How to Search for Work Requests and RWAs in eRETA

Happy Spring! With just four months until using eRETA becomes mandatory, hopefully you have already begun using the application to create and submit Work Requests (WRs) and RWAs to GSA. To make sure you are prepared for the October 1, 2019 conversion date, here is another Quick Tip! One of the main benefits of eRETA is that you can view and access your organization's active, completed and closed RWAs, as well your active WRs. Use the information below to learn how to use eRETA to search for WRs and RWAs in your organization!

1- Work Request / RWA Search

After logging into eRETA, click on Search to pull up the Work Request / RWA Search page. This will allow you to search for any WRs / RWAs associated with your Agency Bureau (AB) code. You can search on any field and eRETA will retrieve RWAs that match those parameters. Since eRETA uses an AND operator, the results will match the combination of all of the parameters you provide.

For example, if you select WR / RWA Type "W", Region "2" and AB Code "01005", then all Region 2 W-types associated with AB code 01005 will appear in your Search Results list. You can even search by User ID to locate WRs / RWAs that you or someone else in your Agency Bureau has submitted to GSA, as shown below. User ID refers to the eRETA user's government email address used to log into the PBS Portal. Clicking on the icon to the right of the User ID field will auto-populate your eRETA user ID into the search window.



This report displays current WR/RWA information, including pending transactions. Therefore Pending or In Queue transactions may display differently than the official values in Pegasys.

Search R	esults									
WR/RWA Number 🔺	AB Code	BOAC	Building	Org. Code/ Region	Acc./Start/ Requested Date	Authorized Amt	Status	GSA User ID	WR Re	quested By
W1884843	01005		VI0007ZZ	02	02/11/2019	\$0.00	Planning/Est.	robin.sakaguchi02@gsa.gov	shervin	clarke@vid.uscourts.gov
W1885143	01005		VI0008ZZ	02	02/12/2019	\$0.00	Planning/Est.	robin.sakaguchi02@gsa.gov	shervin	clarke@vid.uscourts.gov
W1885237	01005		VI0007ZZ	P0225600	02/12/2019	\$0.00	Planning/Est.	robin.sakaguchi02@gsa.gov	shervin	clarke@vid.uscourts.gov
W1885363	01005		VI0007ZZ	02	02/12/2019	\$0.00	Planning/Est.	robin.sakaguchi02@gsa.gov	shervin	clarke@vid.uscourts.gov
W1885525	01005		VI0008ZZ	02	02/12/2019	\$0.00	Planning/Est.	robin.sakaguchi02@gsa.gov	shervin	clarke@vid.uscourts.gov
									5 Records found.	Displaying page 1 of 1 1

Use different fields on the WR/RWA Search to locate your WR or RWA.

2- Financial Review Search

You can review the commitment, obligation and expense transactions for accepted RWAs through the Financial Review Search screen. Selecting an RWA from this page opens the Financial Review Summary page.

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🕅 Financial R	eview Search								H	lide Criteria
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Search Results										
RWA Number 🔺	Org. Code	Work Site	Authorized	% Obligated	Commitments	Obligations	Balance	Expenses	Brief Project Descripti	on
N1006951	P082D001	CO0660AA	\$30,507,945.56	95.30%	\$107,978.00	\$28,978,380.04	\$1,421,587.52	\$24,123,553.87	SSA Data Center	
N1009479	P0940001 0	CA0213ZZ	\$33,703,339.00	93.40%	\$0.00	\$31,483,354.88	\$2,219,984.12	\$29,933,101.40	Seismic retrofit	
N1033474	P0576000	IL0233ZZ	\$677,000.00	14.40%	\$0.00	\$97,255.07	\$579,744.93	\$97,255.07	Data cable replacement	
N1035375	P00Q1200	NY0349ZZ	\$291,970.15	80.80%	\$0.00	\$235,839.69	\$56,130.46	\$54,451.31	HVAC pressurization stud	dy
N1050347	P07250D1	TX0224ZZ	\$2,050,091.23	89.80%	\$558,131.80	\$1,283,182.01	\$208,777.42	\$200,926.49	26424-Renovations to th terview areas 1A07	e front back
N1054437	P0576000	L0233ZZ	\$1,171,499,99	94.60%	\$0.00	\$1,107,758.57	\$63,741.42	\$377,519.94	Reorganization of interior	office space

Use the Financial Review Search to review commitment, obligation and expense transactions for accepted RWAs.

3- Documentation Search

You can view WR / RWA documentation using the Documentation Search page. Selecting a WR / RWA from this page opens the Documentation Detail page where you can download documents associated with the WR / RWA (e.g. automated communications, customer letters, estimates, etc.)

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PDN Q PCN Customer ID	
Authorized Amount from \$ 1000000 to \$ 5000000 Agency Accounting Data User ID	
A Acceptance/Start Date from II to Agency Contact Email GSA PM/POC Email	

Only official Authorized Amounts are displayed in this report, therefore Pending and In Queue RWAs will display the authorized amount of the last successful RWA submission. RWAs deemed as "sensitive projects" by the customer and/or GSA will not be displayed in search results. If you require information about a "Restricted RWA" please contact the appropriate GS4 Regional RWA Manager. A list of current Regional RWA Managers can be found at <u>www.gsa.gov/rwa</u>

Search Res	ults								Select Page Size:	20	•
RWA #	RWA Status	AB Code	BOAC	Org. Code/ Region	Primary Worksite City	Primary Worksite State	Customer Order Number	Acceptance/ Start Date	Auth Amt GSA PM/POC		
N3596508	Purged	01005	103351	P0225200	NEW YORK- MANHATTAN	NY	N3596508	04/11/2007	\$1,290,058.06		
N3360572	Accepted	01005	103351	P0225500	SYRACUSE	NY		09/15/2007	\$1,297,514.00		
N0752361	Purged	01005	102222	P0225500	ROCHESTER	NY		09/24/2013	\$1,051,212.00 erin.marshall		
1.12									40 005 007 55		

Use the Documentation Search to access documents associated with WRs / RWAs.

4- Export WR / RWA Data to Excel

To export WR / RWA data to Excel from <u>any</u> of the Search pages listed above, click the "Export to Excel File" button at the bottom right of the search screen. This will download an Excel file of WR / RWA data based on the search parameters selected will and include additional columns of data not displayed on the search screen results (due to space limitations).

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Export WR / RWA Data from any of the WR / RWA Search screens.

BONUS KNOWLEDGE: Getting eRETA access is easier than ever and takes only 1-2 business days to process! After your supervisor forwards your application to <u>eRETA@gsa.gov</u>, the PBS National Helpdesk will send you a "Welcome to eRETA" email which no longer includes a validation form to complete. Please wait to hear from <u>eRETA@gsa.gov</u> before completing the steps in that email and we'll get your account set up ASAP!

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

DOUBLE BONUS KNOWLEDGE: Training, training and more training!

Starting in June and continuing throughout the summer, we will offer not one but TWO eRETA training sessions per month! One will be an "eRETA Basics" overview session, the other an "eRETA Advanced" session focused on answering some of the more complex questions posed by customers like you! These courses are held through GSA's Client Enrichment Series and you can register by visiting <u>www.gsa.gov/ces</u> or by clicking the links below!

- eRETA Basics Overview Sessions
 - June 27: 1-3pm (eastern)
 - July 9: 1-3pm (eastern)
 - August 6: 1-3pm (eastern)
 - September 10: 1-3pm (eastern)
- **eRETA Advanced How do I...? Feature Focus Sessions** (attending an Overview session and gaining access to eRETA are strongly encouraged prior to attending these advanced sessions)
 - June 11: 1-2:30pm (eastern)
 - July 18: 1-2:30pm (eastern)
 - August 15: 1-2:30pm (eastern)

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