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Release date: 23-October-2020

Posted date: 21-December-2020

Source of document: U.S. Nuclear Regulatory Commission
Mail Stop TWFN-6 A60M
Washington, DC 20555-0001
Fax: 301-415-5130
Email: FOIA.resource@nrc.gov
FOIAonline
RESPONSE TO FREEDOM OF INFORMATION ACT (FOIA) REQUEST

DESCRIPTION OF REQUESTED RECORDS:
A copy of the detailed description of the WEBACTS database of the Advisory Committee on Reactor Safety [ACRS] and the operating manual or handbook or user guide for that database.

PART I. -- INFORMATION RELEASED

☐ The NRC has made some, or all, of the requested records publicly available through one or more of the following means: (1) https://www.nrc.gov; (2) public ADAMS, https://www.nrc.gov/reading-rm/adams.html; (3) microfiche available in the NRC Public Document Room; or FOIA Online, https://foiaonline.gov/foiaonline/action/public/home.

☑ Agency records subject to the request are enclosed.

☐ Records subject to the request that contain information originated by or of interest to another Federal agency have been referred to that agency (See Part I.D -- Comments) for a disclosure determination and direct response to you.

☐ We are continuing to process your request.

☑ See Part I.D -- Comments.

PART I.A -- FEES

☐ You will be billed by NRC for the amount indicated.

☐ You will receive a refund for the amount indicated.

☒ Fees waived.

Since the minimum fee threshold was not met, you will not be charged fees.

Due to our delayed response, you will not be charged search and/or duplication fees that would otherwise be applicable to your request.

PART I.B -- INFORMATION NOT LOCATED OR WITHHELD FROM DISCLOSURE

☐ We did not locate any agency records responsive to your request. Note: Agencies may treat three discrete categories of law enforcement and national security records as not subject to the FOIA ("exclusions"). See 5 U.S.C. 552(c). This is a standard notification given to all requesters; it should not be taken to mean that any excluded records do, or do not, exist.

☐ We have withheld certain information pursuant to the FOIA exemptions described, and for the reasons stated, in Part II.

☐ Because this is an interim response to your request, you may not appeal at this time. We will notify you of your right to appeal any of the responses we have issued in response to your request when we issue our final determination.

☑ You may appeal this final determination within 90 calendar days of the date of this response. If you submit an appeal by mail, address it to the FOIA Officer, at U.S. Nuclear Regulatory Commission, Mail Stop T-6 A60M, Washington, D.C. 20555-0001. You may submit an appeal by e-mail to FOIA.resource@nrc.gov. You may fax an appeal to (301) 415-5130. Please be sure to include on your submission that it is a "FOIA Appeal." Only a pre-registered user may file an appeal through FOIA Online, https://foiaonline.gov/foiaonline/action/public/home. A user who has not registered an account prior to filing the initial FOIA request may still submit an appeal by one of the above mentioned options.

PART I.C -- REFERENCES AND POINTS OF CONTACT

You have the right to seek assistance from the NRC's FOIA Public Liaison by submitting your inquiry at https://www.nrc.gov/reading-rm/foia/contact-foia.html, or by calling the FOIA Public Liaison at (301) 415-1276.

If we have denied your request, you have the right to seek dispute resolution services from the NRC's Public Liaison or the Office of Government Information Services (OGIS). To seek dispute resolution services from OGIS, you may e-mail OGIS at ogis@nara.gov, send a fax to (202) 741-5789, or send a letter to: Office of Government Information Services, National Archives and Records Administration, 8601 Adelphi Road, College Park, MD 20740-6001. For additional information about OGIS, please visit the OGIS website at https://www.archives.gov/ogis.
Upon receipt of your request, we tasked the Advisory Committee on Reactor Safety [ACRS] to search for responsive records. ACRS identified two records that would be responsive to your request. The first is the Privacy Impact Assessment [PIA], which describes the nature and uses of the WebActs database. The second is the "WebActs Help Document", which serves as the operating manual for the database.

A revised PIA is currently in concurrence review and is expected to be finalized in the next 30 days, at which time the NRC will proactively release it. We will inform you once it has been made publicly available. Based on this, you agreed to narrow your request to exclude it at this time. We have attached the WebActs Help Document.

Signature - Freedom of Information Act Officer or Designee
Stephanie A. Blaney
Digitally signed by Stephanie A. Blaney
Date: 2020.10.23 07:31:39 -04'00'
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WebACTs Help Document

WebACTs comprises several areas to help facilitate the work of the ACRS:
- System Administration/Maintenance
- Auditing
- Users
- Available Committee Date Management
- Topic Management
- Meeting Scheduling and Preparation
- Hotel Reservations
- Task Assignment
- Emails
- Alerts

The PMDA Module includes the following:
- Public User Data
- Reports
- Travel Management, including:
  a. Hotels and Hotel Reservations
  b. Travel Requests
  c. Travel Records
  d. Travel Reservation Meeting List
- Appropriations Management
- Training Management
- Procurement Management, including:
  a. Contracts
  b. Visa Requests and Requisitions
- PMDA Maintenance Items
Logging In

WebACTs integrates login with the NRC network. If a user logged in to the NRC network goes to WebACTs in their web browser (Internet Explorer), the user will automatically be logged in to WebACTS. If the user utilizes another browser, he will be prompted for the NRC network credentials before logging in.

Upon logging in, each user will see a customized menu with all the options they have permissions to access.
The “Site Admin” portion of WebACTs allows users with “Site Admin” privileges to set up and maintain the various fundamental data on which the system relies.

Specific administrative features will be explained in subsequent sections of this help documentation. The general administrative/maintenance features that will be described here are:

1) Page Administration  
2) Role Management  
3) Cognizant Office Management  
4) Meeting Location Management  
5) Subcommittee Management  
6) Settings and other Maintenance Items
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<td>Audit Log</td>
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Updated: November 2012
Page Administration

Each separate screen/web page within the WebACTs system must be entered into the system if this hasn’t already occurred as part of the installation or upgrade.

Each page requires:
1. a title
2. the relative path to the page
3. the “parent” page in the page hierarchy

Each page may optionally have:
1. a description
2. limited access to specific roles (if no roles are selected, all roles are allowed access)
3. a designation indicating whether the page will be visible in menus
4. the name of the help file in the /help directory

Page Administration may also be used to set up horizontal menus placed on certain pages, such as within the Technical Scheduler. This allows items on these menus to be configured by a WebACTs administrator as needs change and evolve over time.
To set up a horizontal menu, the user needs only select the “Is Horizontal Menu Control” check box. The rest of the settings are the same.
Page Edits

To edit an existing page, click on the edit icon next to the desired page in the list. The page details are then loaded above where they may be changed and saved.

*Note: A user cannot delete pages once they have been entered. To remove a page from the menu, uncheck the box Visible from Menu.*
Report Button:

The report button control is available for any page within WebACTs and allows access to a report menu associated with the particular page on which the report button control is placed. The report menu associated with the page is indicated within the Report Menu dropdown list within the Page Administration section of Site Admin.

The report button automatically passes in any parameters to associated reports by using the query string identifiers within the URL of the page, resulting in the control being easy to place on any page without requiring file compilation or coding.
Role Administration

WebACTs is a role-based system, meaning that many of its features are restricted or behave differently based on which roles a user has been assigned.

To enter a new role:
1) Enter the role’s name.
2) Click the save icon.

Warning: Editing roles should be done with extreme caution. Many features of the system are tied to these roles and their names, so changing a role’s name could have far-reaching consequences. To edit an existing role:
1) Click the edit icon next to the appropriate role.
2) Edit the role name.
3) Click the save icon.
4) The cancel icon may be used to abandon any changes prior to saving.

Warning: Deleting roles should be done with extreme caution. Many features of the system are tied to these roles and their names, so deleting a role could have far-reaching consequences. To delete a role:

Updated: November 2012
1) Click the delete icon next to the role that should be deleted.
2) Click “OK” in the confirmation pop up window.
Branches Associated with Roles

Site Administrators may now associate roles within the system with branches. This data is then used to correctly filter certain alerts.

For example, assume a role called "Branch A Approver" has been created, and that role is associated with Branch A. If an alert is created which emails people in the Branch A Approver role when a new travel request is created, the alert system will check to ensure that the person making the request is also in Branch A. If not, the email alert will not be sent to people in the Branch A Approver role.
Cognizant Office Management

Cognizant offices are assigned to each agenda item of a meeting from a dropdown list of choices. Those choices are configured using the Cognizant Office Management screen.
To enter a new Cognizant Office:
1) Enter the name/abbreviation of the Cognizant Office.
2) Enter a short description of the Cognizant Office.
3) Enter a contact email address.
4) Enter a contact phone number.
5) Enter a contact fax number.
6) Click “Add”.

To edit a Cognizant Office:
1) Click the appropriate edit icon in the list of Cognizant Offices.
2) Edit the appropriate information.
3) Click “Save”.

Updated: November 2012
To enter contacts for a Cognizant Office:
1) Enter the contact’s name.
2) Enter a phone number for the contact.
3) Enter an email for the contact.
4) Click the “Save” icon.

To edit a contact for a Cognizant Office:
1) Click the edit icon to select the Cognizant Office.
2) Click the edit icon next to the contact to be edited.
3) Edit the information as needed.
4) Click the “Save” icon.
To delete a contact for a Cognizant Office:
1) Make sure the Cognizant Office has been selected.
2) Click the delete icon next to the contact to be deleted.
Meeting Location Management

Each meeting is scheduled in one or more locations. These locations are managed using the Meeting Location Management screen.

To enter a new location:
1) Enter a name for the location.
2) Enter a contact name for the location.
3) Enter a room number.
4) Enter a contact phone number.
5) Enter an address.
6) Enter a contact email address.
7) Click “Add”.

![Meeting Location Management Screen](image-url)
To edit a meeting location:
1) Click the edit icon next to the location.
2) Add/edit the data as needed.
3) Click “Save”. 
Subcommittee Management

Each subcommittee has various data that need to be input so the system knows about that subcommittee, such as membership, lead members, branch, etc.

To enter a new subcommittee:
1) Enter a name.
2) Enter a short description.
3) Select whether this subcommittee is allowed to meet during other subcommittees. For example, some subcommittees meet during the lunch break of another subcommittee meeting. Selecting this checkbox notifies the system to allow these “overlapping” meetings, instead of enforcing the “one meeting at a time in each location” rule.
4) Select whether meetings of this subcommittee require Cognizant Offices and Office Contacts.
5) Select the branch that the subcommittee is a part of.
6) Select the program area that applies to the subcommittee.
7) Select the lead member of the subcommittee.
8) Select the lead engineer of the subcommittee.
9) Select the committee chairman.
10) Select the members of the subcommittee.
11) Select a color to represent the subcommittee on certain reports.
12) Click “Add”.

![Subcommittee Management Interface](image-url)
To edit an existing subcommittee:

1) Click the appropriate edit icon in the list of subcommittees.
2) Edit the information as needed.
3) Click “Save”.

Updated: November 2012
To delete/deactivate a subcommittee:
1) Click the delete icon next to the subcommittee that is to be deleted.
2) Confirm the deletion.

Note: Subcommittees are not actually deleted. They are deactivated and hidden, so they appear for all intents and purposes to be deleted.
Sequence Administration

Many transactions within the PMDA module require a sequence of steps to authorize, obligate, and expend transaction resources. These sequences are controlled through the programming interface and defined within the Sequence Maintenance section of the Site Admin portion of WebACTs.

Examples of sequences maintained include RFPA Approval, Travel and Training.

**Warning:** The system relies on many of these settings so be very cautious when editing them that it is done properly. Otherwise pieces of the system could stop working.
## Settings and other Maintenance Items

There are several other settings and maintenance items that the system relies on for various operations. These settings are controlled in the Maintenance Items screen. This screen has several sections.

*Warning: The system relies on many of these settings so be very cautious when editing them that it is done properly. Otherwise the system could stop working.*

### General Types and Roles

<table>
<thead>
<tr>
<th>Type</th>
<th>Access Level</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</table>

### Organisational Unit Administration

<table>
<thead>
<tr>
<th>Type</th>
<th>Access Level</th>
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</table>

### Technical Procedure Administration

<table>
<thead>
<tr>
<th>Type</th>
<th>Access Level</th>
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</thead>
<tbody>
<tr>
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</tbody>
</table>

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**Updated: November 2012**
The first section contains the various types of settings and those individual settings.

To add a setting:
1. Choose the appropriate type of setting in the drop down list.
2. Enter the setting name.
3. Enter a short description.
4. Click the “Save” button.

To edit a setting:
1. Click the edit icon next to the appropriate setting.
2. Edit any information as necessary.
3. Click “Save”.

Updated: November 2012
To delete a setting:
1. Choose the appropriate type of setting in the dropdown list.
2. Click the appropriate delete icon.
3. Confirm the deletion.

To add a new type of setting:
1. Click the + symbol next to the dropdown list.
2. Enter the type of setting.
3. Click the “Add” button.
The second section is the Organizational Chart Administration, where the branches are managed.

To add a new branch:
1. Add the name of the branch.
2. Add a short description.
3. Select who heads the branch.
4. Click the "Save" icon.
To edit a branch:
1. Click the edit icon next to the branch to be edited.
2. Edit the data.
3. Click the “Save” icon.

### Organizational Chart Administration

<table>
<thead>
<tr>
<th>Delete</th>
<th>Name</th>
<th>Description</th>
<th>Chief or Director</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ACRS</td>
<td>ACRS Members and Consultants</td>
<td>At J</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Office of the Director</td>
<td>Office of the Director</td>
<td>Ha M. Ed</td>
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<tr>
<td></td>
<td>PMDA</td>
<td>PMDA</td>
<td>Be Al</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Technical Support Branch</td>
<td>Technical Support Branch</td>
<td>Sa Ca</td>
<td></td>
</tr>
</tbody>
</table>

Record Count: 5

To delete a branch:
1. Click the delete icon next to the branch to be deleted.
2. Confirm the deletion.
The third section is the Technical Program Area Administration. This section is used to add to and edit the various program areas that are available for topics and subcommittees to be assigned to.

To add a new program area:
1. Enter the prefix.
2. Enter the name.
3. Select if it’s required by statute.
4. Select the category of program area (this list of categories is controlled by the first section of settings).
5. Click the “Save” icon.
To edit a program area:
1. Click the edit icon next to the program area
2. Edit the data as needed
3. Click the save icon
To delete a program area:
1. Click the appropriate delete icon.
2. Confirm the deletion.

The fourth section controls the various defaults used by the system.

These settings are edited by changing the numbers and clicking “Save”. 
Other Settings

Within the Web.config file available from the WebACTS_Redesign folder within the web directory housing the WebACTS application, the key “TrainingExpenseLimit” which defines the threshold beneath which training records are funded by Visa Requests as opposed to Job Codes, exists within the appSettings section and its value may be set by an administrator.

```xml
<appSettings>
  <add key="TrainingExpenseLimit" value="3000"/>
</appSettings>
```

Within the Site Admin portion of WebACTs, a button is available for PMDA Administration, which links to the screens to administer Programs/Job Codes as well as Fiscal Years.
Audit Log

WebACTs provides an auditing feature to provide a trail of user activity and allow administrators to view this audit trail.

Many actions in WebACTs trigger the system to make a record. Some of these actions are logging in or out, saving a record, and any errors generated.

The Audit Log provides a paged list of each of these audit records and has options to filter the list by:

- User
- Audit Type
- Date Range

A search/filter feature is provided to help narrow searches even further.

The details of each audit record can be viewed by clicking the appropriate edit icon.
### Users

**User Administration**

#### Add New User

<table>
<thead>
<tr>
<th>Access Level</th>
<th>Employee Type</th>
<th>Branch</th>
<th>Title</th>
<th>Last Login</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>Employee</td>
<td>PMDA</td>
<td>Branch Chief</td>
<td>7/13/2012</td>
</tr>
<tr>
<td>User</td>
<td>Employee</td>
<td>PMDA</td>
<td>Management Analyst</td>
<td>8/29/2012</td>
</tr>
<tr>
<td>User</td>
<td>Engineer</td>
<td>Reactor Safety Branch B</td>
<td>Technical Advisor</td>
<td>9/19/2012</td>
</tr>
<tr>
<td>Disabled</td>
<td>Employee</td>
<td>PMDA</td>
<td>Support Services Specialist</td>
<td>2/21/2012</td>
</tr>
</tbody>
</table>

Updated: November 2012
WebACTs keeps track of certain information about all users with access. Each user may have these types of information:

- Contact information (primary address, etc.).
- Private information (hire date, visa card number, etc.)

- Account information (roles and access levels)
- Organization information (type of user and branch)

- Any conflicts of interest
- Checklists done

<table>
<thead>
<tr>
<th>CheckList Type</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exit Checklist</td>
<td>Visa Purchase Card</td>
</tr>
<tr>
<td></td>
<td>Travel Bancard</td>
</tr>
<tr>
<td></td>
<td>Thank you letter from Commission/Committee</td>
</tr>
<tr>
<td></td>
<td>Termination SF276</td>
</tr>
<tr>
<td></td>
<td>Security Termination Statement</td>
</tr>
<tr>
<td></td>
<td>Return or Destruction of Sensitive Unclassified Documents</td>
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<tr>
<td></td>
<td>Reconcile Outstanding Travel Vouchers/Compensation</td>
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<td>Faxquis</td>
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<td></td>
<td>NRC Badge</td>
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<td></td>
<td>FTS 2000/Telephone Credit Card</td>
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<td></td>
<td>Form S2</td>
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<td></td>
<td>Disposition of all NRC property</td>
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<tr>
<td></td>
<td>Delete Document Distribution List for NRC publications Microfiche Subs (DCS, HS, etc.)</td>
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<tr>
<td></td>
<td>Close Member Mailbox</td>
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<td></td>
<td>Cert. Of Non-possessment of Classified</td>
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<td></td>
<td>Cancel Lab e-mail</td>
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<tr>
<td>New Member Checklist</td>
<td>New Member Certificate (mat and frame)</td>
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<td></td>
<td>New Member Acceptance Letter</td>
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<tr>
<td></td>
<td>NRC-178, Security Acknowledgment</td>
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<td></td>
<td>Apply for Travel Bancard</td>
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<td>Create a mailbox</td>
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<td>Computer Equipment</td>
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<td>FTS 2000/Telephone Credit Card</td>
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<td>Name Plate</td>
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<td>LPR e-mail Account</td>
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<td>Visa Purchase Card</td>
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<td>SF-87, Fingerprint Card (2 copies)</td>
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<td>Photo Badge</td>
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<tr>
<td></td>
<td>SF 278, Public Financial Disclosure Report</td>
</tr>
<tr>
<td></td>
<td>Press Release/Biography</td>
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<td></td>
<td>SF-86, Questionnaires for Sensitive Positions (300 version); 446</td>
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<td></td>
<td>Form 306, Declaration of Federal Employment</td>
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<td>Appointment Memo from Commission</td>
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<td>Form 2231, FAF Start Date Direct Deposit</td>
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<td>Federal Withholding Form, W-4</td>
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<td></td>
<td>Forms 52,446, 230, 145B, and SF278/004/0409 memos</td>
</tr>
<tr>
<td>Renewal Checklist</td>
<td>SRM approving reappointment</td>
</tr>
<tr>
<td></td>
<td>Letter of Reappointment from NRC Chairman</td>
</tr>
<tr>
<td></td>
<td>Forms 52, 446</td>
</tr>
</tbody>
</table>

Updated: November 2012
- Any Human Resources communications

![Human Resources Communication Table]

- Hotel Preferences

![Hotel Preferences]

This data is all entered and edited using the User Details page. If any required fields have not been entered, the user record will not be saved and there will be a message at the top of the screen reflecting the issue.
The User Details page is reached by going through the User Administration page, which provides a filterable list of all users.

This list can be filtered by:
- Access Level
- Employee Type
- Branch
- Title
- Status (active vs. inactive)
To view/edit a user's details, click on the edit icon next to their name.

To deactivate a user:

1. Click the delete icon next to their name.
2. Confirm the deletion.

*Note: Items with a delete icon next to them are not already deactivated and have no future meetings assigned.*
Technical Scheduler

**Available Committee Dates**

The Available Committee Date Management is used to create periods when either subcommittee or full committee meetings can be set up. This section is for branch chiefs and other users with “Technical Admin” privileges.
To add a new available date range:
1. Choose the type of meeting to allow; either subcommittee or full committee.
2. Enter the first and last dates that should allow that type of meeting.
3. Click “Add”.

To edit an existing date range:
1. Select the proper meeting type in the Committee Type View area and the right time period using the Date View area.
2. Click the edit icon next to the range to be edited.
3. Change the data as needed.
4. Click “Save”.

Updated: November 2012
To delete a date range:
1. Click the appropriate delete icon.
2. Confirm the deletion.

Note: No delete icon will be shown for Available Committee Date ranges that already have meetings scheduled within them since these ranges aren’t allowed to be deleted.
**Topic Management**

The Topic Management portion of WebACTs is meant to keep track of the various topics dealt with by the ACRS and ensure they are dealt with fully. This section is for Engineers and others with access to the Technical Scheduler portion of WebACTs. Depending on access roles, some users will have a read-only view.

**Topic List**

![Topic Management Menu](image-url)
The Topic List provides a paged view to find a topic and delete and/or view it according to access roles.

The list can be filtered by:
- Subcommittee.
- Technical Program Area.
- Year.
- Whether it’s been completed or not.
- The lead engineer.

The list can also be further searched to find topics with specific keywords.
To view/edit a topic
1. Click the edit icon next to the topic

2. You will then be brought to the topic detail page.
To delete a topic
1. Click the delete icon
2. Confirm the deletion

Note: If a delete icon isn’t displayed, that topic isn’t eligible for deletion, either because the logged in user doesn’t have access or the topic is marked as completed.
Topic Detail

Each Topic can be viewed using the Topic Detail page. This page displays the data about each topic as well as any agenda items that have been created to address this topic.

To add/edit a Topic:
1. Enter the Topic.
2. Select the applicable Technical Program Area.
3. Select the type of committee meetings needed.
4. Click "Save".

Add Agenda Items as needed
Note: If, by the end of the day, a Topic doesn’t have agenda items to satisfy the requirements set by the Meetings Needed administrative setting, it will be deleted. For example, if a Topic is supposed to have both a full committee meeting and a subcommittee meeting, but only has a subcommittee meeting set up, an error message will be displayed and the Topic will be cleared from the system.
To edit an associated agenda item:
1. Click the appropriate edit icon.
2. You are now taken to the meeting details page.

If deletion of an agenda item is allowed and the logged in user has sufficient rights, a delete icon will be displayed which can be clicked to delete it.
Meetings and Agenda Items

The primary purpose of the Technical Scheduler portion of WebACTs is to schedule committee meetings and the agenda items.

There are two kinds of meetings, full committee meetings and subcommittee meetings. Each type of meeting has its own set of rules.
**Meeting List**

The Meeting List is a list of committee meetings which includes the following information and capabilities:

1) The list can be filtered by committee type as well as date range.
2) The list can be sorted by clicking on the header of any column that contains an up or down arrow.
3) The page also includes (if the user has sufficient access rights) a button to add a new Full Committee meeting.
1) To view/edit an existing meeting, click the appropriate edit icon.
2) To delete an existing meeting (if allowed), click the delete icon and confirm.
Meeting Calendars

WebACTs provides several different calendar views of meetings.

One view is a single month calendar of all meetings.
The calendar may also be viewed three months at a time.
The final view, My Calendar, allows a user to see all of the meetings he/she is to attend.

Each of the meetings on the calendar can be hovered over to get more details or clicked on to be taken to the appropriate page with full details.
Here is a view of full meeting details:
The single month view contains a dropdown field in the lower left corner to navigate quickly to other months.
Another useful view is the Subcommittee Schedule page. This page features a scheduling grid displaying each meeting in each location over the specified date range.

Clicking on the meeting header will open specific details for that committee date range.

Updated: November 2012
**Subcommittee Agenda Item**

Subcommittee meetings are scheduled using the Agenda Item Details page. Since subcommittees are only allowed one agenda item per meeting, everything can be done on one page.

To create a new subcommittee meeting agenda item:

1. Go to the Topic Detail page:
   1. Click the “Add Subcommittee Meeting for Topic” button.
On the Agenda Item Detail page:
1. Choose the appropriate subcommittee
2. Choose the available committee date range you would like to schedule this meeting within.
   - Click the “Request New Dates” button if no dates are available or if different dates are needed, which will send a request to a Technical Admin to create more available dates.
3. Check the “Tentative?” box if this meeting is not confirmed.
4. Fill in the start and end times for each day of the meeting; WebACTs will handle assigning an available room.
   - Note: Not all dates within the available range need to be used.
5. Enter a purpose for the meeting.
6. Enter a description.
7. Select a category.
8. Select a security level.
9. Select a priority.
10. Enter the date pre-meeting documents are due (or select N/A if they aren’t needed).
11. Select a lead member.
12. Select a lead engineer.
13. Select a backup lead member, if applicable.
14. Select a backup lead engineer, if applicable.
15. Ensure the members attending are correct.
16. Add any consultants who will be attending.
17. Add the appropriate NRC Cognizant Offices.
18. Add the applicable TAC #s.
19. Enter the Program Office Staff Contact.
20. Add any External Stakeholders.
21. Click “Save Pre-Meeting Details”.

Note: If any errors occur during saving, or required fields have not been entered, validation messages will appear on the screen to alert the user.
To edit a subcommittee meeting or enter post-meeting details:

1. From the Meeting Details page, located under the “Technical Scheduler”, “Topic List”, Edit Details:
1. Change any pre-meeting data as needed.
2. Click “Save Pre-Meeting Details”.

Updated: November 2012
1. Click on the “Post-Meeting Details” header to expand this section.
2. Enter any data as applicable.
3. Click “Save Post-Meeting Details” (this will save the pre-meeting details as well).

This page also has a Reports tab which contains any reports available for this subcommittee meeting.

To copy the details of a subcommittee meeting to a new meeting date:
1. Click on the “Copy Agenda Item to New Meeting” button.
2. Confirm that you wish to continue.
3. All the attributes of the meeting, including members, subcommittee, purpose, etc., will be copied to a new meeting on the date that you select.
To subscribe to alerts for a meeting:
1. Click the “Subscribe to Alerts for this Meeting” button.
2. Changes and updates to the meeting will automatically be sent to your “My Tasks” area.
**Full Committee Meeting**

Full committee meetings may have multiple agenda items assigned to them so a separate page is needed to set up the dates of the meeting. This is done by a branch chief or site administrator using the Meeting Administration page.

This page includes:
1. A list of agenda items for the meeting.
2. The meeting number and times.
3. A list of all future Full Committee meetings and available date ranges.
To add a new meeting:
1. Select the available committee date range that you would like to schedule the meeting within.
2. Choose the start and end dates and times of the meeting.
3. Enter the meeting number.
4. Enter the start and finish times for each day of the meeting.
5. Click “Save”.

Note: To add a new meeting while an existing one is displayed, click the Add New Meeting button and then do the above.
To edit a meeting:
1. Choose the meeting from the Meetings List or a Meeting Calendar or the list of Full Committee meetings on the right side of this page.
2. Edit the necessary data
3. Click Save
Full Committee Agenda Items

Full committee meeting agenda items are also scheduled using another Agenda Item Details screen.

To create a new full committee meeting agenda item:

1. Go to the Topic Detail page:
   - Click the “Add Topic to Full Committee” button.
On Agenda Item Detail page:
1. Choose the full committee meeting that the agenda item should be a part of.
2. Choose which day of the meeting the agenda item should start.
3. Choose how many hours the agenda item should be allotted.
   Note: If the user has the proper access rights, he/she can assign a specific date and times to the agenda item.
4. Enter an Agenda Header.
5. Check the “Tentative” box if appropriate.
6. Enter a description.
7. Select a purpose.
8. Select a category.
9. Select a security level.
10. Select a priority.
11. Enter the date pre-meeting documents are due, or select “N/A”.
12. Select a lead member.
13. Select a lead engineer.
14. Select a backup lead member if applicable.
15. Select a backup lead engineer if applicable.
16. Add the appropriate NRC Cognizant Offices.
17. Add the applicable TAC #s.
18. Enter the Program Office Staff Contact.
19. Add any External Stakeholders.
20. Click “Save Pre-Meeting Details”.

Note: If any errors occur during saving, or required fields have not been entered, validation messages will appear on the screen to alert the user.
To edit a full committee meeting or enter post-meeting details:
1. Change any pre-meeting data as needed.
2. Click on the “Post-Meeting Details” header to expand the post-meeting details section.
3. Choose the appropriate accomplishment type.
4. Fill in the requested data
5. Click the “Save Post-Meeting Details” button. Pre-Meeting details will also be saved.
To subscribe to alerts for a meeting:

1. Click the “Subscribe to Alerts for this Meeting” button.
2. Changes and updates to the meeting will automatically be sent to your “My Tasks” area, alerting you of the update for the particular meeting.
This page also has a reports tab containing any reports available for the agenda item:
Reports

Various reports are available throughout the WebACTs pages. These are useful for data to be output in formats that ACRS personnel are accustomed to seeing. These are either displayed individually or as part of a menu of reports.

This section of the help documentation relates to how to set these reports up in the system, as opposed to what each report is and what it means. It is applicable to users with the “Site Admin” role.

Adding/Editing Individual Reports

Reports are entered into the system using the Report Administration screen in the Site Admin section. This tells WebACTs where the report is located on the SSRS (SQL Server Reporting Services) report server so that it can be imported and displayed when requested.
To add a new report:
1. Add the report’s name—this is what will be used when a link to the report is displayed.
2. Add the relative URL to the report on the report server (e.g. /coi).
3. Enter a brief description.
4. Select all roles allowed to view the report.
5. Enter each parameter the report accepts.
   o Add Parameter: Type parameter and click the small “Add” button.
   o Remove Parameters: Select parameters to remove and click “Remove Selected”.
6. Click “Add”.

Updated: November 2012
To edit an existing report:
1. Click the edit icon next to the report to edit.
2. Change the data as needed.
3. Click “Save”.
Adding/Editing Report Menus

Report menus are set up and configured by means to the Report Menu Administration page, but they need to be programmatically added to any pages on which they appear.
To set up a new Report Menu:
1. Enter the name of the menu.
2. Select each report that should be included and click the small “Add” button.
3. Once all reports have been added, click the large “Add” button.
To edit an existing Report Menu:
1. Click the edit icon next to the Report Menu to be edited.
2. Add any newly needed reports by selecting and clicking the small “Add” button.
3. Remove any unneeded reports by clicking the delete icon.
4. Re-order the reports using the up and down arrows.
5. Click “Save”.

![Report Menu Administration](image-url)
To delete a Report Menu:

1. Click the delete icon.

**Warning**: Be careful in deleting Report Menus to ensure the Report Menu has been removed programmatically from the page it was on. If it hasn’t, an error will be generated since the system will be looking for a Report Menu that doesn’t exist.
Hotel Reservations

WebACTs keeps track of each member who is attending each committee meeting. To facilitate this process, it also tracks each member’s hotel reservations.
Hotels Reservations

Hotel Setup

Before hotel reservations can be entered, each potential hotel must be set up in the system. This is done in the Hotel Management page in the Site Admin section.

To add a new hotel:

- Enter the hotel’s name.
- Enter a contact person for the hotel.
- Enter the hotel’s phone number.
- Enter the hotel’s fax number.
- Enter the hotel’s address.
- Enter the hotel’s email address.
- Click “Add”.
To edit an existing hotel:
1. Click on the applicable edit icon in the list of hotels.
2. Edit the information as needed.
3. Click “Save”.

Note: Hotels can’t be deleted once saved as they are needed for historical data purposes.
**Hotel Reservations**

Entering hotel reservations starts with the Manage Hotel Reservations screen in the PMDA portion of WebACTs. This screen contains a list of committee meetings, the attending members, and their reservation information. It is filtered by date and whether the reservations have been processed or not.
To edit the hotel reservations for that meeting:

- Click “Reserve”.

- Fill in the appropriate information for each member on the next page:
  1. Whether the member requires a reservation.
  2. Which hotel the reservation should be for.
  3. The check-in date.
  4. The check-out date.
  5. Confirmation number.
  6. Any other notes.
  7. Click “Save”.

Updated: November 2012
Tasks

The purpose of the Tasks Management portion of WebACTs is to ensure everything gets done that needs to get done. Tasks are assigned either to a person or to a role with a date due. If they are assigned to a person, they will show up to be handled in that person’s “My Tasks” page. If they are assigned to a role, they will show up in the “My Tasks” page of all the people with that role until someone completes it.

Tasks are assigned by the system as part of an automated process that has been set up or by someone with the proper access roles.

My Tasks Page

Each user has a list of all tasks they are responsible for, as well as a list of tasks they have completed (which haven’t been archived).
To view the details of a task:
- Click the edit icon.

To mark an incomplete task as completed:
- View the task details.
- Click “Complete”.

Updated: November 2012
To archive a completed task:

- View the task details.
- Click “Archive”.

![Image of My Tasks interface with an arrow pointing to the Archive button]
Tasks may also be archived by:

1) Click the selection box to the right of each desired task.
2) Click the “Archive Selected Tasks” button.
**Assign Tasks**

A task can be assigned to specific people or to a role in general (e.g. if a Branch Chief needs to open up more time for meetings).

To assign a task:
1. Select specific people the task should be assigned to.
2. Select any roles the task should be assigned to.
3. Enter a short description of the task.
4. Enter the details of the task.
5. Pick the date the task is due.
6. If you would like each person notified of the task by email, click the “Send Email Notification” checkbox.
7. Click “Assign”.

![Assign Tasks](image-url)
Emails

There are several instances where WebACTs will email users notifications. This can happen when meetings change, a new task is assigned to them, etc.

Each user has a “My Emails” page which stores these emails in case they were not received. In order to keep this list from becoming unwieldy, the list can be filtered by date and the maximum number of emails desired to be displayed.

To view or hide the details of an email, click on the header containing the summary.
**Email Templates**

Various emails sent within the system can be formatted to display the data in a user-friendly format. This is done by configurable email templates.

To add a new Email Template:
1. Enter a template name.
2. Enter a short description.
3. Enter the subject line that should appear in the email.
4. Enter the content of the email using `<<message>>` as a placeholder for where the system message will be inserted automatically.
5. Click “Add”.

![Email Template Administration](image-url)
To edit an existing Email Template:
1. Click the edit icon next to the appropriate template.
2. Change the data as needed.
3. Click “Save”.

![Email Template Administration](image)
Alerts

Alerts are used throughout the system to notify users when specific triggers occur. Alerts may exist for Agenda Items, Reserved Meeting Dates and Hotel Reservations. Three types of alerts may be specified: Action, Reminder and History.

The “Action Alert” type executes specific actions, such as sending an email or assigning a task, immediately upon a trigger pertaining to the entity acted upon. For example, an Action Alert may be specified to send an email to the lead engineer of an Agenda Item when that Agenda Item’s date has changed.

The “Reminder Alert” type reminds users to perform a task pertinent to an entity like an Agenda Item, Reserved Date or Hotel Reservation. For example, a Branch Chief may receive an email or assigned task to remind them to send a Full Committee Meeting Agenda report fourteen days before the occurrence of the meeting.

The “History Alert” type records a history of actions performed upon an entity so a record may be kept of those actions, and the data may be used throughout the system and in reports. For example, a History Alert may be recorded in the system whenever a Reserved Date is cancelled.
**Alert Templates**

In order to specify that alerts occur, alert templates are created and edited to generate the details of the alert, such as the type of alert, the entity the alert applies to, and the actions which trigger an alert.

**Action Alert Template:**
To add a new Action Alert Template:
1. Enter an alert template name.
2. Choose “Action” as the alert type.
3. Choose the object the alert will act upon: Agenda Item, Reserved Meeting Date, or Hotel Reservation.
4. Choose the trigger the alert will be sent upon. Each object has trigger fields specific to it. For example, Agenda Item has “Agenda Item Hours Updated” and “Lead Engineer Changed”.
5. Choose the type of meeting the object applies to: Full Committee or Subcommittee. This will update the names of trigger fields, as different types of meetings may carry different names for their data fields.
6. When choosing certain triggers, such as date related triggers, the “Trigger Field” control will become visible. If it is visible, choose a trigger field, such as “Agenda Item Date” or “Reserved Meeting Date”. This will indicate which time-dependent field the alert is to be triggered from.
7. Choose whether to send an email.
8. If the “send email” checkbox is selected, the “Email Template” field will appear, and a selection is required. If this is chosen, an email detailing the alert will be sent to the recipients specified.
9. Choose to send an assigned task. If this is chosen, an assigned task detailing the alert will be sent to the recipients specified.
10. Enter the email subject.
11. Enter the body of the email.
12. Select the alert recipients. The list of available recipients differs depending on the object the alert exists for. For example, Agenda Items include the members attending, while Hotel Reservation alerts may be sent to the member affected by the reservation.
13. Select the roles which should receive the alert. The email or assigned task detailing the alert will be sent to each user assigned that role.
14. Enter any specific email addresses to send the alert message to. If the email server portion of the system has been completely and correctly configured, the system will send emails to these recipients.
15. Select any system users to send the assigned task or email detailing the alert to. The selected people will see these assigned tasks and/or emails in their “My Tasks” or “My Emails” section when logging in to the program.
16. Select the information pertinent to the alert that you wish to include in the message body. The information that may be included differs with the object chosen. For example, Agenda Items may include the meeting members in the body of the alert message, while a Hotel Reservation alert may include the member affected by the reservation.
17. Click the “Add” button to save and add the alert template.
**Alert Template Administration**

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<th>Field Description</th>
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<tbody>
<tr>
<td>1</td>
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<td>2</td>
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<td>Alert Object:</td>
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<tr>
<td>4</td>
<td>Trigger:</td>
</tr>
<tr>
<td>5</td>
<td>Type of Meeting:</td>
</tr>
<tr>
<td>6</td>
<td>Trigger Field:</td>
</tr>
<tr>
<td>7</td>
<td>Send Email:</td>
</tr>
<tr>
<td>8</td>
<td>Email Template:</td>
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</tr>
<tr>
<td>16</td>
<td>Information to Include:</td>
</tr>
<tr>
<td>17</td>
<td>Add</td>
</tr>
</tbody>
</table>
To edit or delete an existing Action Alert Template:
1. Click the edit icon next to the appropriate template.
2. Change the data as needed.
3. Click the “Save” or “Delete” button.
Reminder Alert Template:
To add a new Reminder Alert Template:
1. Enter an Alert Template name.
2. Choose “Reminder” as the alert type.
3. Choose the object the alert will act upon: Agenda Item, Reserved Meeting Date, or Hotel Reservation.
4. Choose the type of meeting the object applies to: Full Committee or Subcommittee. This will update the names of trigger fields, as different types of meetings may carry different names for their data fields.
5. Choose the trigger the alert will be sent upon. Each object has trigger fields specific to it. For Reminder alerts, all of these fields are related to a date. When choosing certain triggers, such as date related triggers, the “Trigger Field” control will become visible. If it is visible, choose a trigger field, such as “Agenda Item Date” or “Reserved Meeting Date”. This will indicate which time-dependent field the alert is to be triggered from.
6. Choose if the alert is triggered by the start or end of the related date. For example, if the trigger field is the Reserved Meeting Date, and you choose “Start of Date”, the system will send the alert on the first day of the date range.
7. Enter of the number of days before/after the primary alert at which a reminder should be sent. Negative numbers trigger a reminder prior to the event; positive numbers trigger a reminder after the event. For example, to send the reminder seven days before the trigger date, enter “-7”. To send the reminder seven days after the trigger date, enter “7”. Enter “0” to send the reminder on the day of the event.
8. Choose whether to send an email. If this checkbox is selected, the “Email Template” field will appear, and a selection is required. If this is chosen, an email detailing the alert will be sent to the recipients specified.
9. Choose to send an assigned task. If this is chosen, an assigned task detailing the alert will be sent to the recipients specified.
10. Enter the email subject.
11. Enter the body of the email.
12. Select the alert recipients. The list of available recipients differs depending on the object the alert exists for. For example, Agenda Items include the members attending, while Hotel Reservation alerts may be sent to the member affected by the reservation. When selecting by role, the email or assigned task detailing the alert will be sent to each user assigned that role.
13. Enter any specific email addresses to send the alert message to. If the email server portion of the system has been completely and correctly configured, the system will send emails to these recipients.
14. Select any system users to send the assigned task or email detailing the alert to. The selected people will see these assigned tasks and/or emails in their “My Tasks” or “My Emails” section when logging in to the program.
15. Select the information pertinent to the alert that you wish to include in the message body. The information that may be included differs with the object chosen. For example, Agenda Items may include the meeting members in the body of the alert message, while a Hotel Reservation alert may include the member affected by the reservation.
16. Click the “Add” button to save and add the alert template.
To edit or delete an existing Reminder Alert Template:
1. Click the edit icon next to the appropriate template.
2. Change the data as needed.
3. Click the “Save” or “Delete” button.
History Alert Template:
To add a new History Alert Template:
1. Enter an alert template name.
2. Choose “History” as the alert type.
3. Choose the object the alert will act upon: Agenda Item, Reserved Meeting Date, or Hotel Reservation.
4. Choose the trigger the alert will be sent upon. Each object has trigger fields specific to it. For example, Agenda Item has “Agenda Item Hours Updated” and “Lead Engineer Changed”.
5. Choose the type of meeting the object applies to: Full Committee or Subcommittee. This will update the names of trigger fields, as different types of meetings may carry different names for their data fields.
   When choosing certain triggers, such as date related triggers, the “Trigger Field” control will become visible. If it is visible, choose a trigger field, such as “Agenda Item Date” or “Reserved Meeting Date”. This will indicate which time-dependent field the alert is to be triggered from.
6. Click the “Add” button.
To edit or delete an existing History Alert Template:
1. Click the edit icon next to the appropriate template.
2. Change the data as needed.
3. Click the “Save” or “Delete” button.
WebACTs PMDA Module

The PMDA section of WebACTs is reached via the PMDA button on the home menu.

Within the PMDA section, the information deals primarily with these six areas:

1) Public user data
2) Reports
3) Travel Management, including:
   a. Hotels and Hotel Reservations
   b. Travel Requests
   c. Travel Records
   d. Travel Reservation Meeting List
4) Appropriations Management
5) Training Management
6) Procurement Management, including:
   e. Contracts
   f. Visa requests and requisitions
Here is the main PMDA menu:
**View Public User Information**

Certain basic information about each person is available through this screen. This is a limited sub-set of all the data accessible to administrators via the User Administration section. This sub-set is available to most people with access to WebACTs.

A person’s conflict of interest data is also included on this screen, as well as a link to request additions/corrections to be made.
To request additions/corrections:
1) Click on “Click to Request Addition of Data”.
2) Select who the request is to be sent to.
3) Fill in the request.
4) Click “Send Request”.

If your permissions allow, the “Update COI Info” option will be available, allowing you to edit the COI Information without sending a request.
PMDA Reports

The PMDA Reports page includes a categorized list of all the PMDA reports that serve the overall needs of PMDA.

Appropriation Reports:
- Appropriation Summary Report
- Appropriation Budget Summary

Contract Reports:
- Contracts Summary of Spent Funds
- Contracts Summary
- Contracts with invoices

General Reports:
- CML with Hotel Reservation Conf #
- Committee Meeting List
- Open-Closed Meetings in web/CTA for Fiscal Year 2010
- SC Membership
- Members Term Dates
- Committee List Public Web Report
- Members Contact Report
- Consultant Contact Report
- TAC Numbers

Training Reports:
- Training Report for CCFO Reconciliation
- Training
- Training By Branch

Travel Reports:
- Travel Report - AlphaSort
- Travel Reconciliation Report
- PMDA Travel Justification - Auth # Sort
- Travel Justification

Visa Reports:
- Visa Log
**Training Management**

Training is tracked using the Training Management screen. This screen gives you an overview of the funding available for training as well as a filtered list of training requests.
1) To view/edit the details of a specific training record, click on the edit icon.
2) You may now view the record.
Training Records

*Trainer:  [Name]
*Fiscal Year: 2013
*Course Title: ANS Annual Meeting
*Start Date: 06/29/2011
*End Date: 07/01/2011

Location:
*Provider Name: American Nuclear Society
Provider Phone: 703-679-8315
*City: [City]
*State: Florida
*Country: [Country]

Estimated Cost:
NRC Cost: $50.00
Book Cost: $0.00
Total Cost: $50.00

Actual Cost:
NRC Cost: $750.00
Book Cost: $0.00
Total Cost: $750.00

Notes:
[Notes]

Payment Information:
Job Code: [Code]
Funding Source: Funded by Credit Card
Visa Lodging Date: 7/15/2011
Amount Paid: $750.00
Paid Date: 07/15/2011

Save

Updated: November 2012
3) To delete the training record, click on the trash icon to the left (this icon will only display if the record is able to be deleted).
Adding a New Training Record

To add a new training record:
1) Select the trainee.
2) Select this record’s fiscal year.
3) Put in the Authorization Number.
4) Fill in the course title.
5) Enter the start and finish dates.
6) Put in the provider name, city, and country.
7) Enter any known estimated or actual costs.
8) Select the applicable job code.
9) Fill in any optional fields you are able to.
10) Click “Submit”.

Updated: November 2012
Depending on the cost of the training record, it may automatically be authorized and reconciled, thus pulling its expenses directly from the Job Code budget, or it might need to go through the Visa Request approval process. To view the associated Visa Request created, click on the “View Visa Request” link on the Training Screen.
As the applicable steps of the Visa Request process are completed, the appropriate step in the training record should be marked as complete in the sequence steps at the top of the page.

An authorized training record has its estimated expenses obligated toward its associated job code.

A reconciled training record has its actual expenses expended from its associated job code.

A verified training record cannot be edited, and simply verifies that the charges and information are correct.

Cancelling a training record will return the record’s expenses to the associated job code.
**Appropriation Management**

The PMDA portion of WebACTs is used to track how much money has been received, allocated, and spent for budgets which exist within a program identified by a job code. The Appropriation Management screen provides various functions related to this.

Managing appropriations allows one to:
1. View programs and detailed information for each.
2. Transfer funds from one program to another.
3. Enter anticipated charges used for forecasting budgets.
4. Access the Program Administration screen which allows users to manage programs and fiscal years.

![Appropriation Management Screen](image-url)
Overview

The first function is an overview of all of the programs for a fiscal year.

The grid may be sorted by any column, and totals for each column may be viewed toward the bottom of the screen.

If a view of available funding for “Anticipated Charges” is needed, click the checkbox entitled, “Include Anticipated Charges when Calculating Available Funding”.

Each program name is uniquely colored for identification. Green indicates a program has met its spending goals. Red indicates a program has failed to meet its spending goals.
To access the details of a particular program, click the “View” button to the right side of the program grid.

Details include the Job Code and Program Area, as well as budget specifics including Allowance, Full Time Employee (FTE) information, Transaction Details showing charges and transfers against the program, and spending goals which can be specified.
Transaction Details can be expanded on the grid, as shown below, to view specific records associated with the charges listed.

<table>
<thead>
<tr>
<th>Charges:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td>Transfers:</td>
</tr>
<tr>
<td>Type</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td>Transfer</td>
</tr>
</tbody>
</table>

Allowance Adjustments:

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
<th>Who Adjusted</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/27/2011</td>
<td>($3,000.00)</td>
<td>PeiJa</td>
<td>$3K transferred to N7498.</td>
</tr>
<tr>
<td>11/8/2011</td>
<td>($24,000.00)</td>
<td>PeiJa</td>
<td>$24K transferred to Reactor travel.</td>
</tr>
<tr>
<td>11/9/2011</td>
<td>($3,000.00)</td>
<td>PeiJa</td>
<td>$3K transferred to N7326</td>
</tr>
<tr>
<td>12/14/2011</td>
<td>$94,000.00</td>
<td>PeiJa</td>
<td>2nd CR allotment.</td>
</tr>
<tr>
<td>12/14/2011</td>
<td>($20,000.00)</td>
<td>PeiJa</td>
<td>See Value comments</td>
</tr>
<tr>
<td>12/14/2011</td>
<td>($40,000.00)</td>
<td>PeiJa</td>
<td>$40K moved to N7303</td>
</tr>
<tr>
<td>1/13/2012</td>
<td>($15,000.00)</td>
<td>PeiJa</td>
<td>Current Balance</td>
</tr>
<tr>
<td>1/24/2012</td>
<td>($5,000.00)</td>
<td>PeiJa</td>
<td>See above note.</td>
</tr>
<tr>
<td>2/2/2012</td>
<td>$23,000.00</td>
<td>PeiJa</td>
<td>See above note.</td>
</tr>
<tr>
<td>2/15/2012</td>
<td>($27,000.00)</td>
<td>PeiJa</td>
<td>See above note.</td>
</tr>
</tbody>
</table>

Value Adjustments:

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
<th>Who Adjusted</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/13/2011</td>
<td>($40,000.00)</td>
<td>PeiJa</td>
<td>Adjusted value during CR.</td>
</tr>
<tr>
<td>10/27/2011</td>
<td>($3,000.00)</td>
<td>PeiJa</td>
<td>$3K transferred to N7498.</td>
</tr>
<tr>
<td>11/8/2011</td>
<td>($24,000.00)</td>
<td>PeiJa</td>
<td>$24K transferred to Reactor Travel.</td>
</tr>
<tr>
<td>11/9/2011</td>
<td>($3,000.00)</td>
<td>PeiJa</td>
<td>$3K transferred to N7326</td>
</tr>
<tr>
<td>12/14/2011</td>
<td>$94,000.00</td>
<td>PeiJa</td>
<td>2nd CR allotment.</td>
</tr>
<tr>
<td>12/14/2011</td>
<td>($20,000.00)</td>
<td>PeiJa</td>
<td>$20K transferred to N7498 for M&amp;O Contract.</td>
</tr>
<tr>
<td>12/14/2011</td>
<td>($40,000.00)</td>
<td>PeiJa</td>
<td>$40K moved to N7303.</td>
</tr>
<tr>
<td>1/13/2012</td>
<td>($15,000.00)</td>
<td>PeiJa</td>
<td>Current Balance</td>
</tr>
<tr>
<td>1/24/2012</td>
<td>($5,000.00)</td>
<td>PeiJa</td>
<td>Funds provided for Decommission Travel</td>
</tr>
<tr>
<td>2/2/2012</td>
<td>$23,000.00</td>
<td>PeiJa</td>
<td>Current value after allotment and internal transfers.</td>
</tr>
<tr>
<td>2/15/2012</td>
<td>($27,000.00)</td>
<td>PeiJa</td>
<td>Funds transferred to other business lines in prep for budget load.</td>
</tr>
</tbody>
</table>

The spending goal for a program, which is the percentage that must have been spent by the date specified, may also be set through this area. Spending goal targets may be viewed through the appropriations management program grid on the main appropriations management page.
Transfers

Program funds may be transferred from program to program, incrementing the allowance of the program transferred to and decrementing the allowance of the program transferred from.

To transfer funds from one program to another:

1. Filter the programs by a specific fiscal year.
2. Select the job codes to transfer funds from and to. Only Programs/Job Codes that allow transferring funds will be available, and you may only transfer funds to and from programs which are in the same program area.
3. Enter the transfer amount.
4. Enter the reason for the transfer.
5. Click the “Transfer” button.
6. The funds will be transferred and reflected in the grid at the bottom of the screen, including historical data. The program allowance also displays, reflecting the change to funds.
Anticipated Charges

Anticipated charges are created for programs as a forecasting mechanism. They allow the Appropriations Administrator to enter anticipated increases or decreases.

To enter an anticipated charge:

- Select the fiscal year to display associated job codes.
- Select a job code.
- Select the record type for the anticipated charge.
- Enter an amount (use a positive number for anticipated charges and a negative number for anticipated funding).
- Click “Add”.
- A grid showing the anticipated charges for the job code will be shown. This grid is visible each time a job code is selected which has anticipated charges associated with it.
Choose “Select All” from the dropdown list to see all anticipated charges for all job codes.

Anticipated charges may also be deleted when they are no longer necessary.
Program Administration

The Administration Programs/Job Codes screen and Fiscal Years screen may be accessed through the Program Administration tab of the Appropriations section.

Programs are the primary budget account entity used in PMDA to distribute and track funds. Indicators of program funding may be set through the Site Admin section within “Maintenance Items”. Programs are shown as “green”, “yellow” or “red” depending on the amount of funding remaining within them, as well as the thresholds set in the Site Admin section.

To edit an existing Job Code, click the appropriate edit button in the grid.

Note: Program/Job Codes without charges against them may be deleted by an administrator.
Adding a New Program/Job Code

1) Enter the program name (if entering an existing name, you may select from an “auto-fill" list).
2) Select a Program Area.
3) Enter a Planned Activity Name (“auto-fill" feature available).
4) Select a Fiscal Year.
5) Enter the Value (this is generally the maximum budget of the program).
6) Enter the Allowance (this is generally the allowable amount currently spendable).
7) Enter the Supervisory FTE’s (Full Time Employees)
8) Enter the Non-supervisory FTE’s (Full Time Employees).
9) Enter the Supervisory FTE’s (Full Time Employees).
10) Enter the Date of Goal (this is the amount targeted to be spent by the given goal date, and will be indicated using colors in the programs grid in Appropriations Management).
12) Enter the job code’s BR Number.
13) Select a funding code.
14) Enter a BOC code (optional).
15) Enter a job code description.
16) Indicate if the job code is active.
17) Select the permissions for the job code, indicating items such as what kind of expenses the job code may be used for, and if it allows transfers, etc.
18) Click “Save".
All options will remain the same when editing the Program/Job Code, however, when adjusting the program’s value or allowance, comments will be required and a transaction will be recorded in the system for the adjustment.
Fiscal Years

Fiscal Years are used throughout the system.

To add or edit a fiscal year:

1) Enter the text of the year. (e.g. 2011, 2012, etc.)
2) Enter a start date for the fiscal year.
3) Enter a finish date for the fiscal year.
4) Click the “Save” button.

Note: Be careful not to duplicate fiscal years, or having overlapping date values. Deleting fiscal years is not recommended, as this information is used throughout existing system transactions.
Travel Records

The Travel Records screen provides an overview of travel records in the system. It has a list of the programs related to travel, fiscal status, and a filtered list of travel records.
To enter a new Travel Record (without a Travel Request), click the “New Travel Record” button.

**Note:** There is no way to retroactively hook up a Travel Record created on this page to an existing Travel Request. If a new Travel Record is to be created from an existing Travel Request, it should be done from the Travel Request Details page.

To view/edit a Travel Record, the appropriate edit icon should be clicked.

If a Travel Record can still be deleted, a small trash can icon will be displayed. This can be clicked to delete the Travel Record.
To enter a new Travel Record:
1) Select the traveler.
2) Select the fiscal year.
3) Select the appropriate job code.
4) Fill in the Trip ID.
5) Choose a purpose.
6) Select a justification.
7) Pick an authorization type.
8) Fill in the departure and return dates.
9) Pick the type of travel and check any applicable modes of travel.
10) Fill in any duty stations.
11) Fill in any known costs and hotel data.
12) Enter any other fields you are able to.
13) Click Save/Update.

You may move a travel record along the approval sequence as each step is completed. For example, you may mark it as Authorized, Vouchered and Reconciled.

An authorized travel record obligates funding toward the associated job code for the estimated expenses.

A vouchered or reconciled travel record expends the actual charges from the associated job code.

A reconciled travel record cannot be edited unless it is checked “Unreconciled” by clicking the “undo” button by the “Reconciled” sequence step.

A cancelled travel record returns its expenses to the associated job code.
Bulk Travel Record Entry

It’s also possible to enter travel records for the members in bulk by meeting date. This is done using the Travel Reservation Meeting List screen. This works similarly to the Hotel Reservations screen.

To view reservations, select the date range of the meeting and choose whether you want to see processed, unprocessed or all travel requests, then click “Update”.

Click the “Book” button to edit a reservation.

Updated: November 2012
You may now edit/enter the travel records in bulk by entering the departure and return dates for each member. Each individual travel record can still be edited manually using the Travel Records screen if it requires distinct data from the rest.
After entering the travel record, click “Save”. You will be returned to the prior screen where you may book travel reservations for other attendees of the selected meeting.
Travel Requests

The Travel Requests screen provides a filtered list used for managing requests.

1) To create a new travel request, click the “New Travel Request” button.
2) To view or edit an existing travel request, click the appropriate edit icon.
3) If a travel request is able to be deleted, a small trash can icon will be displayed.
4) For those that are able to convert Travel Requests to Travel Records, there is a “Convert” column allowing a shortcut to conversion.
To enter a Travel Request:
1) Select the traveler.
2) Pick a purpose for the trip.
3) Make sure the “Date Submitted” is correct.
4) Check any appropriate modes of travel.
5) Choose the appropriate type of travel.
6) Choose the correct fiscal year.
7) Fill in the departure and return dates.
8) Fill in the duty stations and any optional fields you can.
9) Click “Save”.

[Image of the Travel Request Details interface with highlighted fields for steps 3, 5, 6, 7, and 8.]

Updated: November 2012
To edit a Travel Request:
1) Change any necessary information.
2) Click “Save”.
3) Depending on your level of access, you’ll also be able to approve or deny travel requests using this screen, as well as convert the request into a travel record.
**Procurement**

Procurement consists of the Visa module and the Contracts module.

The Visa module allows:

- Visa Request Management
- Visa Request Approval
- Visa Invoice Processing
- Visa Requisitions

The Contracts module allows entry of Contracts and Contract Invoices:
Visa

The Visa module includes:

a) Visa Request Management
   i) Allows entry and edit of visa requests.

b) Visa Request Approval
   i) Allows approval of visa requests by dedicated roles.

c) Visa Invoice Processing
   i) Allows Visa Requests to be reconciled by a Visa Administrator.

d) Visa Requisitions
Visa Request Management

The Visa Request Management screen gives access to all existing Visa Requests filtered by the logged in user and gives the ability to create a new Visa Purchase Request. Visa Administrators have access to all users' Visa Requests.

To create a new Visa Request:
1) Enter the “Items” section and enter the following:
2) Item Name, Description, Vendor, Justification, Required Date, Notes, Property Tag #.
3) Item Quantity, Cost and Total (not required).
4) Click on the “Save” button to the right of the item to add it to the list of item requests.
5) If another item is requested, click the green “+” button at the bottom of the grid to add a new item. After adding that item, click the “Save” button to add it to the list.
6) Click “Submit” to submit the request.
Processing Visa Requests (assigning a funding source)

Visa Administrators must assign a funding source to a visa request, which will indicate the type of approvals that request requires (Manager Approval and/or IT Approval) to allow it to be invoiced.

To assign the funding source to the visa request, select the visa request from the Visa Request Management screen by clicking the edit button next to the request in the grid. You will be taken to the Visa Request Details screen where you may edit the line items, assigning a funding source to each.

To assign a funding source:

1. Click “Edit” button next the line item in the “Items” section of the visa request.
1. The item will show as yellow and will be editable.
2. Select the funding source from the “Funding Source” dropdown list within the “Funding and Dates” column.
3. Click the “Save” button next to the item to save the changes to the item list.
4. Repeat this for each item in the item list.
5. When all funding sources have been assigned for each item and saved, click the “Save” button at the bottom of the Visa Request Details screen.

Assigning the funding source will have put the request into a “Pending” state in which supervisors may approve the request.
Approving Visa Requests

Administrative and supervisory users may approve visa requests for staff. The “Approve Visa Requests” screen automatically filters visa requests to those that are pending, meaning they have been assigned a funding source, which dictates that they are either miscellaneous or IT-related requests, and require the approval of a manager, IT supervisor, or both.

Visa Requests with other statuses, such as Approved or Denied, may be viewed by adjusting the “Status” dropdown list filter in the screen, as shown below.

The supervisor selects a visa request by using the “Edit” button in the grid, as shown below.

The supervisor will be shown a view of the visa request which allows them to mark the request as “Approved” or “Denied” by checking the appropriate radio button in the “Approval” section of the Visa Request Details screen and clicking the “Save” button.
Visa Request Invoice Processing

Visa Administrators may access the Visa Request Invoice Processing screen, which allows them to enter the actual amounts receipted for visa requests and mark them as reconciled directly from a grid view. The administrator may also access the visa request directly by clicking the “View” button, which takes them to the Visa Request Details screen for the selected visa request.

To reconcile visa invoices through the Invoice Processing Grid:

1. Use the filters at the top of the screen to select the Fiscal Year, Month, and Billing Cycle you wish to reconcile. If needed, filter the requests using the “Reconciled” filter so you only see un-reconciled records.
2. To reconcile a request, click the “Edit” button next to the request.
1. Enter the Billing Date (if not present).
2. Enter the Delivery Date (if not present).
3. Enter the Actual Amount of the request.
4. Click the “Yes” radio button in the “Reconciled” column to indicate that this request is reconciled.
5. Click the “Save” button to the right of the item. The request will be marked as reconciled and the appropriate actual charges are expended from the Visa Request’s Requisition or Job Code (depending on how its funded).
Visa Requisitions

Visa Requisitions contain program funding used for Visa Requests.

The Visa Requisition Management screen shows existing visa requisitions, allows the creation of new requisitions, and tracks the expenditures per billing cycle of specific visa credit cards held by bank card holders.
Visa Cardholder Summary

A Visa credit card held by a specific bank card holder is allowed a specific expense limit per billing cycle. A particular card may not have more than $10,000 spent on it per cycle. To track this data so that the Visa Administrator may set visa requests to a specific card to ensure no one card exceeds the limit, the Visa Requisition Management screen is used.

To view the amount expended and obligated for a visa card held by a particular cardholder per billing cycle:

1) Select the Cycle and Fiscal Year from the dropdown lists in the Visa Cardholder Summary section of the screen.
2) The associated grid will be updated to show the cardholder and amount expended and obligated for the cycle which is indicated in the cycle column.

To view and edit an existing requisition:

1) Select the requisition from the grid using the “Edit” button next to the requisition.
2) A view of the funding records for that visa requisition will be shown.
Select an edit button next to any of the funding records shown to be directed to the Visa Requisition Details screen for that requisition.
The Visa Requisition Details screen shows a detailed view of the requisition, including a section for details, funding for the requisition, and visa requests against the requisition.

The details section includes summarized information pertaining to the requisition’s total amount of:

1) Approved active funding.
2) Pending funding.
3) Pending visa requests against the requisition.
4) Expended (reconciled) visa requests against the requisition.
5) Total spent and obligated.
6) Remaining funding available.
The funding section shows a grid of all the funding records associated with the visa requisition and their status. A pending funding record has not yet been approved to be active and spendable, while an active funding record may incur expenses from visa requests. To access a funding record, click the “Edit” button next to it. Funding records which have no visa requests against them may be safely deleted if necessary.

The requests section shows visa requests that use this requisition as a funding source. The grid may be filtered by month.
To create a new visa requisition:

From the Visa Requisition Management Screen:

1. Click the "New Visa Requisition" button.

![Image of Visa Requisition Management Screen]
1. Enter a requisition number.
2. Select the requisition type.
3. Select the type of service.
4. Select the fiscal year.
5. Select the funding source.
6. Enter an amount.
7. Enter a description.
8. Enter notes.
9. Click the “Save Requisition Details” button.

Upon saving the new requisition, you will be redirected to the funding record created for the requisition so you may activate it.
Visa Funding

When a new requisition is created, the requisition’s first funding record is also created and exists in a pending state. A funding record may be made active by clicking the check buttons to mark the record as having been “Sent Form 30 to CFO” and “Scanned Form 30”. Active funding is expended against the Visa requisition’s associated job code. Closed funding records cannot incur Visa requests expenses, and cancelled funding records are inactive and de-obligate their funding.

The “Form 30” associated with the funding record may be accessed and printed by selecting the “Forms” tab and clicking the Form 30 link to generate the form report, or clicking the “Print” icon at the top right of the screen.
Additional funding may be added to an existing Visa Requisition.

To add funding to a Visa Requisition:

From the “Funding” tab of the Visa Requisition:

1. Click the “Add Funding/New Form 30” button.
1. Enter the requisition number.
2. Enter the date of the request.
3. Enter the due date.
4. Select the requestor (person requesting the requisition).
5. Select the funding source (if this is an existing requisition, the funding source will default to the job code of the requisition).
6. Enter an amount for the funding request.
7. Enter a description.
8. Enter any notes necessary.
9. Click the “Save” button to create the funding record. The record will need to be activated to be used by marking it as “Sent Form 30 to CFO” and “Scanned Form 30”.

Updated: November 2012
Contracts

Contracts are managed in WebACTs as a collection of RFPAs (Request for Procurement Action), invoices and payments. The Contract Management screen provides an overview of all contracts meeting the filter criteria.

To start a new Contract/RFPA, click the “Initiate RFPA” button.

To edit an existing contract (change details, add/edit RFPAs, add/edit invoices, mark invoices as paid, etc.), click the edit icon.

If a contract can be deleted, click the appropriate trash can icon. The icon will only appear if the contract is allowed to be deleted by business rules.
To enter a new contract/RFPA:
1) Pick the original RFPA number if there is one. This will allow you to enter an RFPA number to append.
2) Enter the RFPA title.
3) Enter the POP (period of performance) start and end dates.
4) Enter the requested start date of the contract.
5) Enter the base period number of months.
6) Select the number of option periods.
7) Enter the estimated fiscal year values.
8) In the Contract Option Years and Ceiling section, verify that the data included is correct.
9) Click “Save”.
### Contract Option Years and Ceiling

<table>
<thead>
<tr>
<th>Period</th>
<th>Contract Ceiling</th>
<th>From Date</th>
<th>To Date</th>
<th>Fiscal Year</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base</td>
<td>$0.00</td>
<td>10/16/2012</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Form 400 and Attached Files

[Save] [Cancel]
The Contract Details page includes four tabs.

The overview tab gives summary data about the ceilings, RFPA and fiscal years.
The Contract Details tab contains the details that apply to all RFPAs for the contract. These can be updated as necessary by changing the data and clicking “Save”.
The Contract Funding tab contains a list of all RFPA##s for the contract. A new RFPA## can be started from here by clicking the “Add Funding/Initiate RFPA##” button.

Each RFPA## can be viewed or edited by clicking the edit icon. This will take you to the RFPA## details screen. You can edit any applicable data and then click “Save”. Each step of the approval process is marked here as it is completed.

If the RFPA## hasn’t been activated and nothing has been paid, it can be deleted by clicking the trash can icon.

The funding associated with an RFPA## is listed in the fund lines shown in the “Certification of Funds” section. Each fund line is associated with a job code so the funding may be drawn from a budget related Job Code/Program.
Completing the sequence items for an RFPA certifies (makes active and available) an RFPA’s funds.

An RFPA that has been created and fund lines provided has the funding committed to the associated job code.

When an RFPA has been marked “RFPA Sent to CFO”, “RFPA Scanned”, “Sent to Contracts” and “Scanned Contract”, its funds are considered “Certified” or “Active” and the funds are obligated from the RFPA’s associated job code. Obligated funds may have invoices paid against them.
The Contract Invoices tab contains a list of all invoices related to the contract.

To add a new invoice, click the “Add Invoice” button.

To edit an existing Invoice, click the edit icon.

To delete an invoice, click the trash can icon.
To enter a new invoice:
1) Enter the invoice number.
2) Enter the invoice date.
3) Enter the due date.
4) Select the fiscal year.
5) Enter the invoice amount.
6) Enter the actual amount paid.
7) Mark if it has been paid.
8) Enter the approval date.
9) Select which RFPA and fund line the funds will come from (it can be split between different fund lines by checking all that apply and putting the appropriate values in each box).
10) Enter any additional notes.
11) Click “Save”.

[Image of the invoice entry screen with highlighted steps and fields]