DSM

0:02
Welcome everyone.

0:05
We would like to provide an overview of the Delivery Schedule Manager application in PIEE. It's new because of the transitioning of the functionality from DCMA eTools and again, the members from the DCMA Development team, DSM Delivery Schedule Manager Development Team are online and it's Regina Schauer, Sam Alger and Jack Little..

0:36
I won't be able to see any hands up or any questions that are posted. However, teammates will Alert me when there are hands up or there's an immediate comment that needs to be addressed. I'm going to share my screen with the slides

1:00
So today we wanted to provide some information and conduct a short demonstration for those of you who may be initiating customer request to DCMA, contract management team members.

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We have some web-based training available and we provide the link for you here. The contractors develop some information and web-based training to accompany the tool that is now located in PIEE.

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And so that all of our where everyone's aware DCMA, all of the contracting activities that are considered DoD and eligible for DCMA's communication are cited in the PGI 2O2.1 definitions.

1:56
Users in DSM will have the option from three roles, the Customer User Roles, Standard and View Only and we're going to talk about these roles further in the presentation.

2:11
The new application actually has some of the same, similar or just a little unique features of functionality. You'll still be able to search for contracts, enter request, customer request, and the DCMA side of the business will be able to enter delay notices.

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As well as they can enter customer requests on behalf of our customers in the event that the customer is not able to enter information in the tool.

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There's a couple of new features such as a toggle feature where you'll you can toggle between EDA and SDW.

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And this tool actually has a reporting functionality with Kibana and that's different from our previous eTool.

3:04
There will be a Resolve feature where you can end communications. Once you have initiated our customer request to the DCMA and we've responded and you considered the action complete, you can use the Resolve feature to end communication.

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Now, what's going to look different? The tool is going to look different. It doesn't look like the eTool.

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And it doesn't interface with the contract management team eTool, either. So we're going to have to ask our customers to continue to access the contract management team view in Etools when it's necessary to locate any of the DCMA administrative teams. That way you'll find the e-mail address for a person to initiate your customer request.

3:58
And further in our demonstration, you'll be able to see how to accomplish, you know, enter the e-mail addresses in the tool for those persons you're trying to reach.

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Now the new tool in PIEE it is Procurement Instruction Identification, PIID compliant. That means that's the new contract format.

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The new structure, however, MOCAS is not.

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What will this mean to our users?

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It means that the new tool will allow for the legacy contract number formats and the new contract structure.

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When we get to the demonstration, we will explain there may be instances where you will be able to enter the contract number in the Contract Number field.

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However, if there's no return data, then you'll need to use the Delivery order field.

5:02
Users must register for the DSM application in PIEE and instructions to register by roles it's available and that we have the different roles that from the customer side of the business you can register for customer user or the view only user.

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Now I'm gonna stop here and turn it over to Regina Schauer, and she's going to talk about registration.

5:37
Basically going over a little bit of basics, some of which we discovered, so I'll probably skim through it. If you need me to slow down, put up a hand and Jack can slow me down and ask me to stop if we need to. So there's a little bit that's basically the topic is the application itself and then accessing PIEE and adding the role because most of the people in here probably already have PIIE for like EDA or things like that. So it's really just a matter of adding a role.

6:04
So we'll go through that. I'm not going to reiterate all this. This is just some of the dates and the deployment. This is a copy of what's on this slide now, which is slide four is. It is basically a copy paste of the pie roll matrix which is also available over in π. Under the WBT there is a link to DSM roles, but there's a whole full list of every role you can get for any of the apps in π there as well, but for the purposes of this.

6:34
So we'll go through that. I'm not going to reiterate all this. This is just some of the dates and the deployment. This is a copy of what's on this slide now, which is slide four is. It is basically a copy paste of the PIEE role matrix which is also available over in PIEE. Under the WBT there is a link to DSM roles, but there's a whole full list of every role you can get for any of the apps in PIEE there as well,but for the purposes of this. I just put a screenshot in here for most of the people. Since this is aimed at the customer user, you're either probably going to be pulling a customer user role or a view only depending on what level of access you need. The standard user is aimed at basically DCMA for them to provide status and respond to your requests. For most customers they're going to, if they're actually wanting to create, let's say, customer requests, they're going to need a Customer User role.

7:06
If they only need to view the data, If they just need to look at it, they don't need to respond or create anything, then view only would be the role they would pick. And then this very small bit, and I'll go into it on a couple other slides, you can either get a group which is multiple DoDAACs or location codes. PIEE uses different things, but when they say location code, they're typically they're talking about a DoDAAC for customers that's going to be issued by DoDAAC. For DCMA, it's an admin by DoDAAC. So most of our users are DoDAAC admin by.

7:36
Most customers, probably just have their own office, so they're probably a customer user by DoDAAC but you could have a upper level management office that needs to see multiple, let's say Air Force offices.

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So they may have a group role.

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And then if they don't need to create anything, view only can be also done at a group level or or specific location DoDAAC level.

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And so this kind of breaks it down in like, I don't know, shortcut speech. This was for me just to make a visual. This is essentially, what a standard user does. They create and respond to delay notices. Only DCMA does the delay notices. That's why this is role is really aimed at us. Customer users though, respond to them. So this functionality allows you to both create and respond to customer requests as well as to respond any delay notices that are relevant to your DoDAAC.

8:30
That mechanism will filter out anybody else, so you aren't going to look at other buying offices data, you're not gonna be able to respond. If you're an army group, you cannot respond to the Navy's items, and that really should be how it's working for you as well in the current legacy tool. And then for somebody's view only they can read customer requests and delay notices, but they can't actually action them. All of these functions can pull report data.

8:53
And this just sums it up. Yes, DoDAAC or group. Contractors do not have access to view or create content in this. It's meant to be a government to government only community communication tool. Doesn't mean we don't like our specialists who do reach out to contractors to, you know, get status and things like that, but this is meant to be communication between DCMA and their customers and vice versa.

9:20
This just kind of breaks out what I sort of already covered. Ultimately, the decision is going to be made with within your leadership and with your GAMS or the people that approve and activate roles on what's appropriate for you. We're just giving some guidance.   I did see a hand up Mark,   Yes ma'am, I'm an epass contract A&AS with the Air Force and I currently have access to E tools.

9:51
Am I not going to be able to have access to create and ask about contract status?

9:53
How are, there's 2 parts to that? When we say talk, talk about contractors, we mean like vendors, we'retalking about let's say Lockheed Martin, Okay, that kind of thing.

10:11
So if you are in, if your role assigned within PIEE is government you will have access. Yes, ma'am. Thank you. I just wanted to clarify.

10:17
OK, no problem. So this kind of sums up again, your leadership will decide what roles are appropriate. What I will tell you as a customer, it would really you should not be applying for the standard user that really is DCMA. But you may either depend on the level of access via group or DoDAAC for your issue by and either a customer user role or view only depending on how much you need to have access to what will the approval process and we're going to go through that essentially is 2 steps you're going to make your request.

10:48

It goes to your supervisor. Once they approve it, it goes to your game and your game activates the role. Until the GAM activates the role, you will not see DSM on your dashboard.

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In this presentation whichyou have a copy of, there is some. I wrote this before it was available but the DSM materials out. So you can actually get to any of the the web-based training related to the DSM tool. There's material that talks specifically to how to do certain functions. How do you create a customer request, how do you respond to it. There's some information there on on the how to use the tool. This was the training environment. I think I need to update the slide but this is the link that's top one is the one you guys will go to to get the to look at the

11:29
PIEE Roll matrix. This is actually the matrix right here, but there's other material within the WBT as well, but this one is specific to that matrix that I showed you at the beginning. That was that chart that I copied and pasted it. Now this matrix should be available for you to look at in detail

11:46
So is there anybody in this room who doesn't or in the the the session that does not already have PIEE access?

11:56
OK, if you ever need someone to, there is. I just put the resources on this particular slide. Slide 8 on the PIEE has training on requesting access like specifically just getting into PIEE to begin with. So that is on this slide should you anyone you know need it. This is some general information, this is the PIEE information. But what I'm going to do in the next few slides is get specific as to getting DSM.

12:21
You're going to go into your profile to start adding this. This is just some things like this. If the supervisor doesn't sponsor respond within 72 hours, the system will send out another e-mail. If your supervisor doesn't approve this within 30 days, it's going to get kicked back. Hopefully they will not take that long, but just FYI that is what happens. And then the the GAM, that depends on who's doing the roles. They have two different names, but we're going to use the term GAM because we're government employees.

12:51
There's some additional training here specific to their material if you want it as a reference. This is just pretty much just what walk through. As far as to get into it, you're going to go to the pot. This is the production site link. You're going to click on login. This is typically you're going to go to the My Account piece.

13:08
Up in the up near the PIEE name. And then you're going to get into the piece that talks about roles. You're going to add an additional role. That's what we're doing here.

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So once you are in there, of course this is what you select.

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And this is where we get into the what you do. So you're you're going to need to it brings into your profile and you'll need to edit any material that's out of date. For instance, cyber awareness training date. If your cyber awareness training is expired, you do need to update that because they won't approve it. If anything's changed, you know, you need to make sure you have your correct information in your e-mail, that kind of thing. And just FYI, there is an account activation guide too. They put all this help stuff in there.

13:50
But this is what you'll be doing as far as you're going to when you're adding a role, you'll go through each of these screens.

13:57
And this part is important so that when you get into the supervisor role, make sure your supervisor information is up to date. The other thing I would point out is.

14:05
You and it's hard to see because I did a screenshot to blow this up. But if you know your supervisors out of town, you can put in an alternate supervisor in this piece so that they'll get the notification and be able to approve you. I had to do it because my supervisor was out of town. Just an FYI. But either way, make sure that this information is correct because if it doesn't get routed you don't get approved and you don't get the role because it will kick back after 30 days and then once that parts done you've updated that now you're going to go into the role and the default.

14:37
That comes up at least for me is WAWF. So you're going to need to change this. What you will do is you will pick, you will when you're in the tool, you'll click on this down arrow and then look for delivery schedule manager. You'll click that and then it'll change the roles that are open for you, which will be customer standard review only. In the sample we're going to follow through, we're going to go with this customer user.

15:02
So you're going to pick do the Step 2, which once this is done, you'll pick your customer user. Then you're going to click on Add Roles. That's Step 3. It's a little bit more exploded on this screen, so it's more visually obvious.

15:17
Again, add the roles and then what happens once you've added roles is you'll get this piece down at the bottom here where it shows that your DSM Customer user, the default is DoDAAC. If you need to change to group, you're going to press this down arrow and it'll bring up three options. It'll have DoDAAC, MPAC. I'm not actually sure what that is, but it's not one of the ones we use and group. So if you're going with DoDAAC, then your next step is going to be different than if you're going with group,

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But I'll go to the next slide to.Keep us moving.

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So this is in summary what you need to do. So if you're the location, if you are a DoDAAC user, you need to select that

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If DoDAAC, verify or type in the DoDAAC. So depending on how you're set up you may have a DoDAAC. It auto populates from your profile. If that's the DoDAAC you want to use you can keep moving. If it's not you can overwrite it and put in the DoDAAC you want.

16:13
And as I pointed out for DCMA, that's going to be our admin code. If it's. If you're buying Office is going to be the issue by if you're doing DoDAAC, if your group user wants the group, you're going to have to select the group to and it'll change some things out. I'm going to show that in a second.

16:28
Because what you're going to do next is if the group, if you change it from DoDAAC to Group, it will blink out the location code related to DoDAAC and it'll show you the action to do the group lookup because you have to look up your group.

16:41
Once you've updated your role summary, you're going to click Next. So the illustration on the next slide is coincidentally Customer User by group. So that I can give you an illustration of how the groups a little bit different one in here. The top line is DSM Customer User changed it to Group.

16:59
Which then once this is grouped it blanks out the location code and then you have to go over to the group lookup under action which will then do this pop up so you can start looking for a group. You'll type in a group, in this case I just picked Army contracting command.

17:15
Typed it into search by name and then what it brought up when I did that search was this link. You select that and then it fills the bottom thing to show DSM group. And this is also visual cue just so you know if you're not a group it won't have this it'll just say DSM Customer User and then of course DoDAAC and the location code so that there's a very clear visual difference between a group group user and a DoDAAC user. And then so this is I needed to make sure this was this is right.

17:46
So, but at this point it looks like from the customer standpoint this is set up, the next thing I would do is hit next.

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And that's really true of anybody. Whatever your role is the net one you once you hit next after confirming your profile, that information then you put in your justification. Why do you need this DSM access?

18:04
So whatever you need to put in there to get your supervisor to approve the use of DSM is what you would put in there. And then once you fill that in, you click Next. What it brings up is this big screen which is probably not as visible on here, but you go through confirm all the information is correct. Once you've confirmed it on the registration summary page, you click Next.

18:25
And then what will come up is this, it's graying this out and then it's uh, so you'll review the agreement page, click the signature block, which is this one. When you click that, it pops up this so that you read this. The PIEE signatures change are you by signing this, you accept the agreement. So if you're ready to go, you hit submit registration and that then goes into the queue to be approved. At that point you it's going to show pending until your supervisor approves it.

18:56
And then it'll still be pending until your GAM activates it.

19:01
So you won't have anything right away until it's actually approved. And then this last page is just some references. I mentioned that there's a WBT.

19:12
Web-based training sites so there's resources on here and the role list and this is a mailbox for our our group to do help desk information.

19:22
That covers how to register for a role.