

eRETA 8.7 Enhancements

In this Quick Reference Guide, we will preview the new enhancements included with the eRETA 8.7 Release available to users starting June 22nd, 2019.

Summary of eRETA 8.7 Enhancements

1. Making “Amendment Summary” tab accessible at all times for all amendments
2. Renaming several RWA statuses: Pre-planning, Planning/Estimating, and Accepted
3. “Estimated FY Needed” field added to Work Requests
4. New fields added to RWA Search Export to Excel: “Estimated FY Needed”, “GSA PM/POC”, and “WR Requested By”
5. Customer eRETA Enhancement: Additional instructional text for uploading documents when submitting a Work Request

eRETA 8.7 Enhancements

1) Making “Amendment Summary” tab accessible at all times for all amendments

Previously, the “Amendment Summary” tab was only accessible on a temporary basis when an RWA was undergoing an amendment initiated by a customer eRETA user. The eRETA Data Entry user would review the “Amendment Summary” tab to identify what changes were made and submit the amendment to GSA. Once submitted, the “Amendment Summary” tab would no longer be available.

With eRETA 8.7 the “Amendment Summary” tab is now accessible at all times to all users (Read Only and Data Entry) for all RWAs that have been amended at least once. Furthermore, the “Amendment Summary” tab includes a drop-down of all amendments processed against the RWA to date, regardless if the amendment was GSA initiated or customer eRETA user initiated.

NOTE: The “Amendment Summary” tab only shows the changes made on the first four customer data entry tabs. If a past amendment was a change to GSA only data (tabs 5-7) or the entry of a completion date or termination date, the “Amendment Summary” tab will show no changes between the Before and After columns since none of the customer centric data was changed on this amendment selected.

WR/RWA Number: N0766629 Status: Accepted Successfully Input Code: Edit

To view amendment information, select an amendment from the list below.

Submitted on: 2019-06-20 C-input
Select
2019-06-20 C-input
2018-11-09 N-input
2018-07-03 C-input
2018-07-03 C-input
2018-05-31 X-input
2018-05-31 N-input
2018-05-31 X-input
2018-05-31 H-input
2018-01-24 N-input
2016-08-22 C-input
2015-08-22 H-input
2013-09-25 X-input

Updated By : SystemAdmin.Finance@gsa.gov

Summary of Requested Changes		
	Before	After
1 - Customer Information		
Agency POC	derek.allen@hq.dhs.gov	derek.allen@hq.dhs.gov
Agency RWA I		calvin.nance@hq.dhs.gov
Description of F	Design and construction remodeling for the 3rd, 4th, and 5th floors at 800 N Capitol ***Please send executed copy of RWA to Bethany.Hemphill@hq.dhs.gov***	Design and construction remodeling for the 3rd, 4th, and 5th floors at 800 N Capitol ***Please send executed copy of RWA to Bethany.Hemphill@hq.dhs.gov***
Overtime Utilities	No	No
Related RWA Number(s)		
Requested Service Start	09/11/2013	
Requested Service End		
Request is for Multiple Buildings	No	No
Room Number/Specific Location in Facility		
Work Related to Other RWA(s)	No	No
2 - Billing Information		
Account Code/BOAC	707071	707071

“Amendment Summary” tab and details

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2) Renaming RWA statuses: Pre-planning, Planning/Estimating, and Accepted

To provide a more accurate description of the current status of a Work Request or RWA, the following status name changes were made:

- “New” is now labeled as “**Pre-planning**” to represent a Work Request a customer has started and saved, but has not yet sent to GSA for action. This label change is made in conjunction with the new “Estimated FY Needed” field (see enhancement #4 on the next page) to allow customers to enter Pre-planning Work Requests for future years.
- “Assigned” is now labeled as “**Planning/Estimating**” to represent a Work Request that has been assigned to a GSA Project Manager and the current effort on the Work Request is to develop requirements, a cost estimate, and a project schedule. This status represents the time between Work Request assignment and eventual RWA acceptance.
- “Submitted” is now labeled as “**Accepted**” to match existing RWA guidance and trainings where the term “Accepted” indicates an RWA that has been signed by both the customer and GSA, funding is in place, and the project or service can be executed.

NOTE: As a reminder, clicking on the label “WR/RWA Status” (or any other hyperlink in eRETA) will open up the eRETA Glossary for that term and provide a detailed definition.

The screenshot shows the 'Work Request / RWA Search' interface. The 'WR/RWA Status' dropdown menu is open, displaying the following options:

- Select All
- Work Request**
 - Pre-planning**
 - Unassigned
- Planning/Estimate**
- Cancelled
- RWA**
 - Accepted**

The updated status names 'Pre-planning', 'Planning/Estimate', and 'Accepted' are highlighted with orange boxes in the original image.

WR/RWA Status Search menu displays the updated status names of “Pre-planning”, “Planning/Estimating”, and “Accepted”

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3) “Estimated FY Needed” field added to Work Requests

The new “Estimated FY Needed” field was added to the “Customer Information” tab for eRETA users to populate when creating a new Work Request. The required field is a pull-down menu that will list the options of “Current” and then the next four future fiscal years. The majority of Work Requests submitted are for projects or services a customer needs relatively soon, thus they would select “Current” to indicate the Work Request is something needed in the current fiscal year. However, some of GSA’s larger RWA customers requested the creation of this field so they could enter Work Requests to help them fully pre-plan their future year needs.

NOTE: As a result of numerous Work Requests submitted by customers prior to the installation of eRETA 8.7 (before the “Estimated FY Needed” field was added) and now GSA working to assign or otherwise manage those Work Requests, GSA data entry users have been advised to enter a selection of “Current” unless the Description of Requirements field suggests the Work Request is for a future year need. This will be a temporary responsibility for GSA to enter this missing value. All Work Requests created since eRETA 8.7 was installed will be entered by the customer agency.

The screenshot displays the 'Customer Information' tab in the eRETA system. A sidebar on the left contains navigation links for CUSTOMER INFORMATION, BILLING INFORMATION, ACCOUNTING DETAILS, CUSTOMER APPROVAL, PBS INFORMATION, AUTHORIZING DETAILS, and PBS APPROVAL. The main content area shows various fields for a Work Request. The 'Estimated FY Needed' field is highlighted with an orange box and is currently set to 'Current'. Other visible fields include Agency Bureau (01040), Agency Name (JUDICIARY, DISTRICT JUDGE CHAMBERS), Primary Building State (South Carolina), Building (SC0004ZZ), Address (315 S MCDUFFIE ST), City (Anderson), Building Name (G. ROSS ANDERSON JR. FB-CT), and Zip Code (29624). The 'Estimated Amount' is shown as 0.00. The 'Agency POC' is listed as [redacted]@sc.uscourts.gov. The 'Description of Requirements' field contains the text: 'Replace faces of existing cabinet doors and drawers in Work Room and Service Unit. Laminate to match existing. Adjust or replace hinges as necessary to prevent failure of laminate moving forward.'

“Estimated FY Needed” field on the “Customer Information” tab allows customers to select the FY the WR is needed

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4) “Estimated FY Needed”, “GSA PM/POC”, and “WR Requested By” added to Excel

The Export to Excel feature of the eRETA “Search” now includes the additional fields of “Estimated FY Needed” (see enhancement #4 above), the “GSA PM/POC” email address and the “WR Requested By” email address.

Code	Estimated FY Needed	Establish Date	Acceptance/Start Date	Authorized Amt	Status	GSA PM/POC	User ID	WR Requested By
	2019		04/15/2019	\$0.00	Unassigned			marie.jordan@ice.dhs.gov
	2022		05/29/2019	\$0.00	Planning/Estimate	david.zeeb@gsa.gov	christopherj.hill@gsa.gov	angelia_joos@ilcd.uscourts.gov
			11/28/2018	\$0.00	Planning/Estimate	jeff.chiavetta@gsa.gov	frances.garofanello@gsa.gov	jason.middlebrooks@ssa.gov
			07/07/2019	\$0.00	Planning/Estimate	roger.habrand@gsa.gov	denisha.guarles@gsa.gov	michael.ierkles?riu@mail.mil

Three new fields have been added to the eRETA “Search” Export to Excel

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5) Additional instructional text for uploading documents when submitting a Work Request

Customer eRETA users have the ability to upload supporting documentation to their Work Request or RWA at any point after the Work Request is initially saved in eRETA (with a status of “Pre-planning”). However the workflow in eRETA was not necessarily intuitive on how the customer would upload documents.

With eRETA 8.7, we have added additional text in the initial Work Request confirmation messages to direct customer eRETA users on where and how to upload documents. We have added text on the initial confirmation message after a customer saves their Work Request in eRETA (eRETA Status = “Pre-planning”) and then a repeat set of directions on the confirmation message after the customer submits their Work Request to GSA (eRETA Status = “Unassigned”).

Acknowledgement

Submission of this request does not guarantee GSA acceptance of an eventual RWA. GSA recommends that you do not record an obligation until both parties sign the RWA 2957 Form and GSA issues the Acceptance Letter. Until GSA accepts the request and signs the RWA 2957 Form, there is no binding agreement as required to record an obligation in accordance with the Recording Act, 31 USC 1501.

Note for late fiscal year submissions:

Your Work Request may not become an accepted RWA due to time constraints to properly review scope, develop requirements, and finalize estimates. For late fiscal year submissions, please refer to the deadlines outlined in the End of Year Customer Letters found at www.gsa.gov/rwa

Please check this box to acknowledge the above.

Uploading documents? Click OK, then follow the prompt on the next screen.

OK

Close

Confirmation

Work Request has been submitted. GSA will contact you and/or the Agency Point of Contact listed on the Work Request when further action is needed.

Need to upload documents? Click OK, then click on the yellow Documentation hyperlink at the bottom of the screen.

OK

“Acknowledgement” and “Confirmation” pop-ups instructing customer eRETA users where to upload documents

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For additional RETA/eRETA questions, the following resources are available for...

GSA Employees:

- Log-in to the PBS Portal → select the RETA icon → Click on the “QRGs” tab
- Log-in to the PBS Portal → select the RETA icon → Click on the “Training” tab
- Email us at RETAdmin@gsa.gov for RWA and SCE questions or at OUET.help@gsa.gov for OUET questions

Customer Agencies (including non-PBS, internal GSA customers)

- Visit www.gsa.gov/ereta for eRETA training materials including user guides, video demos and more.
- Email us at eRETA@gsa.gov for all eRETA questions