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

*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”.

"Pending Action" pull-down on the RWA Search screen
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.

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”.

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.

**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 and/or email 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!