Cardholder Role Appointment
Welcome to Procurement Integrated Enterprise Environment (PIEE). This demonstration contains audio narrative. Please adjust your volume accordingly.

This presentation provides an overview of the Cardholder (CH) appointment initiated by an A/OPC or O A/OPC. After reading the Privacy Statement click the Accept button to continue.
Step 2

The first step in the process is appointing a CH. In this demonstration we will start the appointment process by logging into PIEE as a A/OPC or O A/OPC.

Step 3

A nominator with an A/OPC or O A/OPC role will initiate the Cardholder appointment. Click the Cardholder Appointment option from the Create Appointment dropdown.
Step 4

The A/OPC or O A/OPC clicks the Select button. They will serve as the initiator for the Cardholder appointment with the selected role and organization.

Step 5

A list of available appointees under the span control of the selected organization will be displayed. The A/OPC or O A/OPC clicks the Select button for the corresponding appointee.
Step 6

The A/OPC or OA/OPC will then enter all the required information.

Step 7

Add any relevant training which has been completed. Click the Add Training button.
Step 8

Click the Add button after entering Training information.

Step 9

Click the Add Special Designation button. Select a Special Designation from the dropdown then fill in any mandatory fields and click the Add button.
Step 10

Enter an Email Address and click the Lookup Direct Oversight A/OPC button. Select a user who will act as the direct Oversight A/OPC for the appointment. This is a required action.

Step 11

After all mandatory information has been entered click the Next button.
Step 12

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

Step 13

An External DAS can be entered as well. Click Select External Delegating/Appointing Signatory button.
Step 14

Click the Continue button.

Step 15

Click the Submit button.
Step 16

Click I concur with the Appointment Certifications button.

Step 17

Enter Comments and click the Submit button.
Step 18

The appointment has been submitted successfully. An email notification will be sent to the Appointee's Supervisor.

Step 19

The Appointee's Supervisor will click on the link to approve the appointment.
Step 20

The Appointee’s Supervisor selects a certificate and clicks the OK button.

Step 21

As the Appointee’s Supervisor review all appointment information.
Step 22

The Appointee's Supervisor clicks the Approve button at the bottom of the screen.

Step 23

The Appointee's Supervisor clicks the Approve button after reviewing the Appointment Certifications.
Step 24

Enter Comments and click the Approve button.

Step 25

The Appointee's Supervisor selects a certificate and clicks the OK button.
Step 26

The Appointment has been approved by the Appointee's Supervisor. An email notification will be sent to the Delegating/Appointing Signatory to approve the appointment.

Step 27

The Delegating/Appointing Signatory will click on the link to approve the appointment.
Step 28

The Delegating/Appointing Signatory selects a certificate and clicks the OK button.

Step 29

Click the Affirm button.
Step 30

Click the Approve button at the bottom of the screen.

Step 31

Click Approve button to approve the appointment.
Step 32

Enter Comments and click the Approve button.

Step 33

Select a certificate and click OK.
An email notification has been sent to the Appointee letting them know the Appointment has been approved. An email notification is sent to the GAM with information to activate the CH role. The appointment process is complete and the Cardholder role is active.

This concludes our demonstration.