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](http://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
external RETA 7.0 Enhancements

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 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.
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).

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

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.
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.

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.
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.

Sample eRETA Financial Summary screen.
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.

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

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 eR ETA 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.

Navigation links at the bottom of the Documentation Summary screen
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.

Sample RWA History Report
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)