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

Step 1

DD577 Appointing Authority (AA), Agency/Organization Program Coordinator (A/OPC), or Oversight Agency/Organization Program Coordinator (O-A/OPC) will initiate the CO role Nomination.
Step 2

This presentation provides an overview of nominating, registering, and setting an appointment for a Joint Appointment Module (JAM) Certifying Officer user. After reading the Privacy Statement click the Accept button to continue.

Step 3

The first step in the process is nominating a user for the CO role. In this demonstration we will start the nomination process logging into PIEE as an Oversight A/OPC.
Step 4

Once logged into PIEE to nominate a user, click the GPC Nomination dropdown.

Step 5

Now click Create Nomination from the GPC Nomination dropdown.
Step 6

AA, A/OPC, or an O-A/OPC will identify the CO via the required fields Email, Home DoDAAC, and DoDAAC for the role.

Step 7

On the GPC Role Nomination page enter the Nominee's Email.
Step 8

Once the email is entered click the Next button.

Step 9

If the System maps the email to a single PIEE user, the information will be prepopulated.
**Step 10**

The GPC Nomination page displays the results and if one account matches the User information will be populated.

![GPC Nomination Page](image1)

**Step 11**

Select Certifying Officer from the Role dropdown menu. Enter the Role Location Code.

![Select Certifying Officer](image2)
Step 12

After entering the information click the Submit button.

Step 13

A GPC Role Nomination Confirmation message will be displayed with information regarding the user being nominated.
An email is sent to the user being nominated for the Certifying Officer role informing them to log into their account to continue the process.

The Certifying Officer Nominee will receive an email with instructions to complete the registration process for the CO role.
Step 16

For this portion of the demonstration we will be showing the process for an existing PIEE user logging in and adding the Certifying Officer role. At this time the user being nominated for the Certifying Officer role will need to log into PIEE to complete the registration process for the Certifying Officer role. If the user does not have an existing active PIEE account, they will need to register for another role and be activated before continuing this part. After reading the Privacy Statement click the Accept button to continue.

Step 17

Log into PIEE as the Nominee to begin the registration process.
Step 18

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

Step 19

Under the Roles section click the Add Additional Roles button.
Step 20

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

Step 21

On the Additional Profile Information page verify the information and update as necessary. Then click the Next button.
Step 22

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

Step 23

On the Training page a Warning message will indicate that training will need to be added to the user's account. If there is existing training on the account it will be prepopulated here. Click the Add Training button to add them now.
Step 24

On the Add Training page enter the training information.

Step 25

After entering the information for the training click the Add button.
Step 26

The new training will be displayed you can edit, delete, or view the training. Click the Add Training button to add the next one. Any training added will now show up in the user’s account profile.

Step 27

On the Add Training page add the information for the next training course.
Step 28

After entering the information click the Add button to finish adding the training.

Step 29

Now both completed training course names will be displayed. Click the Next button to continue.
Step 30

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

Step 31

The Registration Summary page is displayed, please validate the information. If any updates are needed please return to the section to make the update there.
Step 32

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

Step 33

The Agreement page is displayed please review the Statement of Accountability Agreement. The Home Organization DoDAAC will be automatically populated in the Government Organization field: PIEESSO-SSOAC-1518 - When self-registering in PIEE the system will populate the 'Government Organization' field on the Statement of Accountability page with the Home Organization Location DoDAAC from the User Profile. Click the Signature button to sign the document indicating you have read and agree.
Step 34

As the Nominee, if you are using a User ID and password, the user will have a prompt to enter it here. For our demonstrations we are using a software certificate. Select a Certificate from the Java Applet, then click the 'OK' button.

Step 35

A Success page will be displayed indicating the roles that have been added. Based on the information on the Additional Profile Information page, an email will be sent to your Supervisor and they will approve the role request.
Step 36

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

Step 37

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 38

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 39

After reviewing the information, the Supervisor/Sponsor will select Approve or Deny from the action dropdown. Enter Additional Justifications as needed and check the check box indicating that you have read the user’s Justifications. Click the Submit button.
Step 40

Select a Certificate from the Java Applet, then click the 'OK' button.

Step 41

A Success page will be displayed after the Supervisor has completed the applicant’s application process for the role(s) the user requested access to.
Step 42

An email notification is sent to the Nominee for informational purpose only and no action is needed. The Nominator will also receive the email informing them they can now initiate the CO Appointment process.

Step 43

An email notification with instructions will be sent to the Nominator and additional emails will be sent to anyone in the span of control of the Nominee informing them to create a JAM CO Appointment for the Nominee.
Step 44

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

Step 45

The Nominator (AA, A/OPC, or O-A/OPC) and anyone in the span of control of the Nominee will receive an email notification with instructions to create and review the CO role appointment for the Nominee then submits the appointment.
Step 46

The Nominator will need to create the CO appointment for the appointee at this time. Log into PIEE as the nominator to continue the appointment process.

Step 47

Click the JAM icon to create the CO appointment.
Step 48

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

Step 49

Click the Certifying Officer Appointment from the Create Appointment dropdown.
Step 50

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

Step 51

A Certifying Officer Appointment page will be displayed as a draft, verify the information.
Step 52

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

Step 53

The External Delegating/Appointing Signatory section opens so the user can enter information for an external DAS. After entering in the information click the Continue button.
Step 54

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

Step 55

The external DAS will now be displayed on the page. If the user has made a mistake or wants to change the currently selected DAS, they can click Reset Delegating/Appointing Signatory button to remove the selected DAS. Click the Reset Delegating/Appointing Signatory button to continue.
**Step 56**

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

**Step 57**

Click the Select button next to the DAS that will be given the privileges to activate the appointment.
Step 58

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

Step 59

After verifying the information click the Submit button to continue, please update as necessary.
Step 60

Comments can be entered with the appointment.

Step 61

Click the Submit button to complete the appointment creation.
Step 62

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

Step 63

The DAS will receive an email notification with instructions to sign the appointment for the CO role.
Step 64

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

Step 65

As the DAS select a Certificate from the Java Applet, then click the 'OK' button.
Step 66

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

Step 67

If the information is correct click the Approve button for the appointment.
Step 68

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

Step 69

You can enter Comments and then click the Approve button.
Step 70

The user will be prompted with either using a password or selecting a software certificate. For this demonstration select a Certificate from the Java Applet, then click the 'OK' button.

Step 71

A Success page and message will be displayed. An email notification will be sent to the Appointee.
Step 72

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

Step 73

An email notification will be received by the Appointee regarding the Approval of the appointment from the Delegating/Appointing Signatory. To complete the request a Government Administrator must activate your requested role. The user can click the link to access the appointment for approval or log into PIEE to access JAM and approve the appointment. For demonstrations both methods will be shown.
Step 74

This page is an example of what would appear for a user that logs in with a software certificate and used the link to access the appointment in JAM.

Step 75

The next step in the process will require the Appointee to login. After reading the Privacy Statement click the Accept button to continue.
Step 76

As the Appointee log into PIEE at this time.

Step 77

Click the JAM icon to access Joint Appointment Module.
Step 78

Click the My Appointments dropdown to expand the options.

Step 79

Click the Search for appointments that require my action from the My Appointments dropdown to locate appointment to activate.
Step 80

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

Step 81

The CO appointment is displayed for approval, verify the information.
Step 82

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

Step 83

The Appointment Certifications page is displayed. Review the information and click the Sign Certifying Officer Appointment button to approve the appointment.
Step 84

Comments can be entered here with approval.

Step 85

Click the Approve button to continue.
Step 86

Select your Certificate from the Java Applet and click the 'OK' button to finish the approval process of the appointment.

Step 87

A Success page and message will be displayed. An email notification will be sent to the Delegating/Appointing Signatory indicating the appointment is activate the appointment after the Appointee approves the appointment for the DAS to review the appointment.
Step 88

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

Step 89

A Government Administrator must login to activate the requested role. The GAM is associated to the DoDAAC that the appointee registered the Oversight A/OPC role for. The GAM must be within the group of the DoDAAC.
Step 90

As a GAM expand the Administration dropdown to access the Administration console to locate the user to activate their role(s).

Step 91

Select PIEE Administration from the dropdown.
Step 92

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

Step 93

The GAM can search on any criteria. Here we will be entering the E-mail of the appointee with the role that needs activated.
Step 94

Then click the Search button.

Step 95

Click the User Id from the list to review their role(s).
Step 96

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

Step 97

Locate the role(s) that need to be activated by the GAM.
Step 98

Select Activate from the Action dropdown.

Step 99

Click the Update button to continue.
Step 100

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

Step 101

Click the Confirm button to continue.
Step 102

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

Step 103

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

This concludes our demonstration.