

external RETA 7.0 Enhancements

In this Quick Reference Guide, we will introduce changes and new enhancements to be installed to the RETA and eRETA family starting on Saturday 25 October 2015.

Summary of external RETA 7.0 Enhancements

The ability to access eRETA as an external customer has not changed, however with this latest release, external eRETA users will now technically be logging into RETA, which was formerly only accessible to GSA users internally. This release, which combines the two applications, will be officially labeled RETA 7.0 to both external and internal users. While the header and footer labels throughout the application will now display “RETA”, external customer users can and should, still refer to it as eRETA, continue to access information at www.gsa.gov/ereta, and continue to email us at eRETA@gsa.gov.

This Promo Guide will introduce external users to the following primary enhancements of external RETA 7.0:

- Refreshed look, feel, and layout of all eRETA screens
- Introduction of three new search screens: RWA Search, Financial Review Search, and Estimate Search. The original Documentation Search has not gone anywhere and continues to be available.
 - RWA Search – Provides Read-only view of all RWA Data Entry Screens
 - Financial Review Search – Provides RWA Financial Activity sliced and diced in a variety of ways
 - Estimate Search – provides access to Summary Cost Estimates and Overtime Utility Estimates and their related Data Entry screens (read-only)
- Navigation hyperlinks to easily access information associated with an RWA or estimate
- Introduction to the RWA History Report
- The Future of RETA and eRETA

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Refreshed Look, Feel, and Layout of eRETA Screens

The combination of RETA and eRETA introduces external users to the same refreshed color scheme and navigation first presented to internal RETA users in April 2015. Furthermore, external users now have access to new search screens, which in turn provide access to the RWA and estimate data entry screens (in read-only mode). This access provides a level of detail to individual RWAs and estimates that will come as a welcome improvement. Each of these new screens is outlined in more detail on the following pages.

The screenshot shows the RETA application interface. At the top, there is a navigation bar with the RETA logo and the text 'RWA ENTRY & TRACKING APPLICATION'. To the right of the logo, the user's email address 'external.readOnlyUser@gsa.gov' is displayed along with home and help icons. Below the logo, a navigation pane contains four links: 'SEARCH', 'FINANCIAL REVIEW', 'DOCUMENTATION', and 'ESTIMATES', with 'SEARCH' highlighted in orange. Below the navigation bar, the current date and time are shown as 'Tuesday, October 20, 2015 12:04:44 PM', and a 'Print/Save Report' button is visible. A 'Note Board & User Resources' section is expanded, showing a 'National RETA Note Board' entry dated 10/25/2015, which announces the upgrade from eRETA 1.0 to RETA 7.0. Below this, the 'Logged in User Details' section displays the user ID 'external.readOnlyUser@gsa.gov', the agency '02805 - SOCIAL SECURITY ADMINISTRATION, SOCIAL SECURITY ADMIN, OIG', and the group 'eRETA_READ_ONLY_USER'. At the bottom of the details section, there are links for 'Other Applications & Resources' including the RWA Customer Site, RWA Form 2957, Small Projects and Reimbursable Services (SPRS) Division, RWA Billing Details, Treasury Credit Card Site, and Rent on the Web (ROW).

The RETA Welcome Screen greets user with a refreshed look and feel replicated across all RETA screens. Navigation links to the three new searches (four total) along the top RETA navigation pane provide external users extended access to RWA and estimate information

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New eRETA Search Feature #1 - the RWA Search

The RWA Search (accessible from the “Search” tab on the top navigation pane) looks and works almost identically to the Documentation Search eRETA users have been using in eRETA 1.0. The only difference is the search results provide different information in the on screen display and the export to Excel display. Furthermore, selecting any of the results navigates users to the RETA data entry screens for that RWA (see next page).

RWA Search
Hide Criteria

RWA Type

RWA Status

Building Number

Primary Worksite City

Agency Bureau Code

BOAC

PDN

Authorized Amount from \$ to \$

RWA Acceptance/Start Date from to

RWA Number

Building Name

Primary Worksite State

Agency Name/Bureau Name

Severable Service

PCN

Agency Accounting Data

Closure Status

Organization Code

Building Type

Customer Funding Type

Customer ID

User ID

Search Results

RWA Number ▲	AB Code	BOAC	Work Site	Org. Code	Acceptance/Start Date	Authorized Amt	Status	User ID
A5005615	04700	0079CN	IL0236FC	P0575000	09/05/2014	\$97,455.33	Submitted	tomeika.manuel@gsa.gov
A5005628	04700	0079CN	IL0236FC	P0575000	09/05/2014	\$103,259.74	Submitted	tomeika.manuel@gsa.gov
D1160570	04700	0079CN	WI0044ZZ	P0525241	11/03/2014	\$1,132.87	Submitted	mohammed.ahmed@gsa.gov
N0663337	04700	473709	DC0506ZZ	P1172001	03/05/2013	\$394,390.36	Pending-New	crystal.jackson@gsa.gov
N0961929	02108	2149N1	OH0189CN	P0525164	04/01/2014	\$57,225.40	Submitted	kenneth.connair@gsa.gov
N1015007	02108	21392I	VA0088ZZ	P037C000	06/26/2014	\$196,028.57	Submitted	rhaina.hobbs@gsa.gov
N1025097	02108	2149R6	OH0189CN	P0574000	07/31/2014	\$506,672.28	Submitted	tomeika.manuel@gsa.gov
R0633804	04700	473818	DC0001ZZ	P112HOTD		\$488,812.37	Pending-New	stanton.riley@gsa.gov
R0721839	02108	2149N1	TN0111AA			\$0.00	Pending-New	ramona.wright@gsa.gov

9 Records found. Displaying page 1 of 1 1

Sample eRETA RWA Search screen. Includes search query in the top half, and search results in the lower half.

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The RWA Summary Screen – Access to the RETA Data Entry Screens

Selecting an RWA from the RWA Search results (shown above) takes you to the RWA Summary screen for that RWA. The RWA Summary screen includes an overview of the current RWA. The navigation tabs on the left hand side provide read-only access into each of the six data entry tabs where GSA RETA users enter new and amended RWAs. In a future release, external customer users will have the ability to edit their RWAs from the RWA Summary screen.

You are in Read-Only Mode

Form 2957 Print

RWA SUMMARY					
CUSTOMER INFORMATION					
BILLING INFORMATION					
ACCOUNTING DETAILS					
PBS INFORMATION					
AUTHORIZING DETAILS					
PBS APPROVAL					

Sample RWA Summary screen. Read-only access to the six data entry tabs is provided on the left pane. Action buttons at the top of the screen allow users to generate the current RWA in the GSA Form 2957 format or Print a PDF version of the RWA Summary screen.

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New eRETA Search Feature #2 - the Financial Review Search

The Financial Review Search (accessible from the “Financial Review” tab on the top navigation pane) looks and works almost identically to the RWA Search mentioned above and the original Documentation Search. Once again, the difference between the Financial Review Search and other eRETA search screens is the type of data returned on screen and in the export to Excel display. The Financial Review Summary screen (next page) provides more in depth information about RWA financial activity.

Only official Authorized Amounts are displayed in this report, therefore Pending and In Queue RWAs will display the authorized amount of the last successful RWA submission.

RWA Number	Org. Code	Work Site	Authorized	% Obligated	Commitments	Obligations	Balance	Expenses	Brief Project Description
A5005615	P0575000	IL0236FC	\$97,455.33	96.90%	\$0.00	\$94,454.12	\$3,001.21	\$44,826.65	Change Management
A5005628	P0575000	IL0236FC	\$103,259.74	79.60%	\$0.00	\$82,205.04	\$21,054.70	\$102,378.65	Design Construction
D1160570	P0525241	WI0044ZZ	\$11,132.87	19.70%	\$0.00	\$222.76	\$910.11	\$0.00	Janitorial/O&M Event
D1160570	P0525241	WI0044ZZ	\$1,132.87	19.70%	\$0.00	\$222.76	\$910.11	\$0.00	Janitorial/O&M Event
N0961929	P0525164	OH0189CN	\$57,225.40	95.20%	\$0.00	\$54,491.71	\$2,733.69	\$34,960.90	US COE Upgrades
N1015007	P037C000	VA0088ZZ	\$196,028.57	98.80%	\$0.00	\$193,657.47	\$2,371.10	\$191,537.08	5th FI Construction
N1025097	P0574000	OH0189CN	\$506,672.28	0.00%	\$0.00	\$0.00	\$506,672.28	\$0.00	Constuction

7 Records found. Displaying page 1 of 1

Sample eRETA Financial Review Search screen. Search allows users to locate RWAs based on many of the same search criteria as other eRETA search screens, but also includes a search based on percent of the RWA that has been obligated.

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The Financial Summary Screen – Break-down of GSA Obligation, Expense, Billing, and Collection Activity

Opening any RWA from the RWA Financial Review results (shown above) takes you to the Financial Summary screen for that RWA. The Financial Summary provides four financial summaries of the RWA. The upper half includes a general summary along with the “Authorizing Details Rollup” which breaks down the spending of the RWA by general categories (similar to the breakdown shown on VCSS bills). The lower half (not shown) includes a “Function Code/Object Class Summary” as well as a “Spending by Vendor Summary”. NOTE: All financial data on these screens is GSA financial activity.

FINANCIAL SUMMARY

Financial Summary

← Back to RWA List
Obligation and expense information as of VAT 231 Posted 08/20/15

Print
VCSS – Bill Search
Invoice Search

RWA: N0961929 US COE Upgrades
RWA Status: Submitted Successfully
ETN: SCOH0210814050007
Estimate Approval Date: 09/24/2014

Organization: P0525164 CINCINNATTI OFFICE
Office Symbol: 5PSSBF
Worksite: OH0189CN JOHN WELD PECK 550 MAIN ST CINCINNATI OH 45202
GSA PM/POC: kevin.robinson@gsa.gov

Agency: 02108 DEPARTMENT OF THE ARMY, ARMY CORPS OF ENGINEERS
Billing Office Address Code (BOAC): 2149N1 US ARMY CORPS OF ENGINEERS FIN. CNTR.

Acceptance/Start Date: 04/01/2014
Substantial Completion Date:
Cancellation Date:
<Pending> Financial Term Date:
Last Bill Date: 05/19/2015

REXUS Lease Project #:
Lease #:

Total Billed: \$34,960.90
Chargeback Amount: \$0.00
Total Collected: \$0.00
Write-Off Amount: \$0.00

[RWA_0961929](#) [RWA History](#) [Documentation](#) [ETN: SCOH0210814050007](#)

☐ Authorizing Details Rollup

	Current Authorized	Commitments	Obligations	Balance	Expenses	UFCO
Construction/Const Support	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Design	\$0.00	\$0.00	\$51,145.05	(\$51,145.05)	\$31,248.56	
Security/Protection	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Space Changes	\$51,145.04	\$0.00	\$0.00	\$51,145.04	\$0.00	
Studies	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Utilities/O&M	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Other	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Total Direct Costs	\$51,145.04	\$0.00	\$51,145.05	*(\$0.01)	\$31,248.56	
RWA Fees	\$6,080.36	\$0.00	\$3,346.66	\$2,733.70	\$3,346.66	
Total	\$57,225.40	\$0.00	\$54,491.71	\$2,733.69	\$34,595.22	\$22,264.50

* Total Direct Balance is the amount available before or without Overhead Charges for the project manager to spend.

Sample eRETA Financial Summary screen.

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New eRETA Search Feature #3 - the Estimates Search

The eRETA Estimates Search (accessible from the “Estimates” tab on the top navigation pane) provides access to query both Summary Cost Estimates (SCE) and Overtime Utility Estimates (OUE). The Estimates Search includes slightly different search criteria when compared to the other three eRETA searches, however the functionality works identically, allowing users to search for estimates, then either export the results to Excel or select an estimate. Selecting an estimate from the search results navigates the user to the data entry screens for that estimate (see next page) – similar to the RWA Search screen navigating users to the RWA Summary screen.

Estimate Search

Estimate Type: <input type="button" value="v"/>	Est. Tracking No. <input type="text"/>	Estimate Status: Submitted <input type="button" value="v"/>	
RWA Type: <input type="button" value="Select options"/> ⓘ	RWA Number: <input type="text"/>	Agency Bureau Code: 02108, 02805, 0470 <input type="button" value="v"/>	
Agency Name: <input type="text"/>	Building Name: <input type="text"/>	Primary Worksite State: <input type="button" value="Select options"/>	
Primary Worksite City: <input type="text"/>	Building Type: <input type="button" value="Select options"/>	Estimate Region: <input type="button" value="v"/>	
PBS ORG Code: <input type="text"/> ⓘ	PCN: <input type="text"/> ⓘ	Office Symbol: <input type="text"/> ⓘ	
OA Number: <input type="text"/> ⓘ	Estimate Amount: \$ <input type="text"/> to \$ <input type="text"/>	Data Center/Server Room: <input type="button" value="v"/>	Created/Modified by: <input type="text"/>
Estimated Start Date: <input type="text"/> ⓘ to <input type="text"/> ⓘ	Created Date: <input type="text"/> ⓘ to <input type="text"/> ⓘ	Reviewed By: <input type="text"/>	
Modified Date: <input type="text"/> ⓘ to <input type="text"/> ⓘ	<input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Export to Excel File"/>		

Search Results

Tracking Number	Estimate Status	Estimate Label	RWA Type	RWA Number	Estimate Region	Agency Bureau Code	Primary Worksite (Building) No.	PCN	OA Number	PBS Organization Code	Office Symbol	Total Estimate Amount	Data Ctr/ Server Rm
OUTX0210814258008	Submitted	Stand-Alone	R	1138324	07	02108	TX0224ZZ			P07250D1	7PSC-F	\$41,438.75	No nath
SCAZ0705615072011	Submitted	Stand-Alone	D	1258550	09	04700	AZ0303ZZ			P092D140	9P3PSDP	\$250.87	virgir
OUTX0210814258023	Submitted	Master	R	1191523	07	02108	TX0224ZZ			P07250D1	7PSC-F	\$44,945.62	No nath
SCAZ0210815071038	Submitted	Stand-Alone	F	1257946	09	02108	AZ8079ZZ			P092D140	P33PSDP	\$1,956.37	virgir
SCVA0964415026012	Submitted	Stand-Alone	F	1221561	03	02108	VA0519ZZ			P032C300	3PSSR	\$5,000.00	raym
SCILD470014248060	Submitted	Stand-Alone	A	5005628	05	04700	IL0236FC			P0575000	5PCAA	\$103,259.74	tome
SCWIO470014307011	Submitted	Stand-Alone	D	1160570	05	04700	WI0044ZZ			P0525241	5PSSEC	\$1,132.87	susa
SCILD470014295032	Submitted	Stand-Alone	N	1141201	05	04700	IL0236FC			P0525253	5PSSAB	\$240.24	anne
SCMO0210814251044	Submitted	Stand-Alone	N	1086285	06	02108	MO1667ZZ			P0670103	6PRW	\$28,874.37	chris
SCVA0210814307008	Submitted	Stand-Alone	N	1160321	03	02108	VA0519ZZ			P032C300	3PSSRC	\$42,568.99	charl

Sample eRETA Estimates Search screen. Includes search query in the top half, and search results in the lower half.

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The Estimate Summary Screen – Access to the Estimate Data Entry Screens

Selecting an estimate (SCE or OUE) from the Estimate Search results (shown above) takes you to the Estimate Summary screen for that Estimate. The navigation tabs on the left hand side provide read-only access into each of the data entry tabs where GSA RETA users enter new and amended estimates. Since Summary Cost Estimates (SCE) and Overtime Utility Estimates (OUE) have different templates, the number of navigation tabs and the type of information captured on each screen will vary between the two estimate types.

SUMMARY COST ESTIMATE
BASIC INFORMATION

- BASIC INFORMATION
- CONSTRUCTION COSTS
- TENANT PERS. PROPERTY
- ESTIMATE SUMMARY

Est. Tracking No.: SCVA0210814307008
Estimate Total: \$42,568.99

Estimate Status: Submitted
Estimate Creation Date: 11/3/2014

*Project Phase: 5-Construction *Estimate Type / Range of Accuracy: Construction Estimate (+10%,-5%)

*Estimated Start: 1/5/2015 Estimated End: 4/6/2015

Project Control Number: _____
Project Name: _____
OA Number: _____ CBR Number: _____

*Primary Worksite (Building) No: VA0519ZZ Land Point Of Entry (LPOE)?: No Yes

Primary WorkSite (Building) Name: 201 PRINCE FREDERICK
Address: 201 PRINCE FREDERICK DR
City: WINCHESTER State: Virginia

Zip Code: 22602

*Requesting Agency Bureau Code: 02108
Requesting Agency Bureau Name: DEPARTMENT OF THE ARMY, ARMY CORPS OF ENGINEERS

RWA Type: NI *PBS Organization: P032C300
RWA Number: 1160321 *Office Symbol: 3PSSRC
Estimate Label: Stand-Alone Estimate

Customer Estimate POC: RICHARD.S.TRAMMELL@USACE

Name: TRAMMELL, SCOTT Title: _____
Contact's Phone: (540) 665 - 3737 Ext _____ Fax: () -
Address1: P O BOX 2250 Address2: _____
City: WINCHESTER State: VA
Zip Code: 22604 -

GSA PM/POC Email: CHARLES.W.JONES@GSA.GOV
Point of Contact Name: Jones, Charles Point of Contact Phone: (434) 977 - 0397 Ext _____

ESTIMATE COST SUMMARY

RWA Const.Costs	\$37,916.95
Regional Mgt Fee	\$1,516.68
Const. & Regional Mgmt Fee	\$39,433.63
Moving	\$0.00
Telephones	\$0.00
Furniture	\$0.00
IT	\$0.00
Security	\$0.00
Other	\$0.00
Labor	\$0.00
Reimbursable Personal Property Costs	\$0.00
Total RWA Direct Costs	\$39,433.63
Overhead	\$3,135.36
Total Est RWA Authorized Amount	\$42,568.99

Sample SCE Estimate screen. OUE Estimate screen not shown.

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RWA and Estimate Navigation Hyperlinks

The content above in this Promo Guide introduced external users to the three new eRETA search screens and the content accessible from each search. However, if one wanted to view the RWA Summary screen, then check out the Financial Summary, and lastly the SCE Estimate Summary for the same RWA and linked estimate, they would **not** have to run each of those searches individually. Yellow hyperlinks are provided once inside a specific RWA or estimate (SCE or OUE). These hyperlinks allow you to quickly jump to the related summary screens for the same RWA or linked estimate. The yellow hyperlinks make navigation easy across screens.

DOCUMENTS DETAIL

DOCUMENTS

Documents Detail

Financial information as of Pegasys last download: 09/18/2015 17:53 ET Print View Images

RWA:	N1160321 SIPRNET UPGRADE	REXUS Lease Project #:	
RWA Status:	Submitted Successfully	Lease #:	
Estimate Tracking Number:	SCVA0210814307008		
Estimate Approval Date:	11/03/2014		

Customer Information

Agency:	02108 DEPARTMENT OF THE ARMY, ARMY CORPS OF ENGINEERS		
Billing Office Address Code (BOAC):	213A71 US ARMY CORPS OF ENGINEERS (TAC)		
Customer POC Email:	RICHARD.S.TRAMMELL@USACE.ARMY.MIL		
Customer Cert Official Email:	kristen.abell@usace.army.mil		
Customer Billing Contact Email:	RICHARD.S.TRAMMELL@USACE.ARMY.MIL		

PBS Information

Organization:	P032C300 (192X,192M) SO SVC CTR-RICHMOND FIELD OFC	Office Symbol:	3PSSR
Worksite:	VA0519ZZ 201 PRINCE FREDERICK		
GSA PM/POC:	CHARLES.W.JONES@GSA.GOV		

RWA Details

Acceptance/Start Date:	12/16/2014	Original Auth Amount:	\$42,568.99	Fund Year:	2015
Acceptance Letter Date:	12/18/2014	Current(Submitted) Auth Amount:		Fund Type:	N-No Year
Substantial Completion Letter Date:	04/15/2015	Commitments:	\$0.00	Bill Type:	N-NonIPAC
Close-out Letter Date:		Total Obligations:	\$36,859.66	Bill Term:	M-Monthly
Cancellation Date:		Total Expenses:	\$36,859.66	Overhead Billed Amount:	\$0.00
Last Bill Date:	05/19/2015	Total Billed:	\$36,859.66	Chargeback Amount:	\$0.00
Financial Purge Date:		Total Collected:	\$0.00	Write-off Amount:	\$0.00
Hold Billing Indicator:	No				
Agency Accounting Data:	21 15 2020 29J4GL S44214 W26WKS 43166337				
Project Description:	F&I PDS SIPRNet				

[RWA: 1160321](#) [RWA History](#) [Financial Review](#) [ETN: SCVA0210814307008](#)

Navigation links at the bottom of the Documentation Summary screen

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The RWA History Report

The RWA History report provides a transactional history of accepted RWAs. The report identifies the new RWA and any subsequent amendments that were initiated by GSA in RETA and then successfully submitted to GSA’s Financial Management system (known as Pegasys). Additionally, clicking on any history record opens a copy of the RWA 2957 Form and the information included on the RWA 2957 Form at the time of that particular history record.

Transaction History

History as of: 10/20/2015 RWA Number: N1160321

Created By: raymond.coward@gsa.gov Created Date: 11/21/2014

Last Bill Date: 05/19/2015 Total Billed: \$36,859.66 Total Collected: \$0.00 Write Off Amount: \$0.00

[RWA: 1160321](#) [Financial Review](#) [Documentation](#) [FTN: SCVA0210814307008](#)

History Records

Submission Date / Restored Date	Updated By	Authorized Amount	Customer Funding ⓘ	ABC/BOAC	Input Code ⓘ	Acceptance / Start Date	Com <Car
Agency Accounting Data							
04/15/2015	raymond.coward@gsa.g..	\$42,568.99	2015-N-	02108 / 213A71	N	12/16/2014	
21 15 2020 29J4GL S44214 W26WKS 43166337							
12/18/2014	raymond.coward@gsa.g..	\$42,568.99	2015-N-	02108 / 213A71	A	12/16/2014	
21 15 2020 29J4GL S44214 W26WKS 43166337							

.. Indicates a truncated field.

Sample RWA History Report

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The Future of RETA and eRETA

As indicated, with this release, eRETA and RETA are now technically a single application accessed by both internal GSA users and external customer users. The combined single application will be known as RETA 7.0.

The introduction of the three additional search screens allows external customer users access to information and RWA data their internal GSA counterparts have had access to for many years. This first enhancement for external customers since eRETA 1.0 is the first step in transforming how GSA and customer agencies interact with each other in regards to the Reimbursable Services Program. In the coming months and years the following additional enhancements will be introduced to the RETA application:

- Creation of an external data entry user role and an external approver role, which will allow customer agencies to submit new RWA work requests to GSA as well as to initiate amendment requests on existing RWAs to GSA.
- Direct data entry to Pegasys (GSA’s Financial Management system) via RETA to correct customer related billing information (e.g. Treasury Symbols or Customer Order Numbers) – thus assisting in correcting errant information that might otherwise result in billing chargebacks
- Electronic signature capabilities allowing customer agencies and GSA to electronically sign RWAs from within RETA, no longer requiring paper or PDF copies of the 2957 form to be shared outside of RETA.
- Continued use of agile project management to improve customer workflows and the customer experience related to electronic work request and RWA submissions after onboarding external customer users with the above edit capabilities.

For Additional Questions the following resources are available:

- Navigate to www.gsa.gov/ereta for eRETA user guides (including this one) and FAQs
- Email the pbsnationalhelpdesk@gsa.gov with questions or issues about logging into the external Portal (effectively any part of the log-in process before getting into eRETA itself)
- Email us at eRETA@gsa.gov with questions about using or navigating eRETA (once inside the application itself)