In this Quick Reference Guide, we will preview the new enhancements included with the eRETA 8.8 release available to users starting October 14th, 2019.

**Summary of eRETA 8.8 Enhancements**

1. Disallow clicking the Send to GSA button until an Approved Estimate is linked
2. AC-15 – New RWA/WR gets linked to an Approved Estimate
3. 'OCFO Data Entry' field
4. Allow users to link an estimate with a mismatched AB Code
5. AC-17 - Notify the estimator of AB Code change
6. Add Instructions link on each page in RWA Wizard
7. Reword Treasury Account Symbol instructions
1) **Disallow clicking the Send to GSA button until an Approved Estimate is linked**

Previously, a customer eRETA user could click the “Send to GSA” button on the Customer Approval tab without an Approved Estimate linked to the Work Request (WR). With eRETA 8.8 customers will be prevented from sending their RWA in for GSA review and acceptance until an approved estimate is linked to the WR. This applies to all WRs (including those that will be accepted as F-type RWAs). The linked estimate (SCE or OUE) must be in Approved status in order for the customer to be able to send the WR to GSA. The “Estimate Tracking No.” field will be editable by the customer on any Unassigned and Planning/Estimate WRs and becomes un-editable only after they send the WR to GSA for acceptance (previously this field was only editable by the customer before they sent the WR to GSA for assignment).

*Warning message a customer eRETA user receives when trying to send WR/RWA for acceptance without estimate linked.*
**eRETA 8.8 Enhancements**

2) **AC-15 - New RWA/WR gets linked to an Approved Estimate**

Whenever an estimate (SCE or OUE) that is linked to a WR gets approved, eRETA will send an automated communication (AC) to relevant customer POCs (with a copy to GSA POCs) that an approved estimate has been linked to their WR and they can now complete their data entry and send to GSA for review and potential acceptance of their RWA.

*ETN shows on the Customer Information page after GSA links approved estimate (SCE or OUE) to WR.*
Automated communication sent to Customer POCs (with a copy to GSA POCs) shown below:

Sent from: RETAAdmin@gsa.gov
Subject: GSA has approved the estimate <ETN #> for WR/RWA <RWA #>

GSA Customer,

GSA has finalized and approved <Summary Cost Estimate (SC) or Overtime Utility Estimate (OU)><ETN#> linked to Work Request/RWA <RWA #>.

To review a copy of this estimate, please log into eRETA and click on the "Estimates" search tab at the top of the screen and search for the Estimate Tracking Number listed above.

IMPORTANT: this RWA can now be submitted to GSA in eRETA. In order for this RWA to continue towards final acceptance, you must enter all required fields in eRETA and then click the "Send to GSA" button on the Customer Approval tab. GSA can take no additional action on this RWA until that step is completed.

Should you have any questions regarding this estimate or RWA, please contact one of the GSA Representatives listed below:

GSA PM/POC: <Insert email address, and phone number> <br>
PBS Data Entry User: <insert email address, and phone number (if any)> <br>
Customer Agency: <Insert customer agency name, bureau name> <br>
Building: <insert building number, name, address, city, state> <br>
Description: <insert description from work request> <br>
For more information, please log into eRETA and locate Work Request or RWA Number <insert WR/RWA #>.

-------

*** This is an automatically generated message, please do not reply directly to this email. ***
3) **Addition of the “OCFO Data Entry” User Field (internal-GSA field)**

Previously RETA allowed for one GSA Data Entry “owner” field (though anyone with Data Entry rights in the associated region could edit the RWA even if they weren’t the “owner”). Now there are two GSA Data Entry “Owner” fields in RETA to support the WR-RWA intake workflow and associated handoff between GSA-PBS and GSA-OCFO. The previous Data Entry field is now titled “PBS Data Entry” and the new field is titled “OCFO Data Entry”. The new OCFO Data Entry field is located on the PBS Approval tab under the “Actual Substantial Completion Date” field.

NOTE: the addition of this GSA-OCFO Data Entry User field has no effect on how customers should enter and send WR/RWA information to GSA. This is an internal-GSA field added to assist with internal workflow process efficiencies.
eRETA 8.8 Enhancements

4) Allow users to link an estimate with a mismatched AB Code

Previously customer eRETA users would receive an error message when trying to link an estimate (SCE or OUE) to their WR because the Agency Bureau Code (AB Code) on the estimate provided by GSA does not match the one they entered on the WR. Now customer eRETA users will be able to link the estimate even if the AB Code is not an exact match, as long as it’s still within the same agency.

If they try to link the estimate and only the Bureau (the last 2 digits of the AB Code) is mismatched, the existing error message will be suppressed and the customer eRETA user will instead receive a warning message notifying them the AB Code on the WR and Estimate do not match. If they confirm they want to proceed (i.e. the AB Code on the WR is correct), then eRETA will auto-update the AB Code on the estimate to match that on the WR. If they select the Cancel button, then the WR and Estimate will not link and the AB Code on the estimate will remain unchanged.

Example: AB Code on SCE or OUE is 07051 and the customer eRETA user links that estimate to their WR associated with AB Code 07001. Because the AB Codes are still under the same agency (‘070’ for DHS), the eRETA user receives a message that the AB Codes do not match. They confirm the AB Code on the WR is correct so RETA auto-updates the AB Code on the estimate to match that on the WR.
5) **AC-17 - Notify the estimator of AB Code change**

When the AB Code on the SCE or OUE is overridden to match the AB Code on the Work Request an eRETA user entered and linked to the estimate (see enhancement #4 above), RETA will notify the RETA SC Estimator or OU Estimator of the AB Code change and copy the PBS Data Entry user (if any) on the automated communication. The new AC-17 email will look as follows:

Sent from: eRETA.user@gsa.gov
Subject: Agency Bureau Code updated on Estimate SCDC0470012345

The customer has linked estimate tracking number SCDC0470012345 to Work Request 1234567 and updated the Agency Bureau Code (AB Code). The original AB Code on the estimate was General Services Administration, Federal Acquisition Service (04707) and the customer has updated this AB Code to General Services Administration, Public Buildings Service (04715). The AB Code on the linked estimate has been automatically changed to match the Work Request. If you feel this change is incorrect please contact john.doe@gsa.gov to validate what the proper AB Code should be. If it needs to be changed back, GSA will need to revise the estimate and the Work Request to reflect the correct code.

-------

*** This is an automatically generated message, please do not reply directly to this email. ***
**eRETA 8.8 Enhancements**

6) Add Instructions link on each page in RWA Wizard

Previously instructions on how to fill out an RWA Form 2957 were included on pages 4-5 of the PDF version of the RWA 2957 Form. Since GSA has transitioned from paper/PDF submission of the RWA to electronic, online submission using eRETA, the instructions on what data should be entered in each block has also been converted to an electronic format in eRETA. Each tab in the eRETA Data Entry Wizard will have a link in the lower left corner called “Tab Instructions” which will open a pop-up window outlining the fields on the current tab and instructions on what data should be entered in which field.

Click the “Tab Instructions” link to bring up instructions on how to complete fields in eRETA.
7) Reword Treasury Account Symbol instructions

The instructional text related to the format of the Treasury Account Symbol (TAS) was updated to more accurately align with the Component Format of the TAS used by GSA’s Financial Management System Pegasyx (and required by the Department of Treasury). The instructional text is updated in three separate places in eRETA:

1. Treasury Symbol Search pop-up off the Accounting Details page
2. Treasury Account Symbol Definition modal pop-up off the above search pop-up
3. RETA Glossary

Revised Treasury Account Symbol instructions

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 (including non-PBS, internal GSA customers)
- 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