



US General Services Administration  
Public Buildings Service  
Portfolio Management and Customer Engagement  
PBS Customer Dashboard User Guide

# PBS Customer Dashboard User Guide

**The PBS Customer Dashboard** is a web-based interactive set of data with project and occupancy information for federal agencies with space managed by the Public Buildings Service (PBS) of the U.S. General Services Administration (GSA).

The dashboard provides 24/7 access to current operational views of an agency's GSA-managed occupancies, Reimbursable Work Authorizations (RWAs), and projects of all types, with the most recent status and financial information available.

PBS customers can use this dashboard to view status and details of individual Occupancy Agreements (OAs), RWAs, and projects (lease space, repair and alteration, new construction, design, and many more). The dashboard is designed for portfolio and transactional views, with a variety of filtering capabilities (geographic, size, status, and funding levels) for diverse use by a variety of users.

The dashboard is housed on GSA's D2D (Data to Decisions) web portal, <https://D2D.gsa.gov>.

# Table of Contents

<b>1: <a href="#">How to Access and Use the Dashboard</a></b>	
Gaining Access: Non-GSA Users GSA Users General User Guide Browser Choice Logging in and Entering the Dashboard General Page Layout Filters Map Navigation Downloading Data and Views	
<b>2: <a href="#">Content Guide</a></b>	
Projects Project Types Project Financials Project Lifecycle Phases Project Schedules and Milestones Project Policy and Resources	
RWAs RWA Definition and Lifecycle RWA Policy and Resources	
Occupancies OA Definition and Lifecycle OA Policy and Resources	
Locations	
Rent Billing and Rent Resources	
<b>3: <a href="#">Downloading from the Dashboard</a></b>	
<b>4: <a href="#">Support</a></b>	
Support Roles and Responsibilities	
<b>5: <a href="#">Resources</a></b>	

# How to Access and Use the Dashboard

## Gaining Access to the PBS Customer Dashboard (non-GSA users)

### 1. Register your .gov/.mil email address with MAX.gov

a. If you're already registered with MAX.gov, no action needed (proceed to Step 2)

b. If you're not yet registered, visit <https://login.max.gov>

i. Click the green Register Now button in the top-right corner

ii. Follow the instructions to register with MAX.gov and register your PIV card to enable MAX.gov PIV login

Don't Have a MAX ID Yet?

Register Now



LOGIN WITH YOUR  
PIV OR CAC

Remember to plug in  
your PIV/CAC card

### 2. Log into the D2D Portal using your MAX.gov credentials

a. Go to: <https://d2d.gsa.gov> and click Login at the top right

i. Option A: Login with PIV/CAC (you may need to enter your PIN)

ii. Option B: Login with MAX Secure+ SMS Two-Factor with User ID and Password.

*Note: you have to log into the D2D Portal at least once before moving to step 3 in order for access credentials to work.*

### 3. Email [pbs.dashboard@gsa.gov](mailto:pbs.dashboard@gsa.gov) to request access to your agency's view of the PBS Customer Dashboard

Your email must include:

- Full Name
- Your federal agency and bureau name
- Government email address used to create the MAX.gov account in Step 1
- Verify (state) that you have registered your .gov/.mil email address with MAX.gov
- State whether you are a federal government employee or a contractor

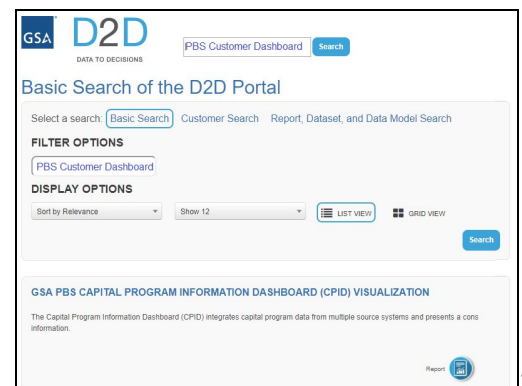
The PBS Dashboard Team will verify your access request with your agency. Requests for access are processed on the 15th & 30th of each month.

*Note: this step is not required if you received a welcome email from PBS Dashboard team - you already have access!*

### 4. Once you've received an access approval email from the PBS Dashboard team, login using this link:

<https://D2D.gsa.gov/report/pbs-customer-dashboard>

You may also Search for "PBS Customer Dashboard"



Please do not try and access the dashboard until you receive confirmation that you have been granted access.

## Gaining Access to the PBS Customer Dashboard (GSA users)

### 1. Register your gsa.gov email address with MAX.gov

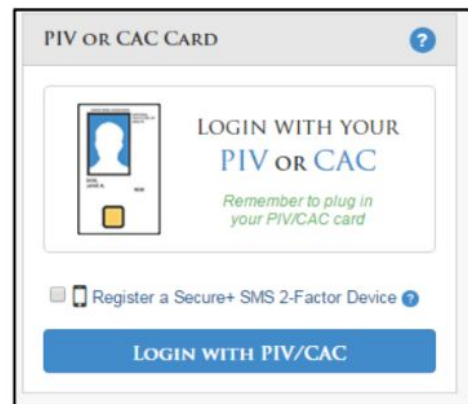
- a. If you're already registered with MAX.gov, no action needed (proceed to Step 2)
- b. If you're not yet registered, visit <https://login.max.gov>
  - i. Click the green Register Now button in the top-right corner
  - ii. Follow the instructions to register with MAX.gov and register your PIV card to enable MAX.gov PIV login

Don't Have a MAX ID Yet?

[Register Now](#)

### 2. Log into the D2D Portal using your MAX.gov credentials

- a. Go to: <https://d2d.gsa.gov/> and click **Login** at the top right
  - i. Option A: **Login with PIV/CAC** (you may need to enter your PIN)
  - ii. Option B: Login with **MAX Secure+ SMS Two-Factor** with User ID and Password



### 3. Login using this link: <https://D2D.gsa.gov/report/pbs-customer-dashboard>

You may also Search for "PBS Customer Dashboard"



PBS Customer Dashboard [Search](#)

#### Basic Search of the D2D Portal

Select a search: [Basic Search](#) [Customer Search](#) [Report, Dataset, and Data Model Search](#)

##### FILTER OPTIONS

##### DISPLAY OPTIONS

Sort by Relevance

Show 12

[LIST VIEW](#)

[GRID VIEW](#)

[Search](#)

#### PBS CUSTOMER DASHBOARD

The PBS Customer Dashboard is a web-based interactive database with project and occupancy information for federal agencies with space managed by the Public Buildings Service (PBS) of the U.S. General Services Administration (GSA).

Report 

# User Guide

## First, a little about Browser Choice...

1. The Dashboard was created and tested using Google Chrome. Most GSA users use Chrome with high levels of success.
2. Some agencies have better results with Microsoft Edge if Chrome is not an option. While working to resolve download issues in particular, the team found that Edge performs as well as Chrome.
3. Internet Explorer is your final choice. There are several known issues with IE, in particular the GSA team and some customers have reported issues with appearance and functionality, and also download capabilities.
4. Any other browsers have not been tested by the GSA team, so performance is not guaranteed nor can we generally troubleshoot issues, since we do not have the ability to use other browsers.

## The D2D Dashboard Landing Page will take you to the Dashboard Welcome & Guidance page

To login to the PBS Customer Dashboard, go to:

<https://d2d.gsa.gov/report/pbs-customer-dashboard> and log in to D2D. You will enter the dashboard via the landing page by clicking on the entry image.



Once you enter the dashboard, you will land on the Welcome and Guidance page. This page has two sections, navigation on the top, and Resources on the bottom.

### GSA PBS Customer Dashboard



The PBS Customer Dashboard provides anytime access to project and occupancy information for federal agencies with space managed by the Public Buildings Service (PBS) of the US General Services Administration (GSA). You will find current operational information on Projects, RWAs, Occupancy Agreements, Locations, and Rent. For more information on the PBS Customer Dashboard, please check out the [User Guide](#), or see below in the PBS Resources section.

**Projects**

Summary and detailed project information

**RWAs**

Reimbursable Work Authorizations

**Occupancy Agreements**

Final Occupancy Agreements

**Locations**

Information on your GSA-Controlled locations

**Rent**

Multiple years billed rent and square feet

#### PBS Resources

PBS Customer Dashboard: <https://www.gsa.gov/pbscustomerdashboard>

PBS Resource Fact Sheets: <https://www.gsa.gov/pbsfactsheets>

PBS Pricing Desk Guide: <https://www.gsa.gov/rentpricingpolicy>

Reimbursable Services Program: <https://www.gsa.gov/rwa>

#### PBS National Offices

Office of Portfolio Management and Customer Engagement: <https://www.gsa.gov/portfoliomanagement>

Office of Design and Construction: <https://www.gsa.gov/newconstruction>


Office of Leasing: <https://www.gsa.gov/leasing>

Office of Facilities Management: <https://www.gsa.gov/facilitiesmanagement>

From the landing page and once in the Dashboard, you can also navigate between sections by using the tabs across the top.


Welcome and Guidance My Projects My RWAs My Occupancies My Locations My Rent

## GSA PBS Customer Dashboard




The PBS Customer Dashboard provides anytime access to project and occupancy information for Buildings Service (PBS) of the US General Services Administration (GSA). You will find current Occupancy Agreements, Locations, and Rent. For more information on the PBS Customer Dashboard, please see the Resources section.

Under the Navigation there are several Resources linked for further information and contact email address.




### Projects

Summary and detailed project information




### RWAs

Reimbursable Work Authorizations



### Occupancy Agreements

Final Occupancy Agreements



### Locations

Information on your GSA-Controlled locations

#### PBS Resources

PBS Customer Dashboard: <https://www.gsa.gov/pbscustomerdashboard>  
PBS Resource Fact Sheets: <https://www.gsa.gov/pbsfactsheets>  
PBS Pricing Desk Guide: <https://www.gsa.gov/rentpricingpolicy>  
Reimbursable Services Program: <https://www.gsa.gov/rwa>

#### PBS National Offices

Office of Portfolio Management and Customer Engagement: <https://www.gsa.gov/porfoliomangement>  
Office of Design and Construction: <https://www.gsa.gov/newconstruction>  
Office of Leasing: <https://www.gsa.gov/leasing>  
Office of Facilities Management: <https://www.gsa.gov/facilitiesmanagement>

#### PBS Systems with Customer Access

RWA Entry and Tracking Application (eRETA) <https://www.gsa.gov/ereta>  
Electronic Occupancy Agreement (eOA) <https://www.gsa.gov/eoa>  
Rent on the Web (ROW) <https://www.gsa.gov/rentontheweb>

#### Contact the PBS Customer Dashboard Team

Please send comments, questions, and suggestions to [pbs.dashboard@gsa.gov](mailto:pbs.dashboard@gsa.gov)



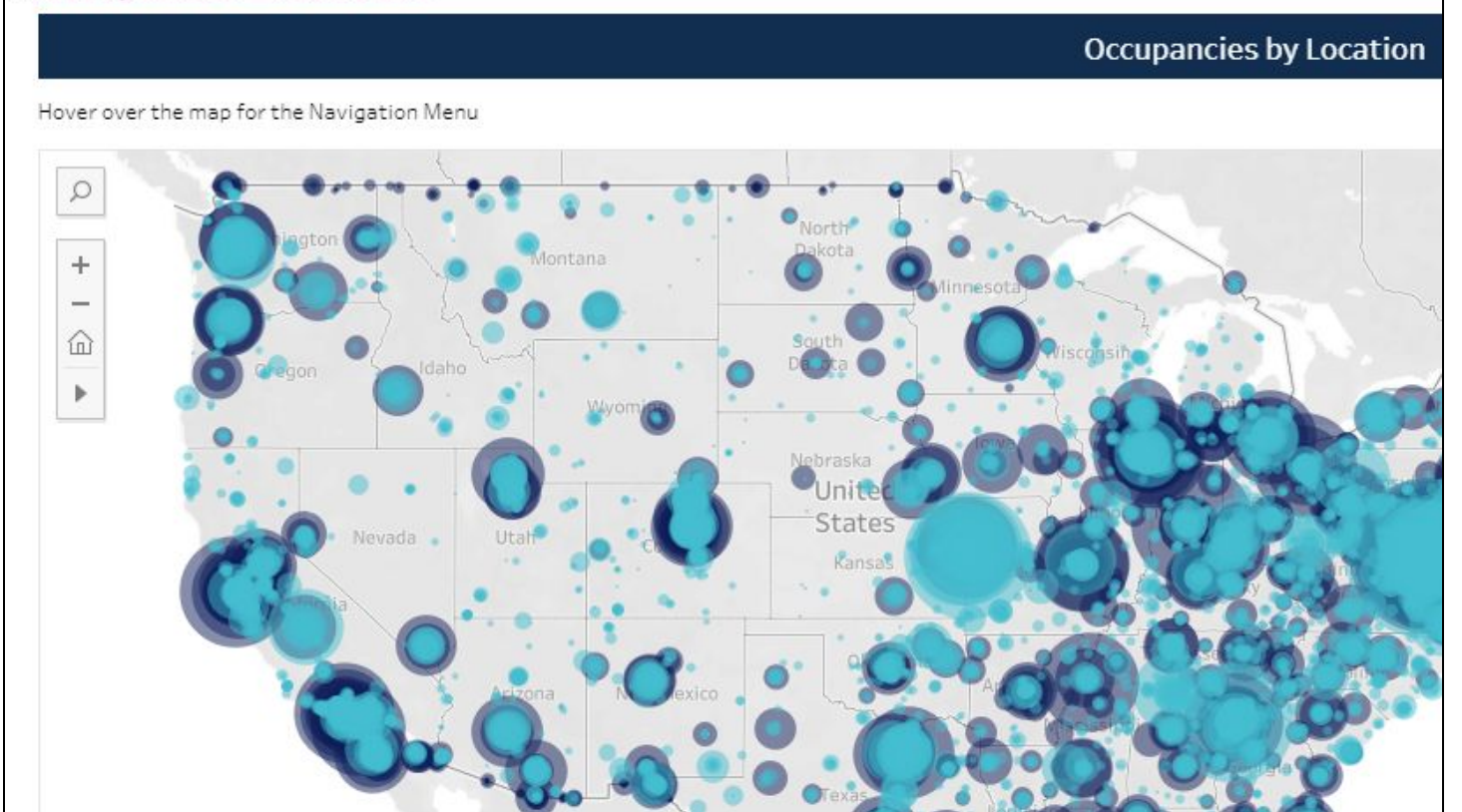
**There are 3 Sections on each of the Projects, RWAs, Occupancies, and Rent tabs**

Each tab contains three sections - *Summary, Statistics, and Details*. The information is presented from a portfolio level and moves towards a more detailed view as you scroll down the page. Screenshots below are from the Occupancies section of the DB.

**Occupancies- National Summary**

	Portfolio Summary							
	OA USF	OA RSF	Count of Personnel	% of Space	OA Count	Number of Buildings	Non-Cancelable OA	Non-Cancelable OA P
GSA-Leased	165,851,455	184,765,614	573,374	52.39%	10,273	6,925	2,398	56,374
GSA-Owned	124,607,394	167,926,656	392,351	47.61%	10,440	1,532	486	8,096
<b>Total All Building Types</b>	<b>290,458,849</b>	<b>352,692,270</b>	<b>965,725</b>	<b>100.00%</b>	<b>20,713</b>	<b>8,457</b>	<b>2,884</b>	<b>64,470</b>

**Occupancies - Statistics**





Occupancy Agreement Details							
OA Number							
IDENTIFIERS	OA Current Version 7	OA Effective Date 4/1/2013	OA Expiration Date 3/31/2021	FY Expiration 2021	Non-Cancelable No	ROI Priced No	Bureau
LOCATION	Building Name SAM NUNN ATLANTA FED. CTR.		Building # GA1007	GSA Region 4			
	Address 100 ALABAMA ST SW		City ATLANTA	State GA			
GSA POC	Responsible Government Associate andy.garner@gsa.gov		Alternate Billing Contact				
SIZE	OA USF 543	OA RSF 724	R/U Factor 1.333358	Count of Personnel Null	Surface Parking 0	Structured Parking 0	Total Parking 0
LEASE INFO	Lease # LGA34033	Lease Effective Date 6/15/1996	Lease Expiration Date 9/30/2023				
	Termination Rights No	Date Termination Rights Begin 9/30/2023	Days to Terminate All Space		Days to Terminate Partial Space		
OCCUPANCY AGREEMENT LIFECYCLE	Project Lifecycle Phase	Milestone			Milestone Target Date		
	Identification	Initial Engagement to Discuss CPA			3/31/2018		
	Initiation	Strategic Requirements Finalized, CPA signed			9/30/2018		

## Locations Views

Locations has a slightly different view than the prior tabs, in that the first section is a list of locations (no summary), followed by Building Details, an OA List, and finally, OA details, including space types for individual OAs and the ability to download space records for all locations/occupancies. For information such as a count of buildings, total assigned square feet, and so on, please view the Occupancies tab.

To access details for a specific Project, OA, or RWA, refer to the List sections and use the drop-down selection menu to find the item and see its details. You can also type in the ID (RWA Number, Project Number, Location Code/Building Number, OA Number) in the search box at the top of the drop-down selection menu.

*Note: If you have applied filters to the top of the page, the selection in the Drop-Down menu will be limited to the filters you have applied.*

**All data is viewable by default - To apply a filter...**

When you open the dashboard, you are looking at *all* of your data, unfiltered. To select the appropriate data, use filters.

There are two general kinds of filters: Checkbox filters OR Slider Filters

**Checkbox Filters** are multi select and you can choose as many or as few to show the data. Be sure and click "Apply".

**Slider Filters** can be used in two ways: You can click into the ends where the data is, and type in the range or use the calendar to pick a start and/or end. You can also slide the slider right or left to narrow or expand the ranges of data.

**Most Filters Contain a Search Box to Type in Desired Filters (Find a City, Bureau or POC Name)**

Directly above the check boxes in all multi-select pick-list filters (like this one below), there is an open text search box where you can type the name of the filter you'd like to apply, such as a bureau, a POC, or a city.

**Filters You've Applied are shown in Selected Filters Listed Below the Filters Grouping**

To verify other filters you've selected, such as building names or lifecycle phases, you'll need to click on the filter and scroll to see which boxes are checked.

Filters that have been applied show at the bottom of the filters section in the gray bar.







**If wording is cut off and you see '...', hover over the wording to see the full word or phrase**

If you see "..." after a word, phrase, or name, the full text is cut off. To view the additional text, just hover your mouse over the cut-off wording and the full text will appear in a floater box.

## Map Navigation Tools Appear When You Hover Your Mouse Over the Map



Map navigation tools are available when you hover over a map. Click on the bottom right arrow to expand the tools available for use on a map. You can also zoom in and out using the +/- buttons.

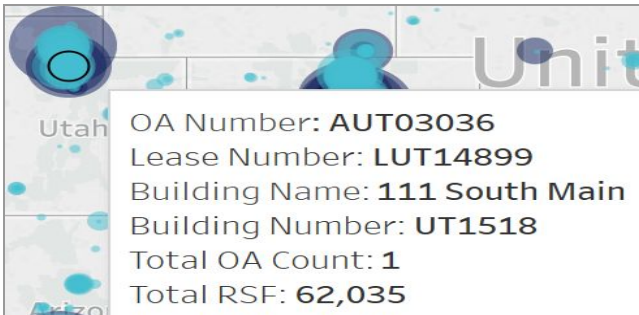
	<b>Home Function:</b> If you have zoomed in, zoomed out, panned, selected or made changes to your view of the map, to reset your view, click on Home.
	<b>Zoom to a Specific Area:</b> To zoom in to a specific area of the view, click the Zoom Area tool button on the view toolbar, and then drag to create the zoom area. If the view toolbar is hidden, hold down Ctrl + Shift (Command-Shift on Mac) to use the Zoom Area tool.
	<b>Pan Tool:</b> To Pan, do one of the following. Hold down Shift, and then drag across the view. Or on the view toolbar, hover over the arrow, select the Pan Tool and then click and drag across the view.
	<b>Rectangular Selection Tool:</b> The Rectangular tool selects marks within a rectangular shape. To use the Rectangular tool, hover over the arrow on the view toolbar, click the Rectangular tool button, and then click and drag across the view.
	<b>Radial Selection Tool:</b> The Radial tool selects marks within a circular area. To use the Radial tool, hover over the arrow on the view toolbar, click the Radial tool button, and then click and drag across the view.
	<b>Lasso Selection Tool:</b> With the Lasso tool, you can select multiple marks by drawing a freehand shape around them. This tool is useful when you want to include only certain marks, and exclude others around them. To use the Lasso tool, hover over the arrow on the view toolbar, click the Lasso tool button, and then draw a freehand shape around the marks you want to select.

You can also search the map for a specific location using the Search box at the top left of the map. Just type in a city or state and the map will show you that location. From there, you can zoom in and out to find out more details about that area.



## Hover over Circle on a Map, or a Colored Bar on a Graph to See Details

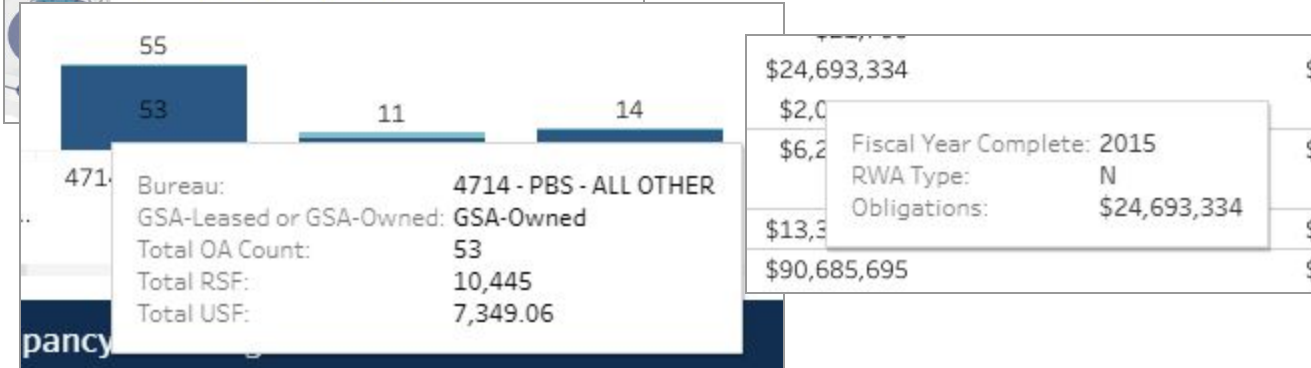
Individual pieces of graphs, maps or diagrams show details when you hover over using a tool tip.



Utah

OA Number: AUT03036  
Lease Number: LUT14899  
Building Name: 111 South Main  
Building Number: UT1518  
Total OA Count: 1  
Total RSF: 62,035

If you hover over an element in the dashboard, a tool tip will often show summary and individual details related to that item. This includes maps with details of the location and occupancy; charts will show additional details related to the information, including summary square feet in addition to counts; details from summary tables to make the information easier to read.



55

53

11

14

471

Bureau: 4714 - PBS - ALL OTHER  
GSA-Leased or GSA-Owned: GSA-Owned  
Total OA Count: 53  
Total RSF: 10,445  
Total USF: 7,349.06

\$24,693,334

\$2,0

\$6,2

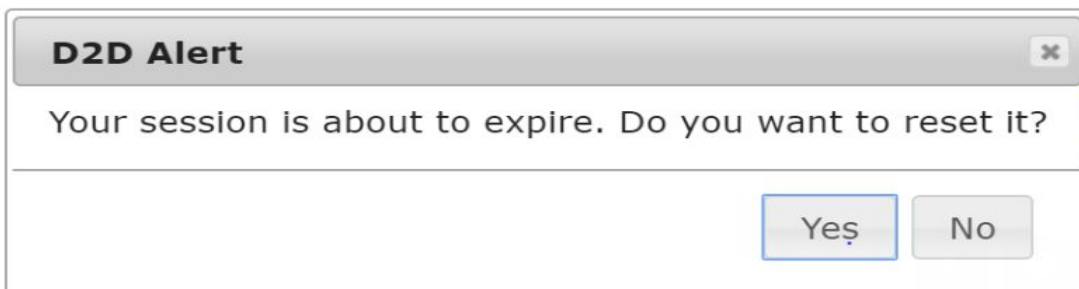
\$13,3

\$90,685,695

Fiscal Year Complete: 2015  
RWA Type: N  
Obligations: \$24,693,334

## If the D2D site asks you if you want to reset your session, click Yes - your filters will remain

The filters you've applied will not reset; only the time clock on your login will reset. Any filters you applied will remain when you click Yes to reset.



**D2D Alert** [X]

Your session is about to expire. Do you want to reset it?

Yes No

**Continue on to learn about Downloads!**

# Downloading from the Dashboard

## Most data in the dashboard can be downloaded as a PDF or .CSV file

Each dashboard view (Projects, RWAs, Occupancies, Locations, Rent) has a **Full Dataset Export** which can be downloaded by following the instructions at the top-right of the view. Selected filters will apply to the export.

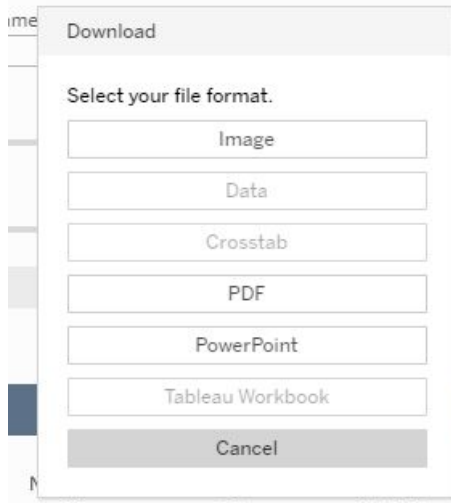


### Instructions to create Rent Standard Export (supporting data file)

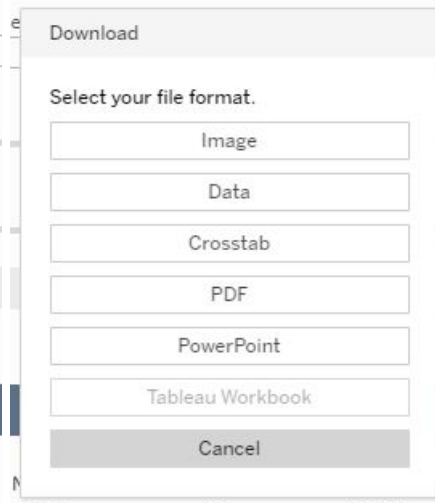
1. Apply filters below, if desired (they will apply to the generated report).
  2. Click on this box (within the gray dotted lines) to activate the export sheet.
  3. Select 'Download' located at footer of the page, followed by 'Crosstab' for an Excel/CSV file.
  4. You will know the export sheet has been selected when there are options available to download.
- Access the User Guide (from Welcome/Guidance tab) for more export options.

It is important to note that when you click on the instruction box, nothing will happen. Click the box, and go to the Download button at the bottom right and select Crosstab. If the Crosstab selection is grayed out, just wait a few more seconds, and try again.

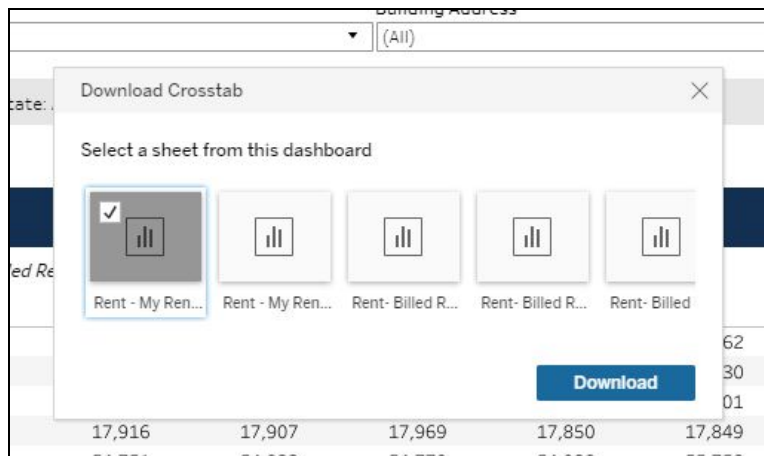
*Not ready to download*



*Ready to download*



Next, you will select the specific sheet which you would like to download. You can download sections of the dashboard for specific uses.



As an example, you can download the list of RWAs from the substantially complete, but not financially closed section. You can download most sections from each tab by scrolling across the options and clicking on the specific sheet you wish to download, once the sheet is selected a check will appear indicating the sheet you have selected and may download by clicking on the Download button to obtain your excel sheet.

The screenshot shows the GSA My RWAs dashboard for the Department of Justice. It includes a navigation bar, a 'Filters' section with dropdowns for Bureau, Building Number, and State, and a 'Download Crosstab' dialog box. The dialog box shows a grid of sheet options: 'RWA Selected...', 'RWA Total Aut...', 'RWA Total Co...', 'RWAs Comple...' (which is selected with a checkmark), and 'RWAs Com'. A 'Download' button is visible at the bottom of the dialog. Below the dialog, there is a table titled 'Open RWAs' with columns for RWA Type, Number of RWAs, Authorized Amount, Obligated, Remaining Balance, and Billed to RWA. The table shows data for RWA types A and R.

## Downloading a section of the Dashboard

In addition to the data file, you can download sections of the dashboard for specific uses. As an example, you can download the list of RWAs from the substantially complete, but not financially closed section. Most sections of the dashboard have this as an option.

To download the summary table and list of RWAs, follow these steps.

- 1) Click the column Count of RWAs so the column is highlighted
- 2) If you want to download this summary table, go to Download, and select Crosstab. This will download the summary table.

RWAs that are Substantially C	
	Count of RWAs
	45
	3
	44
	2
	143

Fiscal Year	RWA Type	Count of F	Authorized Amount	Obligations	Remaining Balance
2013	A	1	\$6,022,809	\$2,443,301	\$3,579,508
2013	N	30	\$29,135,089	\$28,442,473	\$692,616
2013	R	1	\$10,194	\$0	\$10,194
2014	N	27	\$5,500,675	\$4,400,089	\$1,100,586
2014	R	8	\$6,151,498	\$5,918,510	\$232,988
2015	A	1	\$3,887,441	\$3,738,126	\$149,315
2015	B	1	\$20,866	\$21,700	(\$835)
2015	N	34	\$28,294,955	\$24,693,334	\$3,601,620
2015	R	3	\$2,131,060	\$2,068,085	\$62,975
2016	N	45	\$12,278,261	\$6,206,684	\$6,071,577
2016	R	3	\$18,426	\$0	\$18,426
2017	N	44	\$17,676,095	\$12,204,992	\$5,471,103



- 3) If you would like to download a list of RWAs that are summarized in the table, move to the list and click on the first row of the data.
- 4) Once the first row is selected, go to Download, and select Crosstab. This will download a list of all RWAs supporting the summary table. The download from this section is an abbreviated report with just the RWA Number, Substantial Completion Date, Project Description, Service Type, AB Code, City, State, Authorized Amount and Balance.

RWA Numb	Actual Completion Date	Project Description	Service Type	AB Code	City	State	Authorized Amount	Remaining Balance
	11/30/2013	Wall repair at warehouse	Non-Severable				\$648	\$648
	11/30/2013	ELECTRICAL WORK IN CBC	Non-Severable				\$4,724	\$0
	11/30/2013	INSTALLATION OF A TEMP	Non-Severable				\$4,843	\$0
	6/20/2019	JPF17-070/R3 Green Feder	Non-Severable				\$328,818	\$8,317
	3/9/2015	JPF-024-14 Furnish and in	Non-Severable				\$3,659	\$24
	3/22/2016	Replace carpet and paint i	Non-Severable				\$4,579	\$1,758
	12/21/2016	JPF-013-15 CO Rooms 521	Non-Severable				\$3,323	\$106
	12/30/2018	JPF18-021/CO-FY18-RIC G	Severable				\$17,256	\$664
	7/31/2018	Furniture for the JCKLife+	Non-Severable				\$894,663	\$420
	5/4/2018	JCKLife+ Construction Cos	Non-Severable				\$440,410	\$1,335
	11/19/2018	Collocation of FAS (2 emp	Non-Severable				\$15,212	\$15,212
	2/22/2018	TN FEMA coordination	Severable				\$5,000	\$5,000
	7/12/2019	NO TRAVEL IS AUTHORIZED	Non-Severable				\$6,250	(\$439)
	5/31/2019	NO TRAVEL IS AUTHORIZED	Non-Severable				\$5,000	\$4,949
	7/31/2019	NO TRAVEL IS AUTHORIZED	Non-Severable				\$5,000	\$1,881

(You will note that the RWA Number, AB Code, and city have been removed from this table to limit sharing of customers information)

City	State	Authorized Amount	Remaining Balance
Tucson	AZ	\$613,375	\$93,751
Laredo	TX	\$1,780,000	\$10
Chicago	IL	\$179,013	\$39,701
Philadelphia	PA	\$328,818	\$8,317
Cincinnati	OH	\$841,981	\$4,163
Chicago	IL	\$2,103,496	\$79,785
San Francisco	CA	\$75,825	\$1,008
Des Moines	WA	\$384,884	\$288,239
Des Moines	WA	\$664,733	\$300,038

### Examples of Other Sections that can be downloaded

**Occupancies** - To download each section, click on a column header, go to Download, and select Crosstab

- 1) OAs by FY Expiration - Summary Table
- 2) OA List (abbreviated data set) - List
- 3) Occupancy Planning Milestones due in 12 Months - List

**Rent** - To download each section, click on a column header, go to Download, and select Crosstab

- 1) Billed Rent by Fiscal Year - Summary Table (shows current FY, Year to Date by Default, but you can change FY to compare across years.
- 2) Billed Rent for over Multiple Fiscal years. You can download the full data set for multiple fiscal years by using the Fiscal Year filter and selecting All. Go to the Instructions at the top right of the tab, and follow the data file instructions. You can also apply multiple filters (City, State, Region, Leased/Owned, OA, Building, etc) and obtain a data file for all years based on selected filters.

### Rent - National Summary

Fiscal Year	<div style="border: 1px solid gray; padding: 2px;"> <span style="float: right;">(All) ▾</span> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> (All)</li> <li><input checked="" type="checkbox"/> 2017</li> <li><input checked="" type="checkbox"/> 2018</li> <li><input checked="" type="checkbox"/> 2019</li> <li><input checked="" type="checkbox"/> 2020</li> </ul> </div>	*Note:
Rentable Square	<input checked="" type="checkbox"/> 2018	Surface)
Usable Square	<input checked="" type="checkbox"/> 2019	
Parking Spaces	<input checked="" type="checkbox"/> 2020	Surface)
Parking Spac	Ca... Ap...	
Parking Spaces (Surface)		
<b>1. Shell Rental Rate</b>		

- 3) Full Year or All Months comparison from Rent Comparison Tool. Choose to Compare Rent by Year (default) or by Month. Once you choose the view, click on the first column showing data. Go to the bottom right side, and select Download, and then Crosstab.



	A	B	C	D	E
1		FY 2017	FY 2018	FY 2019	FY 2020 (YTD)
2	Rentable Square Feet	370,282,388	367,948,565	370,269,274	367,263,190
3	Usable Square Feet	306,367,602	304,335,261	306,035,596	303,545,318
4	Parking Spaces (Structured + Surface)	445,085	447,348	442,606	436,410
5	Parking Spaces (Structured)	130,209	130,747	132,709	130,722
6	Parking Spaces (Surface)	316,189	317,978	311,258	307,038
7	1. Shell Rental Rate	\$6,295,290,594	\$6,359,813,991	\$6,453,418,424	\$4,425,650,556
8	2. Amortized Tenant Improvement Used/General	\$319,014,483	\$306,876,460	\$306,922,781	\$229,629,098
9	3. Operating Costs	\$2,286,630,178	\$2,324,820,008	\$2,321,465,092	\$1,576,348,119
10	4. Real Estate Taxes	\$248,314,082	\$242,514,553	\$241,993,221	\$162,863,588
11	5. Amortized Tenant Improvement Used/Customization	\$127,408,256	\$130,864,073	\$129,265,490	\$89,478,361
12	6. GSA Installed Building Improvements	\$591,610	\$517,415	\$527,527	\$298,202

This is what your downloaded report will look like in Excel.

- 4) RSF and Billed Rent Summary by Leased and Owned over time (the table at the bottom of the bar charts)

	2017	2018	2019	2020
GSA-Leased	189,222,135	185,537,581	186,600,864	186,927,279
GSA-Owned	165,829,744	165,430,980	167,013,648	168,179,895
Total	355,051,879	350,968,561	353,614,512	355,107,175

**Projects** - To download each section, click on a column header, go to Download, and select Crosstab

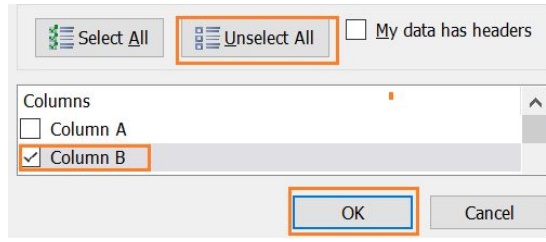
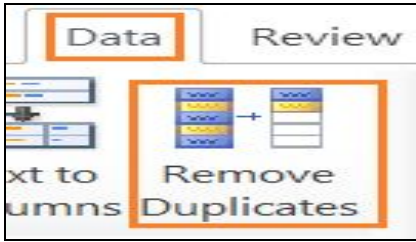
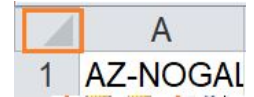
- 1) Projects Summary table
- 2) Project List (list of projects, but abbreviated columns) - Project Number, RWA/Project Control Number (PCN), Lease Number, OA Number, Bureau, Project Name, Project Type, Funding Type, Current Phase, Sub-Phase, Date Awarded, RWA Funding, Total Funding, Total Obligations

**Eliminate Duplicate Projects In Your Export Using Excel Remove Duplicates Function**

If you use the **Full Dataset Report** to export agency-level data from **Projects**, projects which are associated with multiple bureaus may produce duplicate rows in the export. *Note that if you export bureau-level data,*

you will not see this duplication. To eliminate any duplicate rows in Excel:

- 1) Open the exported report in your Excel workbook.
- 2) Select the grey box in the top-left corner of the dataset, between row 1 and column A.
- 3) In the Data Tab of your Excel workbook, select 'Remove Duplicates'.
- 4) Apply these settings - unselect all, check column B, select 'OK'.



5) You can verify that duplicates are eliminated by highlighting column B, select *Conditional Formatting -> Highlight Cell Rules -> Duplicate Values -> OK*. If duplicates have been eliminated, no cells in column B will highlight.

### You can also download visuals of the Dashboard

In addition to downloading tables and lists, you can download images from the Dashboard. You can download a pdf, an image, or a Powerpoint. These three options capture the view of the whole tab, as is. You can apply filters to change the content, but the download of the images from any of the three options, will produce only one full image. This image downloaded as a png (image) can be cropped into parts to aid in presenting the information in handouts and presentations.

*Example of Cropped Image*



# Content Guide

## Details to Understand Dashboard Content

---

Links to Resources, Policy and Training on GSA Projects, RWAs, Occupancies, Locations, and Rent

### Scope of Data in the Dashboard

The dashboard currently has five tabs or views of data available:

<b>Projects</b>	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.
<b>RWAs</b>	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, and 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.
<b>Occupancies</b>	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.
<b>Locations</b>	View your agency's locations, including building details, space types, and lists of OAs for each location. You can also identify building type, historic status, CBSA, and other important building/location information.
<b>Rent</b>	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.

If you would like a copy of the full data dictionary, please email [pbs.dashboard@gsa.gov](mailto:pbs.dashboard@gsa.gov) and request a pdf copy.

# Projects

## Project Types

There are 3 major categories of Project Types in the customer dashboard

### 1. Lease Action Project Types

Project # Structure: # + [State Abbreviation] + ####, **exe OKY2058**

- New Lease or New/Replacing Lease
- Succeeding or Superseding Lease
- Lease Expansion or Reduction

### 2. RWA/RETA-only Project Types

Project # Structure: 1 Letter followed by 7 numbers, **exe N186307**

- A Type RWA - Projects in Federally Owned Space with funding from PBS and Customer
- B Type RWA - Projects related to PBS Prospectus Projects
- N Type RWA - Projects Related to Build-out of Space and/or Services
- F Type RWA - Small Misc. Projects and Services

### 3. ePM Projects Types (all other Projects)

Project # Structure: Typically 5 numbers (count may vary), **exe 35820**

Called *ePM projects* since they are tracked in PBS' ePM project management system

- Design Only
- Disaster Supplemental Funding
- Energy/Water Project
- Fire and Life Safety Project
- Furniture, Fixtures and Equipment (FF&E)
- Judicial Security Project
- Lease Procurement
- New Construction
- Non-Space Projects

## Defining the relationship between RWAs and Projects

- RWA/RETA-only projects are RWA standalone projects which are tracked only in GSA's RETA system and are not tracked in GSA's ePM system. The distinction is made in the dashboard due to the availability of some data in the RETA system vs. the ePM system.
- An RWA can be a standalone project, or it can be a segment of work within a larger Lease Action or ePM project. Either way, the RWA represents a scope of work, and it also represents a funding mechanism for that scope. RWAs for standalone projects are the primary (only) funding mechanism. RWAs which are a segment of a Lease Action or ePM project may be one of several funding sources for that project.
- RWA/RETA-only projects in Projects are active, so you will also see them in Reimbursable view. An RWA which is a segment of a Lease Action or an ePM project will not show in RWAs if it is a completed, closed RWA.

## Project Financials

PBS Projects are often funded through multiple sources, with a Primary Funding Type assigned based on the source of the majority of project funding. GSA uses standard Budget Activity (BA) Codes, a two-character code which represents a program area to which funds are allocated.

- The primary funding type for **Lease Action project types** is Rental of Space (BA53)
- The primary (only) funding type for **RWA only project types** is Reimbursable Work Authorization (BA80)

- **ePM projects** can be associated with a variety of funding types, and may often be mixed funding projects, GSA funding and RWA funding.

**How to Read the Project Financials Chart** in Project Details section:

Project Financials									
Funding Source	ID	Description	Funding Bureau	Effective Date	Expiration Date	Last Updated	Funding, Authorized Amount	Amount Obligated	Remaining Balance
RWA	N1533987	Rooms 5215 - replace door hard..	04704 : GENERAL SERVICES ADMI..	10/1/2015	9/30/2019	7/7/2017	\$23,834	\$21,162	\$2,672
Grand Total							\$23,834	\$21,162	\$2,672

- **Funding Source:** Budget Activity code or short-description of the source of authorized funding
- **ID:** RWA # for BA80 (RWA) funding, or Project Control Number (PCN) # for BA54/55/61/etc. funding
- **Description:** Brief description of the funding source, type or scope of what is being funded
- **Funding Bureau:** Bureau which is financing the authorized amount on the relevant funding line
- **Last Updated:** Date the funding information was last updated in a source system
- **Funding, Authorized Amount:** Authorized funding amount, either from the customer via RWA or from GSA
- **Amount Obligated:** Dollar amount of funding obligated via contract for specified work
- **Remaining Balance:** Authorized amount unobligated

**Additional Notes: Blank Data Elements**

- A blank field typically means the data is not available in the source system
- Obligations may show on multiple lines and may not contain all details available

Project Financials									
Funding Source	ID	Description	Funding Bureau	Effective Date	Expiration Date	Last Updated	Funding, Authorized Amount	Amount Obligated	Remaining Balance
Multiple	RVA00279	-	-	-	-	-		\$247,168	
		2018_BA55_R3_VA0062ZZ_Alt..	4700 : General Services Administr..	-	-	8/24/2018	\$11,677,000		
	RVA00397	-	-	-	-	-		\$372,915	
	RVA00448	-	-	-	-	-		\$111,804	
Grand Total							\$11,677,000	\$731,887	

- Remaining Balance may be blank because of the disassociation described above.
  - To find the Remaining Balance in a chart like the one above, click anywhere in the financial chart, select Download in the footer, followed by Crosstab, to export a .CSV version of the chart. Open the export in Excel and subtract the obligated amounts from authorized amounts to calculate remaining balance.

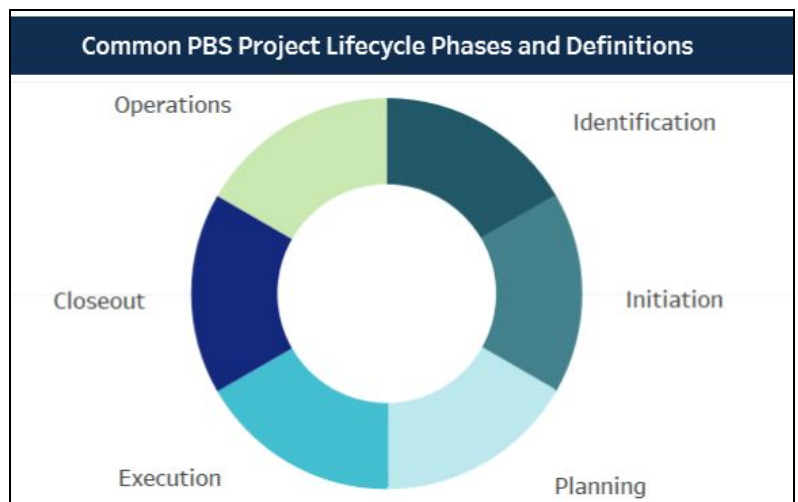
**Project Lifecycle Phases**

You will see a Current Lifecycle Phase applied to all of your project views to assist with categorizing the status of your information. PBS has established a common set of Lifecycle Phases that all projects types fit into.

A project has entered a specific Lifecycle Phase as soon as the first schedule milestone within that phase has been completed.

**Identification Phase includes** programmatic

planning, summary needs interview, summary requirements developed, project parameters defined,





utilization rate considered, Client Project Agreement developed, business decision to proceed determined

**Initiation Phase includes** validation of project summary requirements, initial risk determined, project charter developed, project sponsor and manager assigned, preliminary project budget and schedule discussed

**Planning Phase includes** development of project management and communications plans, detailed needs interview, detailed requirements developed, utilization rate decisions, project budget and schedule finalized, Reimbursable Work Authorizations submitted / accepted

**Execution Phase includes** acquisition, design, construction

**Closeout Phase includes** Reimbursable Work Authorization closeout, contract(s) closeout, finalize Occupancy Agreement for rent start, punch list closeout, property management transition

**Operations Phase** indicates project is complete, the space operational and the space and OA are in maintenance phases

**Project schedule milestones** vary by project type, funding amount and other factors. Your local project manager is the best source for understanding your project schedule and progress. Here are some of the typical sets of project schedule types and milestones you will see in the dashboard:

#### **Project Schedule Type: Post Occupancy Lease Alteration >\$25k Template**

##### Milestone

Customer Request  
Project Initiated  
Initial Scope and Requirements Finalized With Customer  
Customer Concurrence on final scope, schedule and cost estimate  
Project Authorization/ RWA Acceptance  
Request Lessor Pricing  
Issue Lease Amendment for Alterations  
Construction Start/NTP  
Substantial Completion  
Project Closeout

#### **Project Schedule Type: Small Project with Design Template**

##### Milestone

Customer Request  
Project Initiated  
Initial Scope and Requirements Finalized With Customer  
Customer Concurrence on final scope, schedule and cost estimate  
Project Authorization/ RWA Acceptance  
PM Submits Construction or Design/Build PR  
Contracting Accepts Construction or Design/Build PR  
Construction or Design/Build Contract Award  
Construction Start/NTP  
Substantial Completion  
Project Closeout

## Project Schedule Type: Lease Actions

### Milestone

---

Customer Request  
Draft Client Project Agreement Sent  
Signed Client Project Agreement Received  
Requirements Finalized  
Acquisition Plan Finalized  
Initial Financial Assessment with Signed Customer Draft OA  
Transmittal of Solicitation Package  
Receipt of Initial Offers  
Signed OA Document for Award  
Lease Award  
RWA Funds Received/Certified  
Design Intent Drawings Complete  
Customer review and acceptance of Construction Drawings  
TI Costs Approved and NTP Provided  
Space Accepted/Lease Effective  
Punch List Complete

---

## Project Schedule Type: ePM 1.3 Master Project Template

### Milestone

---

Customer Request  
Project Initiated  
Initial Scope and Requirements Finalized With Customer  
Customer Concurrence on final scope, schedule and cost estimate  
Project Authorization/ RWA Acceptance  
PM Submits Construction or Design/Build PR  
Contracting Accepts Construction or Design/Build PR  
Construction or Design/Build Contract Award  
Design PR Submitted  
Contracting Accepts Design PR  
Substantial Completion  
Construction Complete  
Occupancy

---

## Reimbursable Work Authorizations (RWA)

Reimbursable Work Authorizations (RWAs) are established to capture and bill PBS customers the cost of altering, renovating, repairing, or providing services in spaces managed by GSA over and above the basic operations financed through Rent.

The My RWAs tab contains all RWAs that are Open, and that are Substantially Complete, but NOT financially closed. This data set provides an operational view for current, outstanding financial agreements with PBS.

The Summary section provides a quick overview of the data set, as well as a reference guide to RWA Types.

### RWAs - National Summary

Open RWAs						RWA Type Definitions
RWA Type	Number of RWAs	Authorized Amount	Obligated	Remaining Balance	Billed to RWA	
A	95	\$131,216,725	\$68,497,534	\$62,719,192	\$51,646,370	A: Standalone project split-funded by PBS and customer (example: Construction and/or design services in federal space)
B	144	\$864,823,590	\$662,834,462	\$201,989,128	\$603,214,314	B: Project related to PBS prospectus level project that is split funded by PBS and customer (example: Tenant-funded work associated with a PBS prospectus project)
F	507	\$13,020,430	\$4,926,792	\$8,093,638	\$2,404,349	F: Small, miscellaneous, routine project or service, which cannot exceed \$25,000 per transaction and \$250,000 total (example: changing door knobs or key locks)
N	8,655	\$5,777,912,536	\$3,499,820,795	\$2,278,091,741	\$2,330,668,660	N: Standalone project or service funded completely by customer (examples: space changes, overtime utilities in leased space)
R	2,415	\$161,082,405	\$60,346,958	\$100,735,447	\$132,812,840	R: Recurring services or overtime utilities in owned space
<b>Total</b>	<b>11,816</b>	<b>\$6,948,055,687</b>	<b>\$4,296,426,541</b>	<b>\$2,651,629,146</b>	<b>\$3,120,746,533</b>	

\*This chart includes all RWAs that are open, including those that are substantially complete, but not financially closed.

The following two sections contain lists of RWAs based on RWA status (Open and RWAs that are Substantially Complete, but not Financially Closed).

In addition to operational data, the RWA Statistics section shows the prior three fiscal years worth of RWAs that GSA accepted. The information is shown by year and by quarter, by RWA type. The information shown in a heat map format, details dollars and counts.

### RWA Statistics

This RWA Acceptance data is updated annually

RWA Acceptance by Fiscal Year Quarter																	
Total Authorized Amount								Total Count									
FY Accepted	FY Qtr Accepted	RWA Type						Grand Total	FY Accepted	FY Qtr Accepted	RWA Type						Grand Total
		A	B	F	N	R	A				B	F	N	R			
2017	2016 Q4	\$2,591,175	\$4,239,510	\$10,152,283	\$89,510,659	\$142,949,762	\$249,443,389	2017	2016 Q4	6	4	445	1,301	2,080	3,836		
	2017 Q1	\$3,877,448	\$156,411,919	\$2,730,916	\$300,566,740	\$28,229,341	\$491,816,364	2017 Q1	9	11	166	1,201	331	1,718			
	2017 Q2	\$4,950,031	\$17,343,472	\$772,653	\$126,522,560	\$2,445,040	\$152,033,756	2017 Q2	8	13	89	1,249	153	1,512			
	2017 Q3	\$19,360,682	\$50,087,626	\$200,295	\$947,949,244	\$1,151,083	\$1,018,748,929	2017 Q3	18	27	35	3,213	125	3,418			
	<b>Total</b>	<b>\$30,779,336</b>	<b>\$228,082,527</b>	<b>\$13,856,147</b>	<b>\$1,464,549,203</b>	<b>\$174,775,225</b>	<b>\$1,912,042,438</b>	<b>Total</b>	<b>41</b>	<b>55</b>	<b>735</b>	<b>6,964</b>	<b>2,689</b>	<b>10,484</b>			
2018	2017 Q4	\$872,538	\$9,783,601	\$8,726,890	\$124,774,863	\$158,702,240	\$302,860,132	2018	2017 Q4	2	7	357	1,286	2,308	3,960		
	2018 Q1	\$3,301,425	\$5,550,068	\$1,297,226	\$146,479,432	\$5,327,740	\$161,955,891	2018 Q1	3	14	110	1,023	164	1,314			
	2018 Q2	\$2,323,442	\$16,327,221	\$867,514	\$319,124,111	\$2,255,794	\$340,898,082	2018 Q2	4	13	81	1,282	133	1,513			
	2018 Q3	\$38,294,990	\$18,346,594	\$182,301	\$983,972,051	\$1,051,645	\$1,041,847,581	2018 Q3	25	25	28	2,906	119	3,103			
	<b>Total</b>	<b>\$44,792,396</b>	<b>\$50,007,484</b>	<b>\$11,073,931</b>	<b>\$1,574,350,457</b>	<b>\$167,337,419</b>	<b>\$1,847,561,686</b>	<b>Total</b>	<b>34</b>	<b>59</b>	<b>576</b>	<b>6,497</b>	<b>2,724</b>	<b>9,890</b>			
2019	2018 Q4	\$421,305	\$9,604,839	\$9,604,839	\$104,829,185	\$142,067,714	\$256,923,042	2019	2018 Q4	4		370	1,330	2,174	3,878		
	2019 Q1	\$2,930,538	\$4,393,063	\$1,930,664	\$127,635,392	\$4,037,558	\$140,927,214	2019 Q1	7	2	76	777	242	1,104			
	2019 Q2	\$6,363,658	\$38,570,930	\$737,611	\$263,824,323	\$22,090,163	\$331,586,684	2019 Q2	6	10	71	1,334	134	1,555			
	2019 Q3	\$18,331,376	\$57,006,503	\$958,375	\$978,563,275	\$651,287	\$1,055,510,815	2019 Q3	14	23	31	2,826	88	2,982			
	<b>Total</b>	<b>\$28,046,876</b>	<b>\$99,970,495</b>	<b>\$13,231,489</b>	<b>\$1,474,852,174</b>	<b>\$168,846,721</b>	<b>\$1,784,947,756</b>	<b>Total</b>	<b>31</b>	<b>35</b>	<b>548</b>	<b>6,267</b>	<b>2,638</b>	<b>9,519</b>			

The RWA Details section provides details for an individual RWA, including project description, location details, GSA POC, key financial data, and customer funding information.

## Occupancy Agreements

The Occupancy Agreement (OA) is a complete, concise statement of the business terms governing the relationship between PBS and the tenant agency for a specific space assignment. The OA serves as the billing document on which subsequent Rent payments are based. Every space assignment in the PBS portfolio must have its own OA. Each assignment is recorded in the PBS inventory system.

The PBS Customer Dashboard only contains your occupancies in GSA-Controlled spaces (GSA-Owned or GSA-Leased), and DOES NOT include any space managed, owned, or directly leased by your agency. The OAs and associated summary information in this dashboard are the most current final, billing versions.

The Dashboard contains summary information of your occupancies, with a variety of filters to view information on based on selections. You can also view information based on OA expiration, such as when OAs expire by Fiscal Year, when planning milestones are due, and details on individual OAs. You can also apply filters to see your occupancy information on a map.

Occupancies - National Summary													
Portfolio Summary													
	OA USF	OA RSF	Count of Personnel	% of Space	OA Count	Number of Buildings	Non-Cancelable OA	Non-Cancelable OA RSF	ROI OA	ROI OA RSF	Surface Parking	Structured Parking	Total Parking
GSA-Leased	166,344	196,610	910	6.84%	69	52	5	6,368	0	0	325	234	559
GSA-Owned	1,836,261	2,676,023	6,630	93.16%	808	538	27	11,726	54	0	649	931	1,580
Total All Building Types	2,002,605	2,872,633	7,540	100.00%	877	590	32	18,094	54	0	974	1,165	2,139

The OA Details section allows a user to see specific information on one OA at a time.

Occupancy Agreement Details								OA Number	AWA00161
IDENTIFIERS	OA Current Version	OA Effective Date	OA Expiration Date	FY Expiration	Bureau	Agency Tracking Number			
	79	4/1/1997	3/31/2029	2029	4746: PUBLIC BUILDINGS SERVICE (REGIONAL OFFICE)				
	Previous OA		Non-Cancelable	ROI Priced					
			No	No					
LOCATION	Building Name				Building Number	GSA Region			
	ADMINISTRATION BUILDING				WA0811	10			
	Address				City	State			
	400 15TH ST SW				AUBURN	WA			
GSA POC	Responsible Government Associate				Alternate Billing Contact				
	ola.belmonte@gsa.gov								
SIZE	OA USF	OA RSF	R/U Factor	Count of Personnel	Surface Parking	Structured Parking	Total Parking		
	22,570	28,613	1.267750	123	0	0	0		
LEASE INFO	Lease Number	Lease Effective Date	Lease Expiration Date						
	Termination Rights	Date Termination Rights Begin	Days to Terminate All Space	Days to Terminate Partial Space					
OCCUPANCY AGREEMENT LIFECYCLE	Project Lifecycle Phase	Milestone			Milestone Target Date				
	Identification	Initial Engagement to Discuss CPA			3/31/2026				
	Initiation	Strategic Requirements Finalized, CPA signed			9/30/2026				
	Planning	Technical Requirements Finalized			3/31/2027				

## **Locations**

My Locations is a unique mix of information, combining information from the GSA Portfolio, with customer specific information. Unlike other tabs, the My Locations does not follow the same organizational pattern, but rather puts the focus on lists and details, with no summary information. The data contained in this tab are only those buildings where there are Final Occupancy Agreements (so only those buildings a customer resides in).

There are 4 sections to My Locations:

- Locations List
- Building Details
- OA List
- Occupancy Agreement and Space Details

### **Locations List**

Provides quick over details about a building, and a customer status in the building. This includes Building Number, Name, GSA Region, Number of Customer OAs (Count of OAs), USF/RSF occupied by customer, and percent of building occupied, and then building information, including total USF/RSF/ Parking, Historical Status and Security Level.

### **Building Details**

The Building Number drop down can be used to view additional building information, including address, more building details, and also, a concise view of the building, including Facility Manager email.

### **OA List**

A quick overview of the OAs, listed by location.

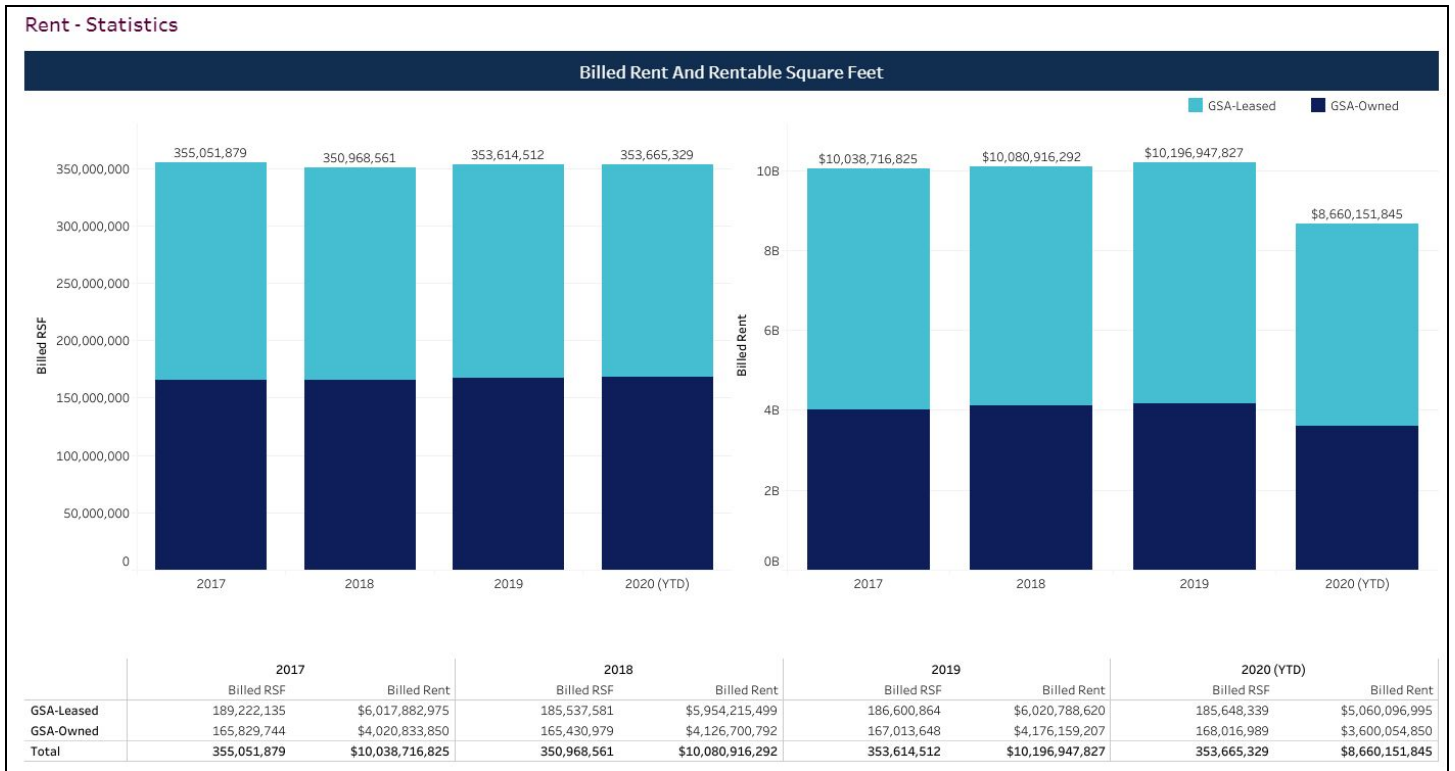
### **OA Details**

This section of the dashboard provides details about a single occupancy agreement, and expands on information that is also in the My Occupancy tab. The expanded information includes additional information on GSA-Leased locations and also Space Type details.

## Rent

My Rent is unique in that the data set is not only current operational data, but contains multiple years worth of billed rent and square feet. The data set is all billed OAs for current year, minus 3 (4 years total, ie. 2020 partial year, and full years for 2019, 2018, and 2017).

The tab contains summary information at the rent component level, as well as the ability to view billed rent by year, a rent comparison tool (by year and by month) as well as a chart showing rent trends over multiple years.



In addition, data can be downloaded to the lowest level, meaning by OA by month, for all years.

The Rent Comparison Tool allows a user to select to compare billed rent by Fiscal Year or Month, and then do also download the results.

**Rent Comparison Tool**

To Use the Rent Comparison Tool

Step 1: Apply a Bureau or OA Filter (neither is required to use the tool)

Bureau: (All) | OA Number: (All)

Step 2: Choose to compare Rent by Fiscal Year or Month

Compare Rent By: Fiscal Year (selected), Fiscal Year, Month

*Filters will be active for the rent comparison that is chosen (i.e. if Month is chosen, only the Month filters will be active)*

- Rentable Square Feet
- Usable Square Feet
- Parking Spaces (Structured + Surface)
- Parking Spaces (Structured)
- Parking Spaces (Surface)
- 1. Shell Rental Rate
- 2. Amortized Tenant Improvements
- 3. Operating Costs
- 4. Real Estate Taxes
- 5. Amortized Tenant Improvements
- 6. GSA-Installed Building Improvements





# Support

---

Individuals and resources to support use of the PBS Customer Dashboard.

## General Dashboard Support

There are many self service tools available on the [PBS Customer Dashboard](#) gsa.gov site. This includes access instructions and training materials, including this user guide.

If general, customers should contact their GSA/PBS point of contact, or contact the PBS Customer Dashboard help email address at [pbs.dashboard@gsa.gov](mailto:pbs.dashboard@gsa.gov).

Below are lists of specific roles within PBS that can support questions or issues with the Dashboard. For more information on who your Customer Lead Point of Contact is, please go to: [gsa.gov/nams](https://gsa.gov/nams). For Regional Customer Engagement points of contact, please go [here](#).

## National Client Executive, National Planning Manager, and National Client Analysts

They serve as the Primary Point of Contact for national customer POCs regarding training and access to the PBS Customer Dashboard. Their responsibilities include:

- Provide training to customers in national meetings and on an ad hoc basis on how to access, navigate, and what content is available in the PBS Customer Dashboard
- Work with customers to define who has access and who will be assigned the access approval role. Ensures that updates or changes to the access approval role are documented; follow ups with customers and Customer Dashboard Team to ensure customers have the right access.
- Help customers understand and define levels of access to data (agency bureau code, email domains).
- Work with the Customer Dashboard Team to provide feedback on the Customer Dashboard.

## Regional Business Analyst and Regional Customer Lead

- Use national training presentation and resources to support regional customer training requests from assigned customer with the support of the Regional SME
- Respond to customer questions about dashboard
- Incorporate reports into standing meetings and ad-hoc as needed

## Regional Dashboard Subject Matter Expert (SME) - Primary and Back-up

Each region has two Dashboard Subject Matter Experts. Each regional SME can assist regional PBS employees on use of the Dashboard, but also can assist local customers if requested. In addition, they have responsibility to:

- Understands that scope and content of data contained within the Dashboard
- Respond to regional internal and external questions about dashboards - data, access, reports, etc.
- Train regional internal stakeholders with national training material, resources, etc.
- Assist Business Analyst (BA) and Client Planning Manager (CPM) with external customer training and responding to questions
  - *NOTE: A BA or other identified regional role may also serve as the Regional Dashboard SME.*

## PBS Customer Dashboard Program Team

The Dashboard Program Team is the lead for the PBS Customer Dashboard. They are the owners, developers, and leaders of the larger PBS community for all things dashboard related. The teams responsibilities include:

- Provide internal training to other support roles (National and Regional Customer Leads and regional

Dashboard SMEs) on the use, navigation, and content of the PBS Customer Dashboard

- Ensure customers have access to the dashboard via collaboration with National Customer Leads
- Keep all resource documentation current including User Guide, You Tube Video, External/Internal Training Slides
- Collect and evaluate feedback for process improvements or enhancements to the dashboard
- Partner with other Divisions to ensure data is accurate and meets the needs of the customer, as well as internal PBS and GSA Offices.
- Develop new content through feedback and review to enhance the user experience
- Monitor [PBS.Dashboard@gsa.gov](mailto:PBS.Dashboard@gsa.gov) mailbox for issues and question, and ensure a timely response, to include follow-up directly to the individual(s)

# Resources

---

## Policy, Process and Training

- [Pricing Desk Guide](#)
- [Managing Customer Requirements Fact Sheet](#)
  - Includes a list of deliverables by the customer during each Occupancy Planning phase
- [Occupancy Planning and Requirements Management Process: GSA PBS Customer Forum 2017](#)
  - Includes timelines for requirements submission (prospectus and non-prospectus), definitions of each planning phase, links to relevant OMB Directives, and an overview of the Client Project Agreement
- [Electronic Occupancy Agreement - eOA](#)
  - Search OAs within designated Agency Bureau codes
  - Select and run report(s) tabulating financial and clause information
  - See history of all rates that apply to the OA including USF, RSF and Parking
- [Inventory and Vacant Space in GSA-Owned and GSA-Leased buildings](#)

## Billing and Rent Resources

[GSA Rent Overview Website](#)

[GSA Billing and Payment Website](#)

- [Paying Reimbursable Services through the Rent Bill](#)
- [RWA Overhead and 4% Fee Calculator](#)

[PBS Pricing Policy Website](#)

- [Pricing Desk Guide 4th Edition](#)
- [PBS Order 7025.1A - Rent Exemption Procedures](#)

[Exhibit 54 Resources](#) - Summary of all Rentable Square Footage, Base Rent Estimate and Anticipated Space Changes

- [Exhibit 54 Guidelines, Template, Contact List](#)
- [Exhibit 54: GSA IC Worksheet Video](#)

[Rent on the Web \(ROW\)](#) allows PBS customer agencies to view their monthly bills online

- [Rent on the Web FAQs](#)

## Project Resource Links - Policy, Process and Training

### Design and Construction Projects

- [Design and Construction Delivery Process](#)

GSA PBS Design and Construction website describes the process and expectations for your architecture and construction projects, including community planning, prospectus development, project authorization, and project management steps and deliverables. Relevant sub-pages include:

  - [Space Assignment process and policy](#)
  - [Construction Excellence program](#)
  - [Design Excellent program and design library](#)
  - [Accessible Facility Design](#)
  - [Urban Development](#)

### Commercial Lease Projects

- [GSA Leasing Desk Guide](#)

Contains authorities, policies, technical and procedural guides, and administrative limitations governing the acquisition by lease of real property. Download the searchable PDF or browse chapters such as source selection, lease construction, renewals and extensions, accessibility standards, parking

acquisition, sustainability considerations, security, and lease file checklists.

- [GSA.gov/Leasing](#)

GSA.gov Leasing Website links to security standards for leased buildings, green lease policies, lease delegation information, lease inventory information, and publicly available lease documents.

- [Redacted Public Lease Documents](#)

### New to Working with GSA

- [Real Estate for Federal Agencies Overview](#)

- [Pricing Desk Guide, 5th Edition](#) (Revised August 2020)
- [Finding Your National GSA Representative](#)
- [Using GSA Schedules](#)

### Looking for Space

- [Inventory of Owned and Leased Properties](#)

Use the IOLP map tool to view data for GSA owned and leased properties. View specific information on each of GSA's properties such as: Vacant space, Physical location, Square footage, Lease expiration, and Congressional District

### RWA Resource Links - Policy, Process and Training

Visit the national **RWA website** at [www.gsa.gov/rwa](http://www.gsa.gov/rwa) for a wealth of RWA-related info, including:

- **RWA Overview:** Overview information regarding RWAs, including a list of RWA Managers
- **Billing & Payment:** RWA billing and payment information and resources for customers
- **Policy & Guidance:** *Featuring* the National Policy Document for RWAs
- **Year-End Customer Letters**
- **Training & FAQs**
  - *Featuring* RWA Training Modules
  - Q&A on RWA Policy, Process, eRETA, RWA Types, Fees and Billing, and Estimates

Also visit the national **eRETA website** at [www.gsa.gov/ereta](http://www.gsa.gov/ereta) to learn about the external RWA Entry and Tracking Application (eRETA), which allows customers to:

- Electronically submit new work requests
- Enter information directly into the system
- Make edits and create amendments to any RWAs associated with your Agency Bureau Code
- Upload documentation into eRETA to maintain an electronic RWA file
- Search and download information for single or multiple RWAs; view related RWA estimates, backup documents, and financial data- how much has been spent, etc.