

## Helpful Search & Shortcut Features in eRETA

Happy Spring! Hopefully you have started using eRETA to send RWAs and RWA Work Requests (WRs) to GSA. Remember, in just over five months (October 1, 2019), eRETA will be the only method for federal customers to do so; manual submissions will no longer be accepted. To help you in this effort we have another Quick Tip below highlighting various search and shortcut features in eRETA that will make your life much easier!

### 1- Pending Action Filter

The “Pending Action” pull-down on the eRETA Search page allows you to quickly locate WRs or RWAs requiring GSA or Customer action. All searches automatically use an AND operator so if you use the Pending Action filter along with other search parameters, eRETA will limit the search to only WRs/RWAs that match all of those criteria.

When “GSA” is selected, eRETA returns WRs or RWAs that are awaiting GSA action in one of the following statuses/positions:\*

- Unassigned WR, Assigned WR (after Send to GSA button is clicked), Pending-New RWA that was initiated as a WR (after Send to GSA button is clicked), Mod-Requested, Pending-Mod, Failed, Signature Requested

When “Customer” is selected, eRETA returns WRs or RWAs that are awaiting a customer action in one of the following statuses/positions:

- New WR (not yet sent to GSA), Assigned WR (before Send to GSA button is clicked), Pending-New RWA that was initiated as a WR (before Send to GSA button is clicked), Mod-Initiated

The screenshot shows the eRETA interface for searching Work Requests (WRs) or RWA Work Requests. The 'Pending Action' filter is set to 'Customer'. The search results table is as follows:

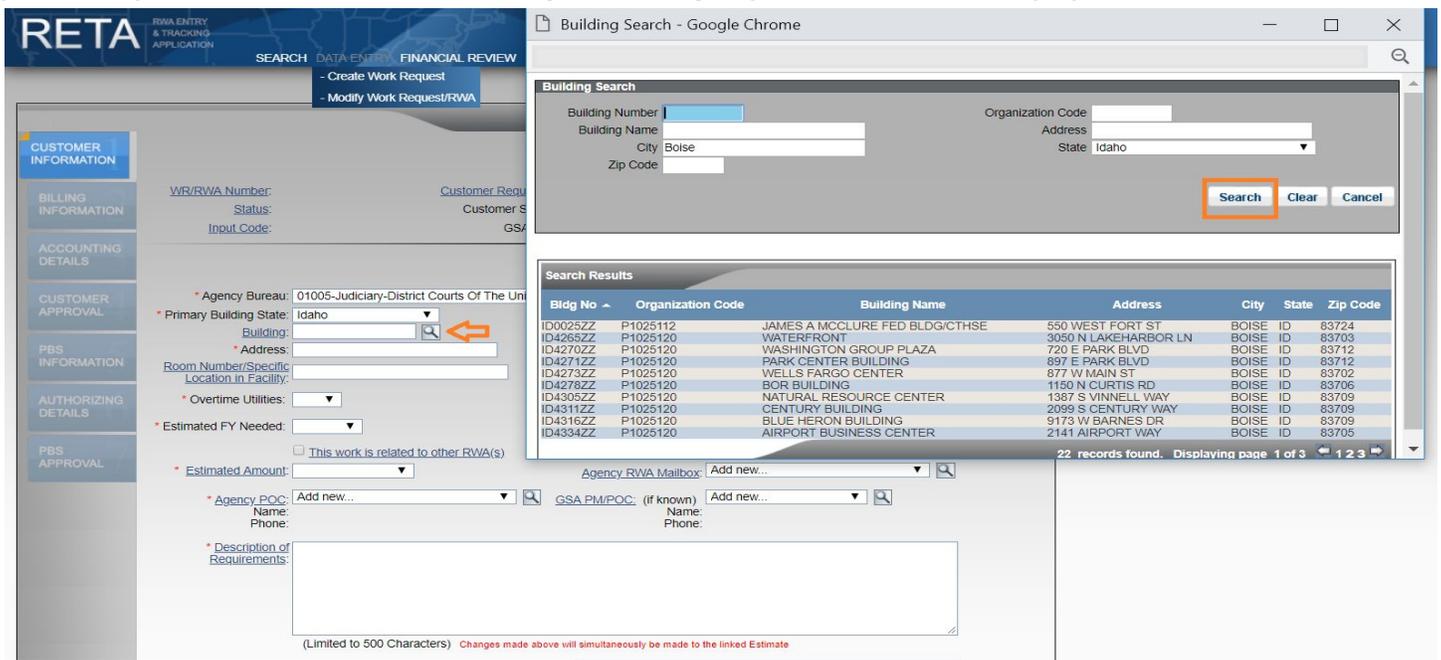
WR/RWA Number	AB Code	BOAC	Building	Org. Code/Region	Acc./Start/Requested Date	Authorized Amt	Status	GSA User ID	WR Requested By
N0694681	02804	283001	NY0349ZZ	P00Q1200	06/04/2013	\$383,000.00	Mod-Initiated	laura.rife@gsa.gov	
N1857317	02804		LA1361ZZ	07	10/30/2018	\$0.00	Pending-New	lori.lee@gsa.gov	evlis.portis@ssa.gov
W1827567	02804	283001	TX2781ZZ	07	11/05/2018	\$0.00	Planning/Est.	tammy.glass@gsa.gov	jason.middlebrooks@ssa.gov
W1857346	02804		TX2781ZZ	07	10/30/2018	\$0.00	Planning/Est.	tammy.glass@gsa.gov	evlis.portis@ssa.gov
W1860948	02804		TX2781ZZ	07		\$0.00	Pre-planning		
W1868458	02804	283001	TX2859ZZ	07	11/15/2018	\$0.00	Planning/Est.	graciela.casiano@gsa.gov	jason.middlebrooks@ssa.gov
W1868704	02804		LA1296ZZ	07		\$0.00	Pre-planning		
W1868791	02804		LA1296ZZ	07		\$0.00	Pre-planning		
W1871018	02804	283001	NM1536ZZ	07	11/28/2018	\$0.00	Planning/Est.	frances.garofanello@gsa.gov	jason.middlebrooks@ssa.gov

\*Pending Action” pull-down on the RWA Search screen

\*When eRETA 8.7 is released late Spring 2019, some of the statuses/positions will change. For example, “New” will change to “Pre-planning” and “Assigned” will change to “Planning/Estimate”.

## 2- Magnifying Glass

Clicking the magnifying glass icon - available on various eRETA screens - launches a lookup pop-up window which allows you to easily search for values such as Building Number, Agency Bureau Code, Treasury Symbol and more.

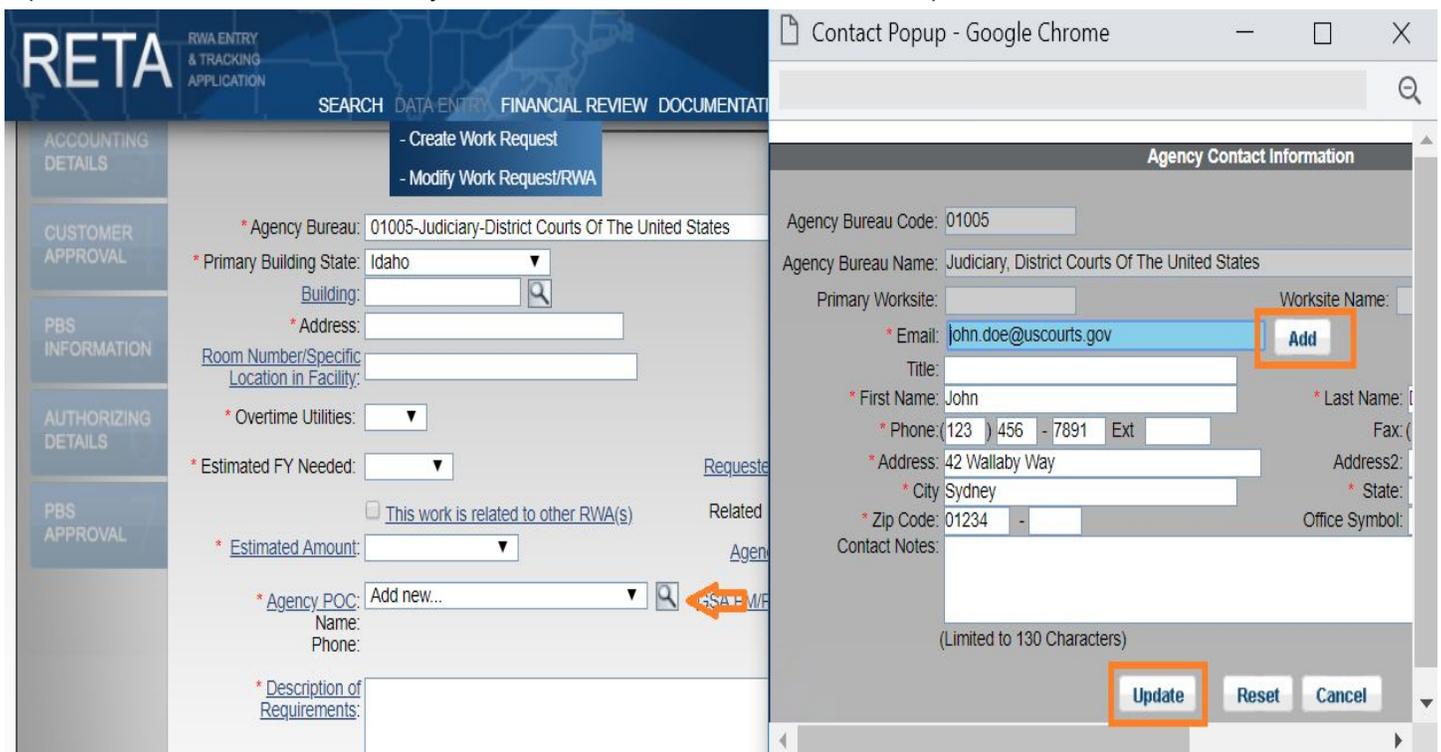


The screenshot shows the RETA application interface with a 'Building Search' pop-up window. The pop-up has a search form with fields for Building Number, Organization Code, Building Name, City, State, and Zip Code. A 'Search' button is highlighted with an orange box. Below the search form is a table of search results with columns: Bldg No, Organization Code, Building Name, Address, City, State, and Zip Code. The table contains 12 rows of data. The main application window in the background shows the 'CUSTOMER INFORMATION' section with various fields like Agency Bureau, Primary Building State, Address, etc. A magnifying glass icon is visible next to the 'Building' field in the main application.

Bldg No	Organization Code	Building Name	Address	City	State	Zip Code
ID0025ZZ	P1025112	JAMES A MCCLURE FED BLDG/CHSE	550 WEST FORT ST	BOISE	ID	83724
ID4265ZZ	P1025120	WATERFRONT	3050 N LAKEHARBOR LN	BOISE	ID	83703
ID4270ZZ	P1025120	WASHINGTON GROUP PLAZA	720 E PARK BLVD	BOISE	ID	83712
ID4271ZZ	P1025120	PARK CENTER BUILDING	897 E PARK BLVD	BOISE	ID	83712
ID4273ZZ	P1025120	WELLS FARGO CENTER	877 W MAIN ST	BOISE	ID	83702
ID4278ZZ	P1025120	BOR BUILDING	1150 N CURTIS RD	BOISE	ID	83706
ID4305ZZ	P1025120	NATURAL RESOURCE CENTER	1387 S VINNELL WAY	BOISE	ID	83709
ID4311ZZ	P1025120	CENTURY BUILDING	2098 S CENTURY WAY	BOISE	ID	83709
ID4316ZZ	P1025120	BLUE HERON BUILDING	9173 W BARNES DR	BOISE	ID	83709
ID4334ZZ	P1025120	AIRPORT BUSINESS CENTER	2141 AIRPORT WAY	BOISE	ID	83705

Use the magnifying glass icon to search for various fields (e.g. Building Number).

It also allows you to add a new contact such as the Agency POC. Select "Add New" from the dropdown list and then click the magnifying glass. Enter the individual's email and click "Add". If the remaining information auto-populates, simply click "Update". If it does not, then manually add their contact information and click "Update"



The screenshot shows the RETA application interface with an 'Agency Contact Information' pop-up window. The pop-up has fields for Agency Bureau Code, Agency Bureau Name, Primary Worksite, Worksite Name, Email, Title, First Name, Last Name, Phone, Address, City, State, Zip Code, and Contact Notes. An 'Add' button is highlighted with an orange box. The main application window in the background shows the 'CUSTOMER INFORMATION' section with various fields like Agency Bureau, Primary Building State, Address, etc. A magnifying glass icon is visible next to the 'Agency POC' dropdown menu in the main application.

Use the magnifying glass icon to add a new contact (e.g. Agency POC).

### 3- “My Favorites” Feature

A “My Favorites” icon (yellow star) is located next to the Treasury Symbol and BOAC fields in the RETA Data Entry Wizard. Users can add/remove commonly used Treasury Symbols or BOACs to the “My Favorites” window next to each field for quick selection. Selecting a code from your “My Favorites” menu automatically populates the selected data into the main data entry field.



My favorites window launch from “Favorites” yellow star icon.

To add Treasury Symbols or BOACs to your “My Favorites” for the first time, click on the “My Favorites” star icon next to the Treasury Symbol or BOAC field. Select the “View All/Add Favorites” link which will open the Treasury Symbol or BOAC lookup window. Search for Treasury Symbols or BOACs like you normally would. In the search results that display at the bottom of the lookup window, click on the star icon next to the Treasury Symbol(s) or BOAC(s) you want to add to “My Favorites”. Codes where the star is shaded yellow will now appear in your “My Favorites” pull-down moving forward. To remove a code from your “My Favorites” simply de-select the star next to the code.

**Treasury Symbol Search**

Treasury Symbol  Main Account Code

Available From Year  Available To Year

Description

My Favorites  **NEW**

The Department of Treasury is transitioning Treasury Symbol format across the federal government to what is called the Component Treasury Account Symbol (TAS). For a full description of the Component TAS please see "Attachment B" at The Department of Treasury's Bureau of Fiscal Service Fact Sheet website - [click here](#).

- As an example a "Two Digit Year Treasury Symbol" for annual funding would be 70150544 and for multi-year funding it would be 7015/170544. These two examples in the Component TAS form would be 070201520150544000 and 070201520170544000 respectively. The Component TAS would be broken down as follows:
  - three digit agency code (070 for DHS)
  - four digit "start" year of the appropriation (2015; a single 'X' would be entered if no-year funds)
  - four digit "end" year of the appropriation (2015 or 2017 respectively)
  - four position fund code of agency (0544)
  - three additional positions to cover any sub-accounts, otherwise this will show as three zeros.
- To aid in the transition, RETA users can query either the old, "Two-Digit Year Treasury Symbol", and the new, "Component Treasury Symbol" format in the Treasury Symbol search field. The search results will display a column for both the "old" format and the "new" Component format. Simply click on the line that contains the Treasury Symbol that matches what the customer provided on the RWA form (regardless if they provided the old or new format). RETA will automatically apply the Component TAS format to the RWA and send that value to Pegasys and eventually to Treasury during the RWA billing cycles.
- IS THE PROVIDED TREASURY SYMBOL NOT AVAILABLE IN RETA? If the Treasury Symbol provided by the customer is not found on this RETA Treasury Symbol look up, please review the [Treasury Symbol Glossary definition](#) for instructions on how to add a missing Treasury Symbol in RETA.

**Search Results**

Favorite	Component Treasury Symbol	Two Digit Year Treasury Symbol	Sub-level Prefix	Agency Identifier	Available From Year	Available To Year	Main Account Code	Sub-Account Code	Description
	02020192019 1824000	20191824		020	2019	2019	1824	000	FEDERAL PAYMENT FOR TESTING AND TREATMENT OF HIV/AIDS, TREASURY
	02020192019 0101000	20190101		020	2019	2019	0101	000	SALARIES AND EXPENSES, DEPARTMENTAL OFFICES, TREASURY
	02020192020 5445000	2019/205445		020	2019	2020	5445	000	DEBT COLLECTION FUND, BUREAU OF THE FISCAL SERVICE, TREASURY

3 Records found. Displaying page 1 of 1 1

“My Favorites” window with multiple favorites saved.

**BONUS KNOWLEDGE:** Click on any of the [blue hyperlinked](#) fields throughout eRETA to open the eRETA Glossary which provides definitions and related information on various terms associated with Work Requests and RWAs.

**DOUBLE BONUS KNOWLEDGE:** To help avoid login issues, only use <https://extportal.pbs.gsa.gov> as your browser's eRETA bookmark. Bookmarking any other link may result in difficulties logging into the PBS external Portal where eRETA is located.

As a reminder, beginning October 1, 2019, federal customers will be REQUIRED to do the following:

- Use eRETA to submit all Work Requests, RWAs and Amended RWAs to GSA.
- Utilize eRETA's digital signature functionality to sign RWAs

Still thirsty for more information and training on eRETA? Visit [www.gsa.gov/ereta](http://www.gsa.gov/ereta) and/or email [eRETA@gsa.gov](mailto:eRETA@gsa.gov) to let us know how we can better meet your needs to ensure a seamless conversion to going fully electronic with eRETA!