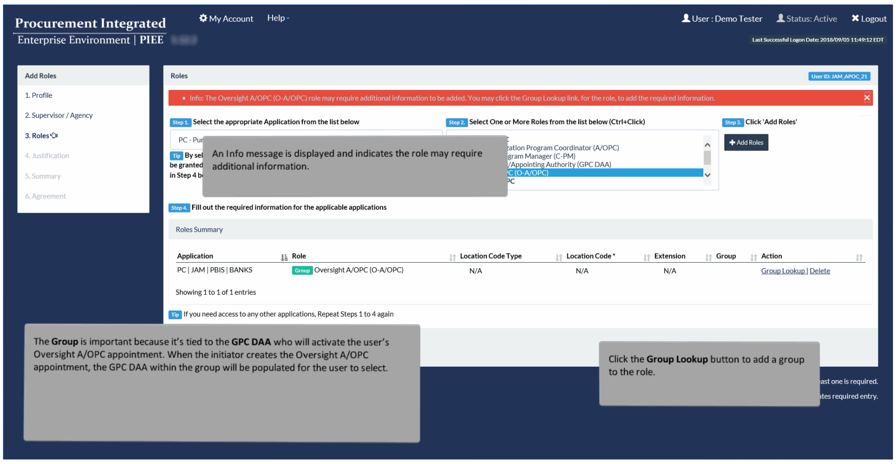
Additional Profile Information page is displayed, this information pertains to Supervisor's information and Agency information. This Supervisor will be approving the Oversight A/OPC role. This information should be kept up to date, please verify all the information. If there are no updates, click Next button.

Step 6



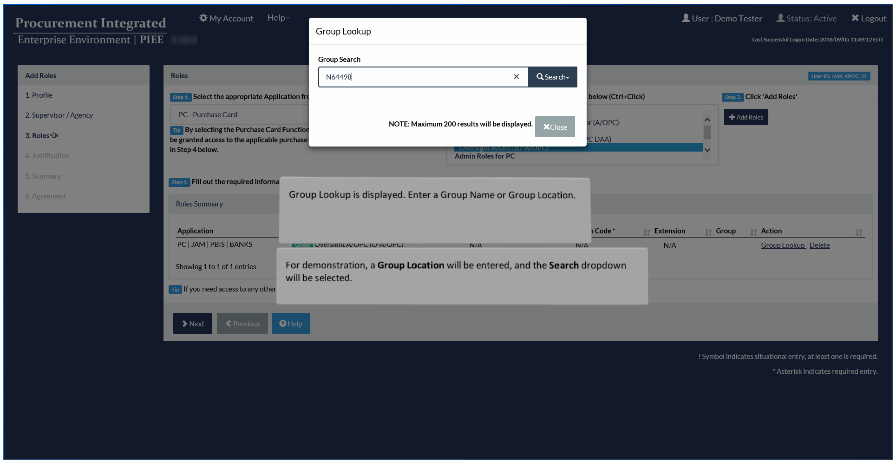
Select PC - Purchase Card from the Step 1 dropdown. Select the Oversight A/OPC (O-A/OPC) role from the Step 2 dropdown. Click the Add Roles button.

Step 7



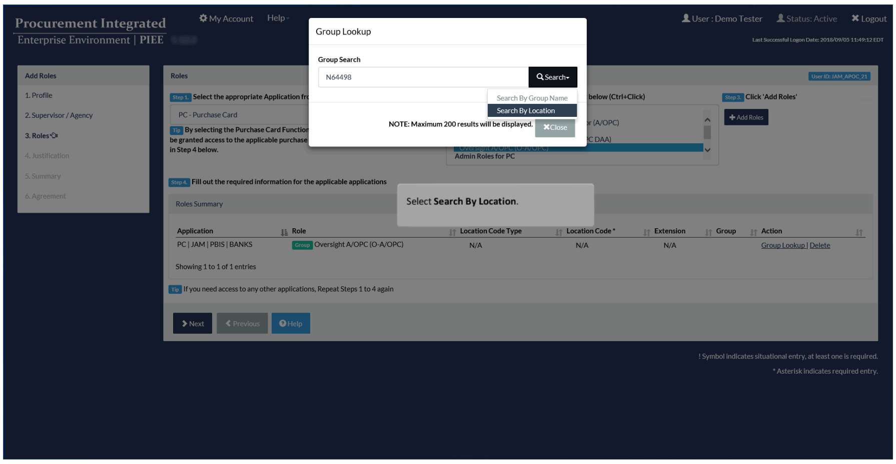
An Info message is displayed and indicates the role may require additional information. The Group is important because it's tied to the GPC DAA who will activate the user's Oversight A/OPC appointment. When the initiator creates the Oversight A/OPC appointment, the GPC DAA within the group will be populated for the user to select. Click the Group Lookup button to add a group to the role.

Step 8



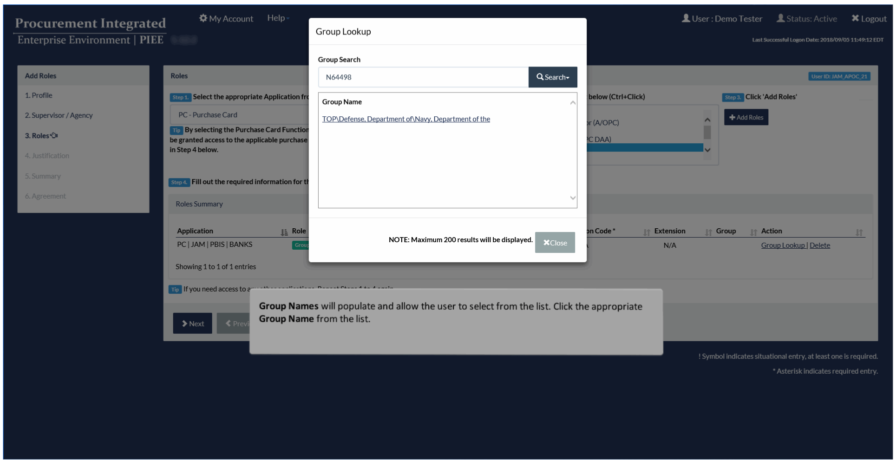
Group Lookup is displayed. Enter a Group Name or Group Location. For demonstration, a Group Location will be entered, and the Search dropdown will be selected.

Step 9



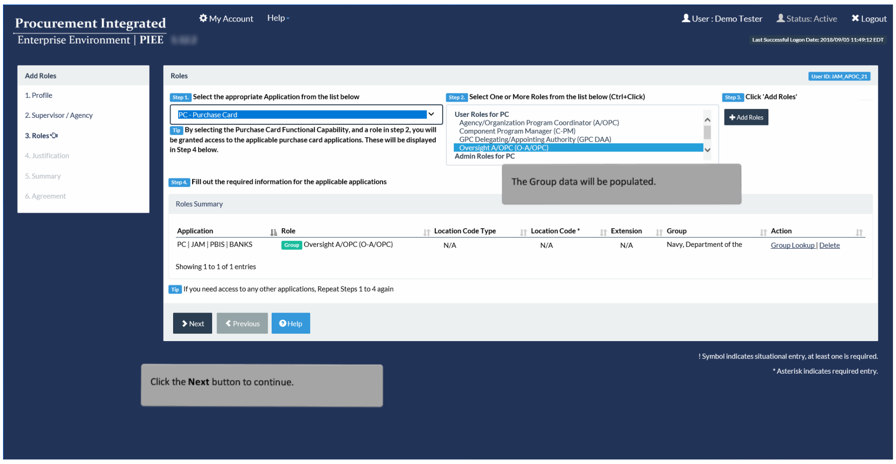
Select Search By Location.

Step 10



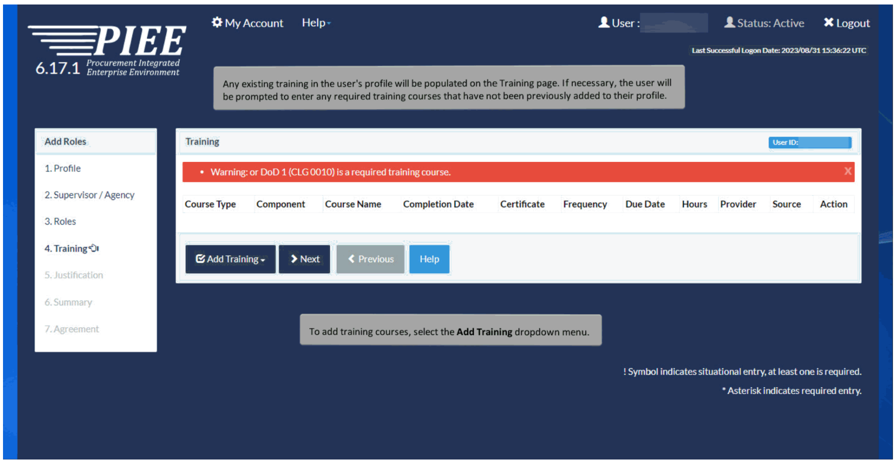
Group Names will populate and allow the user to select from the list. Click the appropriate Group Name from the list.

Step 11



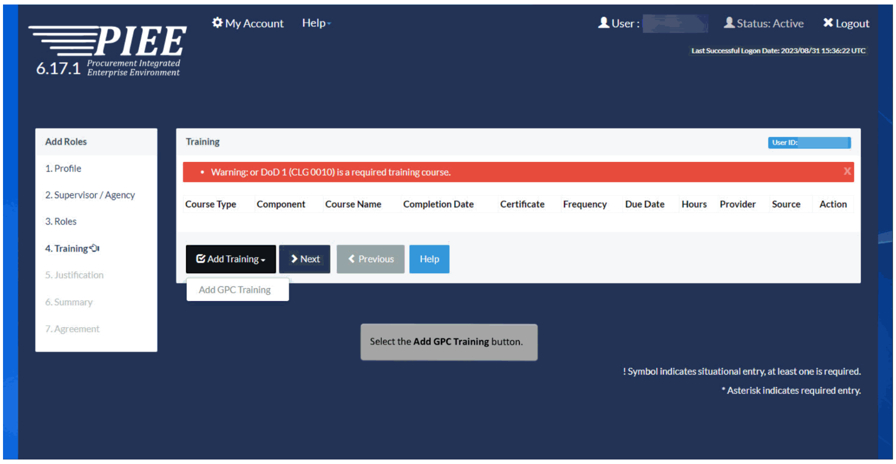
The Group data will be populated. Click the Next button to continue.

Step 12



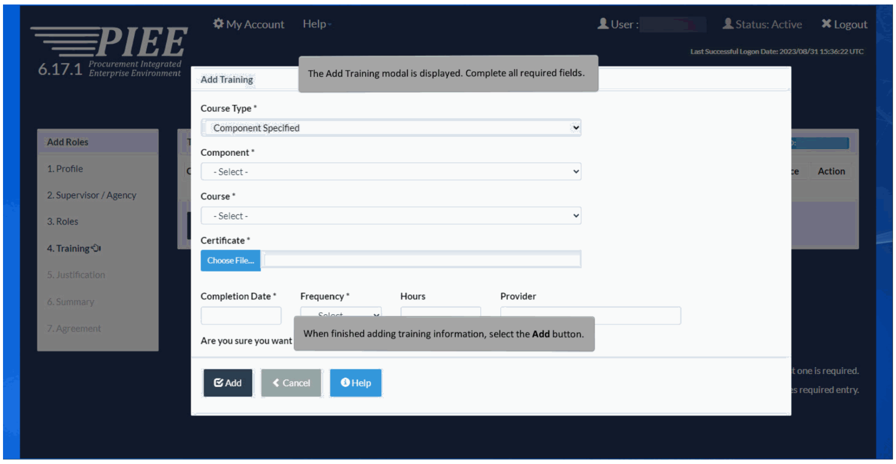
Any existing training in the user's profile will be populated on the Training page. If necessary, the user will be prompted to enter any required training courses that have not been previously added to their profile. To add training courses, select the Add Training dropdown menu.

Step 13



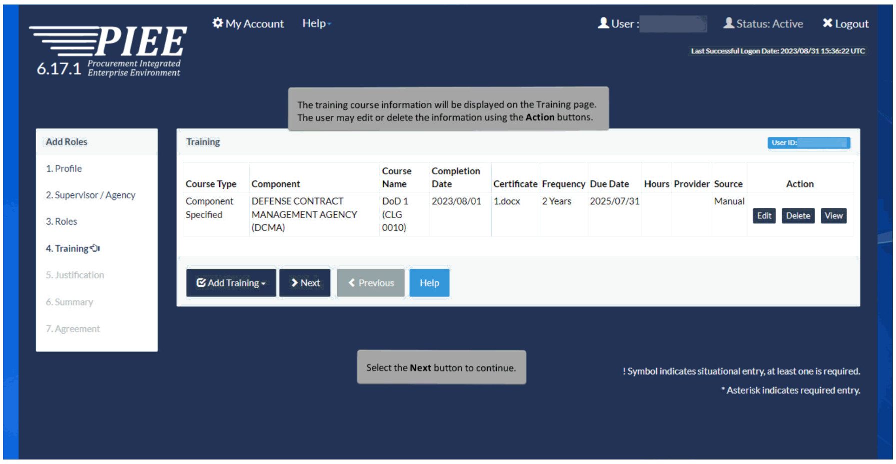
Select the Add GPC Training button.

Step 14



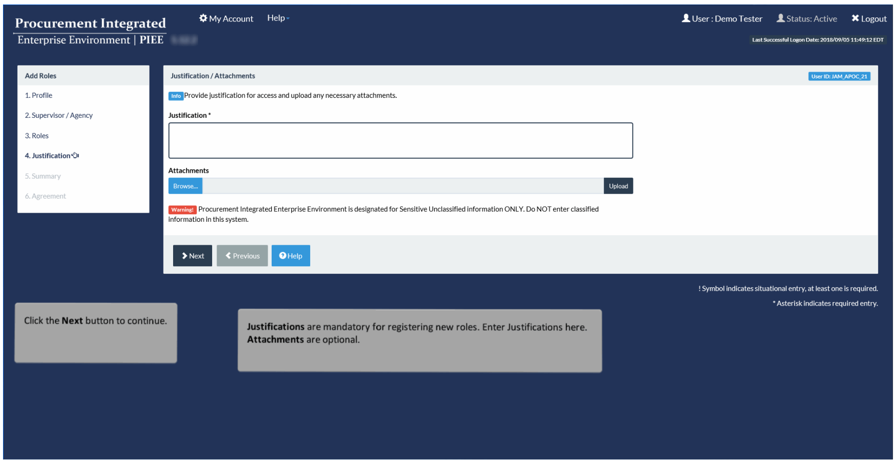
The Add Training modal is displayed. Complete all required fields. When finished adding training information, select the Add button.

Step 15



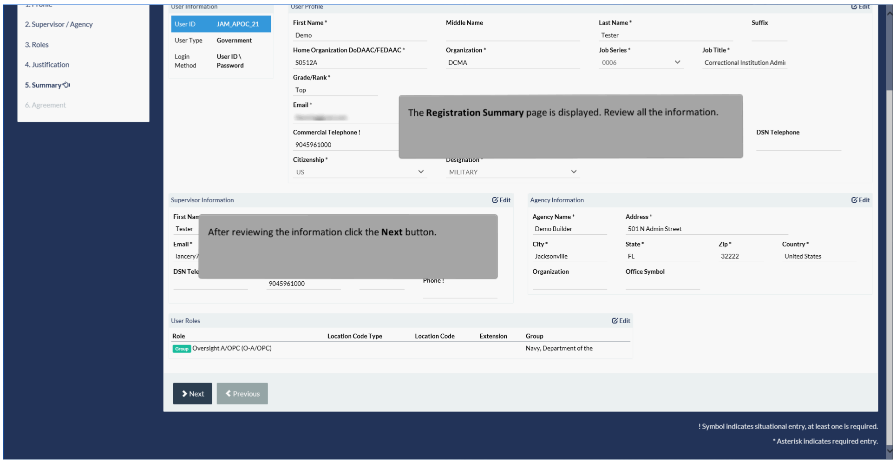
The training course information will be displayed on the Training page. The user may edit or delete the information using the Action buttons. Select the Next button to continue.

Step 16



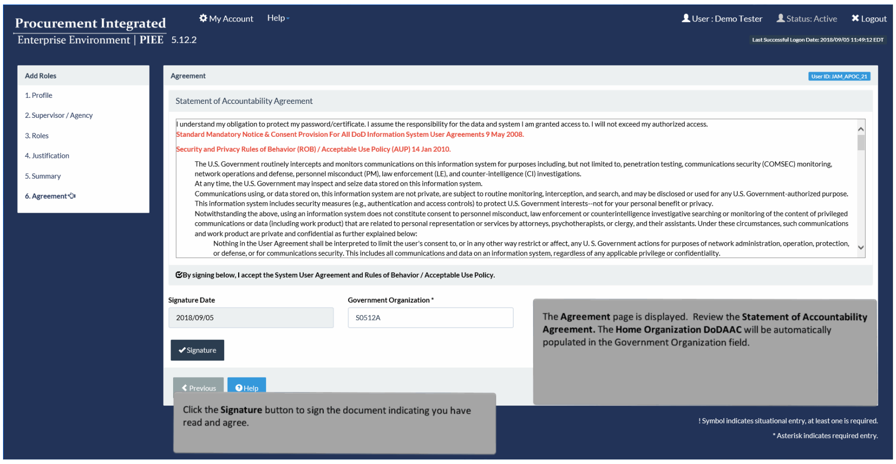
Justifications are mandatory for registering new roles. Enter Justifications here. Attachments are optional. Click the Next button to continue.

Step 17



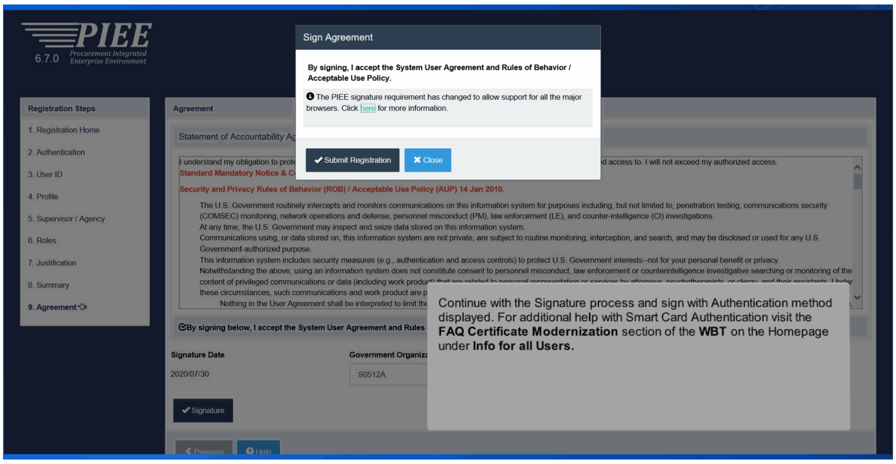
The Registration Summary page is displayed. Review all the information. After reviewing the information click the Next button.

Step 18



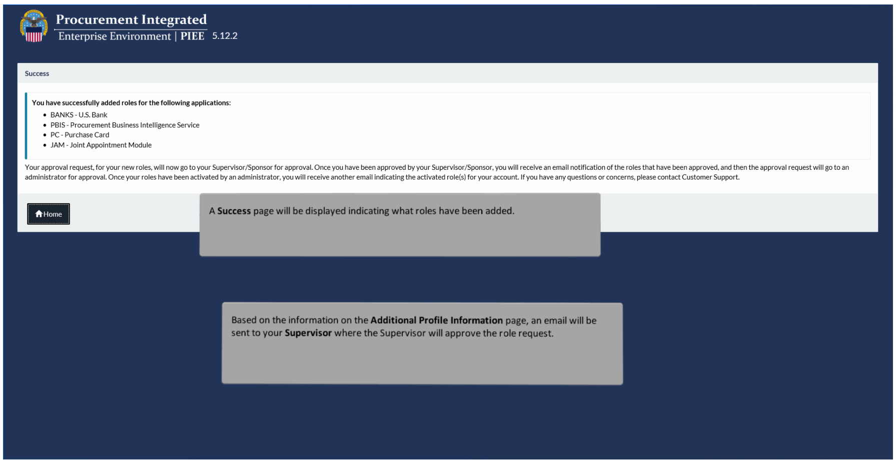
The Agreement page is displayed. Review the Statement of Accountability Agreement. The Home Organization DoDAAC will be automatically populated in the Government Organization field. Click the Signature button to sign the document indicating you have read and agree.

Step 19



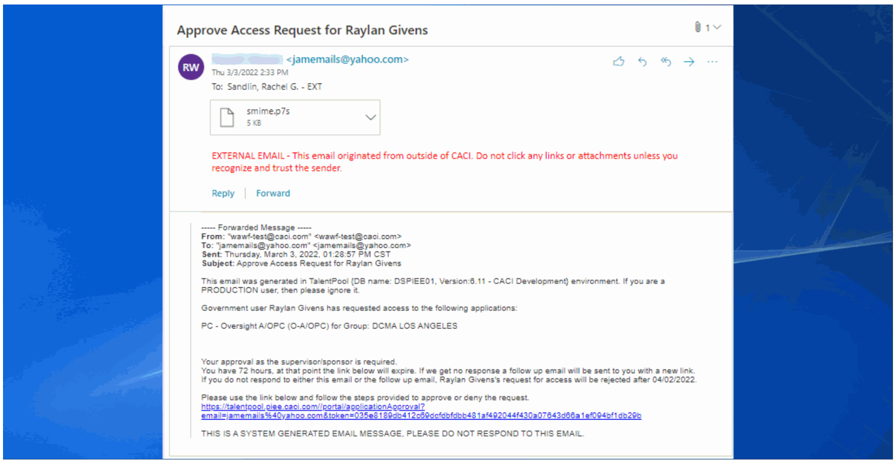
Continue with the Signature process and sign with Authentication method displayed. For additional help with Smart Card Authentication visit the FAQ Certificate Modernization section of the WBT on the Homepage under Info for all Users.

Step 20

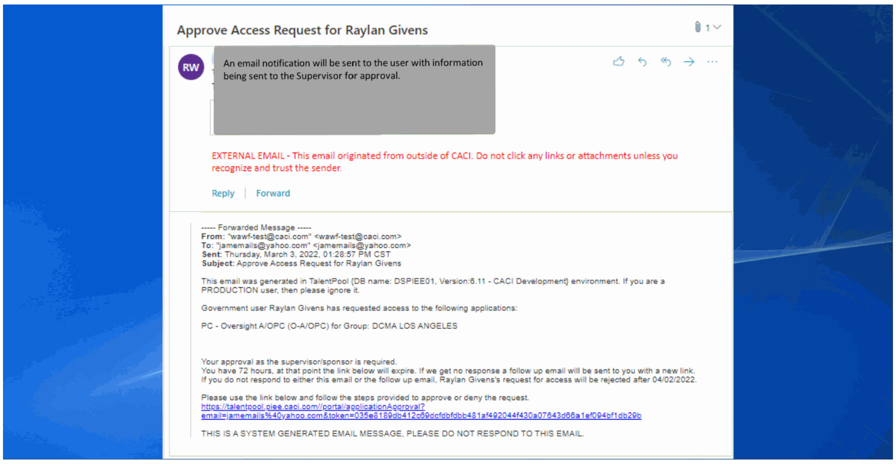


A Success page will be displayed indicating what roles have been added. Based on the information on the Additional Profile Information page, an email will be sent to your Supervisor where the Supervisor will approve the role request.

Step 21



Step 21

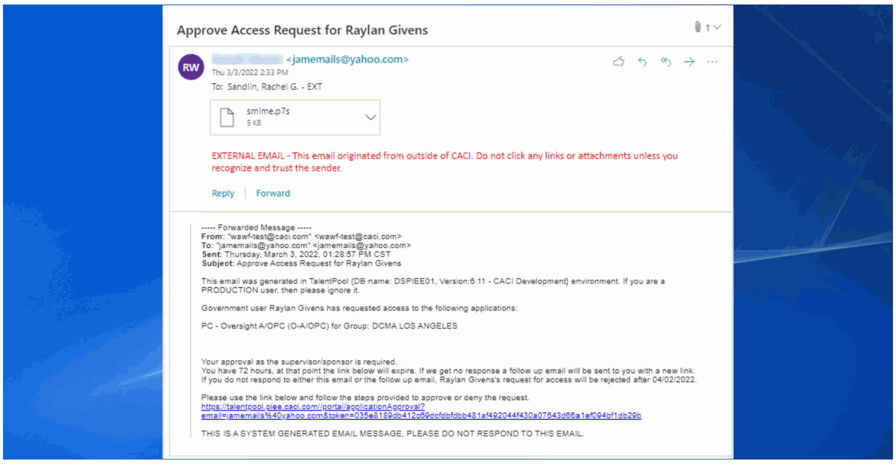


An email notification will be sent to the user with information being sent to the Supervisor for approval.

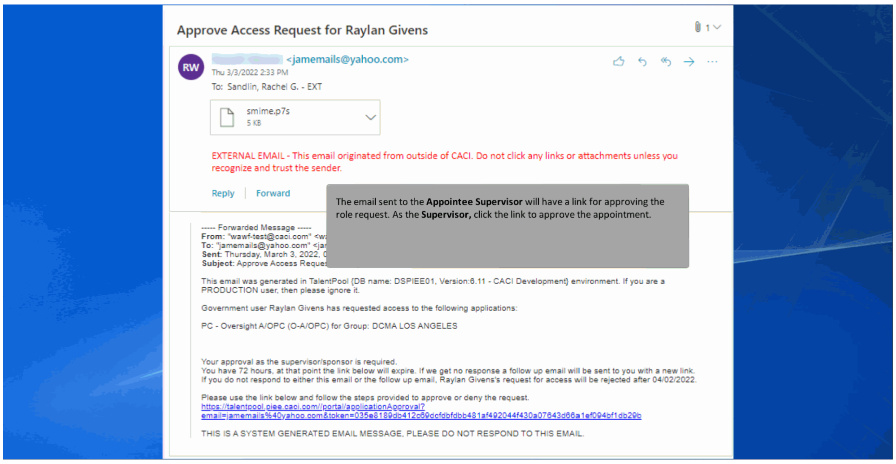
Step 22

The Appointee Supervisor approves the Oversight A/OPC (O-A/OPC) role.

Step 23

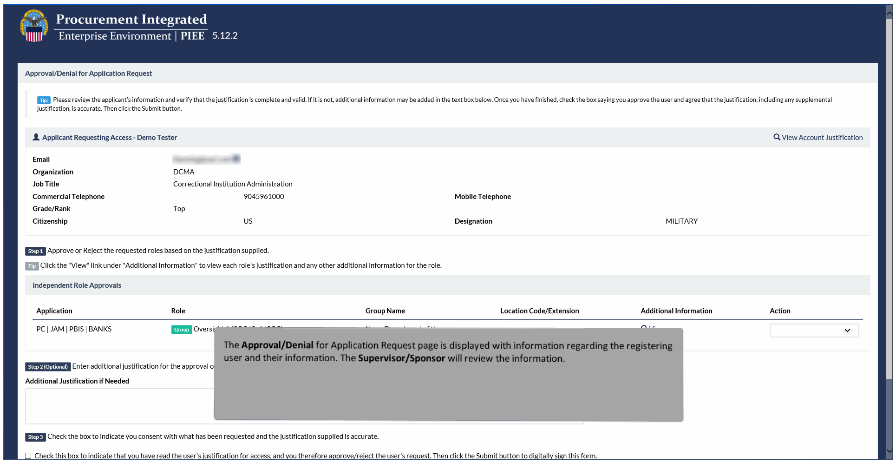


Step 23



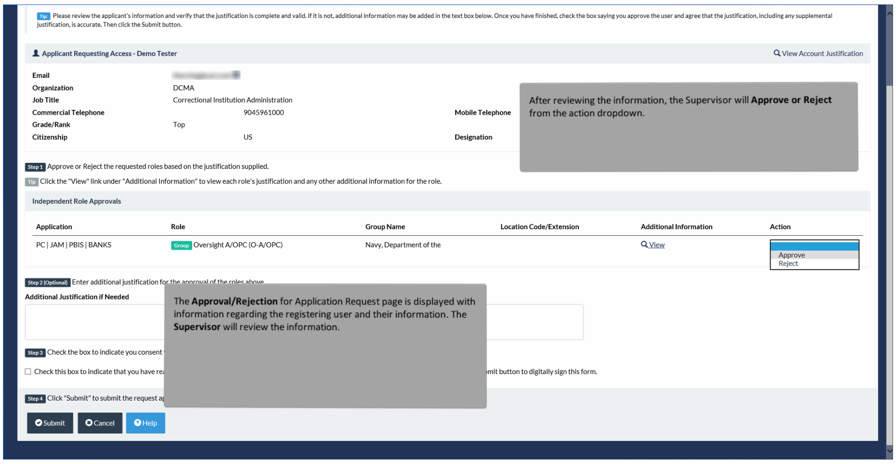
The email sent to the Appointee Supervisor will have a link for approving the role request. As the Supervisor, click the link to approve the appointment.

Step 24



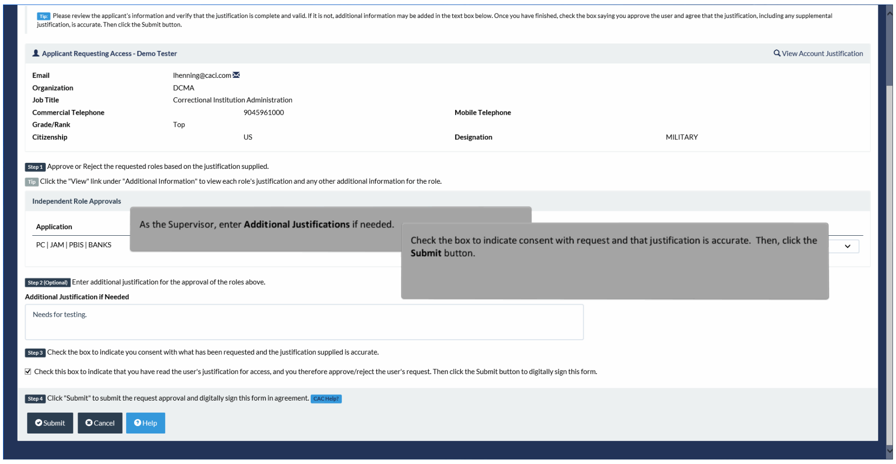
The Approval/Denial for Application Request page is displayed with information regarding the registering user and their information. The Supervisor/Sponsor will review the information.

Step 25



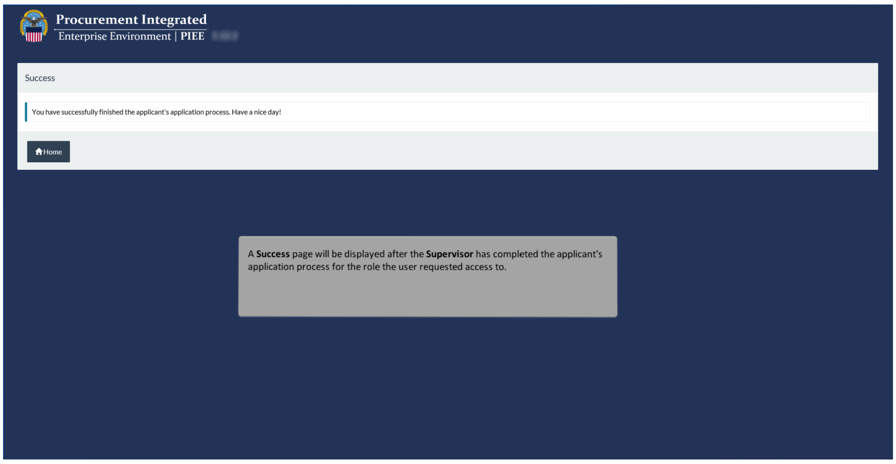
The Approval/Rejection for Application Request page is displayed with information regarding the registering user and their information. The Supervisor will review the information. After reviewing the information, the Supervisor will Approve or Reject from the action dropdown.

Step 26



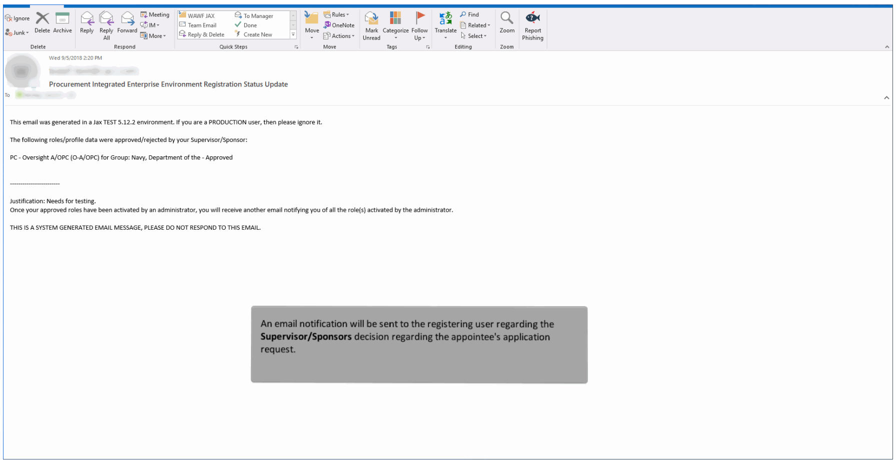
As the Supervisor, enter Additional Justifications if needed. Check the box to indicate consent with request and that justification is accurate. Then, click the Submit button.

Step 27



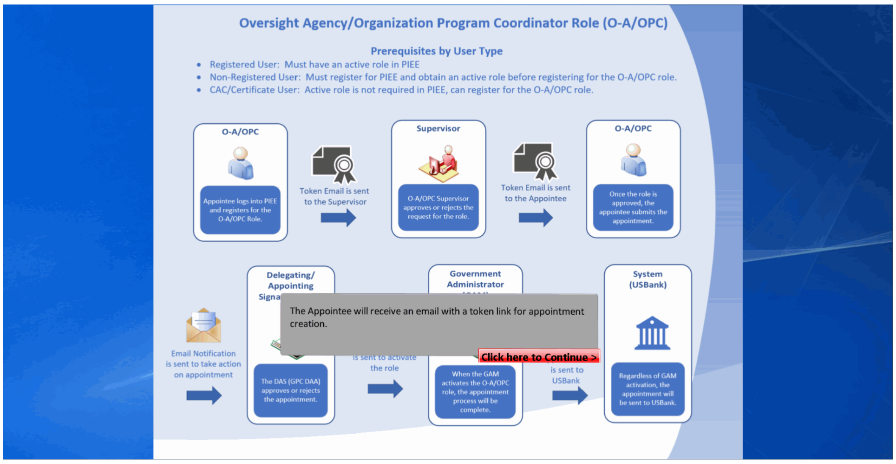
A Success page will be displayed after the Supervisor has completed the applicant's application process for the role the user requested access to.

Step 28



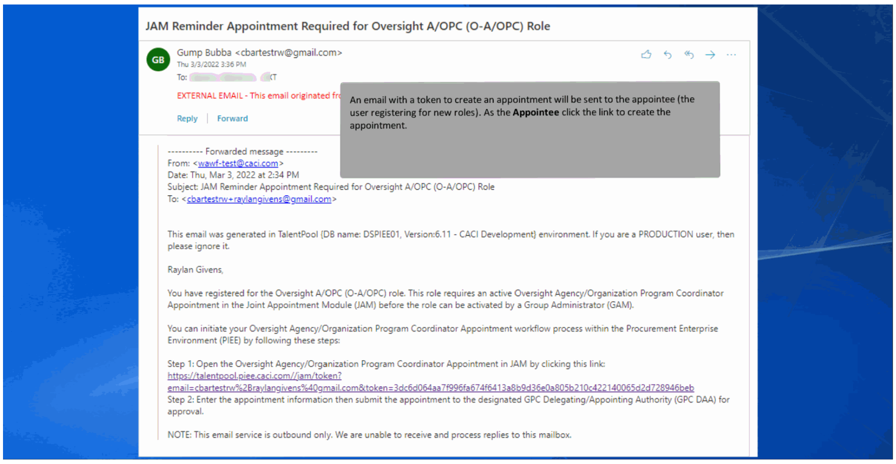
An email notification will be sent to the registering user regarding the Supervisor/Sponsors decision regarding the appointee's application request.

Step 29



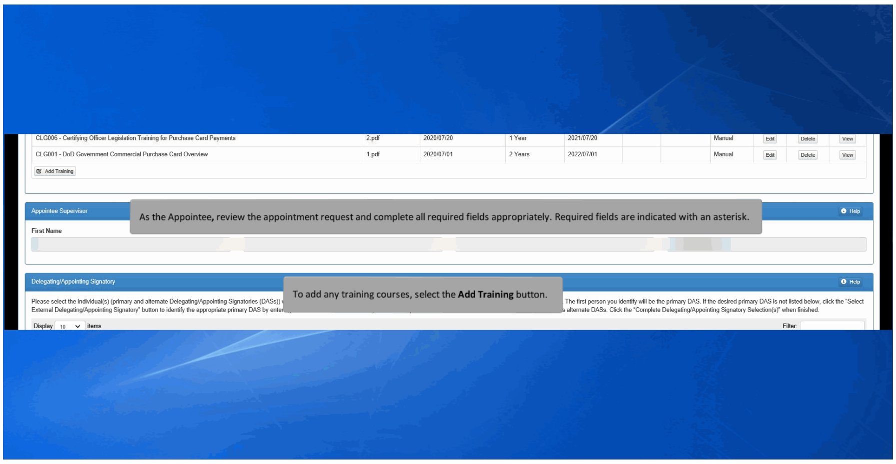
The Appointee will receive an email with a token link for appointment creation.

Step 30



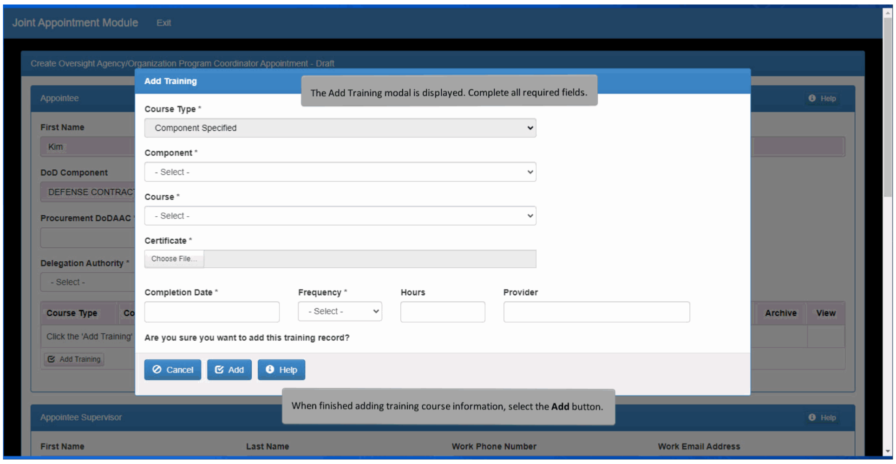
An email with a token to create an appointment will be sent to the appointee (the user registering for new roles). As the Appointee click the link to create the appointment.

Step 31



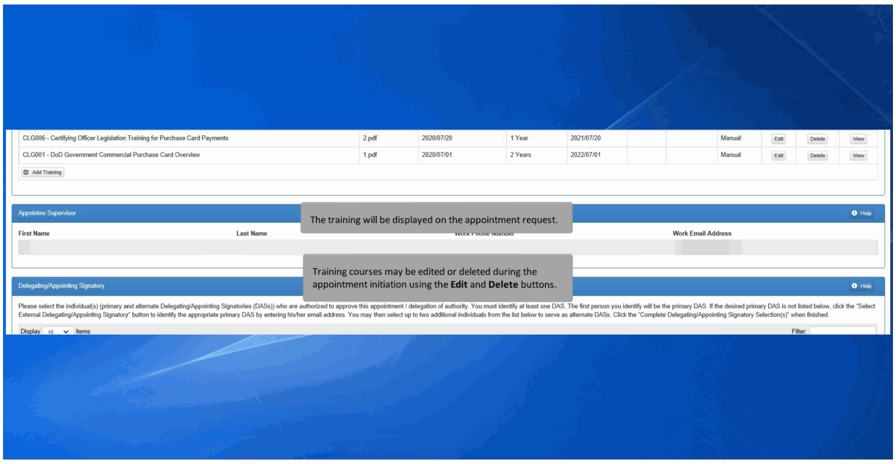
As the Appointee, review the appointment request and complete all required fields appropriately. Required fields are indicated with an asterisk. To add any training courses, select the Add Training button.

Step 32



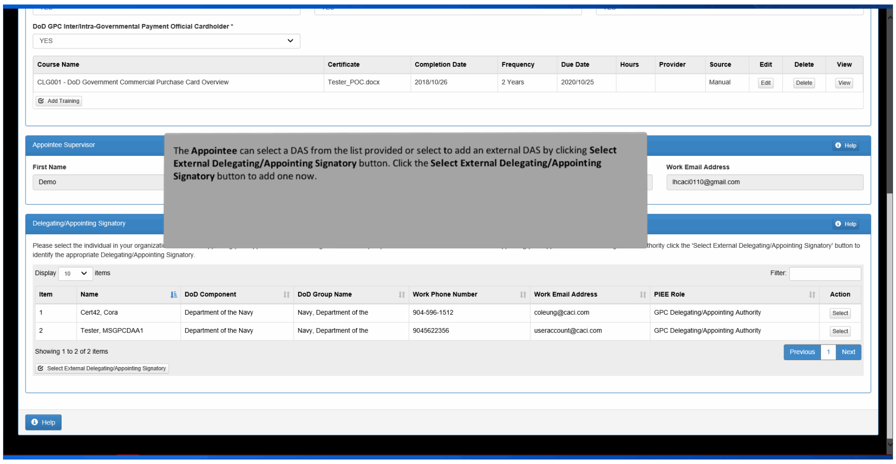
The Add Training modal is displayed. Complete all required fields. When finished adding training course information, select the Add button.

Step 33



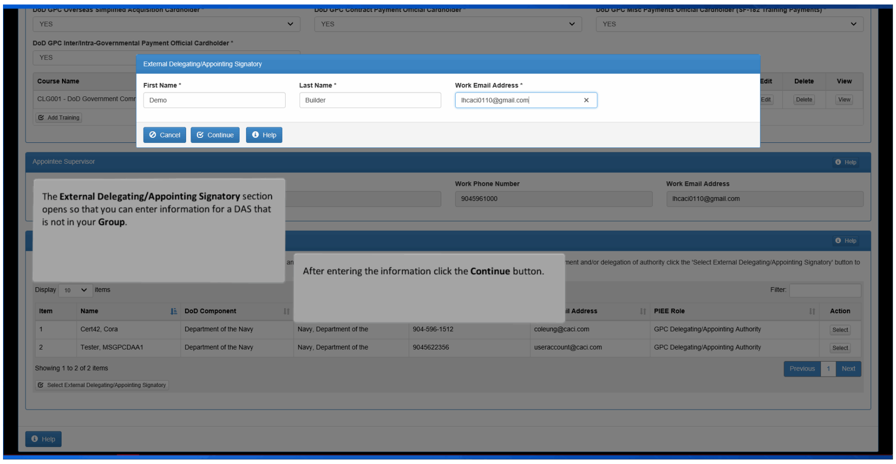
The training will be displayed on the appointment request. Training courses may be edited or deleted during the appointment initiation using the Edit and Delete buttons.

Step 34



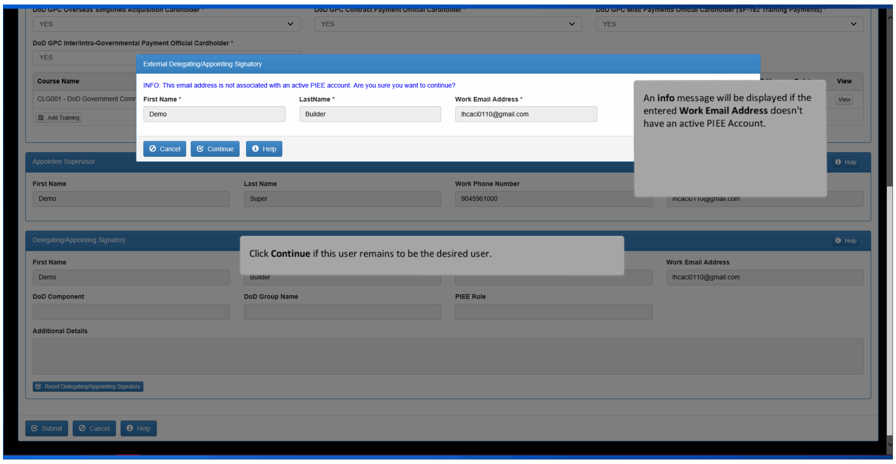
The Appointee can select a DAS from the list provided or select to add an external DAS by clicking Select External Delegating/Appointing Signatory button. Click the Select External Delegating/Appointing Signatory button to add one now.

Step 35



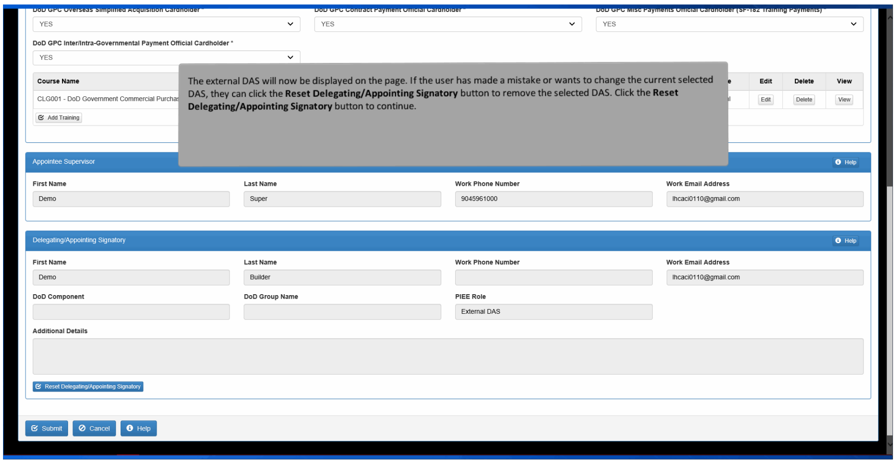
The External Delegating/Appointing Signatory section opens so that you can enter information for a DAS that is not in your Group. After entering the information click the Continue button.

Step 36



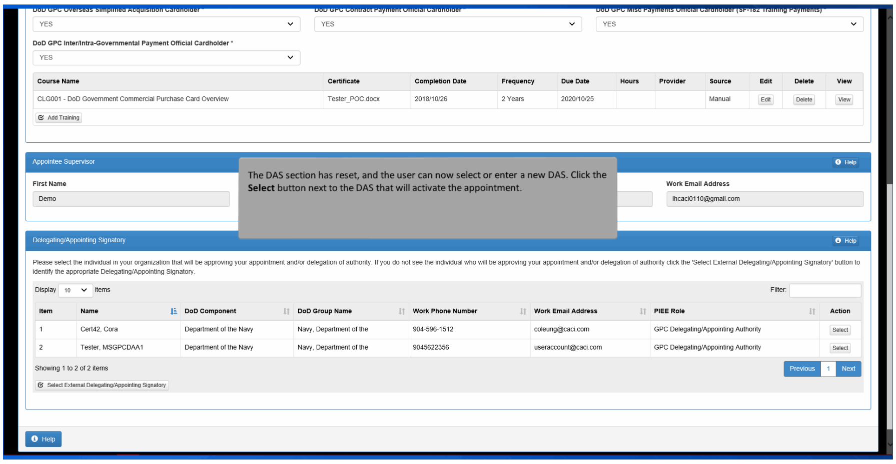
An info message will be displayed if the entered Work Email Address doesn't have an active PIEE Account. Click Continue if this user remains to be the desired user.

Step 37



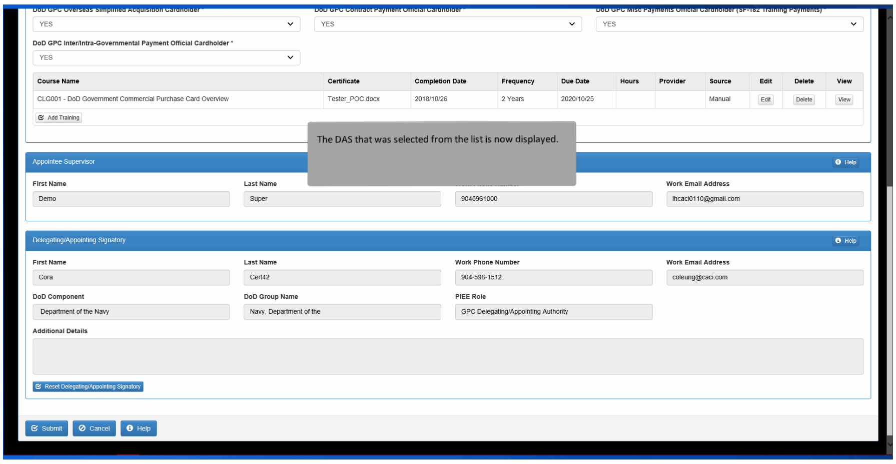
The external DAS will now be displayed on the page. If the user has made a mistake or wants to change the current selected DAS, they can click the Reset Delegating/Appointing Signatory button to remove the selected DAS. Click the Reset Delegating/Appointing Signatory button to continue.

Step 38



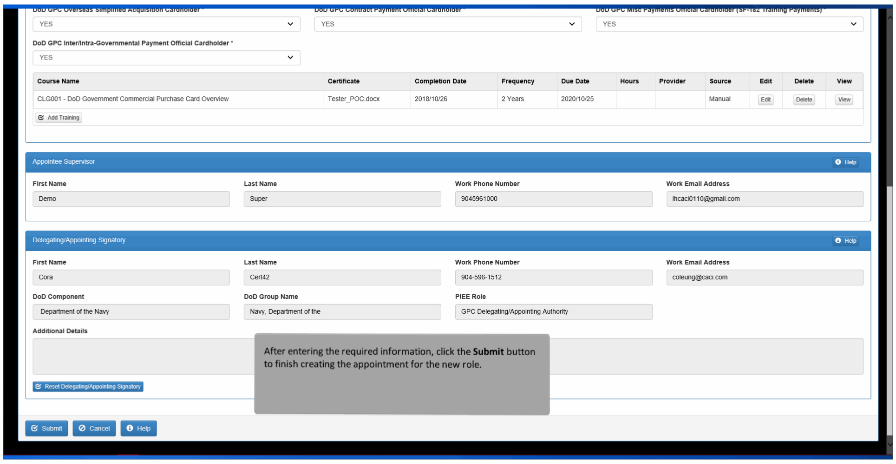
The DAS section has reset, and the user can now select or enter a new DAS. Click the Select button next to the DAS that will activate the appointment.

Step 39



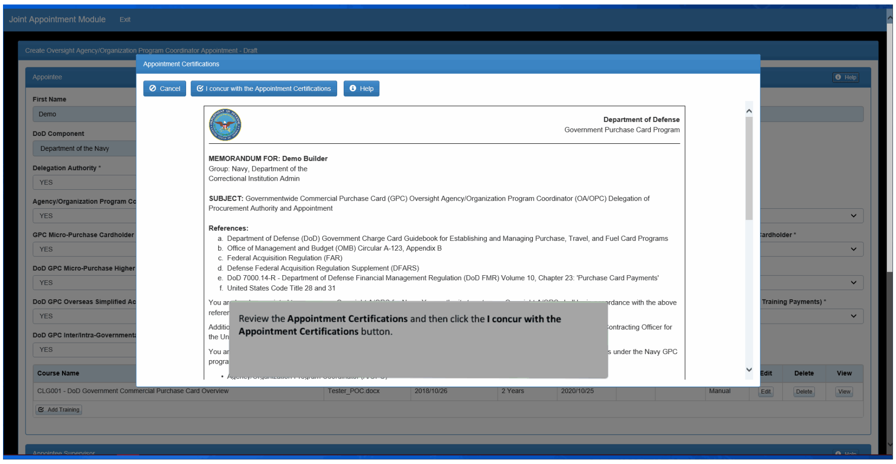
The DAS that was selected from the list is now displayed.

Step 40



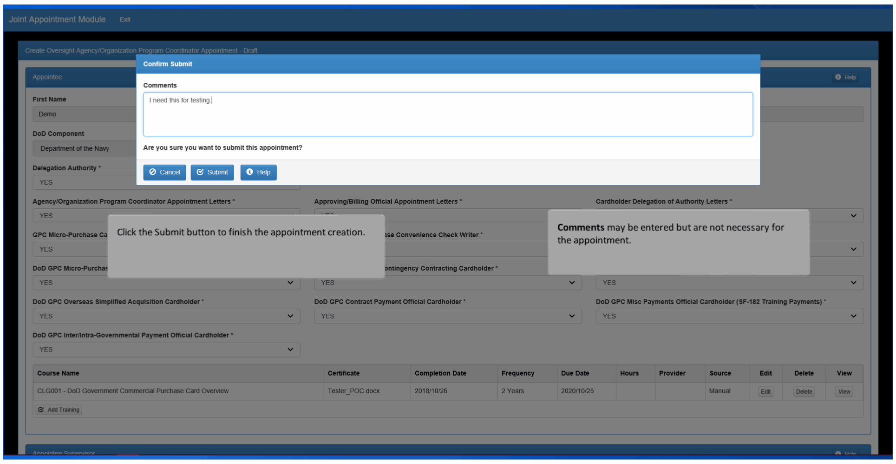
After entering the required information, click the Submit button to finish creating the appointment for the new role.

Step 41



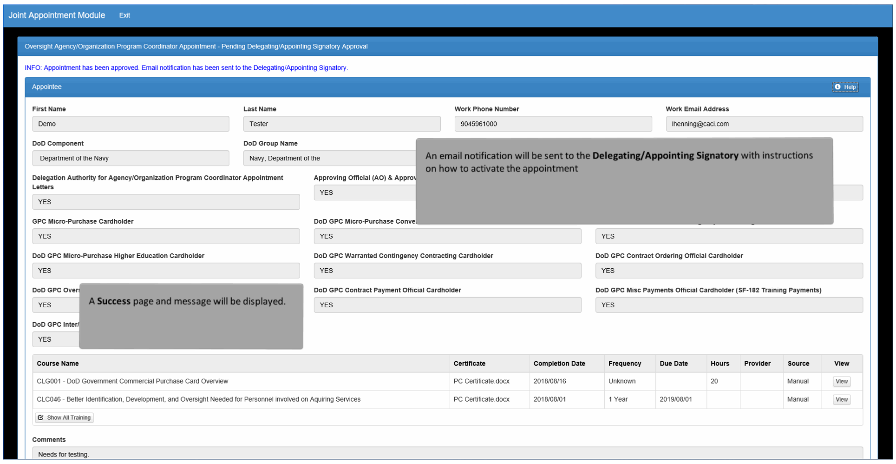
Review the Appointment Certifications and then click the I concur with the Appointment Certifications button.

Step 42



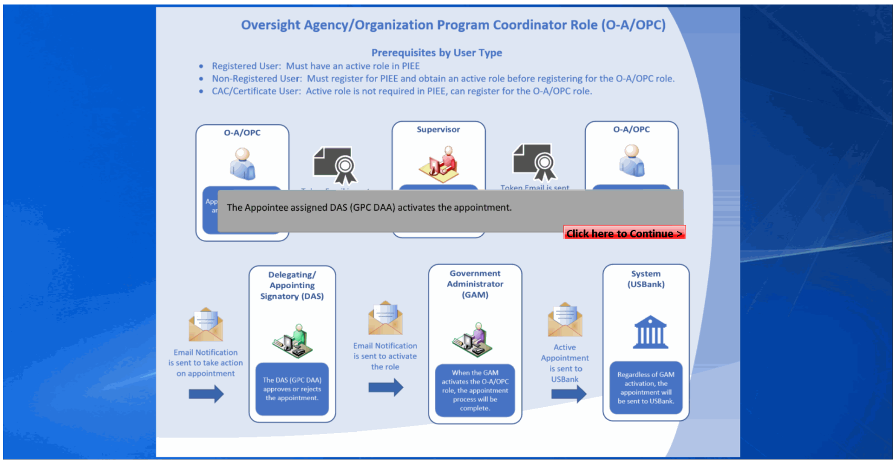
Comments may be entered but are not necessary for the appointment. Click the Submit button to finish the appointment creation.

Step 43



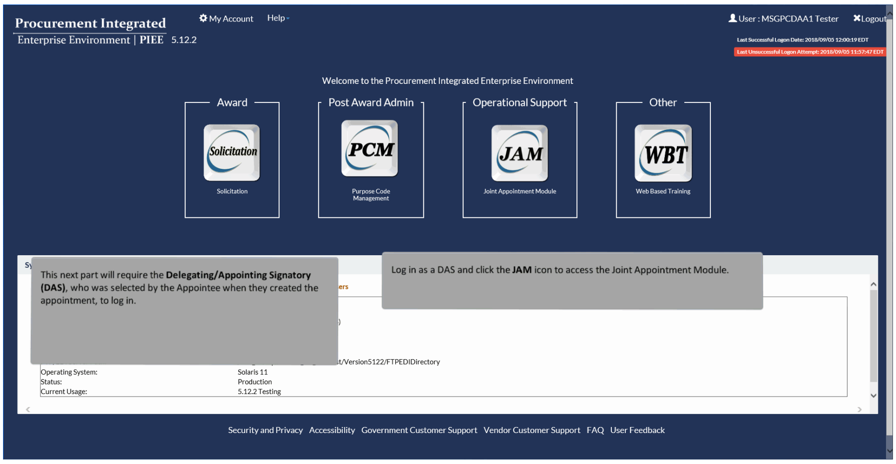
A Success page and message will be displayed. An email notification will be sent to the Delegating/Appointing Signatory with instructions on how to activate the appointment

Step 44



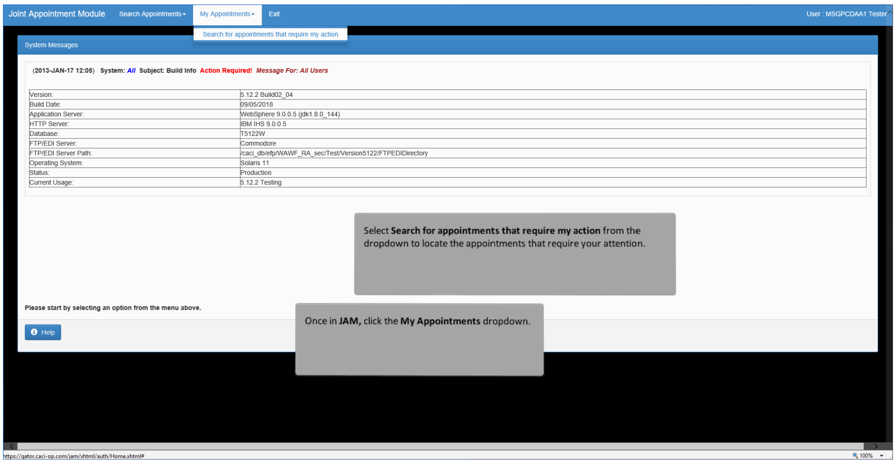
The Appointee assigned DAS (GPC DAA) activates the appointment.

Step 45



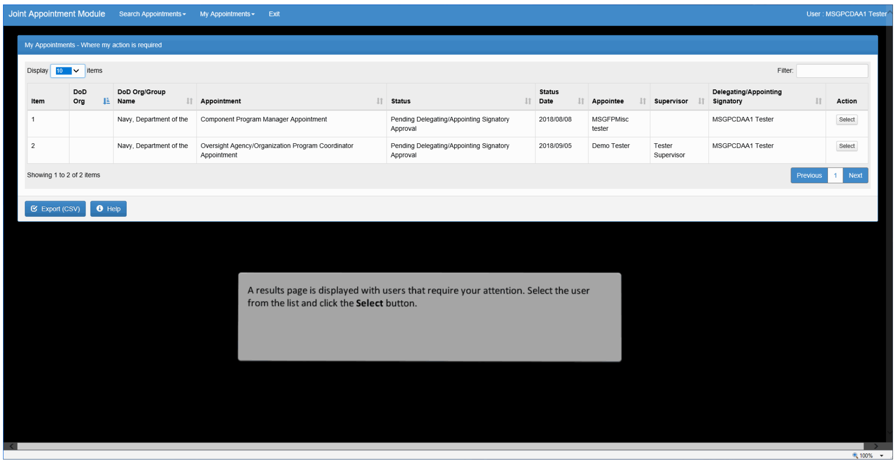
This next part will require the Delegating/Appointing Signatory (DAS), who was selected by the Appointee when they created the appointment, to log in. Log in as a DAS and click the JAM icon to access the Joint Appointment Module.

Step 46



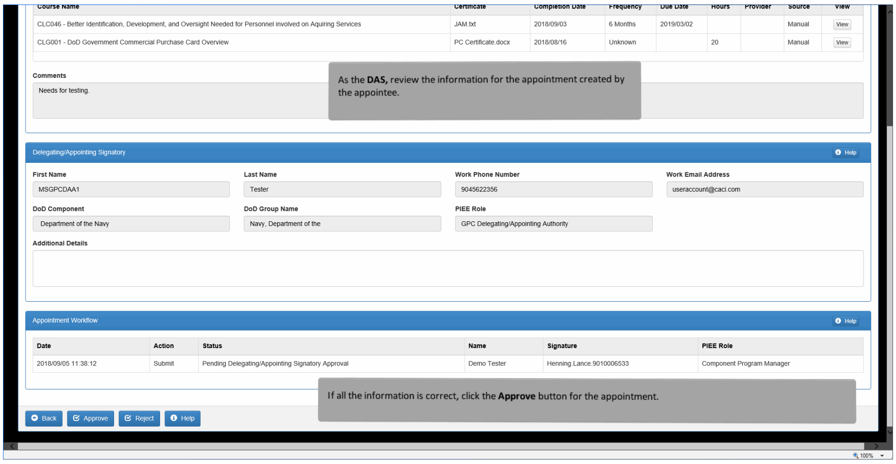
Once in JAM, click the My Appointments dropdown. Select Search for appointments that require my action from the dropdown to locate the appointments that require your attention.

Step 47



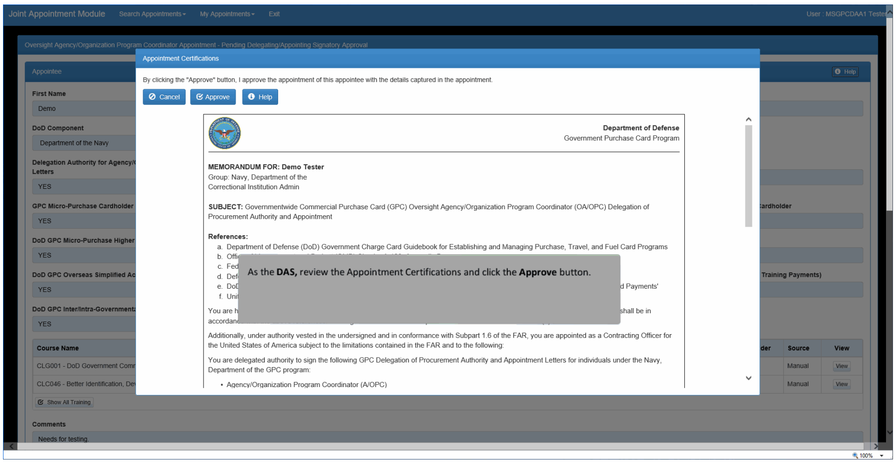
A results page is displayed with users that require your attention. Select the user from the list and click the Select button.

Step 48



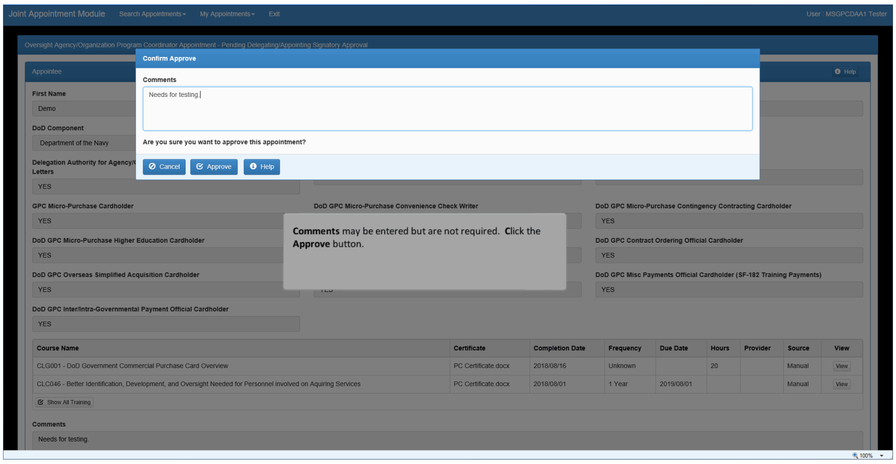
As the DAS, review the information for the appointment created by the appointee. If all the information is correct, click the Approve button for the appointment.

Step 49



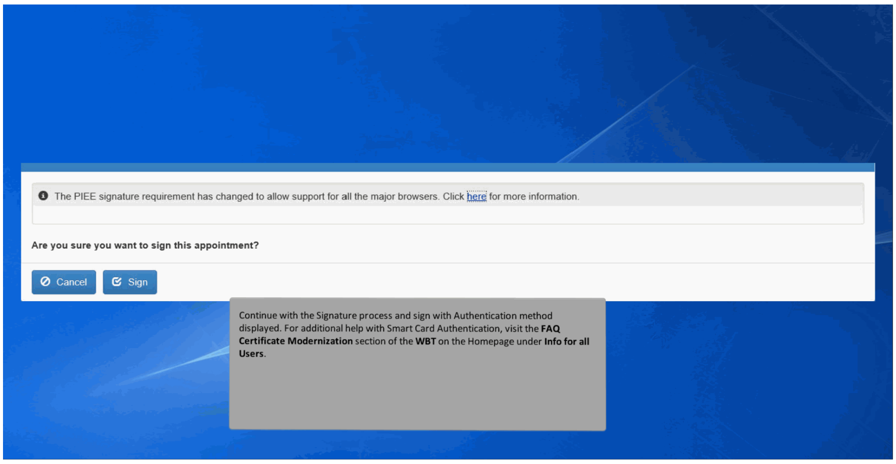
As the DAS, review the Appointment Certifications and click the Approve button.

Step 50



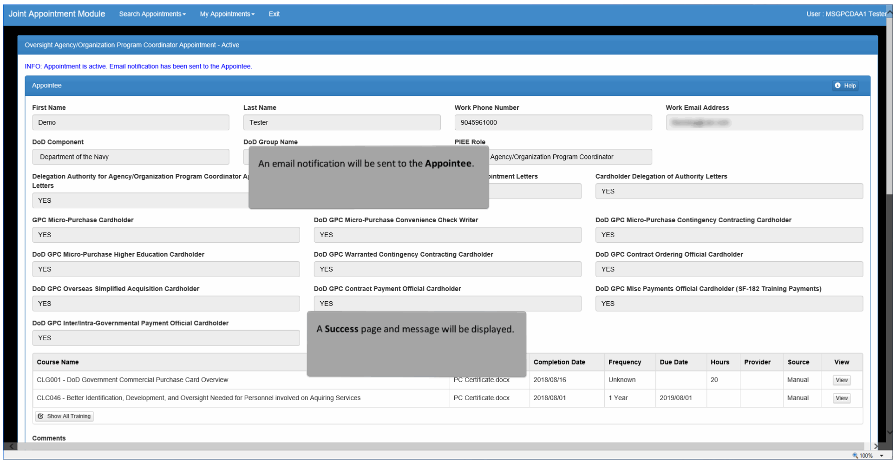
Comments may be entered but are not required. Click the Approve button.

Step 51



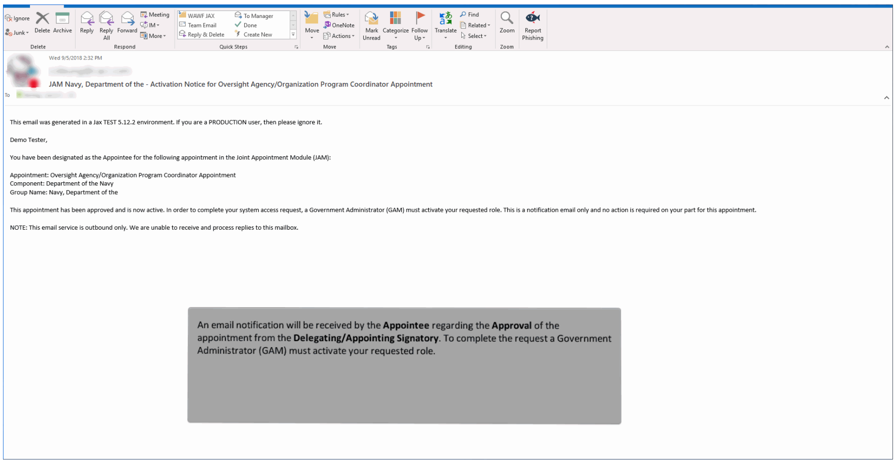
Continue with the Signature process and sign with Authentication method displayed. For additional help with Smart Card Authentication, visit the FAQ Certificate Modernization section of the WBT on the Homepage under Info for all Users.

Step 52



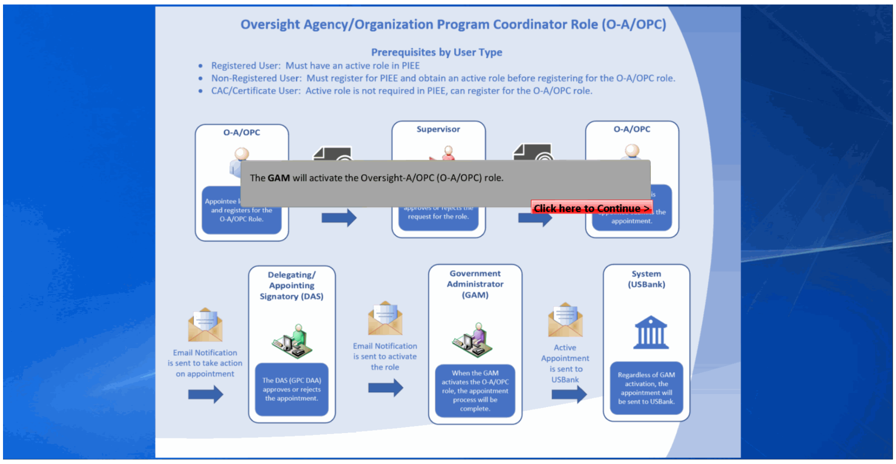
A Success page and message will be displayed. An email notification will be sent to the Appointee.

Step 53



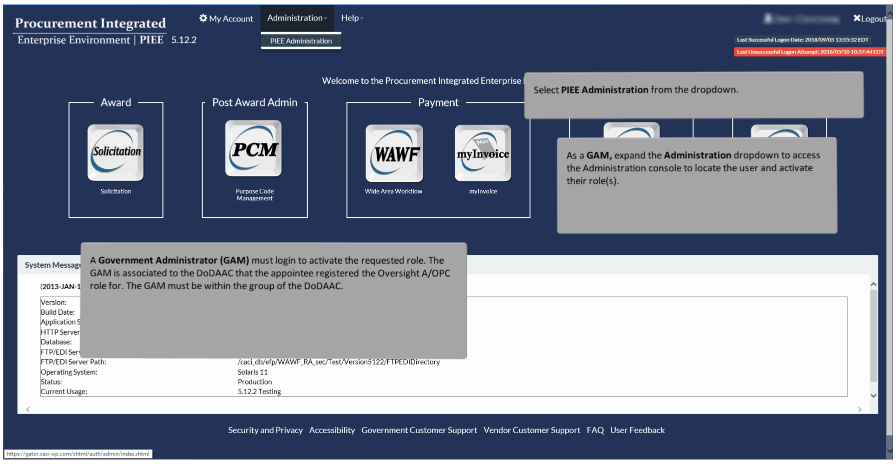
An email notification will be received by the Appointee regarding the Approval of the appointment from the Delegating/Appointing Signatory. To complete the request a Government Administrator (GAM) must activate your requested role.

Step 54



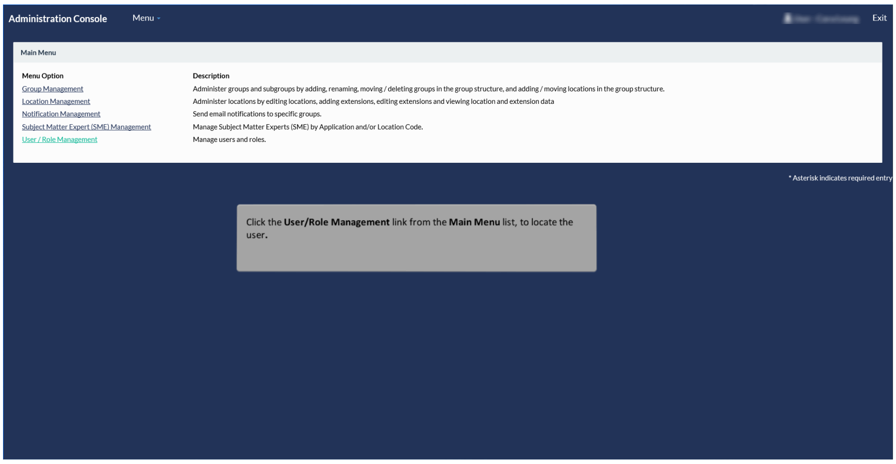
The GAM will activate the Oversight-A/OPC (O-A/OPC) role.

Step 55



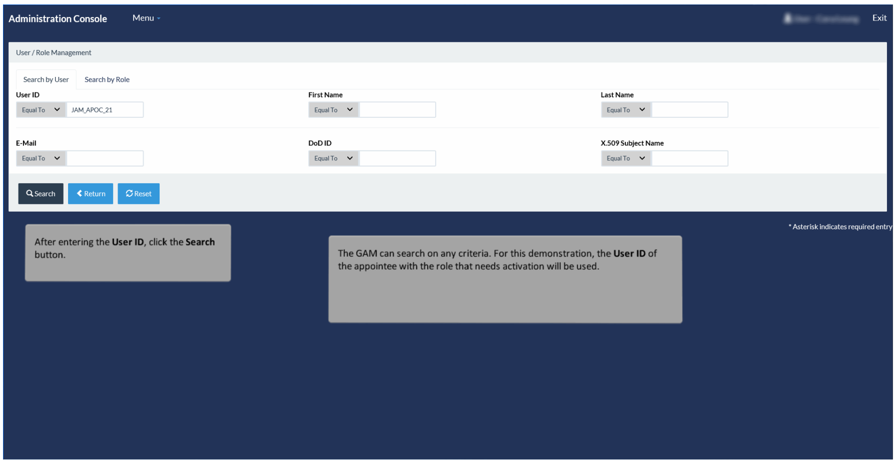
A Government Administrator (GAM) must login to activate the requested role. The GAM is associated to the DoDAAC that the appointee registered the Oversight A/OPC role for. The GAM must be within the group of the DoDAAC. As a GAM, expand the Administration dropdown to access the Administration console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

Step 56



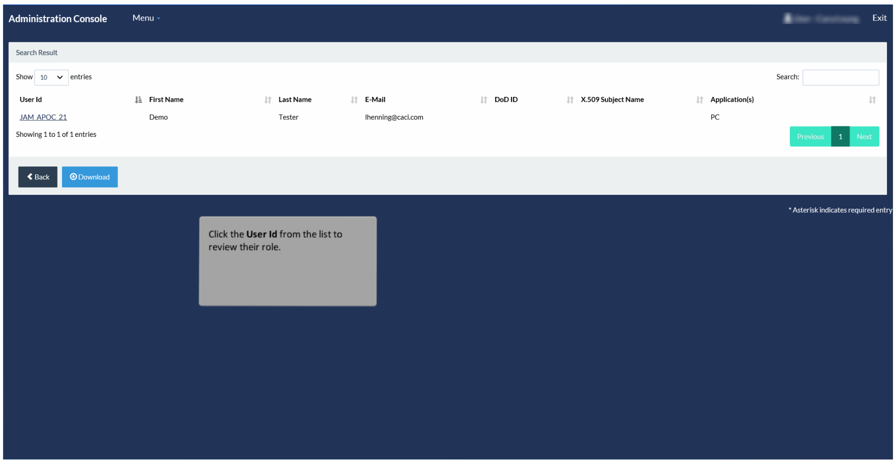
Click the User/Role Management link from the Main Menu list, to locate the user.

Step 57



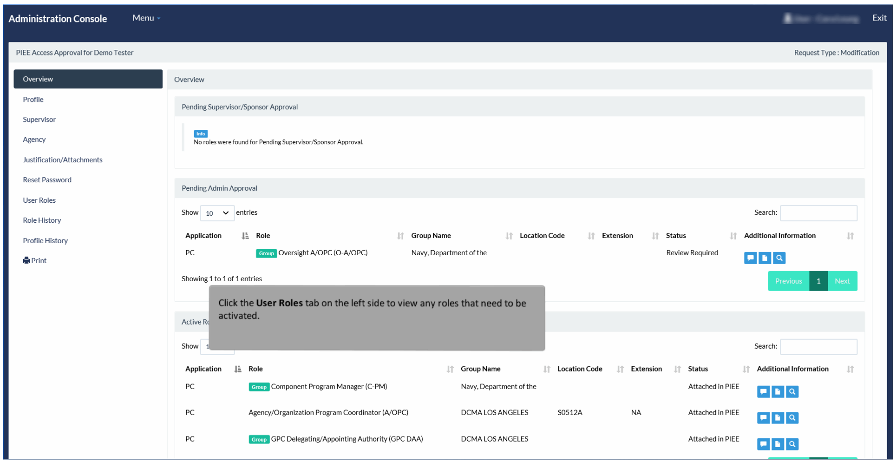
The GAM can search on any criteria. For this demonstration, the User ID of the appointee with the role that needs activation will be used. After entering the User ID, click the Search button.

Step 58



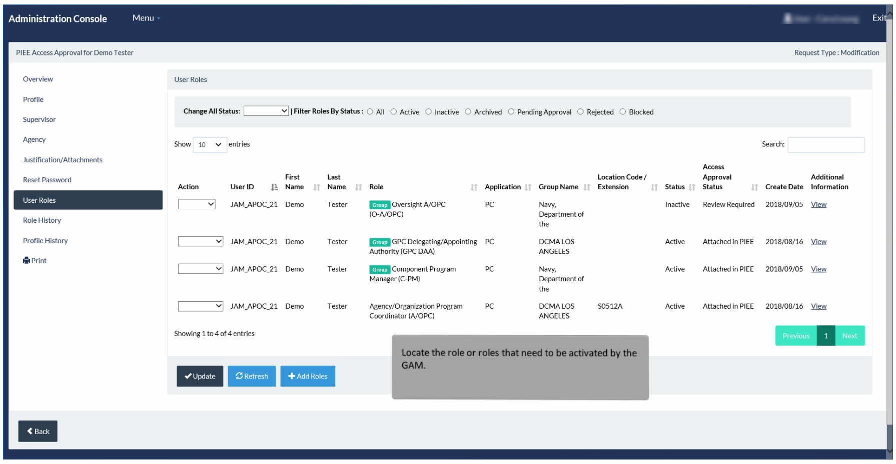
Click the User Id from the list to review their role.

Step 59



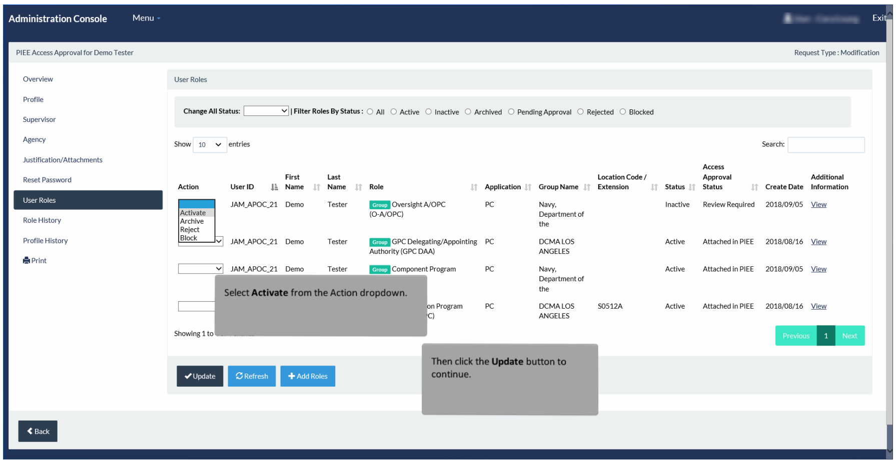
Click the User Roles tab on the left side to view any roles that need to be activated.

Step 60



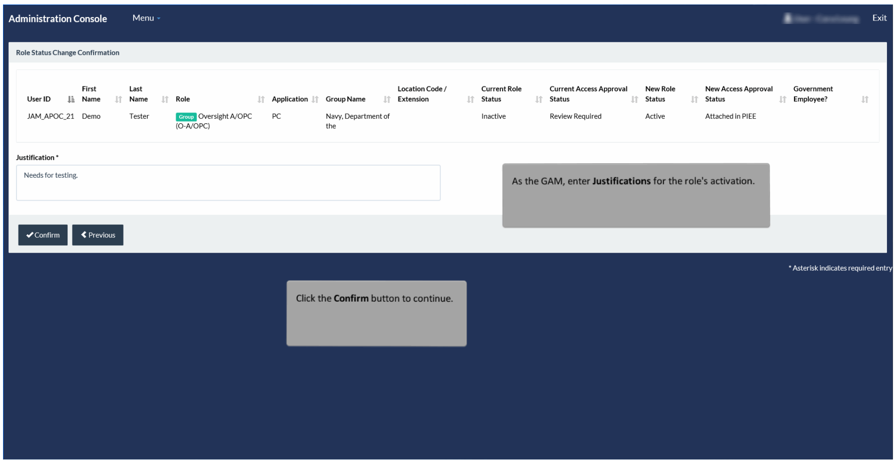
Locate the role or roles that need to be activated by the GAM.

Step 61



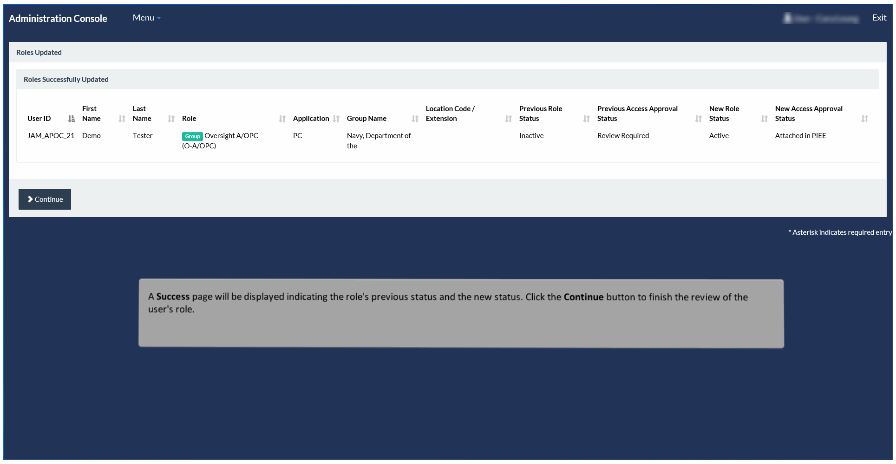
Select Activate from the Action dropdown. Then click the Update button to continue.

Step 62



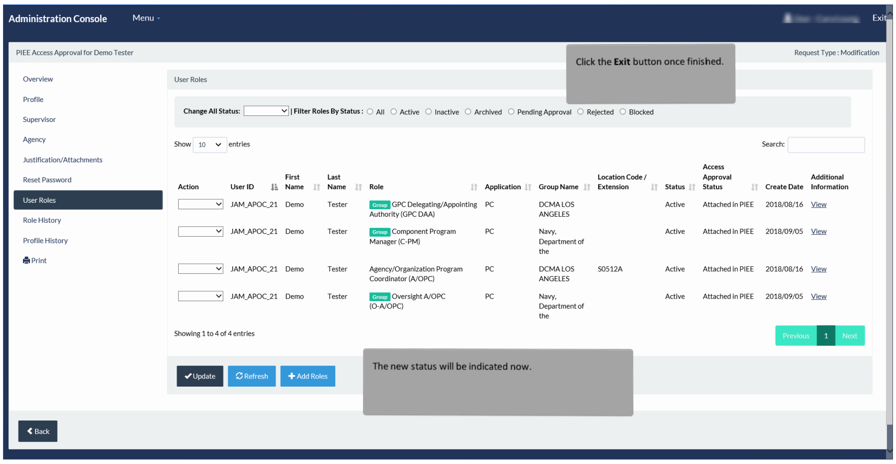
As the GAM, enter Justifications for the role's activation. Click the Confirm button to continue.

Step 63



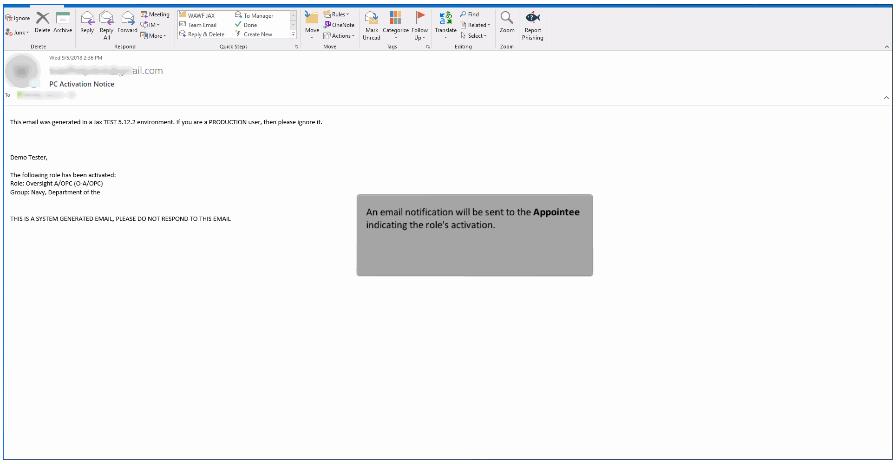
A Success page will be displayed indicating the role's previous status and the new status. Click the Continue button to finish the review of the user's role.

Step 64



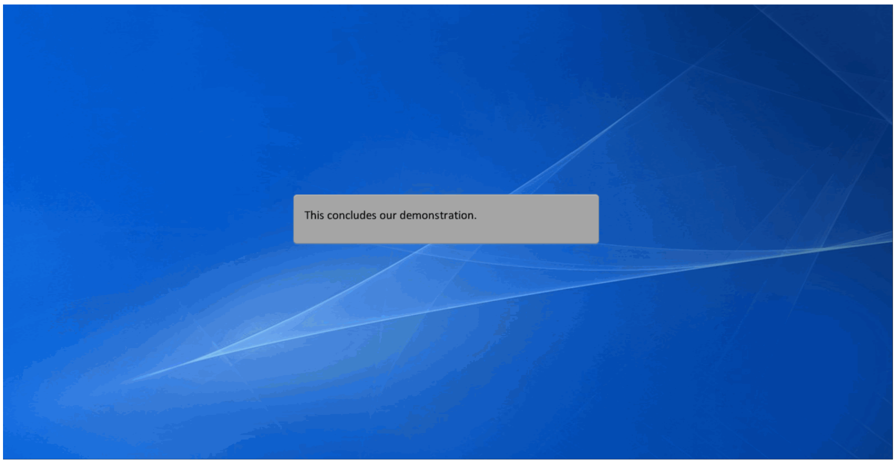
The new status will be indicated now. Click the Exit button once finished.

Step 65



An email notification will be sent to the Appointee indicating the role's activation.

End



This concludes our demonstration.