

Archiving retired/incorrect POC emails from RETA/eRETA drop-down lists

In this Quick Reference Guide available to GSA employees and customer agencies, we will preview how to “archive” email addresses listed in the various RETA/eRETA Point of Contact (POC) drop-down lists. This guide is designed for cases where the email address of a POC is no longer valid due to him/her retiring, or because the email address was typed in incorrectly.

Background

In RETA/eRETA you have the ability to “archive” email addresses listed in the various RETA/eRETA Point of Contact (POC) drop-down lists, including both GSA POCs and Customer POCs. This feature provides useful in the following situations:

1. A POC has retired and thus you would like to remove his/her name from displaying in future drop-down lists, or
2. The email address of a POC was typed in incorrectly and you want to remove the incorrect one so only the valid one shows moving forward.

When a retired or incorrect email address is listed in either the *Customer Fund Certifying Official* or *PBS Approving Official* drop-down list, selecting one of those for digital signature routing would mean the digital signature request would never be received (since it was sent to an invalid email address).

When you archive an old or incorrect email address, the selected email address will no longer display in the pull-down menu for future estimates or RWAs where that POC would normally be listed. However, archiving an email address does not remove it from existing estimates or RWAs where the POC was selected previously. This was done to maintain historical transactions as they were originally entered. You will need to amend existing estimates or RWAs to remove an archived POC if their name was originally associated with it, but no longer should be.

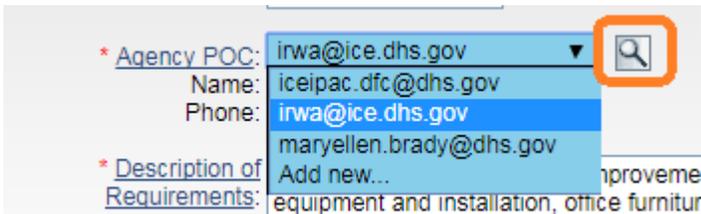
This Quick Reference Guide (QRG) contains the following topics:

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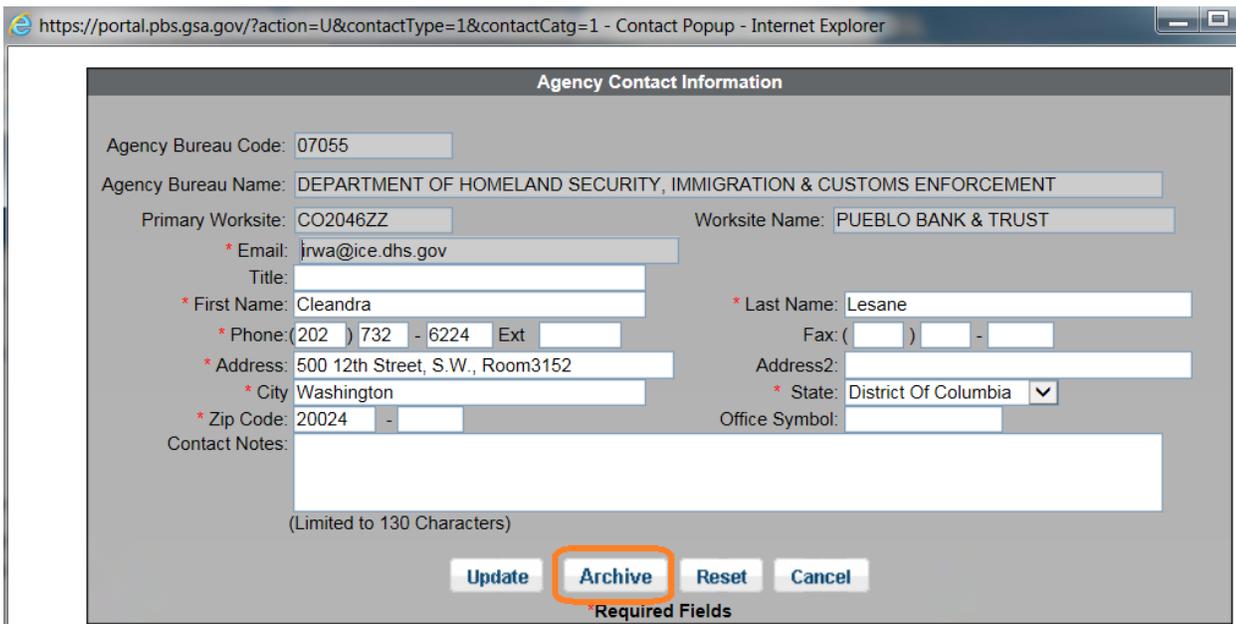
Archiving a retired or incorrect POC

1) Select the email address of the person (or mailbox) that needs to be archived in the drop-down list and then click on the magnifying glass icon to the right of the pull-down field.



Select the POC's email and then click the magnifying glass icon.

2) On the Point of Contact pop-up window, click the "Archive" button. RETA/eRETA will display a message to confirm your action. Once confirmed, the pop-up will close and the email address will no longer display in the pull-down menu of this estimate/RWA and any future estimate/RWA where the archived POC would normally display.



Click the "Archive" button. RETA/eRETA will then prompt a confirmation message. After confirming, the email address will no longer display in the pull-down menu.

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Restoring a POC email that was archived

On any estimate or RWA screen that displays the appropriate POC, select "Add New" in the pull-down list and click on the magnifying glass to open the POC pop-up window. Enter the email address or email box of the contact to be restored in the email field and click "Add". RETA/eRETA will recognize it as a pre-existing POC and will automatically pull in the matching name, phone number, and address associated with the POC the last time it was in use. Click the "Update" button and the POC will again display in this pull-down list on the current RWA or estimate, as well as all future pull-down lists.

After selecting "Add New" in the pull-down list, enter the email of the POC to be restored. Then click "Add" and RETA/eRETA will auto-populate the POC's info. Click the "Update" button to restore the POC to future pull-down lists.

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 RETAAdmin@gsa.gov for RWA and SCE questions or at OUET.help@gsa.gov for OUET questions

Customer Agencies

- 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