



# governmentattic.org

*"Rummaging in the government's attic"*

Description of document: Nuclear Regulatory Commission (NRC) Advisory Committee on Reactor Safeguards (ACRS) Web Advisory Committee Tracking System (WebACTs) Help Document, 2012

Requested date: 21-September-2020

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](mailto:FOIA.resource@nrc.gov)  
[FOIAonline](#)

The governmentattic.org web site ("the site") is a First Amendment free speech web site and is noncommercial and free to the public. The site and materials made available on the site, such as this file, are for reference only. The governmentattic.org web site and its principals have made every effort to make this information as complete and as accurate as possible, however, there may be mistakes and omissions, both typographical and in content. The governmentattic.org web site and its principals shall have neither liability nor responsibility to any person or entity with respect to any loss or damage caused, or alleged to have been caused, directly or indirectly, by the information provided on the governmentattic.org web site or in this file. The public records published on the site were obtained from government agencies using proper legal channels. Each document is identified as to the source. Any concerns about the contents of the site should be directed to the agency originating the document in question. GovernmentAttic.org is not responsible for the contents of documents published on the website.

**RESPONSE TO FREEDOM OF  
INFORMATION ACT (FOIA) REQUEST**

2020-000311

1

RESPONSE  
TYPE☐

INTERIM

☒

FINAL

REQUESTER:

DATE:

10/23/2020

**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**

AMOUNT

- ☐ 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](mailto: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](mailto: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>.



**RESPONSE TO FREEDOM OF  
INFORMATION ACT (FOIA) REQUEST**

NRC -

2020-000311

RESPONSE NUMBER

1

RESPONSE  
TYPE

☐

INTERIM

☒

FINAL

**PART I.D -- COMMENTS**

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'



# ADVISORY COMMITTEE TRACKING SYSTEM



## Table of Contents

<b>LOGGING IN .....</b>	<b>4</b>
<b>SITE ADMINISTRATION/MAINTENANCE .....</b>	<b>5</b>
<i>Page Administration .....</i>	<i>7</i>
<i>Page Edits.....</i>	<i>9</i>
<i>Role Administration .....</i>	<i>11</i>
<i>Cognizant Office Management.....</i>	<i>14</i>
<i>Meeting Location Management .....</i>	<i>18</i>
<i>Subcommittee Management .....</i>	<i>20</i>
<i>Sequence Administration .....</i>	<i>23</i>
<i>Settings and other Maintenance Items.....</i>	<i>24</i>
<i>Other Settings .....</i>	<i>32</i>
<b>AUDIT LOG.....</b>	<b>33</b>
<b>USERS .....</b>	<b>34</b>
<b>TECHNICAL SCHEDULER.....</b>	<b>42</b>
AVAILABLE COMMITTEE DATES .....	42
TOPIC MANAGEMENT.....	45
<i>Topic List .....</i>	<i>45</i>
<i>Topic Detail .....</i>	<i>49</i>
MEETINGS AND AGENDA ITEMS .....	52
MEETING LIST .....	53
MEETING CALENDARS .....	56
SUBCOMMITTEE SCHEDULE .....	61
SUBCOMMITTEE AGENDA ITEM.....	62
FULL COMMITTEE MEETING .....	69
FULL COMMITTEE AGENDA ITEMS .....	72
<b>REPORTS.....</b>	<b>78</b>
ADDING/EDITING INDIVIDUAL REPORTS.....	78
ADDING/EDITING REPORT MENUS .....	81
<b>HOTELS RESERVATIONS.....</b>	<b>86</b>
HOTEL SETUP .....	86
HOTEL RESERVATIONS .....	89
<b>TASKS .....</b>	<b>91</b>
MY TASKS PAGE .....	91
ASSIGN TASKS .....	95
<b>EMAILS .....</b>	<b>96</b>
EMAIL TEMPLATES .....	98

<b>ALERTS .....</b>	<b>100</b>
ALERT TEMPLATES .....	101
<b>WEBACTS PMDA MODULE.....</b>	<b>109</b>
VIEW PUBLIC USER INFORMATION.....	111
PMDA REPORTS .....	113
TRAINING MANAGEMENT .....	114
<i>Adding a New Training Record .....</i>	<i>118</i>
APPROPRIATION MANAGEMENT .....	121
<i>Overview .....</i>	<i>122</i>
<i>Transfers .....</i>	<i>127</i>
<i>Anticipated Charges.....</i>	<i>128</i>
<i>Program Administration .....</i>	<i>130</i>
<i>Adding a New Program/Job Code.....</i>	<i>131</i>
<i>Fiscal Years.....</i>	<i>133</i>
TRAVEL RECORDS.....	134
<i>Bulk Travel Record Entry .....</i>	<i>137</i>
TRAVEL REQUESTS .....	140
PROCUREMENT .....	143
<i>Visa .....</i>	<i>144</i>
<i>Contracts.....</i>	<i>161</i>



# 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

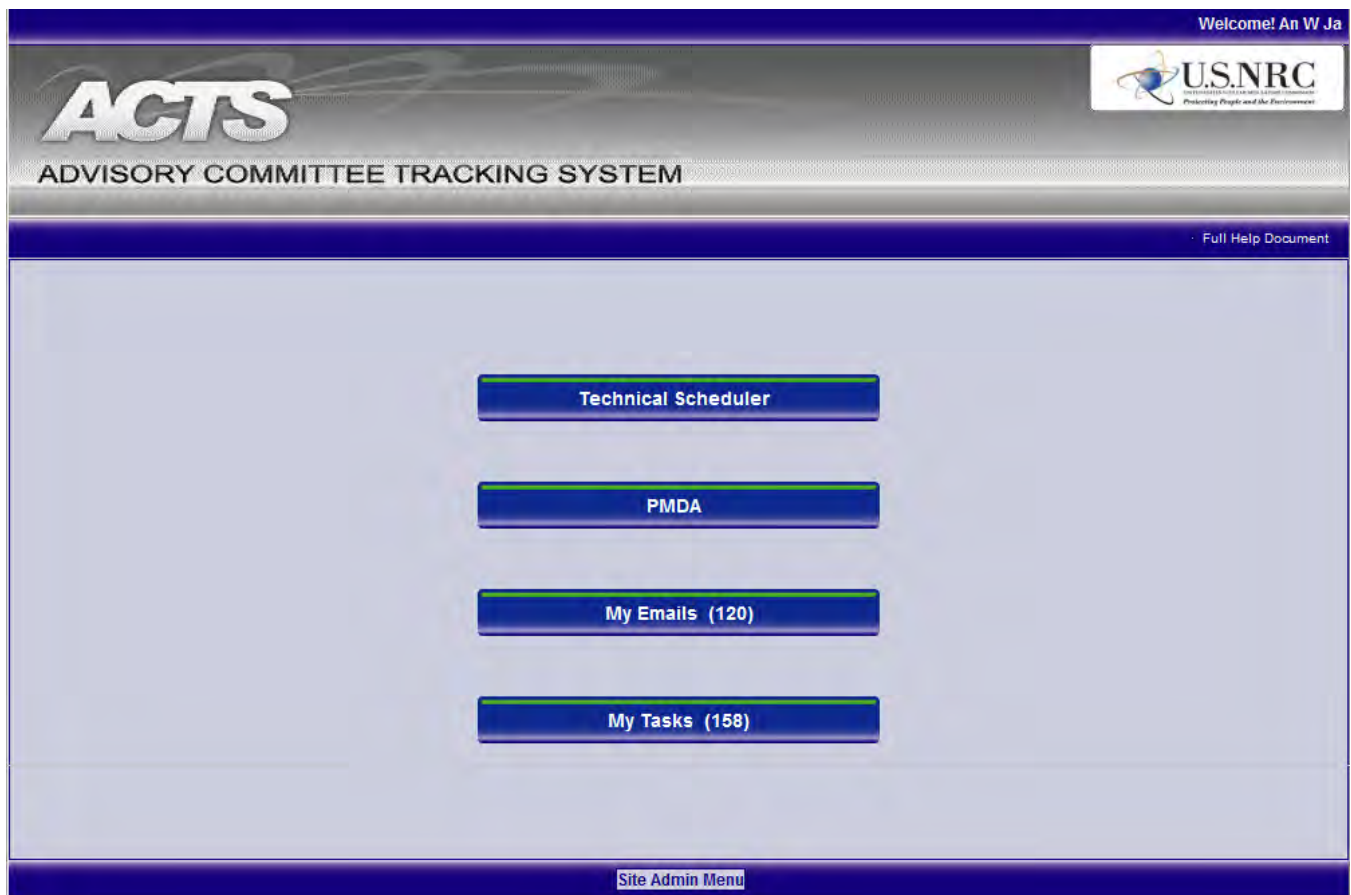
The PMDA Module includes the following:

- 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

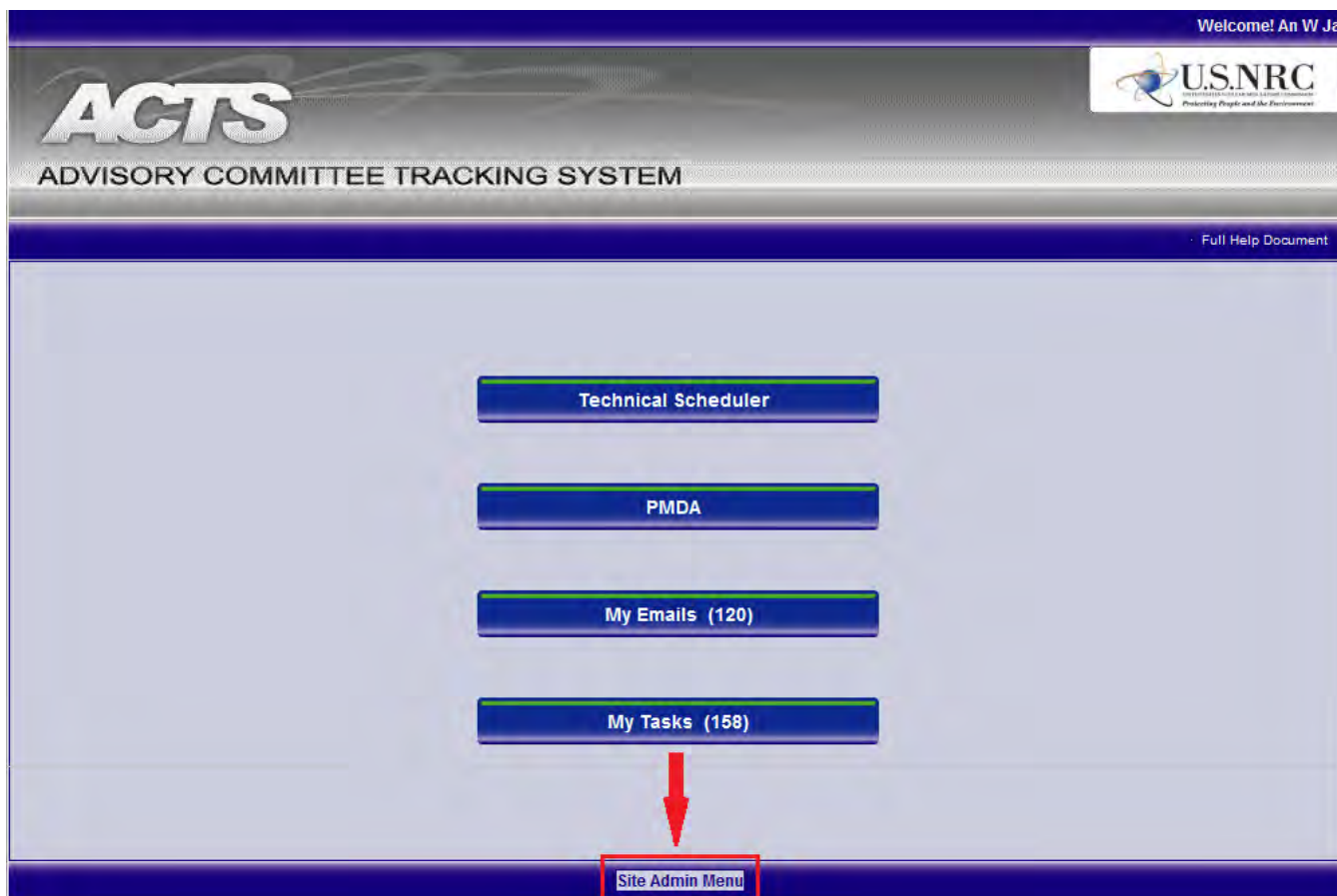
## Logging In

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.



## Site Administration/Maintenance



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





## 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.

Main Menu » Site Admin Menu » Page Administration Page Help · Full

Basic Data

\*Title:  Visible From Menu: ☒

Description:  **Is Horizontal Menu Control:** ☐

\*File:

\*Parent: --Please Select--

Help File:

Report Menu: --Select--

Child Pages:

Choose Roles

- ☐ Appropriations Admin
- ☐ Bank Card Holder
- ☐ Contract Admin
- ☐ Contract POC
- ☐ Contract Specialist
- ☐ Employee Admin
- ☐ IT Admin
- ☐ PMDA Manager
- ☐ PMDA Team A Travel Approval
- ☐ PMDA Team B Travel Approval
- ☐ PMDA Viewer

Main Menu » Technical Scheduler » Technical Reports Full Help Document

ACRS Letters:

[ACRS Letters By Member](#) [ACRS Letters by FY](#) [Letter Matrix for Op Plan](#) **Horizontal Menu Items**

## 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.*

Main Menu » Site Admin Menu » Page Administration Page Help · Fu

**Basic Data**

\*Title:  Visible From Menu: ☒

Description:

\*File:  Is Horizontal Menu Control: ☐

\*Parent:

Help File:

Report Menu:

Child Pages:

Sort	Title
	Appropriation Program Details

Record Count: 1

Choose Roles

☒ Appropriations Admin  
☒ PMDA Manager  
☒ Site Admin  
☐ Bank Card Holder  
☐ Contract Admin  
☐ Contract POC  
☐ Contract Specialist  
☐ Employee Admin  
☐ IT Admin  
☐ PMDA Team A Travel Approval  
☐ PMDA Team B Travel Approval  
☐ PMDA Viewer  
☐ Tech Team A Travel Approval  
☐ Tech Team B Travel Approval  
☐ Technical Admin  
☐ Technical Editor  
☐ Technical Viewer  
☐ Training Admin  
☐ Travel Admin  
☐ Travel Approver  
☐ Visa Admin

Save

Title	Edit
Main Menu	
Main Menu >> Change Password	
Main Menu >> Change Password >> Forgot Password	
Main Menu >> Error Page	
Main Menu >> Lack of Access	
Main Menu >> Missing Page	
Main Menu >> My Emails	
Main Menu >> My Tasks	
Main Menu >> My Tasks >> Assign Tasks	
Main Menu >> PMDA	
Main Menu >> PMDA >> Appropriations Management	
Main Menu >> PMDA >> Appropriations Management >> Appropriation Program Details	

## 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.

**Back**

### Travel Request Details

\*Traveler:  \*Date Submitted:

\*Purpose:  \*Type: ☐ Local ☐ Foreign ☒ Domestic

\*Mode of Travel: ☒ Taxi to/from Airport ☐ Own Car ☐ Rail ☒ Commercial Air ☐ Rental Car ☐ Government Vehicle

\*Fiscal Year:  Approval-Has Supervisor's Signature:

Registration/Conference External Fees:

**ACRS ADVISOR**

Main Menu > Site Admin

Basic Data: \*Title: Description: \*File: \*Parent: Help File: **Report Menu:**  Child Pages:

Choose Roles:

- ☐ Bank Card Holder
- ☐ Contract Admin
- ☐ Contract POC
- ☐ Contract Specialist
- ☐ Employee Admin
- ☐ IT Admin
- ☐ PMDA Manager
- ☐ PMDA Team A Travel Approval
- ☐ PMDA Team B Travel Approval
- ☐ PMDA Viewer
- ☐ Site Admin

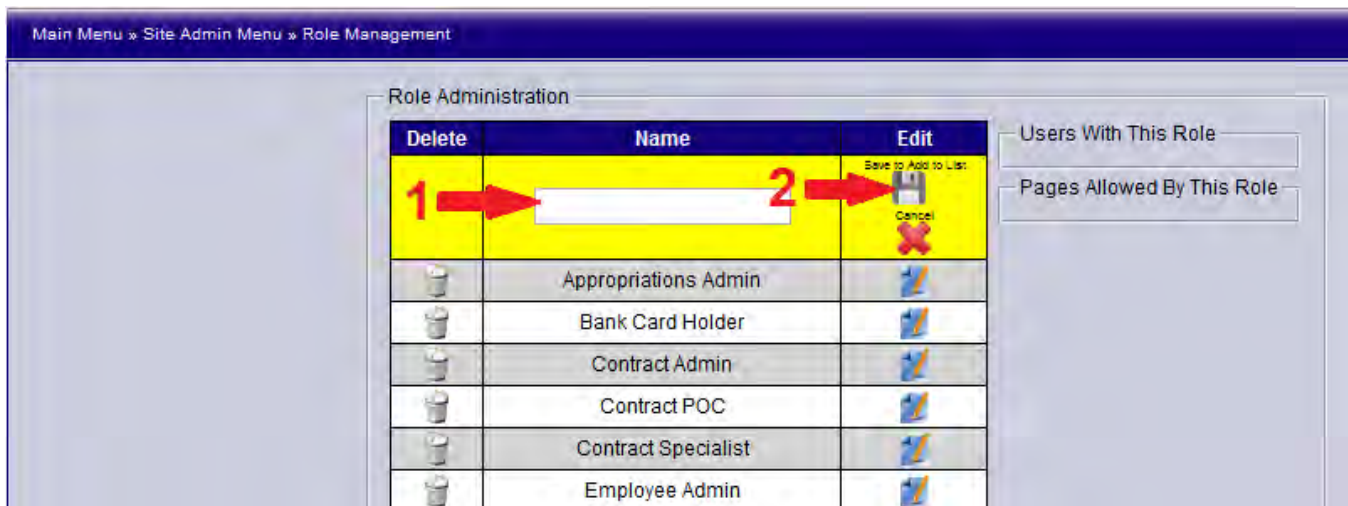
Page Help · Full Help Document

## 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.

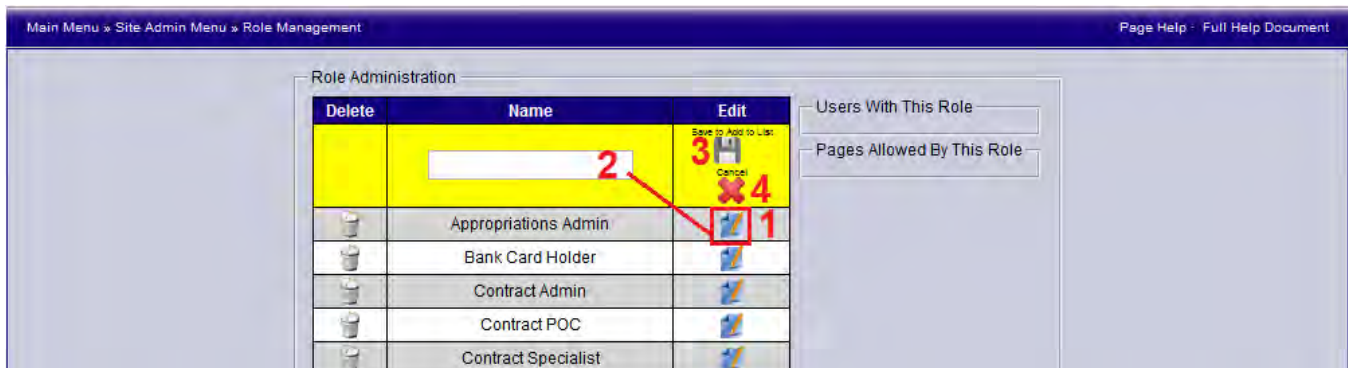
To enter a new role:

- 1) Enter the role's name.
- 2) Click the save icon.



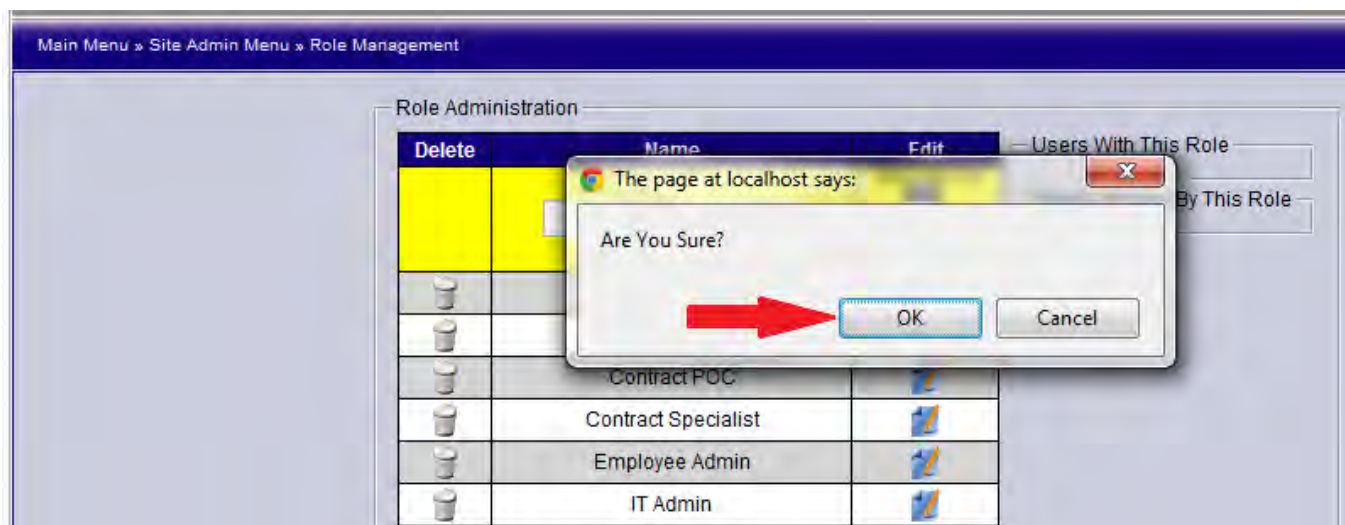
**Warning: Editing roles should be done with extreme caution. Many features of the system are tied to these roles and their names, so changing a role's name could have far-reaching consequences.** To edit an existing role:

- 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:

- 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.

The screenshot displays the 'Role Administration' window. At the top, the breadcrumb navigation reads 'Main Menu > Site Admin Menu > Role Management'. The window is divided into several sections:

- Role Administration Table:** A table with columns 'Delete', 'Name', and 'Edit'. It lists 21 roles, including 'Bank Card Holder' (highlighted in yellow), 'Contract Admin', 'Contract POC', 'Contract Specialist', 'Employee Admin', 'IT Admin', 'PMDA Manager', 'PMDA Team A Travel Approval', 'PMDA Team B Travel Approval', 'PMDA Viewer', 'Site Admin', 'Tech Team A Travel Approval', 'Tech Team B Travel Approval', 'Technical Admin', 'Technical Editor', 'Technical Viewer', 'Training Admin', 'Travel Admin', 'Travel Approver', and 'Visa Admin'. A 'Record Count: 21' is shown at the bottom of the table.
- Users With This Role:** A list showing 'Ch An', 'Ha K Br', and 'Me A Sh'.
- Pages Allowed By This Role:** A long list of menu items, including 'Main Menu', 'Main Menu >> Change Password', 'Main Menu >> Change Password >> Forgot Password', 'Main Menu >> Error Page', 'Main Menu >> Lack of Access', 'Main Menu >> Missing Page', 'Main Menu >> My Emails', 'Main Menu >> My Tasks', 'Main Menu >> My Tasks >> Assign Tasks', 'Main Menu >> PMDA >> CommitteeMeeting List with Hotel Confirmation Numbers', 'Main Menu >> PMDA >> PMDA Reports', 'Main Menu >> PMDA >> Procurement', 'Main Menu >> PMDA >> Procurement >> Contracts >> Contract Detail', 'Main Menu >> PMDA >> Procurement >> Contracts >> Contract Detail >> Contract Funding Set Up', 'Main Menu >> PMDA >> Procurement >> Contracts >> Contract Detail >> Invoice Entry', 'Main Menu >> PMDA >> Procurement >> Visa', 'Main Menu >> PMDA >> Procurement >> Visa >> Visa Request Invoice Processing', 'Main Menu >> PMDA >> Procurement >> Visa >> Visa Requests', 'Main Menu >> PMDA >> Procurement >> Visa >> Visa Requests >> Visa Request Details', 'Main Menu >> PMDA >> Procurement >> Visa >> Visa Requisition Management', 'Main Menu >> PMDA >> Procurement >> Visa >> Visa Requisition Management >> Visa Requisition Details', 'Main Menu >> PMDA >> Procurement >> Visa >> Visa Requisition Management >> Visa Requisition Details >> Visa Funding Detail', 'Main Menu >> PMDA >> Training Management >> Training Record', 'Main Menu >> PMDA >> Travel Management >> Travel Records', 'Main Menu >> PMDA >> Travel Management >> Travel Records >> Travel Record Detail', 'Main Menu >> PMDA >> Travel Management >> Travel Requests', 'Main Menu >> PMDA >> Travel Management >> Travel Requests >> Read Only Travel Record Details', 'Main Menu >> PMDA >> Travel Management >> Travel Requests >> Travel Requests Detail', 'Main Menu >> PMDA >> Travel Request', 'Main Menu >> PMDA >> Visa Purchase Request', 'Main Menu >> Site Admin Menu >> PMDA Administration', 'Main Menu >> Site Admin Menu >> PMDA Administration >> Fiscal Years', 'Main Menu >> Site Admin Menu >> PMDA Administration >> JobCodes', 'Main Menu >> Site Admin Menu >> PMDA Administration >> JobCodes >> Job Code Details', 'Main Menu >> Site Admin Menu >> PMDA Administration >> Programs', 'Main Menu >> Site Admin Menu >> Sequence Administration', and 'Main Menu >> Technical Menu'.
- Branches Associated with this Role:** A section with two lists: 'Available Branches' (ACRS, Office of the Director, PMDA, Reactor Safety Branch B, Technical Support Branch) and 'Selected Branches' (empty). Navigation buttons (>, >>, <, <<) are provided between the lists.


The bottom of the window features a 'Site Admin Menu' button.



## 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.

Welcome! An W Ja



ADVISORY COMMITTEE TRACKING SYSTEM

Main Menu » Site Admin Menu » Cognizant Office ManagementPage HelpFull Help Document

Cognizant Office Data



\*Name:

Description:




Email:

Phone:

Fax:

Delete	Contact Name	Phone Number	Email	Edit
	<div></div>	<div></div>	<div></div>	<div><div> Save to Add to List</div><div> Cancel</div></div>

Add

Name	Edit
EDO	
FSME	
NMSS	
NRO	
NRR	
NSIR	
RES	

Site Admin Menu

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".

Main Menu » Site Admin Menu » Cognizant Office Management Page Help · Full Help Document

Cognizant Office Data

\*Name:

Description:

Email:

Phone:

Fax:

Delete	Contact Name	Phone Number	Email	Edit
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<small>Save to Add to List</small> 

2

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".

Main Menu » Site Admin Menu » Cognizant Office Management Page Help · Full Help Document

Cognizant Office Data

\*Name:

Description:

Email:

Phone:

Fax:

Delete	Contact Name	Phone Number	Email	Edit
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<small>Save to Add to List</small> 
	John Ridgely	301-251-7458	john.ridgely@nrc.gov	
	Paul Clifford	301-415-4043	Paul.Clifford@nrc.gov	

3

Name	Edit
EDO	
FSME	
NMSS	
NRO	
NRR	
NSIR	
RES	

1

Site Admin Menu

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.

Main Menu » Site Admin Menu » Cognizant Office Management Page Help · Full Help Document

Cognizant Office Data

\*Name:

Description:

Email:

Phone:

Fax:

Delete	Contact Name	Phone Number	Email	Edit
	<b>1</b> <input style="width: 100%;" type="text"/>	<b>2</b> <input style="width: 100%;" type="text"/>	<b>3</b> <input style="width: 100%;" type="text"/>	 Save to Add to List  Cancel

[Add](#)

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.

Main Menu » Site Admin Menu » Cognizant Office Management Page Help · Full Help Document

Cognizant Office Data










\*Name:

Description:








Email:

Phone:

Fax:

Delete	Contact Name	Phone Number	Email	Edit
	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	 Save to Add to List  Cancel
	Donald Dube	301-415-1483	donald.dube@nrc.gov	
	Dan Santos	301-251-7664	daniel.santos@nrc.gov	
	Jeff Ciocco	301-415-6391	jeffrey.ciocco@nrc.gov	

[Save](#)

Name	Edit
EDO	
FSME	
NMSS	
NRO	
NRR	
NSIR	
RES	

Main Menu » Site Admin Menu » Cognizant Office Management Page Help · Full Help Document

---

Cognizant Office Data  
 \*Name:   
 Description:   
 Email:   
 Phone:   
 Fax:

Delete	Contact Name	Phone Number	Email	Edit
	<b>1</b> <input type="text"/>	<b>2</b> <input type="text"/>	<b>3</b> <input type="text"/>	<b>4</b>
	John Ridgely	301-251-7456	john.ridgely@nrc.gov	
	Paul Clifford	301-415-4043	Paul.Clifford@nrc.gov	

Name	Edit
EDO	
FSME	
NMSS	
NRO	
NRR	
NSIR	
RES	

[Site Admin Menu](#)

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.

Main Menu » Site Admin Menu » Cognizant Office Management Page Help · Full Help Document

---

Cognizant Office Data  
 \*Name:   
 Description:   
 Email:   
 Phone:   
 Fax:

Delete	Contact Name	Phone Number	Email	Edit
	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<b>2</b>	Donald Dube	301-415-1483	donald.dube@nrc.gov	
	Dan Santos	301-251-7664	daniel.santos@nrc.gov	
	Jeff Ciocco	301-415-6391	jeffrey.ciocco@nrc.gov	

Name	Edit
EDO	
FSME	
NMSS	
NRO	
NRR	
NSIR	
RES	

[Site Admin Menu](#)

## 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".

Main Menu » Site Admin Menu » Meeting Location Management Page Help · Full Help Document

**Required Items**

Location Data

\*Location Name:

Contact Name:

\*Room Number:

Is Main Location?: ☐

\*Phone Number:

Fax Number:

\*Address:

\*City:

State:  Postal Code:







\*Country: UNITED STATES

Email:

**Optional Items**

2

Add

Name	Room	Address	Edit
11545 Rockville Pike, Rockville, MD T-2B1	T-2B1	address 1, city	
11545 Rockville Pike, Rockville, MD T-2B3	T-2B3	address 1, city	
Region I	RI	address 1, city	
Region II	RII	address 1, city	
Region III	RIII	address 1, city	
Region IV	RIV	address 1, city	

To edit a meeting location:

- 1) Click the edit icon next to the location.
- 2) Add/edit the data as needed.
- 3) Click "Save".

Main Menu » Site Admin Menu » Meeting Location Management Page Help · Full Help Document

**2** Location Data

\*Location Name: 11545 Rockville Pike, Rockville, MD T-2B1

Contact Name:

\*Room Number: T-2B1

Is Main Location?: ☒

\*Phone Number: 000-000-0000

Fax Number:

\*Address: address 1







\*City: city

State: Maryland Postal Code:

\*Country: UNITED STATES

Email:

**3** Save

Name	Room	Address	Edit
11545 Rockville Pike, Rockville, MD T-2B1	T-2B1	address 1, city	
11545 Rockville Pike, Rockville, MD T-2B3	T-2B3	address 1, city	
Region I	RI	address 1, city	
Region II	RII	address 1, city	
Region III	RIII	address 1, city	
Region IV	RIV	address 1, city	

Site Admin Menu

## 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”.

The screenshot shows the 'Subcommittee Management' interface. At the top is a navigation bar with 'Main Menu', 'Site Admin Menu', and 'Subcommittee Management'. A 'Page Help' link is on the right. The main form contains the following fields and controls:

- \*Name:** Text input field (1)
- \*Description:** Text input field (2)
- Allow Meetings During Other Meetings:** Checkbox (3)
- Require Cognizant Office and Contacts For Meetings:** Checked checkbox (4)
- \*Branch:** Dropdown menu with 'ACRS' selected (5)
- \*Program Area:** Dropdown menu with 'Licensing Reviews : Combined License' selected (6)
- \*Lead Member:** Dropdown menu with 'Br Ch' selected (7)
- \*Lead Engineer:** Dropdown menu with 'DI F. An' selected (8)
- \*Committee Chairmen:** Dropdown menu with 'Br Ch' selected (9)
- \*Members:** A list of available members (Sk Go, Ra B. Ha, Ar J., Re L. Jo, Si D. Jo, St W. Jo, Co L. Mi, Ry T. Mi, Ba Sa, Sc St, TB TB, Sh J. Wi) (10). Below this list are 'Add', 'Add All ->>', 'Remove', and '<<- Remove' buttons.
- Color Selection:** A color palette with a purple color selected (11).
- Add Button:** A button at the bottom of the form (12).

At the bottom of the page is a table listing existing subcommittees:

Delete	Subcommittee Name	Edit
	ABWR	
	AP 1000	
	Digital I & C Systems	
	EPR	
	ESBWR	

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".


Main Menu » Site Admin Menu » Subcommittee Management Page Help · Full Help Document

---

**Subcommittees**

**2** \*Name:

\*Description:

Allow Meetings During Other Meetings ☐ Require Cognizant Office and Contacts For Meetings ☒ 

\*Branch:

\*Program Area:

\*Lead Member:

\*Lead Engineer:

\*Committee Chairmen:

\*Members:

Available Members

- Br Ch
- Po A. Da
- Sk Go
- Ra B. Ha
- Re L. Jo
- Si D. Jo
- St W. Jo
- Co L. Mi
- Ry T. Mi
- Ba Sa
- Sc St
- TB TB
- Sh J. Wi

Add

Add All ->>





Remove


<<- Remove

Selected Members

- Bl C. De
- Ar J.

**3**

Delete	Subcommittee Name	Edit
<input type="checkbox"/>	ABWR	
<input type="checkbox"/>	AP 1000	
<input type="checkbox"/>	Digital I & C Systems	
<input type="checkbox"/>	EPR	

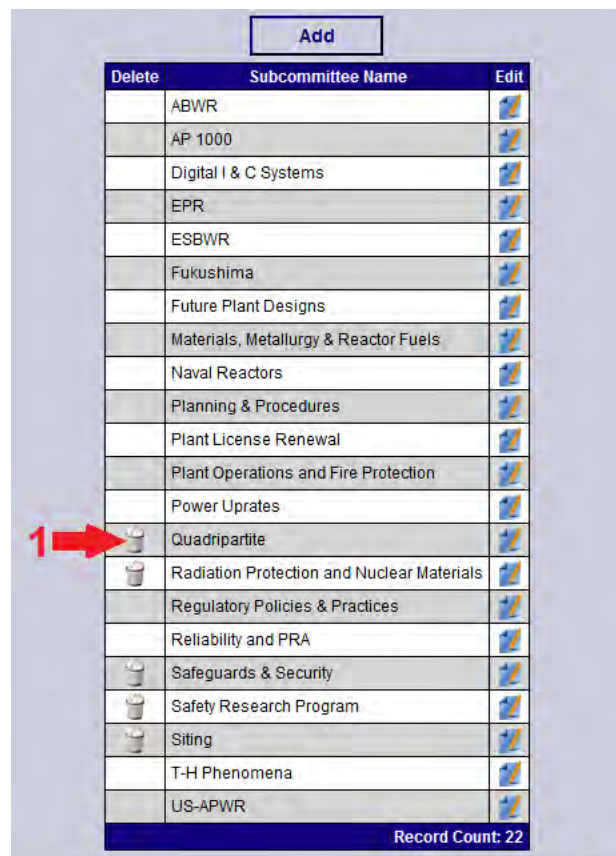
**1** 



To delete/deactivate a subcommittee:

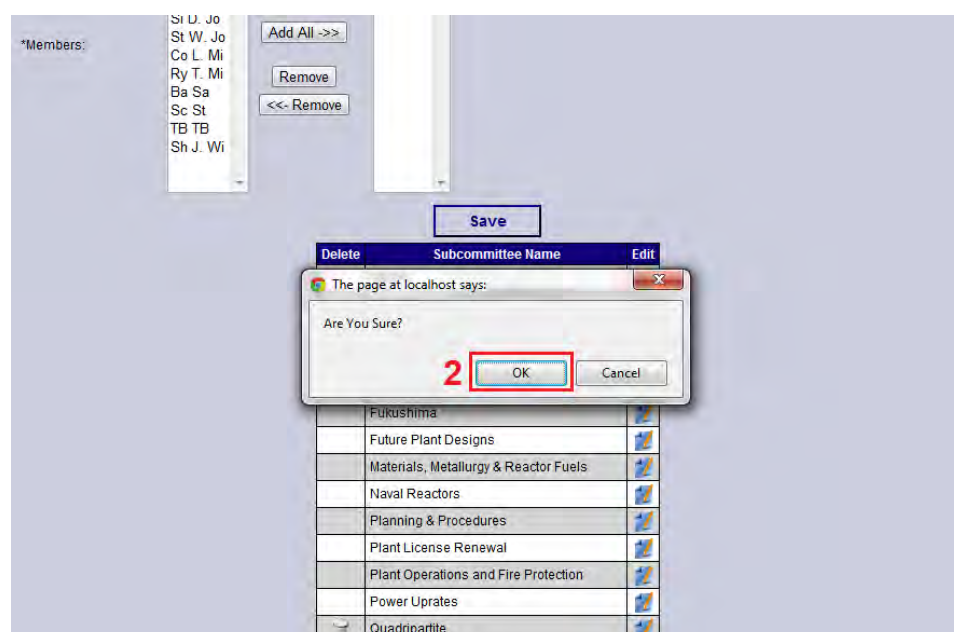
- 1) Click the delete icon next to the subcommittee that is to be deleted.
- 2) Confirm the deletion.

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



A screenshot of a web application interface showing a list of subcommittees. At the top is an 'Add' button. Below it is a table with three columns: 'Delete', 'Subcommittee Name', and 'Edit'. The table lists 22 subcommittees. A red arrow with the number '1' points to the delete icon (a trash can) in the 'Delete' column for the 'Quadripartite' row. At the bottom right of the table, it says 'Record Count: 22'.

Delete	Subcommittee Name	Edit
	ABWR	
	AP 1000	
	Digital I & C Systems	
	EPR	
	ESBWR	
	Fukushima	
	Future Plant Designs	
	Materials, Metallurgy & Reactor Fuels	
	Naval Reactors	
	Planning & Procedures	
	Plant License Renewal	
	Plant Operations and Fire Protection	
	Power Upgrades	
	Quadripartite	
	Radiation Protection and Nuclear Materials	
	Regulatory Policies & Practices	
	Reliability and PRA	
	Safeguards & Security	
	Safety Research Program	
	Siting	
	T-H Phenomena	
	US-APWR	



## 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.**












Main Menu » Site Admin Menu » Sequence Administration

Page Help · Full Help Document

Sequence Maintenance

Type: RFPA Approval 

Sequence steps must be completed in order: ☒

Sort	Delete	Name	Edit
		<input type="text"/>	<div>Save to Add to List</div> <div> Cancel</div>
		RFPA Sent To CFO	
		RFPA Scanned	
		Sent to Contracts	
		Scanned Contract	
		Close	

Record Count: 6

Site Admin Menu

## 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.**











Main Menu » Site Admin Menu » Maintenance Items Page Help Full Help Document

---

General Types and Values

Type:  











Sort Order:  Sort By:

Sort	Delete	Name	Description	Edit
		<input type="text"/>	<input type="text"/>	 
		Disabled	Disabled User	
		Guest	Guest User	
		Administrator	System Administrator	
		User	System User	

Record Count: 5

---







































Organizational Chart Administration

Delete	Name	Description	Chief or Director	Edit
	<input type="text"/>	<input type="text"/>	<input type="text" value="AC, Co"/>	 
	ACRS	ACRS Members and Consultants	Ar J.	
	Office of the Director	Office of the Director	Ha M. Ed	
	PMDA	PMDA	Be Al	
	Technical Support Branch	Technical Support Branch	Sa Ca	

Record Count: 5

---

Technical Program Area Administration

Sort	Delete	Prefix	Name	Is Statutory	Category	Edit
		<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text" value="Licensing Reviews"/>	 
		Licensing Reviews	License Renewal	No	Licensing Reviews	
		Licensing Reviews	Power Upgrades	No	Licensing Reviews	
		Licensing Reviews	Combined License	No	Radioactive Waste and Materials	
		Licensing Reviews	Design Certification	No	Radioactive Waste and Materials	
		Licensing Reviews	Early Site permit	No	Licensing Reviews	
		Licensing Reviews	Other Facilities	No	Radioactive Waste and Materials	
		Regulatory Requirements, Guidance, and Communication	New/Revised Safety-related Rules	No	Regulatory Requirements/Guidance/Communication	
		Regulatory Requirements, Guidance, and Communication	New/Revised Reg. Guides and Standard Review Plan Sections	No	Regulatory Requirements/Guidance/Communication	
		Regulatory Requirements, Guidance, and Communication	Other Guidance Documents	No	Regulatory Requirements/Guidance/Communication	
		Regulatory Requirements, Guidance, and Communication	Bulletins and Generic Letters	No	Regulatory Requirements/Guidance/Communication	
		Operational Experience, Evaluation and Safety Oversight	Review of Significant Operating Events	No	Operational Experience Evaluation and Safety Oversight	
		Operational Experience, Evaluation and Safety Oversight	Generic Issues	No	Operational Experience Evaluation and Safety Oversight	
		Operational Experience, Evaluation and Safety Oversight	Inspection and Assessment	No	Operational Experience Evaluation and Safety Oversight	
		Safety Research	Significant Ongoing Research Activities	No	Safety Research	
		Safety Research	Safety Research Program	No	Safety Research	
		Safety Research	International Information Exchange	No	Safety Research	
		Planning and Procedure		No	Administrative	
		Other		No	Administrative	

Record Count: 19

---

Constant Values

\*Number of Days Documents Are Due Before Meetings:

\*Number Of Hours Available For FC Items:

Full Committee Agenda Purpose Filter String (use semicolons to separate filters, maximum 99 characters):

\*First Day of Bank Card Cycle:

\*Default Carrier Fee:

\*Critical Program Used Percentage (red):

\*Warning Program Used Percentage (yellow):

\*Current FRN Data e.g. October 14, 2010, (74 FR 58268-58269)


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.

Main Menu » Site Admin Menu » Maintenance Items Page Help · Full Help Document





General Types and Values

Type: **Access Level** 

Sort Order: **Sort By:**

Sort	Name	Description	Edit
	<input type="text"/>	<input type="text"/>	 
	Disabled	Disabled User	
	Guest	Guest User	
	Administrator	System Administrator	
	User	System User	

Record Count: 5


Delete	Description	Chief or Director	Edit
	<input type="text"/>	<input type="text"/>	 
	ACRS	ACRS Members and Consultants	

To edit a setting:










1. Click the edit icon next to the appropriate setting.
2. Edit any information as necessary.
3. Click "Save".

Main Menu » Site Admin Menu » Maintenance Items Page Help · Full Help Document

General Types and Values

Type: **Access Level** 

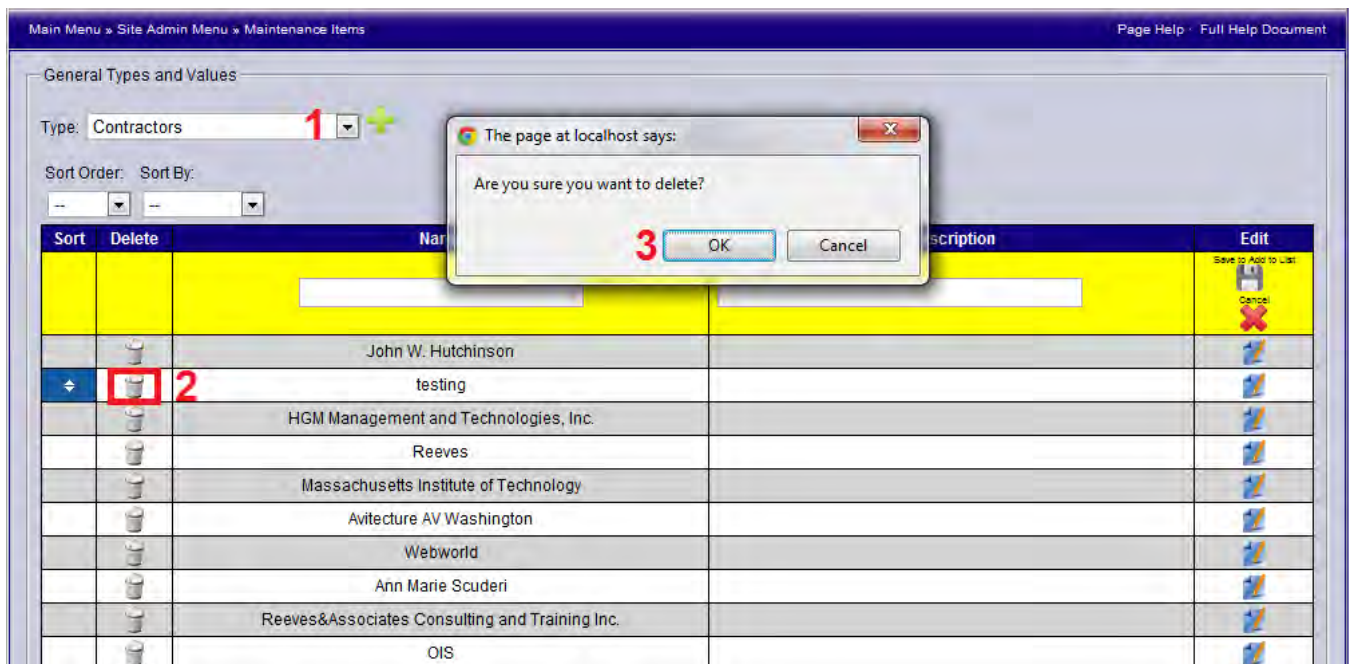
Sort Order: **Sort By:**

Sort	Delete	Name	Description	Edit
		Disabled	Disabled User	 
		Guest	Guest User	
		Administrator	System Administrator	
		User	System User	

Record Count: 5

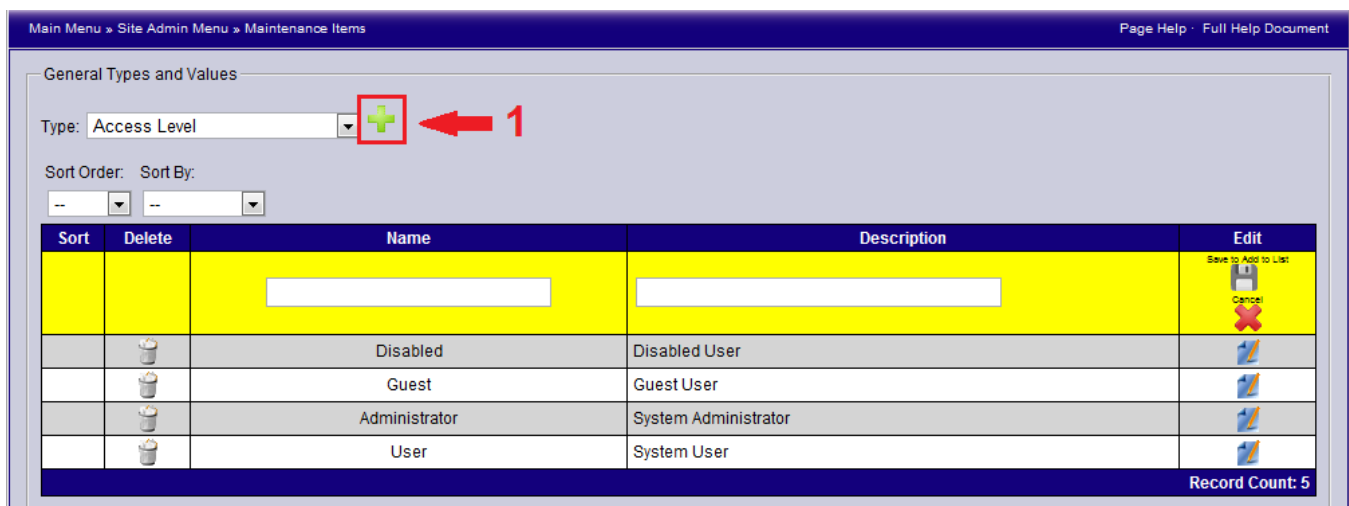
To delete a setting:

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.












Name	Description
Disabled	Disabled User
Guest	Guest User
Administrator	System Administrator
User	System User

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.

Delete	Name	Description	Chief or Director	Edit
	<b>1</b> <input type="text"/>	<input type="text"/> <b>2</b>	AC, Co <b>3</b>	<b>4</b> 
	ACRS	ACRS Members and Consultants	Ar J.	
	Office of the Director	Office of the Director	Ha M. Ed	
	PMDA	PMDA	Be Al	
	Technical Support Branch	Technical Support Branch	Sa Ca	

Record Count: 5









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				
Delete	Name	Description	Chief or Director	Edit
	<input type="text"/>	<input type="text"/>	AC, Co	Save to Add to List Cancel
	ACRS	ACRS Members and Consultants	Ar J.	1 
	Office of the Director	Office of the Director	Ha M. Ed	
	PMDA	PMDA	Be Al	
	Technical Support Branch	Technical Support Branch	Sa Ca	
Record Count: 5				

To delete a branch:

1. Click the delete icon next to the branch to be deleted.
2. Confirm the deletion.

Organizational Chart Administration				
Delete	Name	Description	Chief or Director	Edit
	<input type="text"/>	<input type="text"/>	AC, Co	Save to Add to List Cancel
1 	ACRS	ACRS Members and Consultants	Ar J.	
	Office of the Director	Office of the Director	Ha M. Ed	
	PMDA	PMDA	Be Al	
	Technical Support Branch	Technical Support Branch	Sa Ca	
Record Count: 5				

The page at localhost says:

Are You Sure?

2







































OK

Cancel

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.

Technical Program Area Administration						
Sort	Delete	Prefix	Name	Is Statutory	Category	Edit
		<input type="text"/> 1	<input type="text"/> 2	<input type="checkbox"/> 3	Licensing Reviews 4 <input type="text"/>	5  
		Licensing Reviews	License Renewal	No	Licensing Reviews	
		Licensing Reviews	Power Upgrades	No	Licensing Reviews	
		Licensing Reviews	Combined License	No	Radioactive Waste and Materials	
		Licensing Reviews	Design Certification	No	Radioactive Waste and Materials	
		Licensing Reviews	Early Site permit	No	Licensing Reviews	
		Licensing Reviews	Other Facilities	No	Radioactive Waste and Materials	
		Regulatory Requirements, Guidance, and Communication	New/Revised Safety-related Rules	No	Regulatory Requirements/Guidance/Communication	
		Regulatory Requirements, Guidance, and Communication	New/Revised Reg. Guides and Standard Review Plan Sections	No	Regulatory Requirements/Guidance/Communication	
		Regulatory Requirements, Guidance, and Communication	Other Guidance Documents	No	Regulatory Requirements/Guidance/Communication	
		Regulatory Requirements, Guidance, and Communication	Bulletins and Generic Letters	No	Regulatory Requirements/Guidance/Communication	
		Operational Experience, Evaluation and Safety Oversight	Review of Significant Operating Events	No	Operational Experience Evaluation and Safety Oversight	
		Operational Experience, Evaluation and Safety Oversight	Generic Issues	No	Operational Experience Evaluation and Safety Oversight	
		Operational Experience, Evaluation and Safety Oversight	Inspection and Assessment	No	Operational Experience Evaluation and Safety Oversight	
		Safety Research	Significant Ongoing Research Activities	No	Safety Research	
		Safety Research	Safety Research Program	No	Safety Research	
		Safety Research	International Information Exchange	No	Safety Research	
		Planning and Procedure		No	Administrative	
		Other		No	Administrative	

Record Count: 19



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

Technical Program Area Administration						
Sort	Delete	Prefix	Name	Is Statutory	Category	Edit
				<input type="checkbox"/>	Licensing Reviews	<div>Save to Add to List</div> <div>Cancel</div>
		Licensing Reviews	License Renewal	No	Licensing Reviews	1 →
		Licensing Reviews	Power Upgrades	No	Licensing Reviews	
		Licensing Reviews	Combined License	No	Radioactive Waste and Materials	
		Licensing Reviews	Design Certification	No	Radioactive Waste and Materials	
		Licensing Reviews	Early Site permit	No	Licensing Reviews	
		Licensing Reviews	Other Facilities	No	Radioactive Waste and Materials	

















Technical Program Area Administration						
Sort	Delete	Prefix	Name	Is Statutory	Category	Edit
				No		
		2 Licensing Rev	License Renewal	<input type="checkbox"/>	Licensing Reviews	3 
		Licensing Reviews	Power Upgrades	No	Licensing Reviews	
		Licensing Reviews	Combined License	No	Radioactive Waste and Materials	
		Licensing Reviews	Design Certification	No	Radioactive Waste and Materials	
		Licensing Reviews	Early Site permit	No	Licensing Reviews	
		Licensing Reviews	Other Facilities	No	Radioactive Waste and Materials	
		Regulatory Requirements, Guidance, and Communication	New/Revised Safety-related Rules	No	Regulatory Requirements/Guidance/Communication	
		Regulatory Requirements, Guidance, and Communication	New/Revised Reg. Guides and Standard Review Plan Sections	No	Regulatory Requirements/Guidance/Communication	
		Regulatory Requirements, Guidance, and Communication	Other Guidance Documents	No	Regulatory Requirements/Guidance/Communication	
		Regulatory Requirements, Guidance, and Communication	Bulletins and Generic Letters	No	Regulatory Requirements/Guidance/Communication	
		Operational Experience, Evaluation and Safety Oversight	Review of Significant Operating Events	No	Operational Experience Evaluation and Safety Oversight	
		Operational Experience, Evaluation and Safety Oversight	Generic Issues	No	Operational Experience Evaluation and Safety Oversight	
		Operational Experience, Evaluation and Safety Oversight	Inspection and Assessment	No	Operational Experience Evaluation and Safety Oversight	
		Safety Research	Significant Ongoing Research Activities	No	Safety Research	
		Safety Research	Safety Research Program	No	Safety Research	
		Safety Research	International Information Exchange	No	Safety Research	
		Planning and Procedure		No	Administrative	
		Other		No	Administrative	

Record Count: 19

To delete a program area:

1. Click the appropriate delete icon.
2. Confirm the deletion.

Technical Program Area Administration

Sort	Delete	Prefix	Name	Is Statutory	Category	Edit
				<input type="checkbox"/>	Licensing Reviews	
1		Licensing Reviews	License Renewal	No	Licensing Reviews	
		Licensing Reviews	Power Upgrades	No	Licensing Reviews	
		Licensing Reviews	Combined License	No	Radioactive Waste and Materials	
		Licensing Reviews	Design Certification	No	Radioactive Waste and Materials	
		Licensing Reviews	Early Site			
		Licensing Reviews	Other			
		Regulatory Requirements, Guidance, and Communication	New/R		ments/Guidance/Communication	
		Regulatory Requirements, Guidance, and Communication	New/R		ments/Guidance/Communication	
		Regulatory Requirements, Guidance, and Communication	Other Guidance Documents	No	Regulatory Requirements/Guidance/Communication	
		Regulatory Requirements, Guidance, and Communication	Bulletins and Generic Letters	No	Regulatory Requirements/Guidance/Communication	
		Operational Experience, Evaluation and Safety Oversight	Review of Significant Operating Events	No	Operational Experience Evaluation and Safety Oversight	
		Operational Experience, Evaluation and Safety Oversight	Generic Issues	No	Operational Experience Evaluation and Safety Oversight	
		Operational Experience, Evaluation and Safety Oversight	Inspection and Assessment	No	Operational Experience Evaluation and Safety Oversight	
		Safety Research	Significant Ongoing Research Activities	No	Safety Research	
		Safety Research	Safety Research Program	No	Safety Research	
		Safety Research	International Information Exchange	No	Safety Research	

The page at localhost says:

Are You Sure?

2

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

These settings are edited by changing the numbers and clicking "Save".

Constant Values

\*Number of Days Documents Are Due Before Meetings: 25

\*Number Of Hours Available For FC Items: 4

Full Committee Agenda Purpose Filter String (use semicolons to separate filters, maximum 99 characters): determine

\*First Day of Bank Card Cycle: 14

\*Default Carrier Fee: 0

\*Critical Program Used Percentage (red): 90

\*Warning Program Used Percentage (yellow): 80

\*Current FRN Data e.g. October 14, 2010, (74 FR 58268-58269)  
October 14, 2009, (74 FR 58268-58269)

2

1

## 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.

```
<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.

Main Menu > Site Admin Menu > Audit Log

### Audit Log

**Details**

**Time:** 4/20/2009 2:11:47 PM **Type:** Edit

**User:** Don't Delete, System User

**Session ID:** 2gd2sk45tq5d1o55iqpx5y55 **IP Address:** ::1

**Object Type:** Person **Object ID:**

**Data:** Saved: These internal properties were changed:  
LastLoggedIn--Old Value: 4/20/2009 1:55:25 PM, New Value: 4/20/2009 2:11:46 PM

**List Filter**

**User:**

**Audit Type:**

**Start:** 04/20/2009 **Finish:** 05/20/2009 **Update Dates**

**Find:**  [Clear Search](#)

**Audit Log**

Time	Type	User	Object Name	SessionID	IP Address	Edit
4/20/2009 1:55 PM	Login	Don't Delete, System User	login_aspx	2gd2sk45tq5d1o55iqpx5y55	::1	
4/20/2009 1:55 PM	Edit	Don't Delete, System User	Person	2gd2sk45tq5d1o55iqpx5y55	::1	
4/20/2009 2:03 PM	Login	Don't Delete, System User	Person	2gd2sk45tq5d1o55iqpx5y55	::1	
4/20/2009 2:11 PM	Edit	Don't Delete, System User	Person	2gd2sk45tq5d1o55iqpx5y55	::1	
4/20/2009 2:11 PM	Login	Don't Delete, System User	login_aspx	2gd2sk45tq5d1o55iqpx5y55	::1	
4/20/2009 3:29 PM	Edit	Don't Delete, System User	PhoneNumber	2gd2sk45tq5d1o55iqpx5y55	::1	
4/20/2009 3:29 PM	Create	Don't Delete, System User	PhoneNumber	2gd2sk45tq5d1o55iqpx5y55	::1	
4/20/2009 3:29 PM	Create	Don't Delete, System User	CognizantOffice	2gd2sk45tq5d1o55iqpx5y55	::1	
4/20/2009 3:29 PM	Edit	Don't Delete, System User	CognizantOffice	2gd2sk45tq5d1o55iqpx5y55	::1	
4/20/2009 3:29 PM	Edit	Don't Delete, System User	PhoneNumber	2gd2sk45tq5d1o55iqpx5y55	::1	
4/20/2009 3:29 PM	Create	Don't Delete, System User	PhoneNumber	2gd2sk45tq5d1o55iqpx5y55	::1	

1/1 50

[Export](#)

Site Admin Menu

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

Main Menu » PMDA » User Administration and Maintenance
Page Help · Full Help Document

### User Administration

Add New User

Filter By Access Level		Filter By Employee Type		Filter By Branch		Filter By Title	
Active							

	Disable	Last Name	First Name	User Name	Access Level	Employee Type	Branch	Title	Last Login	Edit
					Disabled		ACRS		Never	
					User		ACRS	None	Never	
					User	Employee	PMDA	Branch Chief	7/13/2012	
					User	Employee	ACRS	Consultant	Never	
					User	Employee	PMDA	Management Analyst	8/20/2012	
					User	Engineer	Reactor Safety Branch B	Technical Advisor	8/10/2012	
					Disabled		ACRS		Never	
					User				Never	
					Disabled	Employee	PMDA	Support Services Specialist	2/21/2012	
					Disabled		ACRS		Never	

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

- Contact information (primary address, etc.).

Main Menu » Site Admin Menu » User Administration » User Details Page Help · Full Help Document

[Save](#)

Profile:  Modified On: 3/2/2011 Modified By:

**Contact Information**

\*First Name:

Middle Initial:

\*Last Name:

Preferred Name:

Title:

Primary Email:

**Primary Address**

Address:  address 1

City:  city

State:

Postal Code:

Country:  UNITED STATES

Email:

\*Primary Phone:  8888888888

Primary Cell:

Primary Fax:

**Alternate Address**

Address:  address 1

City:  city

State:

Postal Code:

Country:  UNITED STATES

Email:

Alternate Phone:

Alternate Cell:

Alternate Fax:

**Other Address**

Address:

City:

State:

Postal Code:

Country:  UNITED STATES

Email:


Other Phone:




Other Cell:

Other Fax:








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

 **Private Information**

Social Security Number:	***-**-	<input type="text"/>
Consultant Number:	<input type="text"/>	
Requisition Number:	<input type="text"/>	
Travel Card Number:	<input type="text"/>	Exp: <input type="text"/> 
Visa Card Number:	<input type="text"/>	Exp: <input type="text"/> 
Grade/Step:	<input type="text"/>	
Series:	<input type="text"/>	
Hire Date:	<input type="text"/>	
Mail Stop:	<input type="text"/>	

- Account information (roles and access levels)

 **Account Information**

User ID:	<input type="text"/>	
Access Level:	<input checked="" type="radio"/>  Disabled	
	<input type="radio"/>  Administrator	
	<input type="radio"/>  Guest	
	<input type="radio"/>  User	
Permission Level:	<b>Choose Roles</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Bank Card Holder</li> <li><input type="checkbox"/> Contract Admin</li> <li><input type="checkbox"/> Contract POC</li> <li><input type="checkbox"/> Contract Specialist</li> <li><input type="checkbox"/> Employee Admin</li> <li><input type="checkbox"/> IT Admin</li> <li><input type="checkbox"/> PMDA Manager</li> <li><input type="checkbox"/> PMDA Team A Travel Approval</li> <li><input type="checkbox"/> PMDA Team B Travel Approval</li> <li><input type="checkbox"/> PMDA Viewer</li> <li><input type="checkbox"/> Site Admin</li> <li><input type="checkbox"/> Tech Team A Travel Approval</li> <li><input type="checkbox"/> Tech Team B Travel Approval</li> <li><input type="checkbox"/> Technical Admin</li> <li><input type="checkbox"/> Technical Editor</li> <li><input type="checkbox"/> Technical Viewer</li> <li><input type="checkbox"/> Training Admin</li> <li><input type="checkbox"/> Travel Admin</li> <li><input type="checkbox"/> Travel Approver</li> <li><input type="checkbox"/> Visa Admin</li> </ul>	
	Reactivate: <input type="checkbox"/> Reactivate (Available only if user is disabled/deleted)	

- Organization information (type of user and branch)

Organization Information	
Employee Type:	<input type="text"/>
*Organization:	ACRS <input type="text"/>
Subcommittees:	User is a member of the following subcommittees: <input type="text"/>
Lead Member of Subcommittees:	User is the lead member of the following subcommittees: <input type="text"/>
Link to Subcommittee Membership:	<a href="#">Subcommittee Membership</a>

- Any conflicts of interest

Conflict of Interest	
Conflict of Interest Data:	<input type="text"/>






- Checklists done

Checklists			
CheckList Type	Item	Checked	Toggle
Exit Checklist	Visa Purchase Card		
	Travel Bankcard		
	Thank you letter from Commission/Committee		
	Termination SF278		
	Security Termination Statement		
	Return or Destruction of Sensitive Unclassified Documents		
	Reconcile Outstanding Travel Vouchers/Compensation		
	Plaque		
	NRC Badge		
	FTS 2000/Telephone Credit Card		
	Form 52		
	Disposition of all NRC property		
	Delete Document Distribution List for: NRC publications Microfiche Subs (DCS, IHS, etc.)		
	Close Member Mailbox		
	Cert. Of Non-possession of Classified		
	Cancel Lan e-mail		
New Member Checklist	New Member Certificate (mat and frame)		
	New Member Acceptance Letter		
	NRC-176, Security Acknowledgment		
	Apply for Travel Bankcard		
	Create a mailbox		
	Computer Equipment		
	FTS 2000/Telephone Credit Card		
	MW 507, Maryland Withholding		
	List of Prohibited Securities		
	NRC 354, Data Report on Spouse		
	Name Plate		
	LAN e-mail Account		
	Visa Purchase Card		
	SF-87, Fingerprint Card (2 copies)		
	Photo Badge		
	SF 278, Public Financial Disclosure Report		
	Press Release/Biography		
	SF-86, Questionnaire for Sensitive Positions (3/00 version), 448		
	Form 306, Declaration of Federal Employment		
	Fair Credit Reporting Form		
	Appointment Memo from Commission		
	Form 2231, Fast Start Direct Deposit		
	Federal Withholding Form, W-4		
	Forms 52, 448, 236, 145B, and SF278/OGE450 memos		
Renewal Checklist	SRM approving reappointment		
	Letter of Reappointment from NRC Chairman		
	Forms 52, 448		

Updated: November 2012

- Any Human Resources communications

Human Resources Communication				
Delete	Comments	Created By	Edit	
			 	

- Hotel Preferences

Hotel Preferences	
<div> <div>Atlanta Airport Marriott</div> <div>Atlanta Marriott Midtown</div> <div>Bethesda Marriott</div> <div>Bethesda North Marriott</div> <div>Hilton Garden Inn Bethesda</div> <div>Hilton Washington DC/Rockville</div> <div>Hyatt Regency Bethesda</div> <div>LOCAL</div> <div>Marriott Pooks Hill</div> </div> <div> <div>&gt;</div> <div>&gt;&gt;</div> <div>&lt;</div> <div>&lt;&lt;</div> </div>	<p>Default Preferred Hotel:</p> <div>&gt; <input type="text"/></div>
<div>Save</div>	

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.

Main Menu » Site Admin Menu » User Administration » User Details

Page Help » Full Help Document

Profile: New

Modified By:

Contact Information

\*First Name:

Middle Initial:

\*Last Name:

Preferred Name:

Title:

Primary Email:

The page at localhost says:

You must enter a value in the following fields or they are invalid:

- \* Required: First Name
- \* Required: Last Name
- \* Required Phone Number Missing

OK

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)

Main Menu » PMDA » User Administration and Maintenance
Page Help · Full Help Document

## User Administration

Add New User

Filter By Access Level

Filter By Employee Type

Filter By Branch

Filter By Title

Active

	Disable	Last Name	First Name	User Name	Access Level	Employee Type	Branch	Title	Last Login	Edit
					Disabled		ACRS		Never	
					User		ACRS	None	Never	
					User	Employee	PMDA	Branch Chief	7/13/2012	
					User	Employee	ACRS	Consultant	Never	
					User	Employee	PMDA	Management Analyst	8/20/2012	
					User	Engineer	Reactor Safety Branch B	Technical Advisor	8/10/2012	
					Disabled		ACRS		Never	
					User				Never	
					Disabled	Employee	PMDA	Support Services Specialist	2/21/2012	
					Disabled		ACRS		Never	



To view/edit a user's details, click on the edit icon next to their name.

Main Menu » PMDA » User Administration and Maintenance Page Help - Full Help Document

### User Administration

[Add New User](#)

Filter By Access Level		Filter By Employee Type		Filter By Branch		Filter By Title	
Active							

Disable	Last Name	First Name	User Name	Access Level	Employee Type	Branch	Title	Last Login	Edit
				Disabled		ACRS		Never	
				User		ACRS	None	Never	
				User	Employee	PMDA	Branch Chief	7/13/2012	
				User	Employee	ACRS	Consultant	Never	
				User	Employee	PMDA	Management Analyst	8/20/2012	
				User	Engineer	Reactor Safety Branch B	Technical Advisor	8/10/2012	
				Disabled		ACRS		Never	
				User				Never	

To deactivate a user:

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

Main Menu » PMDA » User Administration and Maintenance Page Help - Full Help Document

### User Administration

[Add New User](#)

Filter By Access Level		Filter By Employee Type		Filter By Branch		Filter By Title	
Active							

The page at localhost says:

Are you sure you want to deactivate this user?

2

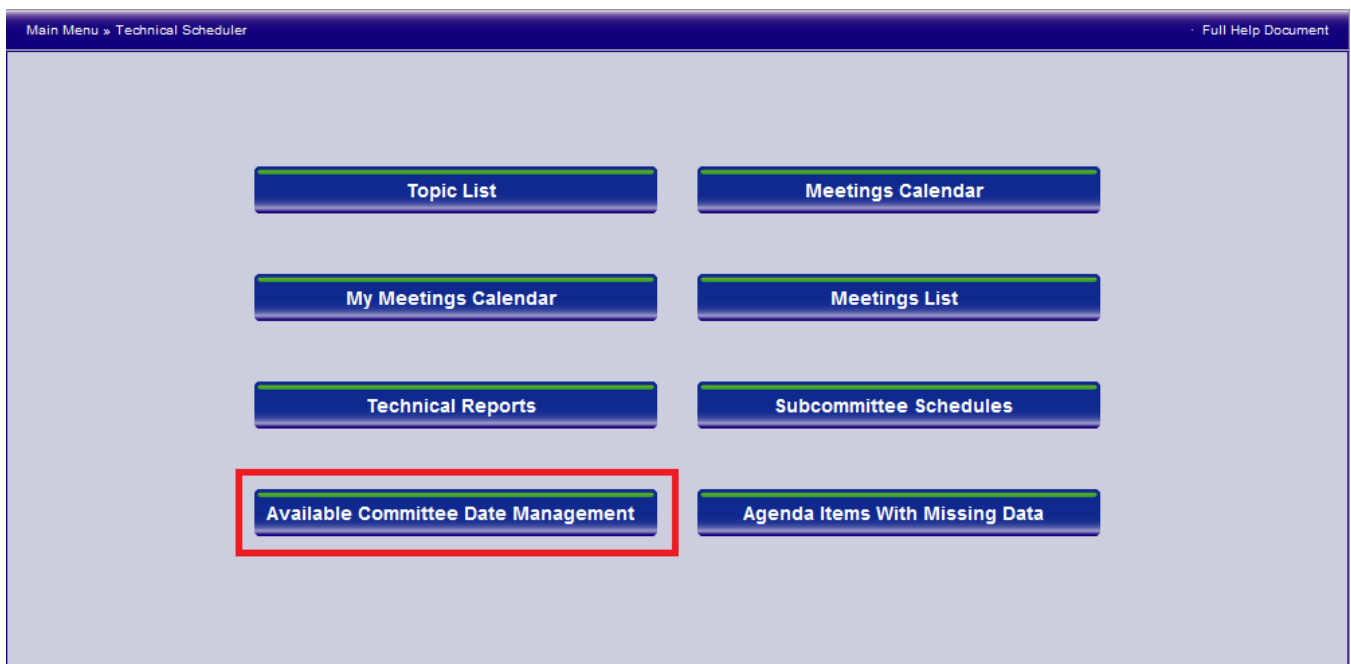
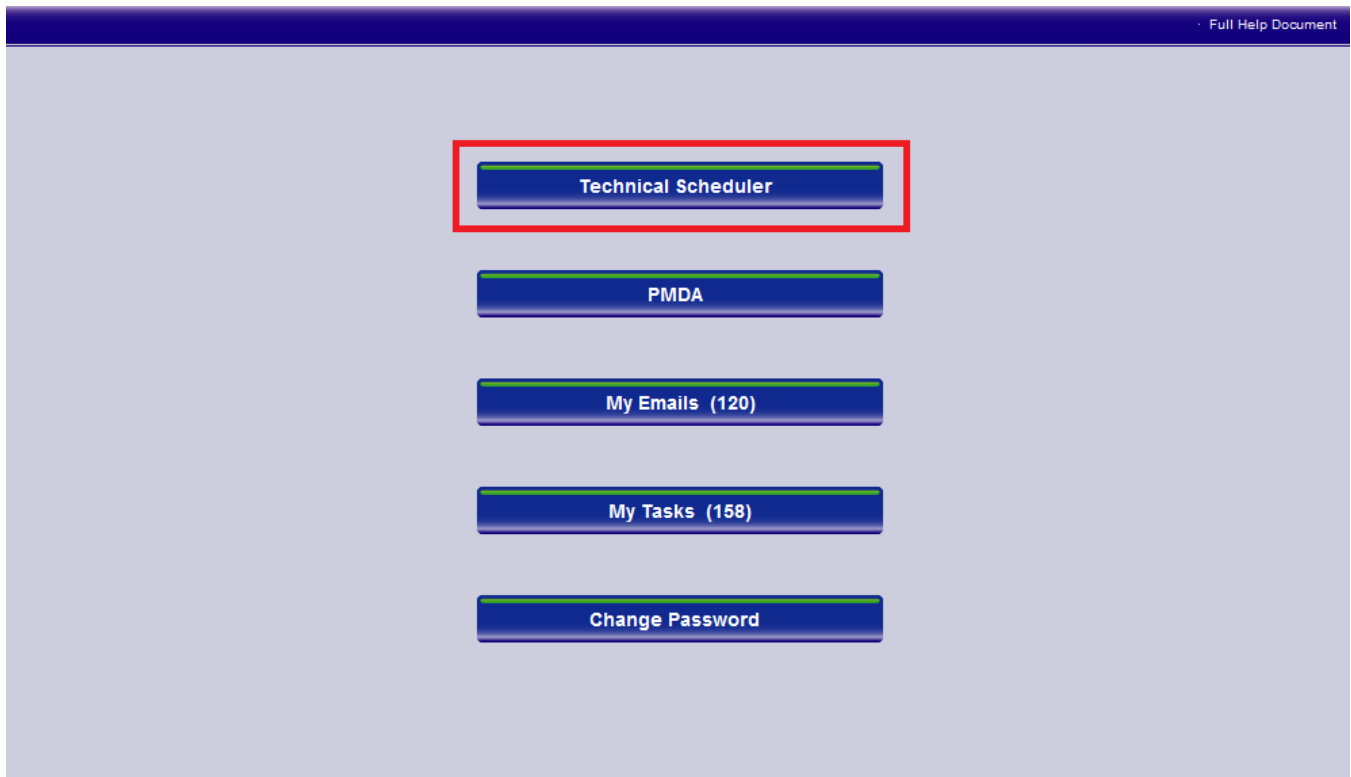
Disable	Last Name	First Name	User Name	Access Level	Employee Type	Branch	Title	Last Login	Edit
	AC	Co		Disabled		ACRS		Never	
	AC	Tr		User		ACRS	None	Never	
	Al	Be	axb3	User	Employee	PMDA	Branch Chief	7/13/2012	
	Al	Pi	ADP1	User	Employee	ACRS	Consultant	Never	
	An	Ch	AHC	User	Employee	PMDA	Management Analyst	8/20/2012	
	An	Di	AFD	User	Engineer	Reactor Safety Branch B	Technical Advisor	8/10/2012	

*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".

Main Menu » Technical Scheduler » Available Committee Date Management Page Help » Full Help Document

### Available Committee Date Administration

Date View  
☒ View Future Dates ☐ View All Dates

Committee Type View  
☒ View Full Committee Dates ☐ View Subcommittee Dates ☐ View All Committee Types

Add/Edit Available Dates

1 Choose Committee Type of the Date to be Added:  
☒ Full Committee ☐ Subcommittee

2 \*Start:    
 \*End:

3

Delete	Type	Start	End	Edit
	Full Committee	10/4/2012	10/6/2012	
	Full Committee	11/1/2012	11/3/2012	
	Full Committee	12/6/2012	12/8/2012	
	Full Committee	2/7/2013	2/9/2013	
	Full Committee	3/7/2013	3/9/2013	

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".

Main Menu » Technical Scheduler » Available Committee Date Management Page Help » Full Help Document

### Available Committee Date Administration

1 Date View  
☒ View Future Dates ☐ View All Dates

2 Committee Type View  
☒ View Full Committee Dates ☐ View Subcommittee Dates ☐ View All Committee Types

Add/Edit Available Dates

Choose Committee Type of the Date to be Added:  
☒ Full Committee ☐ Subcommittee

\*Start:    
 \*End:

Delete	Type	Start	End	Edit
	Full Committee	10/4/2012	10/6/2012	3
	Full Committee	11/1/2012	11/3/2012	
	Full Committee	12/6/2012	12/8/2012	
	Full Committee	2/7/2013	2/9/2013	

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.*

Main Menu » Technical Scheduler » Meetings List Page Help · Full Help Document

[Technical Scheduler](#) [Topic List](#) [Meetings Calendar](#) [My Meetings Calendar](#) [Meetings List](#)

The page at localhost says:

All associated agenda items will also be deleted. Are you sure?

2

Add New Full Committee Meeting

List Filter

Show: ☒ All ☐ Full Committee Only ☐ Subcommittee Only

\*Start: 09/27/2012 \*Finish: 10/27/2012

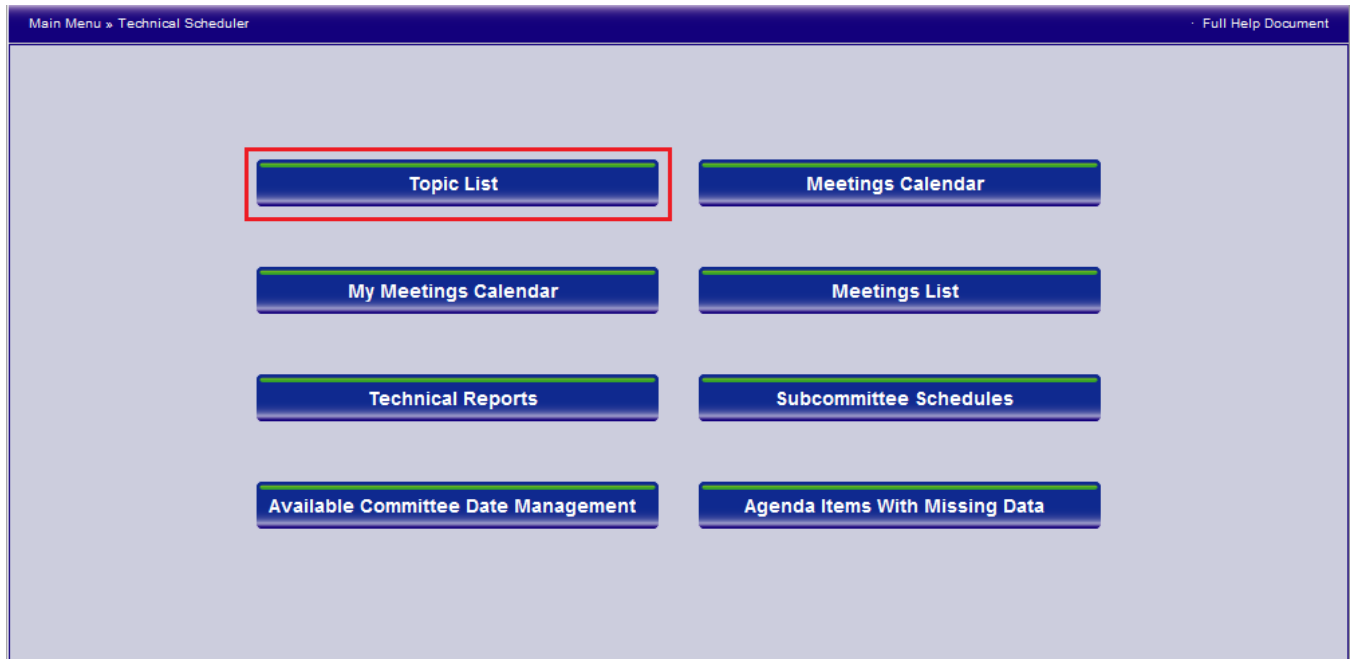
Meeting Dates

Delete	Start Time	Finish Time	Meeting	Days	Topic	Rooms	Status	Edit
1	10/2/2012 8:30 AM	10/2/2012 5:00 PM	SC: ABWR	1	STP COLA - ACRS review of SER with no open items	T-2B1	Tentative	
	10/2/2012 8:30 AM	10/2/2012 12:00 PM	SC: Digital I & C Systems	1	Licensing Approach for I&C for the review of B&W mPower	T-2B3	Definite	
	10/2/2012 1:00 PM	10/2/2012 5:00 PM	SC: Reliability and PRA	1	Economic Consequences / Land Contamination Initiatives	T-2B3	Tentative	
	10/3/2012 8:30 AM	10/3/2012 5:00 PM	SC: Fukushima	1	Filtered Vents	T-2B1	Definite	

## ***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**





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.

Main Menu » Technical Scheduler » Topic List
Page Help · Full Help Document

[Technical Scheduler](#)
[Topic List](#)
[Meetings Calendar](#)
[My Meetings Calendar](#)
[Meetings List](#)

## Topic Administration

Add New Topic

List Filter











Subcommittee: --Show All--

Program Area: --Show All--

Purpose: --Show All--

Completed: No Year: 2012 Lead Engineer: --Show All--

Search:  [Clear Search](#) Lead Member: --Show All--

Delete	Number	Issue	Program Area	Meetings Needed	Edit
	77	Proposed Revision 1 to Regulatory Guide 1.194 (DG-1188), "Atmospheric Relative Concentrations for Control Room Radiological Habitability Assessments at Nuclear Power Plants."	Regulatory Requirements, Guidance, and Communication : New/Revised Reg. Guides and Standard Review Plan Sections	Full Committee only 12/6/2012 - 600th	
	80	Draft Guide DG-1184, "Installation Design and Installation of Valve-Regulated Lead-Acid Storage Batteries for Nuclear Power Plants."	Regulatory Requirements, Guidance, and Communication : New/Revised Reg. Guides and Standard Review Plan Sections	Full Committee only 12/6/2012 - 600th	
	81	Draft Guide DG-1185, "Maintenance, Testing, and Replacement of Valve-Regulated Lead-Acid Storage Batteries for Nuclear Power Plants."	Regulatory Requirements, Guidance, and Communication : New/Revised Reg. Guides and Standard Review Plan Sections	Full Committee only 12/6/2012 - 600th	
	92	Proposed Revision 2 to Regulatory Guide 1.90, (DG-1197), "Inservice Inspection of Prestressed Concrete Containment Structures with Grouted Tendons."	Regulatory Requirements, Guidance, and Communication : New/Revised Reg. Guides and Standard Review Plan Sections	Full Committee only 9/6/2012 - 597th	
	97	Proposed Revision 4 to Regulatory Guide 1.105 (DG-1141), "Setpoints for Safety-Related Instrumentation."	Regulatory Requirements, Guidance, and Communication : New/Revised Reg. Guides and Standard Review Plan Sections	Full Committee only 12/6/2012 - 600th	

To view/edit a topic

1. Click the edit icon next to the topic

### Topic Administration

Add New Topic

List Filter

Subcommittee: --Show All--

Program Area: --Show All--

Purpose: --Show All--

Completed: No Year: 2012 Lead Engineer: --Show All--

Search: Clear Search Lead Member: --Show All--

Delete	Number	Issue	Program Area	Meetings Needed	Edit
	77	Proposed Revision 1 to Regulatory Guide 1.194 (DG-1188), "Atmospheric Relative Concentrations for Control Room Radiological Habitability Assessments at Nuclear Power Plants."	Regulatory Requirements, Guidance, and Communication : New/Revised Reg. Guides and Standard Review Plan Sections	Full Committee 12/6/2012	
	80	Draft Guide DG-1184, "Installation Design and Installation of Valve-Regulated Lead-Acid Storage Batteries for Nuclear Power Plants."	Regulatory Requirements, Guidance, and Communication : New/Revised Reg. Guides and Standard Review Plan Sections	Full Committee only 12/6/2012 - 600th	
	81	Draft Guide DG-1185, "Maintenance, Testing, and Replacement of Valve-Regulated Lead-Acid Storage Batteries for Nuclear Power Plants."	Regulatory Requirements, Guidance, and Communication : New/Revised Reg. Guides and Standard Review Plan Sections	Full Committee only 12/6/2012 - 600th	
	92	Proposed Revision 2 to Regulatory Guide 1.90, (DG-1197), "Inservice Inspection of Prestressed Concrete Containment Structures with Grouted Tendons."	Regulatory Requirements, Guidance, and Communication : New/Revised Reg. Guides and Standard Review Plan Sections	Full Committee only 9/6/2012 - 597th	

2. You will then be brought to the topic detail page.

Main Menu » Technical Scheduler » Topic List » Topic DetailPage Help · Full Help Document

Technical Scheduler Topic List Meetings Calendar My Meetings Calendar Meetings List

Topic Detail

Topic Details

Topic Number: 77

\*Issue/Topic Title: Proposed Revision 1 to Regulatory Guide 1.194 (DG-1188), "Atmospheric Relative Concentrations for Control Room Radiological Habitability Assessments at Nuclear Power Plants."

\*Program Area: Regulatory Requirements, Guidance, and Communication : New/Revised Reg. Guides and Standard Review Plan Sections

\*Meetings Needed: ☐ Subcommittee(s) and full committee ☒ Full Committee only ☐ Subcommittee only

Issue Completed: ☐

Cancel

Full Committee Meetings

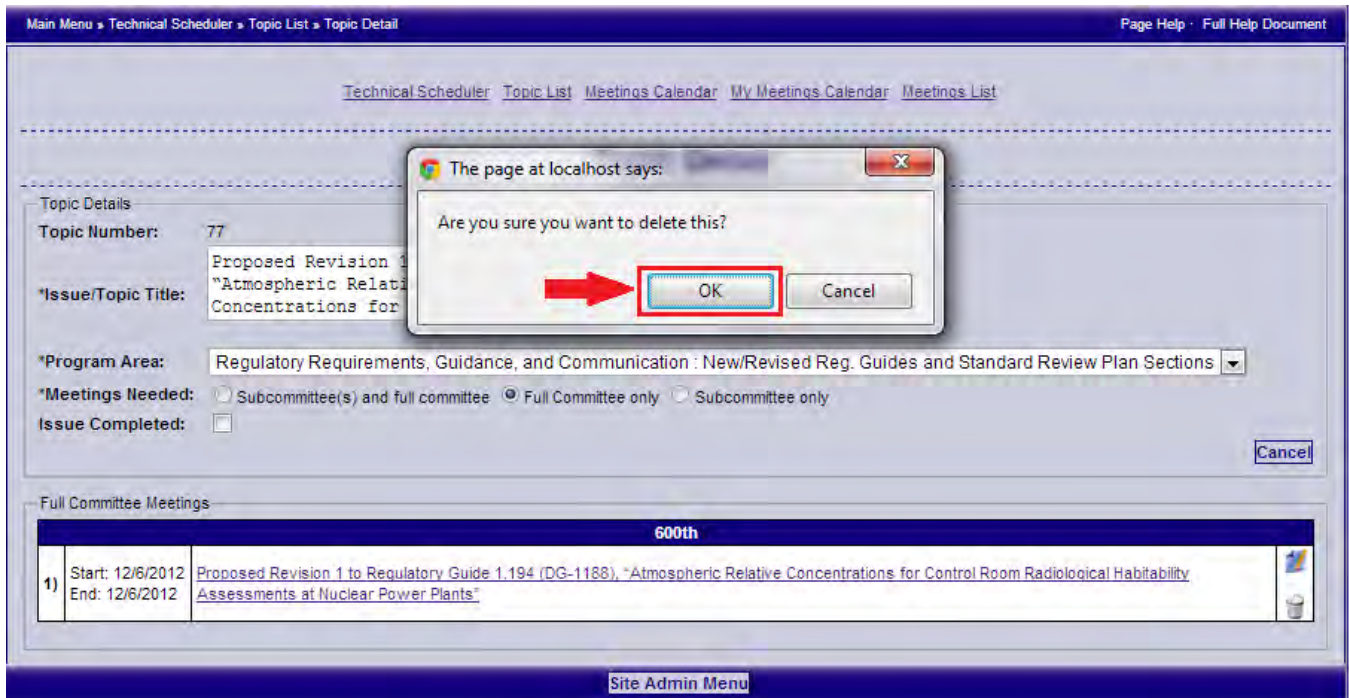
600th

1) Start: 12/6/2012 End: 12/6/2012 Proposed Revision 1 to Regulatory Guide 1.194 (DG-1188), "Atmospheric Relative Concentrations for Control Room Radiological Habitability Assessments at Nuclear Power Plants."

Site Admin Menu

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.

The screenshot shows the 'Topic Detail' page for an existing topic. The breadcrumb trail at the top is 'Main Menu » Technical Scheduler » Topic List » Topic Detail'. The page title is 'Topic Detail'. The 'Topic Details' section contains the following information:

- Topic Number: 77
- \*Issue/Topic Title: Proposed Revision 1 to Regulatory Guide 1.194 (DG-1188), "Atmospheric Relative Concentrations for Control Room Radiological Habitability"
- \*Program Area: Regulatory Requirements, Guidance, and Communication : New/Revised Reg. Guides and Standard Review Plan Sections
- \*Meetings Needed: ☐ Subcommittee(s) and full committee ☒ Full Committee only ☐ Subcommittee only
- Issue Completed: ☐

A 'Cancel' button is located at the bottom right of the 'Topic Details' section. Below this, the 'Full Committee Meetings' section shows a table with one meeting:

600th	
1)	Start: 12/6/2012 End: 12/6/2012 Proposed Revision 1 to Regulatory Guide 1.194 (DG-1188), "Atmospheric Relative Concentrations for Control Room Radiological Habitability Assessments at Nuclear Power Plants"

A 'Site Admin Menu' button is at the bottom of the page.

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".

The screenshot shows the 'Topic Detail' page for adding a new topic. The breadcrumb trail at the top is 'Main Menu » Technical Scheduler » Topic List » Topic Detail'. The page title is 'Topic Detail'. The 'Topic Details' section contains the following information:

- Topic Number: (New)
- \*Issue/Topic Title: 1
- \*Program Area: Licensing Reviews : Combined License 2
- \*Meetings Needed: ☒ Subcommittee(s) and full committee ☐ Full Committee only ☐ Subcommittee only
- Issue Completed: ☐

A 'Save' button and a 'Cancel' button are located at the bottom right of the 'Topic Details' section. Below this, the 'Subcommittee Meetings' and 'Full Committee Meetings' sections are empty, each with a 'Please Save Topic First' message. A 'Site Admin Menu' button is at the bottom of the page.

Add Agenda Items as needed

Updated: November 2012

*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.*

The screenshot shows a web application interface for 'Topic Detail'. At the top, there is a navigation bar with links: 'Main Menu', 'Technical Scheduler', 'Topic List', 'Topic Detail', 'Page Help', and 'Full Help Document'. Below this is a breadcrumb trail: 'Technical Scheduler > Topic List > Meetings Calendar > My Meetings Calendar > Meetings List'. The main heading is 'Topic Detail'. The form contains the following fields:

- Topic Number:** 1084
- \*Issue/Topic Title:** A text input field containing 'New Topic'.
- \*Program Area:** A dropdown menu showing 'Licensing Reviews : Combined License'.
- \*Meetings Needed:** Radio buttons for 'Subcommittee(s) and full committee' (selected), 'Full Committee only', and 'Subcommittee only'.
- Issue Completed:** A checkbox that is unchecked.

At the bottom right of the form, it says 'Topic Saved Successfully' with a 'Cancel' button. Below the form, there is a red-bordered warning box with the text: '2 Topic doesn't satisfy requirements. (Missing both Full Committee and Subcommittee meeting assignments.) It will be deleted tonight unless corrected.' Below this, there are two sections: 'Subcommittee Meetings' and 'Full Committee Meetings'. In the 'Subcommittee Meetings' section, there is a red-bordered box with the number '1' and a button labeled 'Add Subcommittee Meeting for Topic'. In the 'Full Committee Meetings' section, there is a button labeled 'Add Topic to Full Committee'. At the very bottom, there is a 'Site Admin Menu' link.

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.

Main Menu » Technical Scheduler » Topic List » Topic Detail Page Help · Full Help Document

[Technical Scheduler](#) [Topic List](#) [Meetings Calendar](#) [My Meetings Calendar](#) [Meetings List](#)

---

### Topic Detail

---

Topic Details

Topic Number: 92

\*Issue/Topic Title: Proposed Revision 2 to Regulatory Guide 1.90, (DG-1197), "Inservice Inspection of Prestressed Concrete Containment Structures with Grouted Tendon."

\*Program Area: Regulatory Requirements, Guidance, and Communication : New/Revised Reg. Guides and Standard Review Plan Sections


\*Meetings Needed: ☐ Subcommittee(s) and full committee ☒ Full Committee only ☐ Subcommittee only

Issue Completed: ☐

[Cancel](#)

---

Full Committee Meetings

597th		
1)	Start: 9/6/2012 End: 9/6/2012	<a href="#">Proposed Revision 2 to Regulatory Guide 1.90, (DG-1197), "Inservice Inspection of Prestressed Concrete Containment Structures with Grouted Tendon."</a>  

Main Menu » Technical Scheduler » Agenda Item Details Page Help · Full Help Document

[Back](#)

[Technical Scheduler](#) [Topic List](#) [Meetings Calendar](#) [My Meetings Calendar](#) [Meetings List](#)

---

Meeting Details [Reports](#) [P & P Data](#)

---

[Subscribe to Alerts for this Meeting](#)

Topic: Proposed Revision 1 to Regulatory Guide 1.194 (DG-1188), "Atmospheric Relative Concentrations for Control Room Radiological Habitability Assessments at Nuclear Power Plants."

---

#### Pre-Meeting Details

---

\*Meeting Dates: FC: 600th 12/6/2012-12/8/2012 ☐ Tentative?

Start On Which Day of Committee: 1 Requested Number of Hours: 1

\*Start Time: 12/06/2012 08:30 AM \*Finish Time: 12/06/2012 09:30 AM

\*Agenda Header: Proposed Revision 1 to Regulatory Guide 1.194 (DG-1188), "Atmospheric Relative Concentrations for Control Room Radiological Habitability Assessments at Nuclear"

\*Description: The purpose of this meeting is to review the proposed revision to Regulatory Guide 1.194. The ACRS issued a memo in April 2008 approving of the release of the proposed revision for public comment.

\*Purpose: Determine a Course of Action

\*Category: New Reactors \*Priority: Medium

\*Security: Open Document From Program Office Due Date: 12/31/2012 N/A

(Note: Schedule conflicts indicated with red text and \*\*)

\*Lead Member: Ry T. Mi \*Lead Engineer: Co Ne

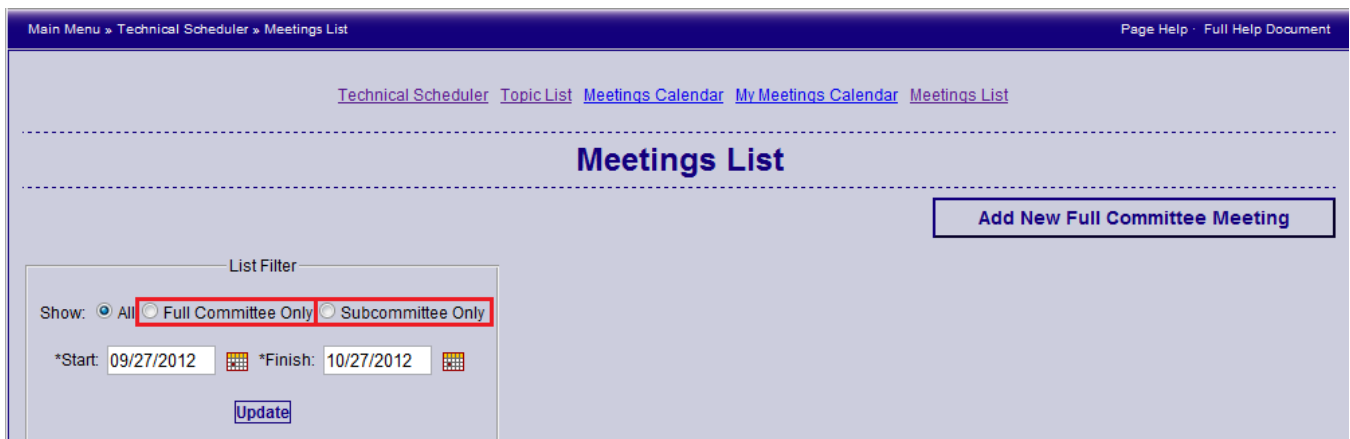
Backup Lead Member: --Please Select-- Backup Lead Engineer: --Please Select--

## 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.

The screenshot shows the 'Meetings List' interface. At the top, there is a navigation bar with 'Main Menu » Technical Scheduler » Meetings List' and 'Page Help · Full Help Document'. Below this is a breadcrumb trail: 'Technical Scheduler > Topic List > Meetings Calendar > My Meetings Calendar > Meetings List'. The main heading is 'Meetings List'. On the right, there is a button 'Add New Full Committee Meeting' (annotated with a red '3'). On the left, there is a 'List Filter' box (annotated with a red '1') containing radio buttons for 'All' (selected), 'Full Committee Only', and 'Subcommittee Only', and date pickers for '\*Start: 10/31/2012' and '\*Finish: 11/30/2012' with an 'Update' button. Below the filter box, there is a table of meetings (annotated with a red '2'). The table has columns: 'Delete', 'Start Time', 'Finish Time', 'Meeting', 'Days', 'Topic', 'Rooms', 'Status', and 'Edit'. The table contains 7 rows of meeting data. At the bottom right of the table, it says 'Record Count: 7'. At the bottom of the page, there is a 'Site Admin Menu' button.

Technical Scheduler > Topic List > Meetings Calendar > My Meetings Calendar > Meetings List

### Meetings List

3 Add New Full Committee Meeting

List Filter

Show: ☒ All ☐ Full Committee Only ☐ Subcommittee Only

\*Start: 10/31/2012 \*Finish: 11/30/2012

Update

Delete	Start Time	Finish Time	Meeting	Days	Topic	Rooms	Status	Edit
	10/31/2012 12:00 PM	10/31/2012 1:00 PM	SC: Planning & Procedures	1	Planning and Procedures	T-2B1	Definite	
	10/31/2012 1:30 PM	10/31/2012 5:00 PM	SC: ABWR	1	STP COLA - ACRS review of SER with no open items	T-2B1	Tentative	
	11/1/2012 8:30 AM	11/3/2012 5:00 PM	FC: 599th	3		T-2B1	Definite	
	11/14/2012 8:30 AM	11/14/2012 5:00 PM	SC: T-H Phenomena	1	Thermal conductivity degradation (TCD) impact evaluation for the related PWRs	T-2B3	Definite	
	11/14/2012 1:00 PM	11/14/2012 5:00 PM	SC: Reliability and PRA	1	Discuss Level 3 PRA Project Plan	T-2B1	Tentative	
	11/15/2012 8:30 AM	11/16/2012 5:00 PM	SC: US-APWR	2	Review of selected chapters associated with the US-APWR design certification and the Comanche Peak COLA. They will also review topical report.	T-2B3	Definite	
	11/15/2012 8:30 AM	11/15/2012 12:00 PM	SC: Plant License Renewal	1	South Texas Project (STP) License Renewal Application (LRA)	T-2B1	Definite	

Record Count: 7

1/1 25

Site Admin Menu



1) To view/edit an existing meeting, click the appropriate edit icon.

Main Menu » Technical Scheduler » Meetings List Page Help · Full Help Document

[Technical Scheduler](#) [Topic List](#) [Meetings Calendar](#) [My Meetings Calendar](#) [Meetings List](#)

---

## Meetings List

[Add New Full Committee Meeting](#)

List Filter

Show: ☒ All ☐ Full Committee Only ☐ Subcommittee Only

\*Start:  \*Finish:

[Update](#)

Delete	Start Time	Finish Time	Meeting	Days	Topic	Rooms	Status	Edit
	10/31/2012 12:00 PM	10/31/2012 1:00 PM	SC: Planning & Procedures	1	Planning and Procedures	T-2B1		
	10/31/2012 1:30 PM	10/31/2012 5:00 PM	SC: ABWR	1	STP COLA - ACRS review of SER with no open items	T-2B1	Tentative	
	11/1/2012 8:30 AM	11/3/2012 5:00 PM	FC: 599th	3		T-2B1	Definite	
	11/14/2012 8:30 AM	11/14/2012 5:00 PM	SC: T-H Phenomena	1	Thermal conductivity degradation (TCD) impact evaluation for the related PWRs	T-2B3	Definite	
	11/14/2012 1:00 PM	11/14/2012 5:00 PM	SC: Reliability and PRA	1	Discuss Level 3 PRA Project Plan	T-2B1	Tentative	
	11/15/2012 8:30 AM	11/16/2012 5:00 PM	SC: US-APWR	2	Review of selected chapters associated with the US-APWR design certification and the Comanche Peak COLA. They will also review topical report.	T-2B3	Definite	
	11/15/2012 8:30 AM	11/15/2012 12:00 PM	SC: Plant License Renewal	1	South Texas Project (STP) License Renewal Application (LRA)	T-2B1	Definite	

Record Count: 7

1/1 25

[Site Admin Menu](#)

Main Menu » Technical Scheduler » Agenda Item Details Page Help · Full Help Document

[Back](#) [Technical Scheduler](#) [Topic List](#) [Meetings Calendar](#) [My Meetings Calendar](#) [Meetings List](#)

Meeting Details [Reports](#) [P & P Data](#)

[Subscribe to Alerts for this Meeting](#)

Topic: Proposed Revision 1 to Regulatory Guide 1.194 (DG-1188), "Atmospheric Relative Concentrations for Control Room Radiological Habitability Assessments at Nuclear Power Plants."

**Pre-Meeting Details**

\*Meeting Dates:  ☐ Tentative?

Start On Which Day of Committee:  Requested Number of Hours:

\*Start Time:   \*Finish Time:

\*Agenda Header:  
Proposed Revision 1 to Regulatory Guide 1.194 (DG-1188), "Atmospheric Relative Concentrations for Control Room Radiological Habitability Assessments at Nuclear"

\*Description:  
The purpose of this meeting is to review the proposed revision to Regulatory Guide 1.194. The ACRS issued a memo in April 2008 approving of the release of the proposed revision for public comment.

\*Purpose:

\*Category:  \*Priority:

\*Security:  Document From Program Office Due Date:  ☐ N/A

(Note: Schedule conflicts indicated with red text and \*\*)

\*Lead Member:  \*Lead Engineer:

Backup Lead Member:  Backup Lead Engineer:

Updated: November 2012

2) To delete an existing meeting (if allowed), click the delete icon and confirm.

Main Menu » Technical Scheduler » Meetings List Page Help · Full Help Document

[Technical Scheduler](#) [Topic List](#) [Meetings Calendar](#) [My Meetings Calendar](#) [Meetings List](#)

---

## Meetings List















[Add New Full Committee Meeting](#)

List Filter

Show: ☒ All ☐ Full Committee Only ☐ Subcommittee Only

\*Start:  \*Finish:

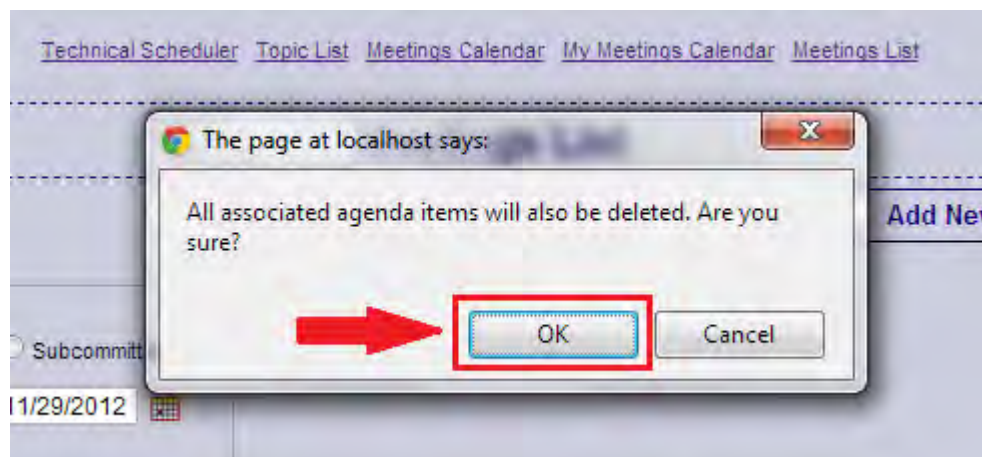
[Update](#)

Meeting Dates								
Delete	Start Time	Finish Time	Meeting	Days	Topic	Rooms	Status	Edit
	10/31/2012 1:00 PM	10/31/2012 1:00 PM	SC: Planning & Procedures	1	Planning and Procedures	T-2B1	Definite	
	10/31/2012 1:30 PM	10/31/2012 5:00 PM	SC: ABWR	1	STP COLA - ACRS review of SER with no open items	T-2B1	Tentative	
	11/1/2012 8:30 AM	11/3/2012 5:00 PM	FC: 599th	3		T-2B1	Definite	
	11/14/2012 8:30 AM	11/14/2012 5:00 PM	SC: T-H Phenomena	1	Thermal conductivity degradation (TCD) impact evaluation for the related PWRs	T-2B3	Definite	
	11/14/2012 1:00 PM	11/14/2012 5:00 PM	SC: Reliability and PRA	1	Discuss Level 3 PRA Project Plan	T-2B1	Tentative	
	11/15/2012 8:30 AM	11/16/2012 5:00 PM	SC: US-APWR	2	Review of selected chapters associated with the US-APWR design certification and the Comanche Peak COLA. They will also review topical report.	T-2B3	Definite	
	11/15/2012 8:30 AM	11/15/2012 12:00 PM	SC: Plant License Renewal	1	South Texas Project (STP) License Renewal Application (LRA)	T-2B1	Definite	

Record Count: 7

1/1 25

[Site Admin Menu](#)



## Meeting Calendars

WebACTs provides several different calendar views of meetings.

One view is a single month calendar of all meetings.

Main Menu » Technical Scheduler » Meetings Calendar
Page Help » Full Help Document

Technical Scheduler
Topic List
Meetings Calendar
My Meetings Calendar
Meetings List

Meetings Calendar

« August 2012
September 2012
October 2012 »

(Click for 3 month view)

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	01
02	03	04	05	06	07	08
			<a href="#">SC: Plant License Renewal</a> <a href="#">SC: Planning &amp; Procedures</a> <a href="#">SC: Fukushima</a>	<a href="#">FC: 597th</a>	<a href="#">FC: 597th</a>	<a href="#">FC: 597th</a>
09	10	11	12	13	14	15
16	17	18	19	20	21	22
		<a href="#">SC: Radiation Protection and Nuclear Materials</a> <a href="#">SC: Regulatory Policies &amp; Practices</a> <a href="#">SC: Radiation Protection and Nuclear Materials</a>	<a href="#">SC: Plant License Renewal</a>	<a href="#">SC: US-APWR</a>		
23	24	25	26	27	28	29
30	01	02	03	04	05	06
		<a href="#">SC: Digital I &amp; C Systems</a> <a href="#">SC: ABWR</a> <a href="#">SC: Reliability and PRA</a>	<a href="#">SC: Fukushima</a> <a href="#">SC: Planning &amp; Procedures</a>	<a href="#">FC: 598th</a>	<a href="#">FC: 598th</a>	<a href="#">FC: 598th</a>

September
2012

Site Admin Menu



The final view, My Calendar, allows a user to see all of the meetings he/she is to attend.

<a href="#">Technical Scheduler</a> <a href="#">Topic List</a> <a href="#">Meetings Calendar</a> <a href="#">My Meetings Calendar</a> <a href="#">Meetings List</a>						
<b>Meetings Calendar</b>						
<a href="#">« February 2012</a> <b>March 2012</b> <a href="#">April 2012 »</a>						
<a href="#">(Click for 3 month view)</a>						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	01	02	03
04	05	06	07	08	09	10
		<a href="#">SC: Materials, Metallurgy &amp; Reactor Fuels</a> <a href="#">SC: Regulatory Policies &amp; Practices</a> <a href="#">SC: Reliability and PRA</a>	<a href="#">SC: Reliability and PRA</a> <a href="#">SC: Planning &amp; Procedures</a>	<a href="#">FC: 592nd</a>	<a href="#">FC: 592nd</a>	<a href="#">FC: 592nd</a>
11	12	13	14	15	16	17
18	19	20	21	22	23	24
			<a href="#">SC: Reliability and PRA</a>	<a href="#">SC: US-APWR</a>	<a href="#">SC: US-APWR</a>	
25	26	27	28	29	30	31
01	02	03	04	05	06	07
March ▼ 2012 ▼						
<a href="#">Site Admin Menu</a>						

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.

<b>Meetings Calendar</b>						
<a href="#">« August 2012</a> <b>September 2012</b> <a href="#">October 2012 »</a>						
<a href="#">(Click for 3 month view)</a>						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	01
02	03	04	05	06	07	08
		<a href="#">SC: Plant License Renewal</a> <a href="#">SC: Plant License Renewal</a> <a href="#">SC: Plant License Renewal</a> <a href="#">SC: Plant License Renewal</a>	<a href="#">SC: Plant License Renewal</a> <a href="#">SC: Plant License Renewal</a> <a href="#">SC: Plant License Renewal</a> <a href="#">SC: Plant License Renewal</a>	<a href="#">FC: 597th</a>	<a href="#">FC: 597th</a>	
09	10	11	12	13	14	15
16	17	18	19	20	21	22
		<a href="#">SC: Radiation Protection and Nuclear Materials</a> <a href="#">SC: Regulatory Policies &amp; Practices</a> <a href="#">SC: Radiation Protection and Nuclear Materials</a>	<a href="#">SC: Plant License Renewal</a>	<a href="#">SC: US-APWR</a>		
23	24	25	26	27	28	29

Here is a view of full meeting details:

Main Menu » Technical Scheduler » Agenda Item Details Page Help Full Help Document

[Back](#) [Technical Scheduler](#) [Topic List](#) [Meetings Calendar](#) [My Meetings Calendar](#) [Meetings List](#)

Meeting Details [Reports](#)

[Copy Agenda Item to New Meeting](#)  
[Switch Meeting Date with Other Meeting](#)  
[Subscribe to Alerts for this Meeting](#)

Topic: NR Briefing on Special Safety Assessments (SSAs)

---

**Pre-Meeting Details**

\*Applicable Subcommittee: Naval Reactors ☐ Tentative?

\*Available Dates: Subcommittee: 10/17/2012-10/19/2012 [\(Request New Dates\)](#)

10/17/2012 Start: 08:30 AM Finish: 05:00 PM Specify Location T-2B3  
Specify Alternate Location

	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM
T-2B1												
T-2B3												

10/18/2012 Start: Finish: Specify Location --Select--  
Specify Alternate Location

	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM
T-2B1												
T-2B3												

10/19/2012 Start: Finish: Specify Location --Select--  
Specify Alternate Location

	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM
T-2B1												
T-2B3												

[Check availability of attendees](#)

\*Purpose: NR briefing on Special Safety Assessments (SSAs)

\*Description: NR briefing on Special Safety Assessments (SSAs)

\*Category: New Reactors \*Priority: Medium

\*Security: Open Document From Program Office Due Date: 09/22/2012 ☐ N/A

(Note: Schedule conflicts indicated with red text and \*)

\*Lead Member: BI C. De \*Lead Engineer: DI F. An

Backup Lead Member: --Please Select-- Backup Lead Engineer: --Please Select--

**\*Available Members** **Members Attending**

Br Ch Ab I. Sa  
BI C. De Ar J.  
Ra B. Ha Ba Sa  
TB TB Co L. Mi  
Po A. Da  
Re L. Jo  
Ry T. Mi  
Sc St

**Available Consultants/Other** **Consultants/Other Attending**

Pi Al  
St Bo  
Di J. Da  
Wa B. Gr  
Ma I. Gu  
Cl H. Ja  
Ba Jo  
Fi H. Jo

**\*Available NRC Cognizant Offices** **NRC Cognizant Offices**

EDO  
FSME  
NMSS  
NRO  
NSIR  
RES

**\*Available TAC#** **TAC#**

S00000-License Renewal Generic (MA 3680) (Non-Billable)  
S00018-Reactor Oversight Process  
S00019-Safety Research Report - Reactors  
S00020-Generic Safety Issues  
S00021-Rulemaking  
S00022-Risk-Informing Regulations - Reactors  
S00023-Power Upgrades - Generic (Non-Billable)  
S00024-Mixed Oxide Fuel Fabrication Facility

S00231-Naval Reactors

FRN Published Date: FRN Revised Date:

\*Program Office Staff Contact Name: Al Adams External Stakeholders:

Program Office Staff Contact Info:

[Save Pre-Meeting Details](#) [Cancel](#)

---

**Post-Meeting Details**

Updated: November 2012

The single month view contains a dropdown field in the lower left corner to navigate quickly to other months.

Main Menu » Technical Scheduler » Meetings Calendar Page Help · Full Help Document

[Technical Scheduler](#) [Topic List](#) [Meetings Calendar](#) [My Meetings Calendar](#) [Meetings List](#)

---

## Meetings Calendar

---

[« August 2012](#)      **September 2012**      [October 2012 »](#)  
[\(Click for 3 month view\)](#)

---

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	01
02	03	04	05 <a href="#">SC: Plant License Renewal</a> <a href="#">SC: Planning &amp; Procedures</a> <a href="#">SC: Fukushima</a>	06 <a href="#">FC: 597th</a>	07 <a href="#">FC: 597th</a>	08 <a href="#">FC: 597th</a>
09	10	11	12	13	14	15
16	17	18 <a href="#">SC: Radiation Protection and Nuclear Materials</a> <a href="#">SC: Regulatory Policies &amp; Practices</a> <a href="#">SC: Radiation Protection and Nuclear Materials</a>	19 <a href="#">SC: Plant License Renewal</a>	20 <a href="#">SC: US-APWR</a>	21	22
23	24	25	26	27	28	29
30	01 <a href="#">SC: Digital I &amp; C Systems</a> <a href="#">SC: ABWR</a> <a href="#">SC: Reliability and PRA</a>	02 <a href="#">SC: Fukushima</a> <a href="#">SC: Planning &amp; Procedures</a>	03 <a href="#">FC: 598th</a>	04 <a href="#">FC: 598th</a>	05 <a href="#">FC: 598th</a>	06 <a href="#">FC: 598th</a>

September ▼ 2012 ▼

## Subcommittee Schedule

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.

The screenshot shows the 'Subcommittee Schedules' page. At the top, there is a navigation bar with links: [Main Menu](#) » [Technical Scheduler](#) » [Subcommittee Schedules](#). On the right, there is a link for [Page Help](#) - [Full Help Document](#). Below the navigation bar, there are links: [Technical Scheduler](#), [Topic List](#), [Meetings Calendar](#), [My Meetings Calendar](#), and [Meetings List](#). The main heading is 'Subcommittee Schedules'. Below this, there are input fields for '\*Start: 09/27/2012' and '\*Finish: 12/27/2012', followed by an 'Update' button. A section titled 'Available Dates' contains a list of subcommittee date ranges, each with a '(Click to expand)' link:

- Subcommittee: 10/2/2012-10/3/2012 (Click to expand)
- Subcommittee: 10/17/2012-10/19/2012 (Click to expand)
- Subcommittee: 10/30/2012-10/31/2012 (Click to expand)
- Subcommittee: 11/14/2012-11/16/2012 (Click to expand)
- Subcommittee: 12/4/2012-12/5/2012 (Click to expand)
- Subcommittee: 12/18/2012-12/19/2012 (Click to expand)

At the bottom, there is a 'Site Admin Menu' link.

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

This screenshot shows the same 'Subcommittee Schedules' page, but with the first date range expanded. The expanded view displays a scheduling grid for the dates 10/2/2012 and 10/3/2012. The grid has columns for days of the week (8, 9, 10, 11, 12, 1, 2, 3, 4, 5, 6, 7) and rows for locations (T-2B1, T-2B3). The meetings are as follows:

	8	9	10	11	12	1	2	3	4	5	6	7
T-2B1												
T-2B3												

For 10/2/2012:

- T-2B1: 10/2/2012 - ABWR
- T-2B3: 10/2/2012 - Digi, 10/2/2012 - Reliab

For 10/3/2012:

- T-2B1: 10/3/2012 - Fukushima
- T-2B3: 10/3

The rest of the page, including the navigation bar, links, and the list of other subcommittee date ranges, remains the same.

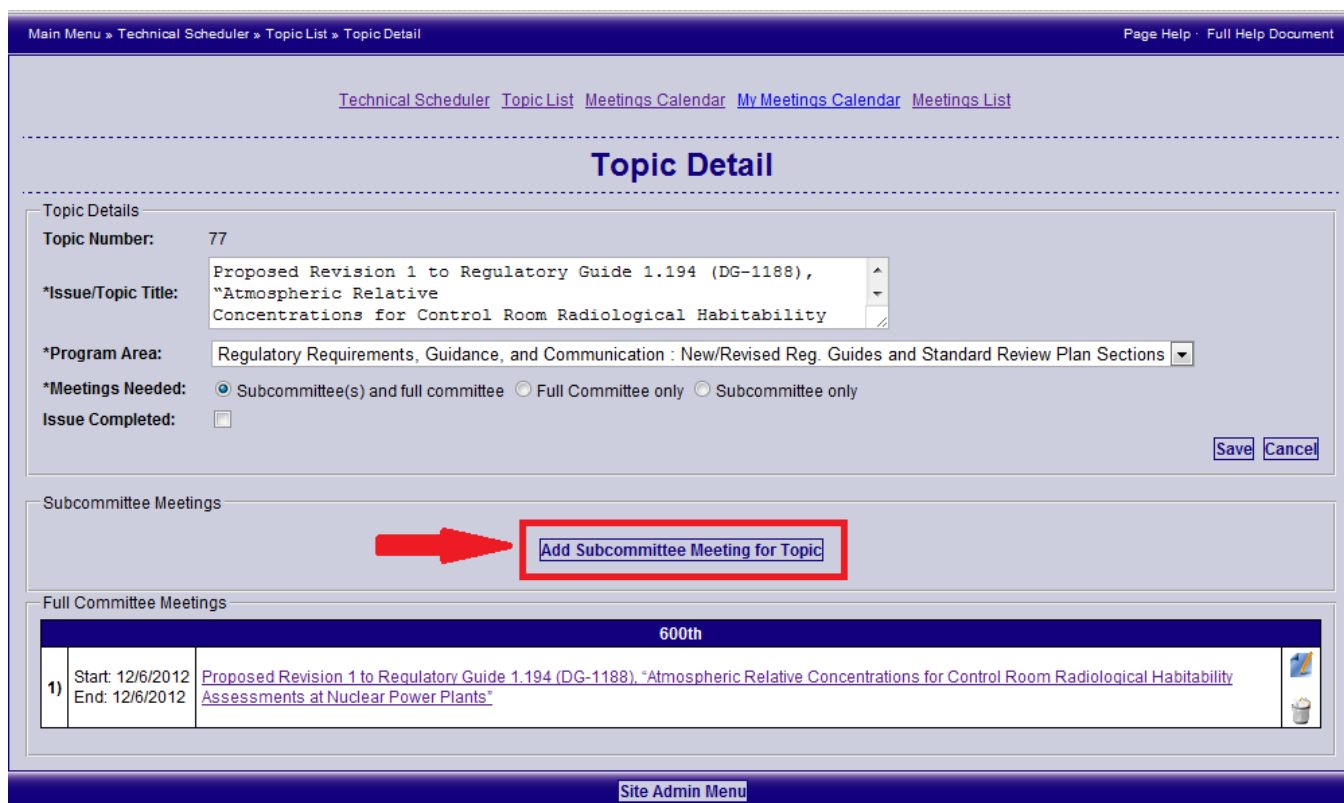


## Subcommittee Agenda Item

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.



Main Menu » Technical Scheduler » Topic List » Topic Detail Page Help · Full Help Document

[Technical Scheduler](#) [Topic List](#) [Meetings Calendar](#) [My Meetings Calendar](#) [Meetings List](#)

---

### Topic Detail

---

Topic Details

Topic Number: 77

\*Issue/Topic Title: Proposed Revision 1 to Regulatory Guide 1.194 (DG-1188),  
"Atmospheric Relative Concentrations for Control Room Radiological Habitability"

\*Program Area: Regulatory Requirements, Guidance, and Communication : New/Revised Reg. Guides and Standard Review Plan Sections


\*Meetings Needed: ☒ Subcommittee(s) and full committee ☐ Full Committee only ☐ Subcommittee only

Issue Completed: ☐

[Save](#) [Cancel](#)

---

Subcommittee Meetings

 [Add Subcommittee Meeting for Topic](#)

---

Full Committee Meetings

600th		
1)	Start: 12/6/2012 End: 12/6/2012	Proposed Revision 1 to Regulatory Guide 1.194 (DG-1188), "Atmospheric Relative Concentrations for Control Room Radiological Habitability Assessments at Nuclear Power Plants"

[Site Admin Menu](#)

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.*

Main Menu » Technical Scheduler » Agenda Item Details
Page Help Full Help Document

[Back](#)
[Technical Scheduler](#)
[Topic List](#)
[Meetings Calendar](#)
[My Meetings Calendar](#)
[Meetings List](#)

Meeting Details
Reports

[Copy Agenda Item to New Meeting](#)  
[Switch Meeting Date with Other Meeting](#)  
[Subscribe to Alerts for this Meeting](#)

Topic: NR Briefing on Special Safety Assessments (SSAs)

Pre-Meeting Details

\*Applicable Subcommittee: Naval Reactors
1

\*Available Dates: Subcommittee: 10/17/2012-10/19/2012 (Request New Dates) 2

☐ Tentative? 3

10/17/2012
Start: 08:30 AM Finish: 05:00 PM
Specify Location T-2B3  
Specify Alternate Location

	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM
T-2B1												
T-2B3												

10/18/2012
Start: Finish:
Specify Location --Select--  
Specify Alternate Location

	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM
T-2B1												
T-2B3												

10/19/2012
Start: Finish:
Specify Location --Select--  
Specify Alternate Location

	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM
T-2B1												
T-2B3												

Check availability of attendees

5
NR briefing on Special Safety Assessments (SSAs)

\*Purpose:

6
NR briefing on Special Safety Assessments (SSAs)

\*Description:

7
New Reactors

\*Category:

8
Open

\*Security:

9
Medium

\*Priority:

10
09/22/2012

Document From Program Office Due Date:

11
Bl C. De

\*Lead Member:

12
Di F. An

\*Lead Engineer:

13
--Please Select--

Backup Lead Member:

14
--Please Select--

Backup Lead Engineer:

\*Available Members

Members Attending

Available Consultants/Other

Consultants/Other Attending

\*Available NRC Cognizant Offices

NRC Cognizant Offices

\*Available TAC#

TAC#

19
FRN Published Date:

20
FRN Revised Date:

\*Program Office Staff Contact Name:

External Stakeholders:

Program Office Staff Contact Info:

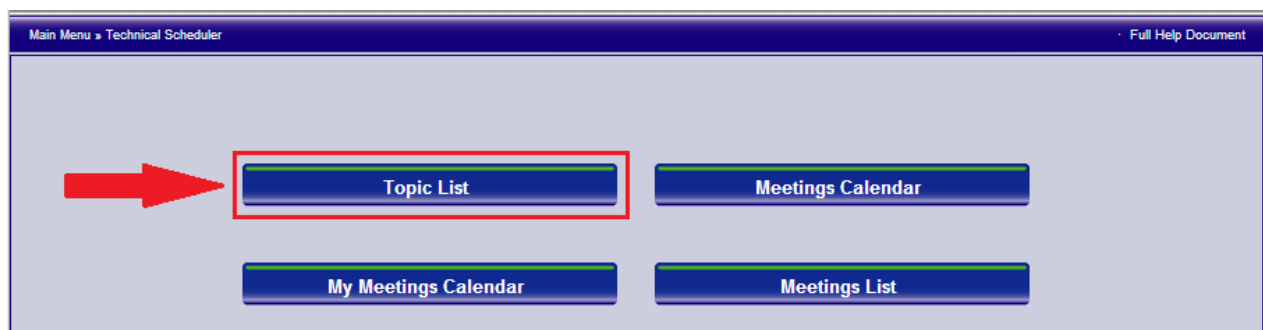
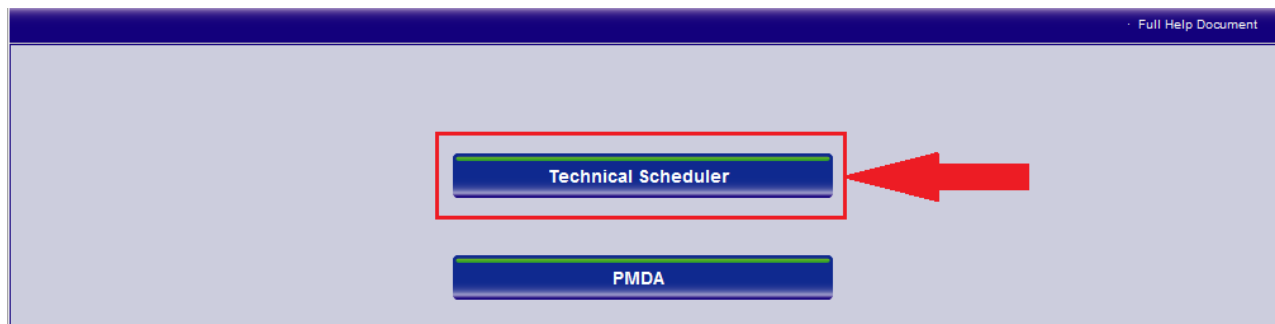
21
Save Pre-Meeting Details

Cancel

Post-Meeting Details

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:



This screenshot shows the 'Main Menu > Technical Scheduler > Meetings List' page. At the top right, there is a link for 'Page Help · Full Help Document'. Below the header, there are several links: 'Technical Scheduler', 'Topic List', 'Meetings Calendar', 'My Meetings Calendar', and 'Meetings List'. The main heading is 'Meetings List'. Below the heading, there is a button 'Add New Full Committee Meeting'. On the left, there is a 'List Filter' section with radio buttons for 'All' (selected), 'Full Committee Only', and 'Subcommittee Only'. Below the filter, there are input fields for '\*Start: 10/31/2012' and '\*Finish: 11/30/2012', with an 'Update' button below them. The main content is a table of meetings.

Delete	Start Time	Finish Time	Meeting	Days	Topic	Rooms	Status	Edit
	10/31/2012 12:00 PM	10/31/2012 1:00 PM	SC: Planning & Procedures	1	Planning and Procedures	T-2B1	Tentative	
	10/31/2012 1:30 PM	10/31/2012 5:00 PM	SC: ABWR	1	STP COLA - ACRS review of SER with no open items	T-2B1	Tentative	
	11/1/2012 8:30 AM	11/3/2012 5:00 PM	FC: 599th	3		T-2B1	Definite	
	11/14/2012 8:30 AM	11/14/2012 5:00 PM	SC: T-H Phenomena	1	Thermal conductivity degradation (TCD) impact evaluation for the related PWRs	T-2B3	Definite	
	11/14/2012 1:00 PM	11/14/2012 5:00 PM	SC: Reliability and PRA	1	Discuss Level 3 PRA Project Plan	T-2B1	Tentative	
	11/15/2012 8:30 AM	11/16/2012 5:00 PM	SC: US-APWR	2	Review of selected chapters associated with the US-APWR design certification and the Comanche Peak COLA. They will also review topical report.	T-2B3	Definite	
	11/15/2012 8:30 AM	11/15/2012 12:00 PM	SC: Plant License Renewal	1	South Texas Project (STP) License Renewal Application (LRA)	T-2B1	Definite	

Record Count: 7

At the bottom, there is a pagination bar showing '1/1' and a dropdown menu set to '25'. Below the pagination bar is a link for 'Site Admin Menu'.

1. Change any pre-meeting data as needed.
2. Click “Save Pre-Meeting Details”.

Main Menu » Technical Scheduler » Agenda Item Details Page Help Full Help Document

[Back](#) [Technical Scheduler](#) [Topic List](#) [Meetings Calendar](#) [My Meetings Calendar](#) [Meetings List](#)

Meeting Details Reports

[Subscribe to Alerts for this Meeting](#)

Topic: Proposed Revision 1 to Regulatory Guide 1.194 (DG-1188), "Atmospheric Relative Concentrations for Control Room Radiological Habitability Assessments at Nuclear Power Plants."

**Pre-Meeting Details**

\*Applicable Subcommittee:  ☐ Tentative?

\*Available Dates:  [\(Request New Dates\)](#)

9/3/2008 Start:  Finish:  Specify Location   
Specify Alternate Location

	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM
T-2B1	Planning & Procedures					Materials, Met						
T-2B3	T-H Phenomena											

[Check availability of attendees](#)

\*Purpose:

\*Description:

\*Category:  \*Priority:

\*Security:  Document From Program Office Due Date:  ☐ N/A

(Note: Schedule conflicts indicated with red text and "-")

\*Lead Member:  \*Lead Engineer:

Backup Lead Member:  Backup Lead Engineer:

**\*Available Members**

- Br Ch
- Po A. Da
- Bl C. De
- Sk Go
- Ra B. Ha
- Ar J.
- Re L. Jo
- Si D. Jo

Add -> <- Remove

**Members Attending**

-

**Available Consultants/Other**

- Pi Al
- St Bo
- Di J. Da
- Wa B. Gr
- Ma I. Gu
- Cl H. Ja
- Ba Jo
- Fi H. Jo

Add -> <- Remove

**Consultants/Other Attending**

-

**\*Available NRC Cognizant Offices**

- EDO
- FSME
- NRO
- NRR
- NSIR
- RES

Add -> <- Remove

**NRC Cognizant Offices**

- NMSS

**\*Available TAC#**

- S00000-License Renewal Generic (MA 3680) (Non-Billable)
- S00018-Reactor Oversight Process
- S00019-Safety Research Report - Reactors
- S00020-Generic Safety Issues
- S00021-Rulemaking
- S00022-Risk-Informing Regulations - Reactors
- S00023-Power Upgrades - Generic (Non-Billable)
- S00024-Mixed Oxide Fuel Fabrication Facility

Add -> <- Remove

**TAC#**

- S00111-Regulatory Guidance (Reg. Guides, GLS, Bulletins, RIS)

FRN Published Date:  FRN Revised Date:

\*Program Office Staff Contact Name:  External Stakeholders:  [Add](#)

Program Office Staff Contact Info:  [Remove Selected](#)

**2** [Save Pre-Meeting Details](#) [Cancel](#)

Site Admin Menu

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.

	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM
T-2B1	Planning & Procedures											
T-2B3	T-H Phenomena											


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.

Main Menu » Technical Scheduler » Agenda Item Details Page Help · Full Help Document

[Back](#) [Technical Scheduler](#) [Topic List](#) [Meetings Calendar](#) [My Meetings Calendar](#) [Meetings List](#)

Meeting Details **Reports**

 **Subscribe to Alerts for this Meeting**

Topic: NR Briefing on Special Safety Assessments (SSAs)

**Pre-Meeting Details**

\*Applicable Subcommittee:  ☐ Tentative?

\*Available Dates:  [\(Request New Dates\)](#)

9/3/2008 Start:  Finish:  Specify Location   
Specify Alternate Location

	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM
T-2B1	Planning & Procedures					Materials, Met						
T-2B3	T-H Phenomena											

[Check availability of attendees](#)

Main Menu » My Tasks Page Help · Full Help Document

**My Tasks**

**Assign Tasks**

\*Start:  ☐ \*Finish:  ☐

[Update](#)

Max Number Tasks Shown:

**Archive Selected Tasks**

Incomplete

Task #	Description	Assigned	Due	View
18202	My Tasks	10/8/2012 10:29:29 AM	10/9/2012 5:00:00 PM	

Complete

Task #	Description	Assigned	Due	View
18200	Task Assigned	10/4/2012 10:07:10 PM	10/5/2012 5:00:00 PM	

[Site Admin Menu](#)

## 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.

Main Menu » Technical Scheduler » Meeting Administration Page Help · Full Help Document

---

**1** [Technical Scheduler](#) [Topic List](#) [Meetings Calendar](#) [My Meetings Calendar](#) [Meetings List](#)

**Agenda Items**

Meeting Details

Available Dates: Full Committee: 11/1/2012-11/3/2012

\*Start: 11/01/2012 08:30 AM

\*Finish: 11/01/2012 05:00 PM

**2** \*Meeting Number: ACRS-08

Load Times

Day	Date	Times & Location	
1	11/1/2012	*Start: 08:30 AM *Finish: 05:00 PM	11545 Rockville Pike, Rockville, MD T-2B1
Conflicts with: FC: 599th 11/1/2012-11/3/2012			

FRN Published Date: FRN Revised Date:

Save

Reports

**3** Available Dates

☒ View Future Dates ☐ View All Dates

Full Committee: 11/1/2012-11/3/2012 (Click to expand)

Full Committee: 12/6/2012-12/8/2012 (Click to expand)

Full Committee: 2/7/2013-2/9/2013 (Click to expand)

Full Committee: 3/7/2013-3/9/2013 (Click to expand)

Full Committee: 4/11/2013-4/13/2013 (Click to expand)

Full Committee: 5/9/2013-5/11/2013 (Click to expand)

Full Committee: 6/5/2013-6/7/2013 (Click to expand)

Full Committee: 7/11/2013-7/13/2013 (Click to expand)

Full Committee: 9/5/2013-9/7/2013 (Click to expand)

Full Committee: 10/3/2013-10/5/2013 (Click to expand)

Full Committee: 11/7/2013-11/9/2013 (Click to expand)

Full Committee: 12/5/2013-12/7/2013 (Click to expand)



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".

The screenshot shows the 'Meeting Administration' interface. On the left, the 'Meeting Details' form is visible. It includes fields for 'Available Dates' (labeled 1), '\*Start' and '\*Finish' dates and times (labeled 2), '\*Meeting Number' (labeled 3), and a table for 'Times & Location' for each day (labeled 4). At the bottom of the form is a 'Save' button (labeled 5). On the right, the 'Available Dates' list shows various date ranges for the 'Full Committee'.

*Note: To add a new meeting while an existing one is displayed, click the Add New Meeting button and then do the above.*

This screenshot shows the same 'Meeting Administration' interface, but with the 'Add New Meeting' button highlighted with a red box and a red arrow pointing to it. The 'Available Dates' list is visible on the right, and the 'Agenda Items' section on the left shows a list of items for 'Day 1: 11/1/2012'.

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

Main Menu » Technical Scheduler » Meeting Administration Page Help · Full Help Document

[Technical Scheduler](#)
[Topic List](#)
[Meetings Calendar](#)
[My Meetings Calendar](#)
[Meetings List](#)

Agenda Items

Meeting Details

Available Dates: Full Committee: 11/1/2012-11/3/2012

\*Start: 11/01/2012 08:30 AM

\*Finish: 11/01/2012 05:00 PM

\*Meeting Number:

[Load Times](#)

Day	Date	Times & Location
1	11/1/2012	*Start: 08:30 AM *Finish: 05:00 PM 11545 Rockville Pike, Rockville, MD T-2B1 <span style="color: red;">Conflicts with: FC: 599th 11/1/2012-11/3/2012</span>

FRN Published Date: FRN Revised Date:

[Save](#)

Reports

Available Dates

☒ View Future Dates ☐ View All Dates

Full Committee: 11/1/2012-11/3/2012 (Click to expand)

FC: 599th  
11/1/2012 8:30:00 AM-11/3/2012 5:00:00 PM

Day 1: 11/1/2012

- Licensing Approach for I&C for the review of B&W mPower Hrs 2.0
- STP COLA - Review of SER with No Open Items and Long-term Core Cooling Approach Hrs 2.0
- Revision 2 to Regulatory Guide 1.79, "Testing of Emergency Core Cooling Systems for Pressurized Water Reactors," and Draft Guide DG-1277, "Initial Test Program of Emergency Core cooling Systems for Boiling Water Reactors" Hrs 1.5
- Development of a position paper addressing the value of filtered vents Hrs 0.5
- Preparation for ACRS Meeting with the Commission Hrs 1.5

Day 2: 11/2/2012

Day 3: 11/3/2012

## 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:

Go to the Topic Detail page:

1. Click the “Add Topic to Full Committee” button.

Main Menu » Technical Scheduler » Topic List » Topic Detail Page Help · Full Help Document

[Technical Scheduler](#) [Topic List](#) [Meetings Calendar](#) [My Meetings Calendar](#) [Meetings List](#)

---

### Topic Detail

---

Topic Details

Topic Number: 1085

\*Issue/Topic Title:

\*Program Area:

\*Meetings Needed: ☒ Subcommittee(s) and full committee ☐ Full Committee only ☐ Subcommittee only

Issue Completed: ☐

Topic Saved Successfully [Cancel](#)

Topic doesn't satisfy requirements. (Missing both Full Committee and Subcommittee meeting assignments.) It will be deleted tonight unless corrected.

Subcommittee Meetings

[Add Subcommittee Meeting for Topic](#)

Full Committee Meetings

[Add Topic to Full Committee](#)

[Site Admin Menu](#)

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.*

Main Menu » Technical Scheduler » Agenda Item Details
Page Help - Full Help Document

Back
Technical Scheduler
Topic List
Meetings Calendar
My Meetings Calendar
Meetings List

Meeting Details
Reports
P & P Data

[Subscribe to Alerts for this Meeting](#)

Topic: Draft Guide DG-1185, "Maintenance, Testing, and Replacement of Valve-Regulated Lead-Acid Storage Batteries for Nuclear Power Plants."

### Pre-Meeting Details

\*Meeting Dates: FC: 600th 12/6/2012-12/8/2012 1
5 ☐ Tentative?

Start On Which Day of Committee: 1 2
Requested Number of Hours: 1 3

\*Start Time: 12/06/2012 08:30 AM \*Finish Time: 12/06/2012 09:30 AM

\*Agenda Header: 4
Draft Guide-1185, "Maintenance, Testing, and Replacement of Valve-Regulated Lead-Acid Storage Batteries for Nuclear Power Plants"

\*Description: 6
The purpose of this meeting is to review the publication of Draft Guide-1185. The ACRS issued a memorandum in April 2008 approving the release of this document for public comment.

\*Purpose: 7
Determine a Course of Action

\*Category: 8
Operating Reactors

\*Priority: 10
Medium

\*Security: 9
Open

Document From Program Office Due Date: 12/31/2012 ☐ N/A 11

(Note: Schedule conflicts indicated with red text and \*\*)

\*Lead Member: 12
Ra B. Ha

\*Lead Engineer: 13
We D. Ka

Backup Lead Member: 14
--Please Select--

Backup Lead Engineer: 15
--Please Select--

Available Consultants/Other
Consultants/Other Attending

Pi Al  
Ma I Gu  
Cl H. Ja  
Ba Jo  
Fl H Jo  
Bo V. Ma  
Ha Mi  
He J My

Add ->  
<- Remove

St Bo  
Di J Da  
Wa B Gr

\*Available NRC Cognizant Offices
NRC Cognizant Offices

EDO  
NRR  
NSIR

Add ->  
<- Remove

RES  
FSME  
NMSS  
NRO

\*Available TAC#
TAC#

S00000-License Renewal Generic (MA 3680) (Non-Billable)  
S00018-Reador Oversight Process  
S00019-Safety Research Report - Reactors  
S00020-Generic Safety Issues  
S00021-Rulemaking  
S00022-Risk-Informing Regulations - Reactors  
S00023-Power Upgrades - Generic (Non-Billable)  
S00024-Mixed Oxide Fuel Fabrication Facility

Add ->  
<- Remove

S00111-Regulatory Guidance (Reg. Guides, GLS, Bulletins, RIS)

\*Program Office Staff Contact Name: Satish Aggrawal 18
External Stakeholders: 19
Add

Remove Selected

Program Office Staff Contact Info:

20 Save Pre-Meeting Details Cancel

### Post-Meeting Details

Site Admin Menu

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.

The screenshot shows a web interface for entering post-meeting details. At the top, there are two buttons: "Save Pre-Meeting Details" (annotated with a red 1) and "Cancel". Below this is a dark blue header bar labeled "Post-Meeting Details" (annotated with a red 2). Under the header, there is a dropdown menu for "Accomplishment Type" set to "Letter" (annotated with a red 3). The main form area contains several text input fields: "Title", "Letter Date" (with a calendar icon and a note "ADAMS accession number for letter:"), "Letter Main Message", "EDO Response Date" (with a calendar icon and a note "ADAMS accession number for EDO response:"), "EDO Response Main Message", "Timeliness", "Effectiveness", and "Follow Up". Each of these fields has a small blue icon to its right. Red arrows point from a red 4 to the "Title", "Letter Date", and "Letter Main Message" fields. At the bottom of the form is a button labeled "Save Post-Meeting Details" (annotated with a red 5). A "Site Admin Menu" link is visible in the footer.


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.

Main Menu » Technical Scheduler » Agenda Item Details Page Help · Full Help Document

**Back** [Technical Scheduler](#) [Topic List](#) [Meetings Calendar](#) [My Meetings Calendar](#) [Meetings List](#)

Meeting Details **Reports** **P & P Data**

 **Subscribe to Alerts for this Meeting**

Topic: Draft Guide DG-1185, "Maintenance, Testing, and Replacement of Valve-Regulated Lead- Acid Storage Batteries for Nuclear Power Plants."

**Pre-Meeting Details**

\*Meeting Dates: FC: 600th 12/6/2012-12/8/2012  ☐ Tentative?

Start On Which Day of Committee:   Requested Number of Hours:

\*Start Time: 12/06/2012  08:30 AM \*Finish Time: 12/06/2012  09:30 AM

Main Menu » My Tasks Page Help · Full Help Document

**My Tasks**

**Assign Tasks**


\*Start: 10/25/2011  \*Finish: 10/30/2012

**Update**


Max Number Tasks Shown:

**Archive Selected Tasks**

Incomplete

Task #	Description	Assigned	Due	View
18202	My Tasks	10/8/2012 10:29:29 AM	10/9/2012 5:00:00 PM	 <input type="button" value="v"/>

Complete

Task #	Description	Assigned	Due	View
18200	Task Assigned	10/4/2012 10:07:10 PM	10/5/2012 5:00:00 PM	 <input type="button" value="v"/>

**Site Admin Menu**

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.
  - Add Parameter: Type parameter and click the small “Add” button.
  - Remove Parameters: Select parameters to remove and click “Remove Selected”.
6. Click “Add”.

Main Menu » Site Admin Menu » Report Administration Page Help · Full Help Document

---

Report Data

\*Report Name: **1**

\*Report URL: **2**

Export Note:

Description: **3**

Parameters (case sensitive):  

**5**

Add

[Remove Selected](#)

Roles: **4**

☐ Bank Card Holder

☐ Contract Admin

☐ Contract POC

☐ Contract Specialist

☐ Employee Admin

☐ IT Admin

☐ PMDA Manager

☐ PMDA Team A Travel Approval

☐ PMDA Team B Travel Approval

☐ PMDA Viewer

☐ Site Admin

☐ Tech Team A Travel Approval

☐ Tech Team B Travel Approval

☐ Technical Admin

☐ Technical Editor

☐ Technical Viewer

☐ Training Admin

☐ Travel Admin

☐ Travel Approver

☐ Visa Admin

**6** Add

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".

Main Menu » Site Admin Menu » Report Administration Page Help · Full Help Document

**Report Data**

**2**

\*Report Name:

\*Report URL:

Export Note:

Description:

Parameters (case sensitive):

[Remove Selected](#)

**Roles:**

- ☒ Technical Admin
- ☒ Technical Editor
- ☒ Technical Viewer
- ☐ Bank Card Holder
- ☐ Contract Admin
- ☐ Contract POC
- ☐ Contract Specialist
- ☐ Employee Admin
- ☐ IT Admin
- ☐ PMDA Manager
- ☐ PMDA Team A Travel Approval
- ☐ PMDA Team B Travel Approval
- ☐ PMDA Viewer
- ☐ Site Admin
- ☐ Tech Team A Travel Approval
- ☐ Tech Team B Travel Approval
- ☐ Training Admin
- ☐ Travel Admin
- ☐ Travel Approver
- ☐ Visa Admin

**3**

Delete	Name	Edit
<input type="checkbox"/>	ACRS Letter Matrix	<b>1</b>
<input type="checkbox"/>	ACRS Letters by FY	
<input type="checkbox"/>	ACRS Letters By Member	
<input type="checkbox"/>	ADAMS Taxonomy Sheet	
<input type="checkbox"/>	Anticipated Workload	

## 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.

Main Menu » Site Admin Menu » Report Menu Administration Page Help - Full Help Document

---

## Report Menu Administration

---

Menu Details









































\*Menu Name: **1**

Add Reports:  **2** Add

Reports:

**3** Add

Report Menus

Delete	Menu Name	Edit
	ACRS Letters Menu	
	Appropriation Reports Menu	
	Contracts Reports Menu	
	Full Committee Report Menu	
	Full Committee Report Menu Summary	
	General Reports	
	Hotel Reservation Report Menu	
	Member Consultant Menu	
	NACT Table Menu	
	PMDA Reports	
	Subcommittee Report Menu	
	Technical Reports	
	Training Reports Menu	
	Travel Reports Menu	
	Travel Request Form	
	Visa Reports Menu	
	Visa Request Form	
	Visa Requisition Menu	
	VisaFundReportList	
	VisaRequestReportList	

**Record Count: 20**

[Site Admin Menu](#)

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”.

Main Menu » Site Admin Menu » Report Menu Administration Page Help - Full Help Document

---

## Report Menu Administration

Menu Details

\*Menu Name:

Add Reports:  2 Add

Reports:

Report Name							
ACRS Letter Matrix	<span style="border: 1px solid red; padding: 2px;">3</span>						
ACRS Letters By Member					<span style="border: 1px solid red; padding: 2px;">4</span>		
ACRS Letters by FY							
Letter Matrix for Op Plan							

Record Count: 4

5 Save

Report Menus

Delete	Menu Name	Edit
	ACRS Letters Menu	<span style="border: 1px solid red; padding: 2px;">1</span>
	Appropriation Reports Menu	
	Contracts Reports Menu	
	Full Committee Report Menu	
	Full Committee Report Menu Summary	
	General Reports	
	Hotel Reservation Report Menu	
	Member Consultant Menu	
	NACT Table Menu	
	PMDA Reports	
	Subcommittee Report Menu	
	Technical Reports	
	Training Reports Menu	
	Travel Reports Menu	
	Travel Request Form	
	Visa Reports Menu	
	Visa Request Form	
	Visa Requisition Menu	
	VisaFundReportList	
	VisaRequestReportList	

Record Count: 20

[Site Admin Menu](#)

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.*

Main Menu » Site Admin Menu » Report Menu Administration Page Help · Full Help Document

---

## Report Menu Administration

---

Menu Details

\*Menu Name:

Add Reports:  [Add](#)

Reports:

	Report Name		
	ACRS Letter Matrix		
	ACRS Letters By Member		
	ACRS Letters by FY		
	Letter Matrix for Op Plan		

Record Count: 4

[Save](#)

Report Menus

Delete		Menu Name	Edit
		ACRS Letters Menu	
		Appropriation Reports Menu	
		Contracts Reports Menu	
		Full Committee Report Menu	



## 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".

## Hotel Data

\*Hotel Name: **1**

Contact Name: **2**

\*Phone Number: **3**

Fax Number: **4**

\*Address: **5**

\*City:

State:  Postal Code:

\*Country: UNITED STATES

Email: **6**

**7**

Add

Name	Address	Edit
Atlanta Airport Marriott	address 1, city	
Atlanta Marriott Midtown	address 1, city	
Bethesda Marriott	address 1, city	
Bethesda North Marriott	address 1, city	
Hilton Garden Inn Bethesda	address 1, city	
Hilton Washington DC/Rockville	address 1, city	
Hyatt Regency Bethesda	address 1, city	
LOCAL	address 1, city	
Marriott Pooks Hill	address 1, city	
Marriott Wardman Park	address 1, city	
Omni Shoreham Hotel	address 1, city	
Residence Inn Marriott	address 1, city	
The Legacy	address 1, city	
Towneplace Suites Cedar Bluff	address 1, city	

Record Count: 14

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".

Main Menu » PMDA » Travel Management » Hotel Management Page Help · Full Help Document

2

**Hotel Data**  
\*Hotel Name:   
Contact Name:   
\*Phone Number:   
Fax Number:   
\*Address:   
  
\*City:   
State:   Postal Code:   
\*Country:    
Email:

3

Name	Address	Edit
Atlanta Airport Marriott	address 1, city	
Atlanta Marriott Midtown	address 1, city	
Bethesda Marriott	address 1, city	
Bethesda North Marriott	address 1, city	
Hilton Garden Inn Bethesda	address 1, city	
Hilton Washington DC/Rockville	address 1, city	
Hyatt Regency Bethesda	address 1, city	
LOCAL	address 1, city	
Marriott Pooks Hill	address 1, city	
Marriott Wardman Park	address 1, city	
Omni Shoreham Hotel	address 1, city	
Residence Inn Marriott	address 1, city	
The Legacy	address 1, city	
Towneplace Suites Cedar Bluff	address 1, city	

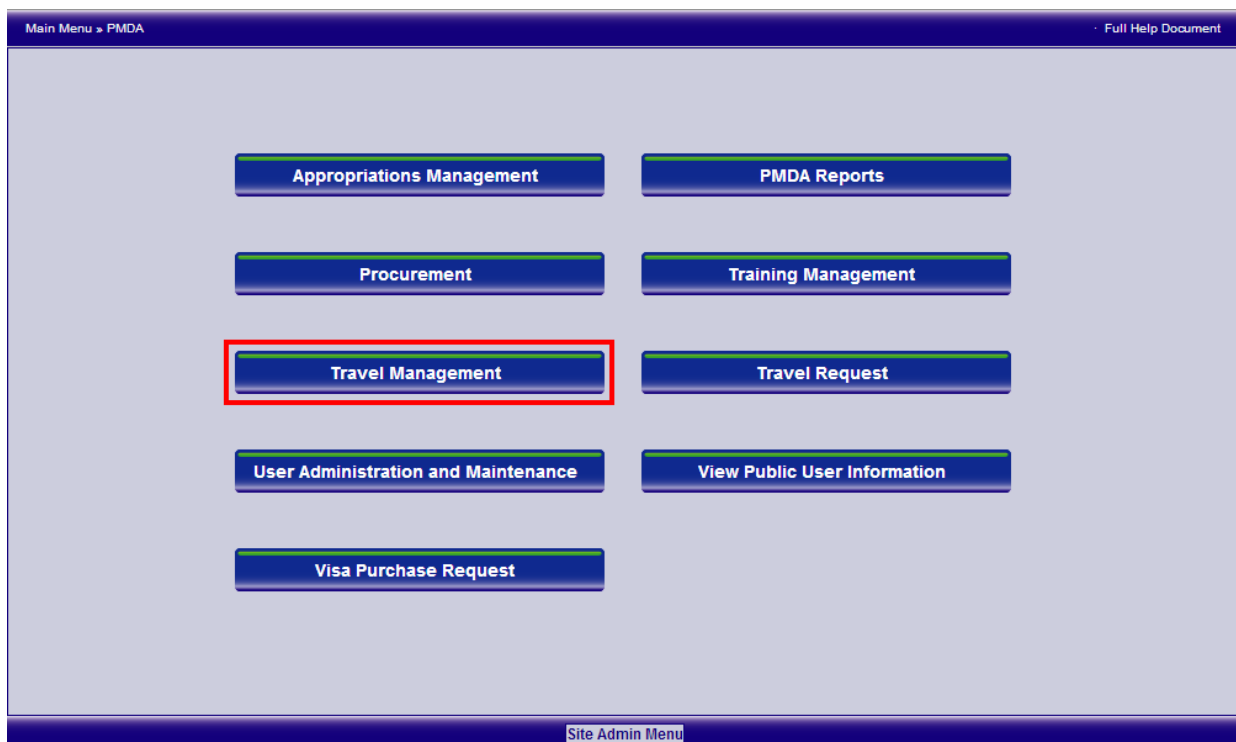
**Record Count: 14**

[Site Admin Menu](#)

*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”.

Main Menu » PMDA » Manage Hotel Reservations Page Help Full Help Document

### Hotel Reservation Meeting List

List Filter

\*Start: 10/04/2012 \*Finish: 11/04/2012 Reservations Processed: All Update

Meeting Dates

**10/4/2012 - 10/6/2012**  
 \*\*Meeting has Changes that may affect Reservations\*\*

Reservations Fully Processed? No  
 Reserve Hotels: **Reserve**

Attendance by the following is anticipated:

Br Ch	Dates Attending:	Hotel Reservation:
Individual Meeting Dates: 10/4/2012 to 10/6/2012	Attending: 10/4/2012 to 10/6/2012	None
Po A. Da Individual Meeting Dates: 10/4/2012 to 10/6/2012	Attending: 10/4/2012 to 10/6/2012	None

- 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”.

Main Menu » PMDA » Manage Hotel Reservations » Hotel Reservation Details Page Help Full Help Document

### Hotel Reservation Meeting Details

10/4/2012-10/6/2012

Save **7**

Fill Down  
 (Add Another Reservation)

Hotel Reservation

Attendee Name:	
Role:	Member
Requires Reservation:	N/A <b>1</b>
Hotel:	Atlanta Airport Marriott <b>2</b>
Address:	address 1, city
Hotel Contact:	
Check-in Date:	Start: <b>3</b>
Check-out Date:	Finish: <b>4</b>
Confirmation Number:	<b>5</b>
Notes:	<b>6</b>

## 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

Main Menu > My Tasks Page Help · Full Help Document

### My Tasks

[Assign Tasks](#)

\*Start: 10/03/2012 \*Finish: 10/08/2012

[Update](#)

Max Number Tasks Shown: 10

[Archive Selected Tasks](#)

Incomplete

Task #	Description	Assigned	Due	View
18202	My Tasks	10/8/2012 10:29:29 AM	10/9/2012 5:00:00 PM	

Complete

Task #	Description	Assigned	Due	View
18200	Task Assigned	10/4/2012 10:07:10 PM	10/5/2012 5:00:00 PM	

[Site Admin Menu](#)

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.

Main Menu » My Tasks Page Help · Full Help Document

---

## My Tasks

[Assign Tasks](#)

\*Start: 10/03/2012 \*Finish: 10/08/2012

[Update](#)

Max Number Tasks Shown: 10

[Archive Selected Tasks](#)

Incomplete

Task #	Description	Assigned	Due	View
18202	My Tasks	10/8/2012 10:29:29 AM	10/9/2012 5:00:00 PM	

Complete

Task #	Description	Assigned	Due	View
18200	Task Assigned	10/4/2012 10:07:10 PM	10/5/2012 5:00:00 PM	

[Site Admin Menu](#)

To mark an incomplete task as completed:

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

Main Menu » My Tasks Page Help · Full Help Document

---

## My Tasks

[Assign Tasks](#)

\*Start: 10/03/2012 \*Finish: 10/08/2012

[Update](#)

Max Number Tasks Shown: 10

[Archive Selected Tasks](#)

Task Details

Assigned: 10/8/2012 10:29:29 AM

Due: 10/9/2012 5:00:00 PM

Details: Task Details

[Complete](#)

Incomplete

Task #	Description	Assigned	Due	View
18202	My Tasks	10/8/2012 10:29:29 AM	10/9/2012 5:00:00 PM	

Complete

Task #	Description	Assigned	Due	View
18200	Task Assigned	10/4/2012 10:07:10 PM	10/5/2012 5:00:00 PM	

[Site Admin Menu](#)



To archive a completed task:


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

Main Menu » My Tasks Page Help · Full Help Document

---

## My Tasks

[Assign Tasks](#)

\*Start:   \*Finish:  

[Update](#)

Max Number Tasks Shown:

Task Details

**Assigned:** 10/4/2012 10:07:10 PM



**Due:** 10/5/2012 5:00:00 PM

**Details:** Task Details



[Archive](#)

[Archive Selected Tasks](#)

Incomplete

Task #	Description	Assigned	Due	View
18202	My Tasks	10/8/2012 10:29:29 AM	10/9/2012 5:00:00 PM	 

Complete

Task #	Description	Assigned	Due	View
18200	Task Assigned	10/4/2012 10:07:10 PM	10/5/2012 5:00:00 PM	 

[Site Admin Menu](#)

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.

Main Menu » My Tasks

Page Help · Full Help Document



## My Tasks

Assign Tasks



\*Start: 10/11/2011 \*Finish: 10/30/2012  
[Update](#)  
Max Number Tasks Shown: 10

2 Archive Selected Tasks

Incomplete

Task #	Description	Assigned	Due	View
18202	My Tasks	10/8/2012 10:29:29 AM	10/9/2012 5:00:00 PM	 

Complete

Task #	Description	Assigned	Due	View
18200	Task Assigned	10/4/2012 10:07:10 PM	10/5/2012 5:00:00 PM	 

Site Admin Menu

## 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”.

The screenshot shows the 'Assign Tasks' interface within a web application. The top navigation bar includes 'Main Menu > My Tasks > Assign Tasks' and a 'Page Help · Full Help Document' link. The main heading is 'Assign Tasks'. The interface is divided into several sections:

- Task Details:**
  - Assigned to:** A list of roles with checkboxes, labeled with a red '1'. Roles include Co AC, Tr AC, Be AI, Pi AI, Ch An, Di F. An, Gu Ar, Th C As, Ja Av, Mo Bi, St Bo, Ha K Br, and Sa Ca.
  - \*Short Description:** A text input field, labeled with a red '3'.
  - \*Task Details:** A larger text area for details, labeled with a red '4'.
  - \*Due:** A date and time selector showing '10/09/2012' and '05:00 PM', labeled with a red '5'.
  - Send Email Notification:** A checkbox, labeled with a red '6'.
  - Assign:** A blue button, labeled with a red '7'.
- Roles:** A list of roles with checkboxes, labeled with a red '2'. Roles include Bank Card Holder, Contract Admin, Contract POC, Contract Specialist, Employee Admin, IT Admin, PMDA Manager, PMDA Team A Travel Approval, PMDA Team B Travel Approval, PMDA Viewer, Site Admin, Tech Team A Travel Approval, and Tech Team B Travel Approval.

The bottom of the page features a 'Site Admin Menu' link.

## 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.

Main Menu » My Emails Page Help · Full Help Document

### My Emails

\*Start: 01/01/2011 \*Finish: 10/08/2012

[Update](#)

Max Number Emails Shown: 10

1/31/2011 10:10 AM: Email	<b>← To View</b>
1/31/2011 10:06 AM: Email	
1/24/2011 1:07 PM: Email	
1/24/2011 1:07 PM: Email	
1/24/2011 12:59 PM: Email	
1/24/2011 12:55 PM: Email	
1/24/2011 12:44 PM: Email	
1/24/2011 12:30 PM: Email	
1/24/2011 10:19 AM: Email	
1/24/2011 10:19 AM: Email	

[Site Admin Menu](#)

## My Emails

\*Start: 01/01/2011 \*Finish: 10/08/2012

[Update](#)

Max Number Emails Shown: 10

1/31/2011 10:10 AM: Email

Email Program Changed: General Update, Information About Program: | Program Name: New Reactors | Percent Spent: 101.79% | Amount Remaining: (\$1,095.40) | Fiscal Year: 2011 | Program Value: \$241,000.00 | Percent Remaining: -1.79% | Program Allotment: \$61,145.31 | Job Code: N7294 | Amount Spent: \$62,240.71 | Link to Program in WebACTS (must be logged in to WebACTS to use link): [Program](#) Amount left alert: (\$1,095.40) left Percentage left alert: -1.79% is percentage left [Archive](#)

1/31/2011 10:06 AM: Email

1/24/2011 1:07 PM: Email

1/24/2011 1:07 PM: Email

1/24/2011 12:59 PM: Email

1/24/2011 12:55 PM: Email

1/24/2011 12:44 PM: Email

1/24/2011 12:30 PM: Email

1/24/2011 10:19 AM: Email

1/24/2011 10:19 AM: Email

[Site Admin Menu](#)

## 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".

Main Menu » Site Admin Menu » Email Template Administration

Page Help · Full Help Document

Email Template Administration

Template Data

\*Template Name: 1

Description: 2

\*Email Subject Line: 3

Instructions: Type out what you would like the body of the email to look like, using <<message>> to represent the message from the Alert.

\*Template: 4

5 Add

Name	Description	Edit
Alert Email	Alert Email	
Available Meeting	Available Meeting Dates	
Cert Minutes	Cert Minutes	
COI Memo	COI Memo	
Consultants Attend	Consults Attend	
Draft Minutes	Draft Minutes	
Email	Default Email Template	
Meeting Cancelled	Meeting Cancelled	
Meeting Reminder	Meeting Reminder	
Status Report	Issue Status Report	
Visa Request date	Visa Request date	

Record Count: 11

Site Admin Menu

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".

Main Menu » Site Admin Menu » Email Template Administration Page Help · Full Help Document

---

## Email Template Administration

2

**Template Data**

\*Template Name:

Description:

\*Email Subject Line:  ABC ✓












Instructions: Type out what you would like the body of the email to look like, using <<message>> to represent the message from the Alert.

Available Committee Meeting Dates have been created ABC ✓

\*Template:

3

Save

Name	Description	Edit
Alert Email	Alert Email	
Available Meeting	Available Meeting Dates	 <span style="color: red; font-size: 1.5em; margin-left: 5px;">1</span>
Cert Minutes	Cert Minutes	
COI Memo	COI Memo	
Consultants Attend	Consults Attend	
Draft Minutes	Draft Minutes	
Email	Default Email Template	
Meeting Cancelled	Meeting Cancelled	
Meeting Reminder	Meeting Reminder	
Status Report	Issue Status Report	
Visa Request date	Visa Request date	

**Record Count: 11**

[Site Admin Menu](#)

## 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

Alert Template Data

\*Alert Template Name: **1**

\*Disabled: ☐

\*Alert Type: **2** Action

\*Alert Object: **3** Agenda Item

\*Trigger: **4** Date Changed

\*Type of Meeting: **5** ☒ Full Committee ☐ Subcommittee

\*Trigger Field: **6** Agenda Item Date

Send Email: **7** ☒

Email Template: **8** Alert Email

Send Assigned Task: **9** ☒

Subject: **10**

Message Body: **11**

Send To: **12**

Available Recipients:

- Consultants
- Lead Member
- Members

Chosen Recipients:

- Branch Chief
- Lead Engineer

Send To Role: **13**

Available Recipients:

- Contract Specialist
- Employee Admin
- IT Admin
- PMDA Manager
- PMDA Team A Travel Approval
- PMDA Team B Travel Approval
- PMDA Viewer
- Site Admin

Chosen Recipients:

- Bank Card Holder
- Contract Admin
- Contract POC

Send To Emails: **14**

Add

ac

ch

[Remove Selected](#)

Ch, Me O  Add

Send To People: **15**

AC, Co

Ch, Me O

[Remove Selected](#)

Information to Include: **16**

Available Info:

- Meeting Dates
- Meeting Members
- TAC Numbers
- Topic Title
- URL Link to Meeting

Chosen Info:

- Consultants
- Meeting Description
- Meeting Number

**17**

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.

Main Menu » Site Admin Menu » Alert Management Page Help · Full Help Document

### Alert Template Administration

**2** Alert Template Data

\*Alert Template Name:

\*Disabled: ☒

\*Alert Type: Action

\*Alert Object: Agenda Item

\*Trigger: Consultants Attending Changed

\*Type of Meeting: ☒ Full Committee ☐ Subcommittee

Send Email: ☐

Send Assigned Task: ☐

Subject:

Message Body: 

Consultants Attending Meeting, information as follows:

Send To:

Available Recipients:

- Lead Member
- Members
- Lead Engineer
- Branch Chief
- Consultants

Chosen Recipients:

Send To Role:

Available Recipients:

- Appropriations Admin
- Bank Card Holder
- Contract Admin
- Contract POC
- Contract Specialist
- Employee Admin
- IT Admin
- PMDA Manager

Chosen Recipients:

Send To Emails: 

ACRS Travel@nrc.gov  
ACRS Comp@nrc.gov

Send To People: 

AC, Co  
La, Mc M  
Ke, Fr  
Sh, Me A  
Ja, Pe I

Information to Include:

Available Info:

- Meeting Members
- Meeting Number
- URL Link to Meeting

Chosen Info:

- Consultants
- Meeting Dates
- Meeting Description
- Topic Title
- TAC Numbers

**3**   **4**

Template Type	Template Name	Disabled	Edit
Action	Consults Attending Meeting	True	
Action	Visa Request Created	True	
Action	Reserved Meeting Date Changed	True	
Action	Meetings Date Changed	True	

**1** ↑

## 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.

## Alert Template Administration

### Alert Template Data

\*Alert Template Name: **1**

\*Disabled: ☐

\*Alert Type: **2**

\*Alert Object: **3**

\*Type of Meeting: **4** ☒ Full Committee ☐ Subcommittee

\*Trigger Field: **5**

\*Trigger From Date: **6** ☒ Start of Date ☐ End of Date

Number of Days from Date Alert

Notify When Amount Spent:  **7**  
(leave blank if no alert needed)

Notify When Amount Left:   
(leave blank if no alert needed)

Notify When Percent Spent:  %  
(leave blank if no alert needed)

Notify When Percent Left:  %  
(leave blank if no alert needed)

Send Email: **8** ☐

Send Assigned Task: **9** ☒

Subject: **10**

Message Body: **11**

Send To: **12**

Available Recipients:

- Branch Chief
- Consultants
- Lead Engineer
- Lead Member
- Members

Chosen Recipients:

Send To Emails: **13**

[Remove Selected](#)

AC, Co

Send To People: **14**

[Remove Selected](#)

Information to Include: **15**

Available Info:

- Consultants
- Meeting Dates
- Meeting Description
- Meeting Members
- Meeting Number
- TAC Numbers
- Topic Title
- URL Link to Meeting

Chosen Info:

**16**

Template Type	Template Name	Disabled	Edit
Action	Consults Attending Meeting	True	
Action	Visa Request Created	True	
Action	Reserved Meeting Date Changed	True	
Action	Meetings Date Changed	True	
Action	Test Meeting Changed Send Ext Email	True	
Action	Visa Request Approved Changed	True	
Action	Availble Meeting Dates Created	True	
Action	Visa Requisition alert depleted funding	True	

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.

Main Menu » Site Admin Menu » Alert Management Page Help · Full Help Document

### Alert Template Administration

**2** Alert Template Data

\*Alert Template Name:

\*Disabled: ☒

\*Alert Type:

\*Alert Object:

\*Trigger:

\*Type of Meeting: ☒ Full Committee ☐ Subcommittee

Send Email: ☐

Send Assigned Task: ☐

Subject:

Message Body: 

Consultants Attending Meeting, information as follows:

Send To:

Available Recipients:

- Lead Member
- Members
- Lead Engineer
- Branch Chief
- Consultants

Chosen Recipients:

Send To Role:

Available Recipients:

- Appropriations Admin
- Bank Card Holder
- Contract Admin
- Contract POC
- Contract Specialist
- Employee Admin
- IT Admin
- PMDA Manager

Chosen Recipients:

Send To Emails:

ACRS Travel@nrc.gov  
ACRS.Comp@nrc.gov

Send To People:

AC, Co

- La, Mc M
- Ke, Fr
- Sh, Me A
- Ja, Pe I

Chosen Info:

Consultants  
Meeting Dates  
Meeting Description  
Topic Title  
TAC Numbers

Information to Include:

Available Info:

- Meeting Members
- Meeting Number
- URL Link to Meeting

Chosen Info:

Consultants  
Meeting Dates  
Meeting Description  
Topic Title  
TAC Numbers

**3**   **4**

Template Type	Template Name	Disabled	Edit
Action	Consults Attending Meeting	True	
Action	Visa Request Created	True	
Action	Reserved Meeting Date Changed	True	
Action	Meetings Date Changed	True	
Action	Test Meeting Changed Send Ext Email	True	
Action	Visa Request Approved Changed	True	

**1**

## 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.

Main Menu » Site Admin Menu » Alert Management Page Help - Full Help Document

---

### Alert Template Administration

---

Alert Template Data

\*Alert Template Name: **1**

\*Disabled: ☐






\*Alert Type: **2** History

\*Alert Object: **3** Agenda Item

\*Trigger: **4** Agenda Item Hours Updated

\*Type of Meeting: **5** ☒ Full Committee ☐ Subcommittee

**6**

Template Type	Template Name	Disabled	Edit
Action	Consults Attending Meeting	True	
Action	Visa Request Created	True	
Action	Reserved Meeting Date Changed	True	
Action	Meetings Date Changed	True	
Action	Test Meeting Changed Send Ext Email	True	

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.

Main Menu » Site Admin Menu » Alert Management Page Help · Full Help Document

### Alert Template Administration

**2** Alert Template Data

\*Alert Template Name:

\*Disabled: ☒

\*Alert Type:

\*Alert Object:

\*Trigger:

\*Type of Meeting: ☒ Full Committee ☐ Subcommittee

**3**   **4**

Template Type	Template Name	Disabled	Edit
Action	Consults Attending Meeting	True	
Action	Visa Request Created	True	
Action	Reserved Meeting Date Changed	True	
Action	Meetings Date Changed	True	
Action	Test Meeting Changed Send Ext Email	True	
Action	Visa Request Approved Changed	True	
Action	Available Meeting Dates Created	True	
Action	Visa Requisition alert depleted funding	True	
Action	Hotel Reservation Cancelled	True	
Action	Consultants Attending Meeting Created	True	
Action	Agenda Item Cancelled	True	
Action	Contract Low Alert	True	
Action	Meeting Members Changed	True	
Action	Travel Request Created	True	
Action	Meeting Date Changed Alert	True	
Action	TravelProgramAlert	True	
Action	Meeting Date Cancelled	True	
History	History Agenda Item Date Changed	True	
History	History Hotel Reservation Alert	True	
History	History Reserved Meeting Date Cancelled	True	
History	History Agenda Item Cancelled	True	
Reminder	POP Contract Reminder	True	
Reminder	Visa Request Required Date Surpassed	True	
Reminder	Reminder issue final certified minutes	True	
Reminder	Meeting Reminder 1 day before	True	
Reminder	Reminder issue draft minutes for meeting	True	
Reminder	Reminder Issue COI Memo and Agenda	True	
Reminder	Consultants Attending Reminder	True	
Reminder	Reminder Issue Status Report for Meeting	True	

Site Admin Menu



## WebACTs PMDA Module

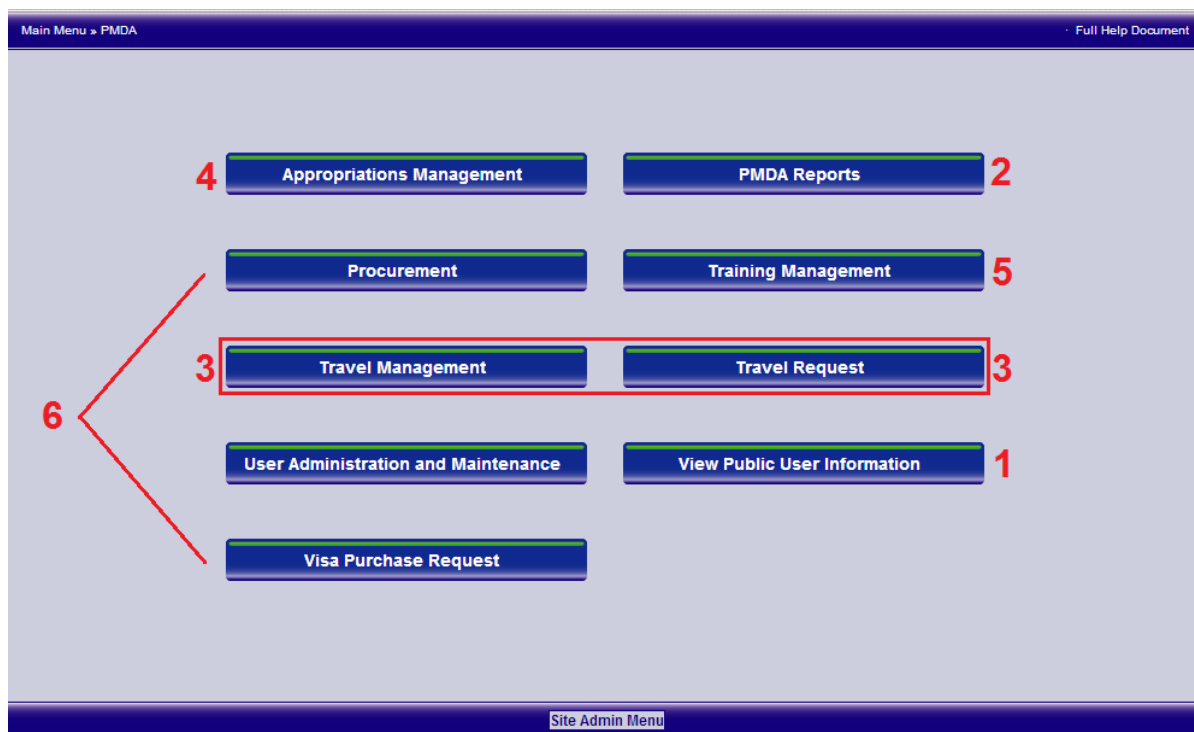
The PMDA section of WebACTs is reached via the PMDA button on the home menu.



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.

The screenshot shows the 'View Public User Information' screen. At the top, there is a navigation bar with 'Main Menu » PMDA » View Public User Information' on the left and 'Page Help · Full Help Document' on the right. Below the navigation bar, there is a 'View Profile For' dropdown menu. The main content area is titled 'Profile Co AC' with a right-pointing arrow icon. Below this title, there is a form with various fields for user information. The fields are organized into rows and columns. The first row contains 'First Name:', 'Middle Initial:', and 'Last Name:'. The second row contains 'Preferred Name:', 'Primary Email:', and 'Mail Stop:'. The third row contains 'Title:'. The fourth row contains 'Primary Address:'. The fifth row contains 'Primary City: city', 'Primary State: MD', and 'Primary Postal Code:'. The sixth row contains 'Primary Phone: 8888888888', 'Primary Cell:', and 'Primary Fax:'. The seventh row contains 'Employee Type:' and 'Organization: ACRS'. The eighth row contains 'Modified On: 3/2/2011' and 'Modified By:'. Below the form, there are two sections: 'User is a member of the following subcommittees:' and 'User is the lead member of the following subcommittees:'. At the bottom of the screen, there is a 'Site Admin Menu' button.

First Name:	Middle Initial:	Last Name:
Preferred Name:	Primary Email:	Mail Stop:
Title:		
Primary Address:		
Primary City: city	Primary State: MD	Primary Postal Code:
Primary Phone: 8888888888	Primary Cell:	Primary Fax:
Employee Type:	Organization: ACRS	
Modified On: 3/2/2011	Modified By:	

User is a member of the following subcommittees:

User is the lead member of the following subcommittees:

Site Admin Menu

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.

The screenshot shows the 'View Public User Information' screen, specifically the 'Conflict of Interest' section. The navigation bar at the top is the same as the previous screenshot. Below the 'View Profile For' dropdown, there is a 'Profile Pi AI' section with a right-pointing arrow icon. Below this, there is a 'Conflict of Interest' section with a right-pointing arrow icon. The main content area of the 'Conflict of Interest' section contains a text box with the text 'SHOULD NOT PARTICIPATE IN:'. Below the text box, there is a 'Update COI Info' button. At the bottom of the screen, there is a 'Site Admin Menu' button.

SHOULD NOT PARTICIPATE IN:

Update COI Info

Click to Request Addition of Data:

Site Admin Menu

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”.

The screenshot shows the PMDA View Public User Information page. At the top, there is a navigation bar with "Main Menu » PMDA » View Public User Information" and "Page Help · Full Help Document". Below this, a dropdown menu shows "View Profile For Ra B. Ha". The main content area has a header "Profile Ra B. Ha" and a section "Conflict of Interest". The conflict of interest text reads: "SHOULD NOT PARTICIPATE IN: Edison International (EIX), unless you receive a waiver from the ACRS Chairman. Financial Disclosure memo dated February 24, 2010." Below this text is an "Update COI Info" button. A red box labeled "1" highlights the "Click to Request Addition of Data" link. Below this is a dropdown menu labeled "Send Request to" with "Ha K Br" selected, highlighted by a red box labeled "2". Below the dropdown is a large text input area highlighted by a red box labeled "3". At the bottom right, a "Send Request" button is highlighted by a red box labeled "4". A "Site Admin Menu" link is at the bottom of the page.

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.

[Main Menu](#) » [PMDA](#) » [PMDA Reports](#)Page Help · Full Help Document

Appropriations Reports:

[Appropriation Summary Report](#)   [Appropriation Budget Summary](#)

Contract Reports:

[Contracts Summary of Spent Funds](#)   [Contracts Summary](#)   [Contracts with Invoices](#)

General Reports:

<a href="#">CML with Hotel Reservation Conf. #s</a>	<a href="#">Committee Meeting List</a>	<a href="#">Open-Closed Meetings in webACTS for Fiscal Year 2010</a>	<a href="#">SC Membership</a>	<a href="#">Members Term Dates</a>
<a href="#">Committee List Public Web Report</a>	<a href="#">Members Contact Report</a>	<a href="#">Consultant Contact Report</a>	<a href="#">TAC Numbers</a>	

Training Reports:

[Training Report for OCFO Reconciliation](#)   [Training](#)   [Training By Branch](#)

Travel Reports:

[Travel Report - AlphaSort](#)   [Travel Reconciliation Report](#)   [PMDA Travel Justification - Auth.# Sort](#)   [Travel Justification](#)

Visa Reports:

[Visa Log](#)

[Site Admin Menu](#)

## 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.

Main Menu » PMDA » Training Management
Page Help · Full Help Document

### Training Management

Filter

Name of Training Recipient  
--Select All--

FY  
--Select All--

Authorized  
--Select All--

Paid  
--Select All--

Reconciled  
--Select All--

Cancelled  
--Select All--

Job Code  
--Select All--

Program Name	Planned Activity	Job Code	Value	Allowance	Committed	Obligated	Expended	Remaining
Reactor Safety	External Training	N7324	\$50,000.00	\$75,914.00	\$0.00	\$13,827.56	\$52,037.97	\$10,048.47
Reactor Safety	ACRS External Training	N7324	\$50,000.00	\$25,300.00	\$0.00	\$1,435.00	(\$398.69)	\$24,263.69
Reactor Safety	Licensing Actions	N7326	\$113,000.00	\$113,000.00	\$34,413.00	\$25,630.37	\$5,500.00	\$47,456.63
Human Resources Management	External Training	N7496	\$39,000.00	\$39,000.00	\$4,593.00	\$18,181.63	\$1,650.00	\$14,575.37
Office Support	External Training	N7496	\$50,000.00	\$50,000.00	\$0.00	\$19,016.62	\$0.00	\$30,983.38
ACRS	CR Funding	Z7RCR	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals</b>			<b>\$302,000.00</b>	<b>\$303,214.00</b>	<b>\$39,006.00</b>	<b>\$78,091.18</b>	<b>\$58,789.28</b>	<b>\$127,327.54</b>

Add New Training

Training Records

Delete	Name	Yr	Start	End	Crs	Est	Act	Auth	JobCd	Pd	Rcd	Vrfd	Cncl	Visa	Edit
	Mi, Le	10	10/21/2009	10/21/2009	Book for Disser	\$72.10	\$72.10	TR07R0003	N7324	Yes	Yes	Yes	No	Yes	
	Ra, Bo	10	11/16/2010	12/20/2010	General Educati	\$1,740.00	\$1,740.00	TR07R0489	N7324	Yes	Yes	No	No	Yes	
	Ma, Ba	11	6/26/2011	7/1/2011	ANS Annual Meet	\$750.00	\$750.00	TGNRC11T1746	N7496	Yes	Yes	Yes	No	Yes	
	An, Ch	10	7/12/2010	7/16/2010	Operating Pract	\$1,120.00	\$1,120.00	TR07R0308	N7324	Yes	Yes	Yes	No	Yes	
	Il, Be	11	11/17/2010	11/18/2010	FACA Training	\$450.00	\$450.00	TG NRC11T0035	N7324	Yes	Yes	No	No	Yes	
	Gu, Ir	10	3/3/2010	3/10/2010	Budget Executio	\$715.00	\$715.00	TR07R0071	N7324	Yes	Yes	Yes	No	Yes	
	Pe, We	12	4/25/2012	4/26/2012	Introduction to	\$1,299.00	\$1,099.00	TG NRC12T0898	N7496	Yes	Yes	No	No	Yes	
	Ne, Co	09	9/23/2009	9/23/2009	Training	\$920.00	\$920.00	TR97R0428	N7324	Yes	Yes	No	No	Yes	
	Ke, Ho	11	11/17/2010	11/18/2010	FACA Training	\$450.00	\$450.00	TG NRC11T0207	N7324	Yes	Yes	No	No	Yes	
	Av, Ja	10	9/13/2010	9/17/2010	Contract Pricin	\$1,120.00	\$1,120.00	TR07R0459	N7324	Yes	Yes	No	No	Yes	
	Ch, An	12	7/22/2012	7/26/2012	Refund - NPIC &	(\$87.00)	(\$87.00)	TG NRC12T1741	N7496	Yes	Yes	No	No	Yes	
	De, Da	10	5/19/2010	5/20/2010	FACA Training	\$450.00	\$450.00	TR07R0061	N7324	Yes	Yes	Yes	No	Yes	
	Ke, Ho	11	9/15/2011	9/16/2011	Effective Gover	\$675.00	\$675.00	TG NRC11T2841	N7496	Yes	Yes	No	No	Yes	
	Vi, Br	10	6/1/2010	8/21/2010	IFSM 410 - DATA	\$750.00	\$750.00	TR07R0232	N7324	Yes	Yes	Yes	No	Yes	
	Br, Ha K	10	6/1/2010	8/12/2010	Books for the c	\$162.33	\$162.33	TR07R0190	N7324	Yes	Yes	Yes	No	Yes	
	Ne, Co	10	11/15/2009	11/19/2009	2009 ANS Winter	\$980.00	\$980.00	TR07R0023	N7324	Yes	Yes	Yes	No	No	
	De, Da	10	11/7/2010	11/11/2010	2010 ANS Winter	\$880.00	\$880.00	TR07R0487	N7324	Yes	Yes	No	No	Yes	
	Qu, Ng	12	6/20/2012	6/21/2012	FACA Training	\$450.00	\$450.00	TG NRC12T1796	N7496	Yes	Yes	No	No	Yes	
	Ke, Fr	10	6/16/2010	6/18/2010	Strategies for	\$1,623.00	\$1,623.00	TR07R0055	N7324	Yes	Yes	Yes	No	Yes	
	Je, Ga M.	10	11/18/2009	11/20/2009	Habits of Highl	\$1,623.00	\$1,623.00	TR07R0004	N7324	Yes	Yes	Yes	No	Yes	
	De, Da	10	9/1/2010	12/9/2010	Counterterroris	\$4,593.00	\$4,593.00	TR07R0318	N7324	Yes	Yes	No	No	No	
	Na, Mi A	10	5/3/2010	5/5/2010	Budget Analysts	\$715.00	\$715.00	TR07R0194	N7324	Yes	Yes	Yes	No	Yes	
	Ho, No	12	6/25/2012	6/29/2012	PSAM 11 and ESR	\$1,279.56	\$1,270.29	12345	N7496	Yes	Yes	No	No	Yes	
	Av, Ja	11	9/12/2011	9/16/2011	Operating Pract	\$1,120.00	\$1,120.00	TG NRC11T2635	N7496	Yes	Yes	No	No	Yes	
	Ra, Bo	10	6/21/2010	8/22/2010	Algebra 1-B	\$1,105.00	\$1,175.00	TR07R0300	N7324	Yes	Yes	Yes	No	Yes	

Record Count: 111
1/5
25

Site Admin Menu

- 1) To view/edit the details of a specific training record, click on the edit icon.
- 2) You may now view the record.

Main Menu » PMDA » Training Management
Page Help Full Help Document

---

## Training Management

---

**Filter**

Name of Training Recipient

--Select All--

FY

--Select All--

Authorized

--Select All--

Paid

--Select All--

Reconciled

--Select All--

Cancelled

--Select All--

Job Code

--Select All--

---

**Training Programs**

Program Name	Planned Activity	Job Code	Value	Allowance	Committed	Obligated	Expended	Remaining
Reactor Safety	External Training	N7324	\$50,000.00	\$75,914.00	\$0.00	\$13,827.56	\$52,037.97	\$10,048.47
Reactor Safety	ACRS External Training	N7324	\$50,000.00	\$25,300.00	\$0.00	\$1,435.00	(\$398.69)	\$24,263.69
Reactor Safety	Licensing Actions	N7326	\$113,000.00	\$113,000.00	\$34,413.00	\$25,630.37	\$5,500.00	\$47,456.63
Human Resources Management	External Training	N7496	\$39,000.00	\$39,000.00	\$4,593.00	\$18,181.63	\$1,650.00	\$14,575.37
Office Support	External Training	N7496	\$50,000.00	\$50,000.00	\$0.00	\$19,016.62	\$0.00	\$30,983.38
ACRS	CR Funding	Z7RCR	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals</b>			<b>\$302,000.00</b>	<b>\$303,214.00</b>	<b>\$39,006.00</b>	<b>\$78,091.18</b>	<b>\$58,789.28</b>	<b>\$127,327.54</b>

Add New Training

---

**Training Records**

Delete	Name	Yr	Strt	End	Crs	Est	Act	Auth	JobCd	Pd	Rcid	Vrfd	Cncl	Visa	Edit
	Mi, Le	10	10/21/2009	10/21/2009	Book for Disser	\$72.10	\$72.10	TR07R0003	N7324	Yes	Yes	Yes	No		
	Ra, Bo	10	11/16/2010	12/20/2010	General Educati	\$1,740.00	\$1,740.00	TR07R0489	N7324	Yes	Yes	No	No	Yes	
	Ma, Ba	11	6/26/2011	7/11/2011	ANS Annual Meet	\$750.00	\$750.00	TGNRC11T1746	N7496	Yes	Yes	Yes	No	Yes	

[Back](#)

## Training Records

Authorized 7/15/2011 Visa Reconciled 7/15/2011 Verified OCFO Report 8/24/2011 [Undo](#) [Cancel](#)

*Trainee:	Ma, Ba		
*Fiscal Year:	2013	*Authorization #:	TGNRC11T1746
*Course Title:	ANS Annual Meeting		
*Start Date:	06/26/2011	*End Date:	07/01/2011
Check to fund training request with <input type="checkbox"/> Funded By Job Code <small>Job Code NOT Visa</small>			
Mark as Anticipated: <input type="checkbox"/> Mark if charges not yet available to OCFO Report			

### Location

*Provider Name:	American Nuclear Society		
Provider Phone:	708-579-8316		
Email:			
*City:	city	State:	Florida
*Country:	UNITED STATES		

### Estimated Cost

NRC Cost:	750.00	Book Cost:	0.00	Total Cost:	750.00
-----------	--------	------------	------	-------------	--------

### Actual Cost

NRC Cost:	750.00	Book Cost:	0.00	Total Cost:	750.00
-----------	--------	------------	------	-------------	--------

### Notes

Notes:			
--------	--	--	--

### Payment Information

Job Code:	
Funding Source:	<input checked="" type="checkbox"/> Funded By Credit Card Visa Log Date: 7/15/2011 <a href="#">View Visa Request</a>
Paid:	<input checked="" type="checkbox"/>
Amount Paid:	750.00
Paid Date:	07/15/2011

[Save](#)[Site Admin Menu](#)



- 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).

Main Menu » PMDA » Training Management Page Help · Full Help Document

## Training Management

Filter

Name of Training Recipient: --Select All--

FY: --Select All--

Authorized: --Select All--

Paid: --Select All--

Reconciled: --Select All--

Cancelled: --Select All--

Job Code: --Select All--

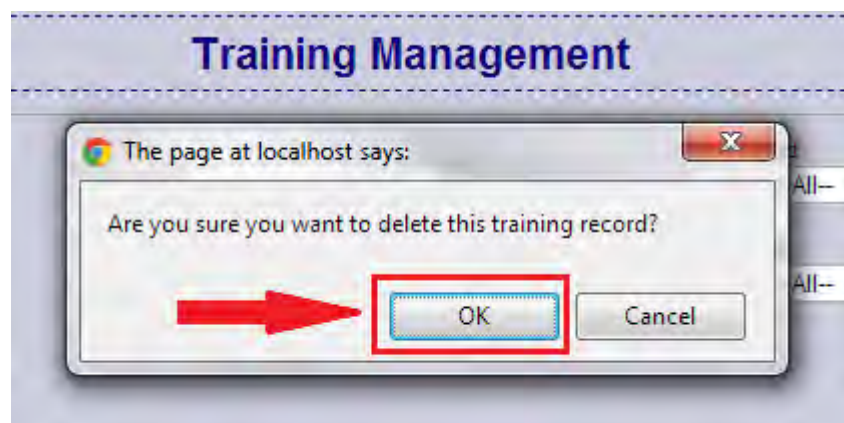
Training Programs

Program Name	Planned Activity	Job Code	Value	Allowance	Committed	Obligated	Expended	Remaining
Reactor Safety	Extenal Training	N7324	\$50,000.00	\$75,914.00	\$0.00	\$13,827.56	\$52,037.97	\$10,048.47
Reactor Safety	ACRS External Training	N7324	\$50,000.00	\$25,300.00	\$0.00	\$1,435.00	(\$398.69)	\$24,263.69
Reactor Safety	Licensing Actions	N7326	\$113,000.00	\$113,000.00	\$34,413.00	\$25,630.37	\$5,500.00	\$47,456.63
Human Resources Management	External Training	N7496	\$39,000.00	\$39,000.00	\$4,593.00	\$18,181.63	\$1,650.00	\$14,575.37
Office Support	External Training	N7496	\$50,000.00	\$50,000.00	\$0.00	\$19,016.62	\$0.00	\$30,983.38
ACRS	CR Funding	Z7RCR	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals</b>			<b>\$302,000.00</b>	<b>\$303,214.00</b>	<b>\$39,006.00</b>	<b>\$78,091.18</b>	<b>\$58,789.28</b>	<b>\$127,327.54</b>

[Add New Training](#)

Training Records

Delete	Name	Yr	Strt	End	Crs	Est	Act	Auth	JobCd	Pd	Rcld	Vrfd	Cncl	Visa	Edit
	Mi, Le	10	10/21/2009	10/21/2009	Book for Disser	\$72.10	\$72.10	TR07R0003	N7324	Yes	Yes	Yes	No	Yes	
	General Educati	10	11/16/2010	12/20/2010	General Educati	\$1,740.00	\$1,740.00	TR07R0489	N7324	Yes	Yes	No	No	Yes	
	Ma, Ba	11	6/26/2011	7/1/2011	ANS Annual Meet	\$750.00	\$750.00	TGNRC11T1746	N7496	Yes	Yes	Yes	No	Yes	
	An, Ch	10	7/12/2010	7/16/2010	Operating Pract	\$1,120.00	\$1,120.00	TR07R0308	N7324	Yes	Yes	Yes	No	Yes	



## 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".

Main Menu » PMDA » Training Management » Training Record Page Help · Full Help Document

---

**Back**

---

### Training Records

---

*Trainee:	AC, Co	1
*Fiscal Year:	2007	2
		*Authorization #: 3
*Course Title:	4	
*Start Date:		5
		*End Date:
Check to fund training request with Job Code NOT Visa: <input type="checkbox"/> Funded By Job Code		
Mark as Anticipated: <input type="checkbox"/> Mark if charges not yet available to OCFO Report		

Location

*Provider Name:	6	
Provider Phone:		
Email:		
*City:		State:
*Country:	UNITED STATES	

Estimated Cost

NRC Cost:	0.00	Book Cost:	0.00	Total Cost:	0.00
-----------	------	------------	------	-------------	------

Actual Cost

NRC Cost:	0.00	Book Cost:	0.00	Total Cost:	0.00
-----------	------	------------	------	-------------	------

7

Notes

Notes:	
--------	--

Payment Information

Job Code:	8
-----------	---

**Submit** 10

[Site Admin Menu](#)

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.

Main Menu » PMDA » Training Management » Training Record Page Help · Full Help Document

[Back](#)

---

### Training Records

---

Authorized  
12/11/2009

Visa Reconciled  
5/17/2011

Verified OCFO Report  
4/30/2010  
  
[Undo](#)

Cancel

*Trainee:	Mi, Le		
*Fiscal Year:	2007	*Authorization #:	TR07R0003
*Course Title:	Book for Dissertation Class		
*Start Date:	10/21/2009	*End Date:	10/21/2009
Check to fund training request with Job Code NOT Visa: <input type="checkbox"/> Funded By Job Code			
Mark as Anticipated: <input type="checkbox"/> Mark if charges not yet available to OCFO Report			

Location

*Provider Name:	Cambridge University Press		
Provider Phone:			
Email:			
*City:	city	State:	Massachusetts
*Country:	UNITED STATES		

Estimated Cost

NRC Cost:	72.10	Book Cost:	72.10	Total Cost:	72.10
-----------	-------	------------	-------	-------------	-------

Actual Cost

NRC Cost:	0.00	Book Cost:	72.10	Total Cost:	72.10
-----------	------	------------	-------	-------------	-------

Notes

Notes:					
--------	--	--	--	--	--

Payment Information

Job Code:					
Funding Source:	<input checked="" type="checkbox"/> Funded By Credit Card Visa Log Date: 12/11/2009 <a href="#">View Visa Request</a>				
Paid:	<input checked="" type="checkbox"/>				
Amount Paid:	72.10				
Paid Date:	05/17/2011				

[Save](#)

[Site Admin Menu](#)

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.

Main Menu » PMDA » Training Management » Training Record Page Help · Full Help Document

---

[Back](#)

---

### Training Records

---

Authorized  
12/11/2009  
✓

Visa Reconciled  
5/17/2011  
✓

Verified OCFO Report  
4/30/2010  
✓  
[Undo](#)

Cancel  
✗

---

*Trainee:	Mi, Le	
*Fiscal Year:	2007	*Authorization #: TR07R0003
*Course Title:	Book for Dissertation Class	
*Start Date:	10/21/2009	*End Date: 10/21/2009
Check to fund training request with Job Code NOT Visa: <input type="checkbox"/> Funded By Job Code		
Mark as Anticipated: <input type="checkbox"/> Mark if charges not yet available to OCFO Report		

## 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.

Main Menu » PMDA » Appropriations Management

Page Help · Full Help Document

Appropriation Management

1 Appropriation

2 Transfer

3 Anticipated Charges




4 Program Administration

Filter

Fiscal Year: --Select All--

Status: All

☐ Include Anticipated Charges when Calculating Available Funding

Planned Activity	Program Name	Program Area	Job Code	Value	Allowance	Expended	Funds Breakdown	Available Funding	View
CR Funding	ACRS	CR	Z7RCR	\$0.00	\$0.00	\$0.00	Anticipated: \$0.00 Committed: \$0.00 Obligated: \$0.00	\$0.00	
Awards	Awards	Awards	A7005	\$82,813.00	\$82,813.00	\$0.00	Anticipated: \$0.00 Committed: \$0.00 Obligated: \$0.00	\$82,813.00	
Awards	Awards	Awards	A7005	\$37,928.00	\$0.00	\$0.00	Anticipated: \$0.00 Committed: \$0.00 Obligated: \$0.00	\$0.00	
Awards	Awards	Awards	A7005	\$78,700.00	\$80,200.00	\$0.00	Anticipated: \$0.00 Committed: \$0.00 Obligated: \$0.00	\$80,200.00	

## 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.

Main Menu » PMCA » Appropriations Management Page Help Full Help Document

### Appropriation Management

Appropriation Transfer Anticipated Charges Program Administration

Filter: Fiscal Year: 2012 Status: All

☐ Include Anticipated Charges when Calculating Available Funding

Planned Activity	Program Name	Program Area	Job Code	Value	Allowance	Expended	Funds Breakdown	Available Funding	View
CR Funding	ACRS	CR	Z7RCR	\$0.00	\$0.00	\$0.00	Anticipated: \$0.00 Committed: \$0.00 Obligated: \$0.00	\$0.00	
Awards	Awards	Awards	A7005	\$37,928.00	\$0.00	\$0.00	Anticipated: \$0.00 Committed: \$0.00 Obligated: \$0.00	\$0.00	
IT Infrastructure	Information Technology	Office Support	N7496	\$85,000.00	\$85,000.00	\$25,139.79	Anticipated: \$0.00 Committed: \$0.00 Obligated: \$72,421.21	(\$12,561.00)	
Travel	Materials and Waste	Fuel Facilities	N7462	\$21,000.00	\$21,000.00	\$0.00	Anticipated: \$0.00 Committed: \$0.00 Obligated: \$0.00	\$21,000.00	
Travel	Materials and Waste	DecommLLW	N7295	\$16,000.00	\$16,000.00	\$4,501.54	Anticipated: \$0.00 Committed: \$0.00 Obligated: \$0.00	\$11,398.46	
External Training	Office Support	Office Support	N7496	\$50,000.00	\$50,000.00	\$0.00	Anticipated: \$0.00 Committed: \$0.00 Obligated: \$19,019.62	\$30,983.38	
Reactor Travel	Reactor Safety	Operating Reactors	N7303	\$541,000.00	\$541,000.00	\$375,780.01	Anticipated: \$0.00 Committed: \$0.00 Obligated: \$17,148.63	\$148,073.36	
Licensing Actions	Reactor Safety	Operating Reactors	N7326	\$113,000.00	\$113,000.00	\$5,500.00	Anticipated: \$0.00 Committed: \$34,413.00 Obligated: \$26,666.37	\$47,421.63	
Licensing	Reactor Safety	New Reactor Licensing	N7497	\$39,000.00	\$39,000.00	\$0.00	Anticipated: \$0.00 Committed: \$0.00 Obligated: \$0.00	\$39,000.00	
New Reactor Travel	Reactor Safety	CR	N7294	\$192,000.00	\$192,000.00	\$55,905.16	Anticipated: \$0.00 Committed: \$0.00 Obligated: \$9,115.20	\$126,378.64	

Record Count: 10

Summary:

Program Name	Value	Allowance	Available Funding
ACRS	\$0.00	\$0.00	\$0.00
Awards	\$37,928.00	\$0.00	\$0.00
Information Technology	\$85,000.00	\$85,000.00	(\$12,561.00)
Materials and Waste	\$37,000.00	\$37,000.00	\$32,398.46
Office Support	\$50,000.00	\$50,000.00	\$30,983.38
Reactor Safety	\$885,000.00	\$885,000.00	\$300,874.53

Budget Totals:

Value	Allowance	Anticipated	Committed	Obligated	Expended	Available
\$1,084,928.00	\$1,057,000.00	\$0.00	\$34,413.00	\$143,966.03	\$466,926.50	\$411,606.47

Without Awards

Value	Allowance	Anticipated	Committed	Obligated	Expended	Available
\$1,057,000.00	\$1,057,000.00	\$0.00	\$34,413.00	\$143,966.03	\$466,926.50	\$411,606.47

Site Admin Menu

To access the details of a particular program, click the “View” button to the right side of the program grid.

Main Menu » PMDA » Appropriations Management

Page Help · Full Help Document

Appropriation Management

Appropriation

Transfer

Anticipated Charges


Program Administration

Filter

Fiscal Year: 2012

Status: All

☐ Include Anticipated Charges when Calculating Available Funding

Planned Activity	Program Name	Program Area	Job Code	Value	Allowance	Expended	Funds Breakdown	Available Funding	View
CR Funding	ACRS	CR	Z7RCR	\$0.00	\$0.00	\$0.00	Anticipated: \$0.00 Committed: \$0.00 Obligated: \$0.00	\$0.00	
Awards	Awards	Awards	A7005	\$37,928.00	\$0.00	\$0.00	Anticipated: \$0.00 Committed: \$0.00 Obligated: \$0.00	\$0.00	
IT Infrastructure	Information Technology	Office Support	N7498	\$85,000.00	\$85,000.00	\$25,139.79	Anticipated: \$0.00 Committed: \$0.00 Obligated: \$72,421.21	(\$12,561.00)	

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.

Main Menu » PMDA » Appropriations Management » Appropriation Program Details																	
Page Help · Full Help Document																	
Back																	
Appropriation Program Details																	
Appropriation Details																	
Program: ACRS																	
Program Area: CR																	
Planned Activity: CR Funding																	
Job Code: Z7RCR																	
B & R Number: 2012-7R-51-G-105																	
Fiscal Year: 2012																	
Program Allowance																	
Program Information and FTEs																	
Transaction Details																	
Spending Goal																	
Site Admin Menu																	

Main Menu » PMDA » Appropriations Management » Appropriation Program Details
Page Help - Full Help Document

Back

## Appropriation Program Details

Appropriation Details

**Program Allowance**

Program Value:	\$0.00
Allowance:	\$0.00
Obligated Funds:	\$0.00
Committed Funds:	\$0.00
Expended Funds:	\$0.00
Available Funding:	\$0.00

Program Information and FTEs

Transaction Details

Spending Goal

Site Admin Menu

Main Menu » PMDA » Appropriations Management » Appropriation Program Details
Page Help - Full Help Document

Back

## Appropriation Program Details

Appropriation Details

Program Allowance

**Program Information and FTEs**

Supervisory FTEs:	0
Non-Supervisory FTEs:	0
Total FTEs:	0

Transaction Details

Spending Goal

Site Admin Menu



Main Menu » PMDA » Appropriations Management » Appropriation Program Details
Page Help · Full Help Document

Back

## Appropriation Program Details

Appropriation Details
Program Allowance
Program Information and FTEs
Transaction Details

Charges:

Type	Number Found	Pre-Obligated (Anticipated) Expenses	Committed Expenses	Obligated Expenses	Actual (Expended) Expenses	Total
------	--------------	--------------------------------------	--------------------	--------------------	----------------------------	-------

Transfers:

Type	Number Found	Total Funding Increase	Total Funding Decrease		
Transfer	1	\$0.00	\$40,000.00	+	-

Allowance Adjustments:

Date	Amount	Who Adjusted	Comments
10/27/2011	(\$3,000.00)	Pe I Ja	\$3K transferred to N7498.
11/9/2011	(\$34,000.00)	Pe I Ja	\$34K transferred to Reactor travel.
11/9/2011	(\$3,000.00)	Pe I Ja	\$3K transferred to N7326
12/14/2011	\$84,000.00	Pe I Ja	2nd CR allotment.
12/14/2011	(\$20,000.00)	Pe I Ja	See Value comments.
12/14/2011	(\$40,000.00)	Pe I Ja	\$40K Moved to N7303
1/13/2012	(\$15,000.00)	Pe I Ja	Current Balance
1/24/2012	(\$5,000.00)	Pe I Ja	See above note.
2/2/2012	\$23,000.00	Pe I Ja	See above above.
2/15/2012	(\$27,000.00)	Pe I Ja	See above note.

Value Adjustments:

Date	Amount	Who Adjusted	Comments
10/13/2011	(\$40,000.00)	Pe I Ja	Adjusted value during CR.
10/27/2011	(\$3,000.00)	Pe I Ja	\$3K transferred to N7498.
11/9/2011	(\$34,000.00)	Pe I Ja	\$34K transferred to Reactor Travel.
11/9/2011	(\$3,000.00)	Pe I Ja	\$3K transferred to N7326
12/14/2011	\$84,000.00	Pe I Ja	2nd CR Allotment
12/14/2011	(\$20,000.00)	Pe I Ja	\$20K transferred to N7498 for M&O Contract.
12/14/2011	(\$40,000.00)	Pe I Ja	\$40K moved to N7303.
1/13/2012	(\$15,000.00)	Pe I Ja	Current Balance
1/24/2012	(\$5,000.00)	Pe I Ja	Funds provided for Decomm/LLW Travel
2/2/2012	\$23,000.00	Pe I Ja	Current value after allotment and internal transfers.
2/15/2012	(\$27,000.00)	Pe I Ja	Funds transferred to other business lines in prep for budget load.

Spending Goal

Site Admin Menu

Main Menu » PMDA » Appropriations Management » Appropriation Program Details
Page Help · Full Help Document

Back

## Appropriation Program Details

Appropriation Details
Program Allowance
Program Information and FTEs
Transaction Details
Spending Goal

\*Percentage: 0

\*Date of Goal:

Save

Site Admin Menu

Transaction Details can be expanded on the grid, as shown below, to view specific records associated with the charges listed.

Transaction Details

Charges:

Type	Number Found	Pre-Obligated (Anticipated) Expenses	Committed Expenses	Obligated Expenses	Actual (Expended) Expenses	Total
------	--------------	--------------------------------------	--------------------	--------------------	----------------------------	-------

Transfers:

Type	Number Found	Total Funding Increase	Total Funding Decrease		
Transfer	2	\$50,000.00	\$40,000.00	+	-

Allowance Adjustments:

Date	Amount	Who Adjusted	Comments
10/27/2011	(\$3,000.00)	Pe I Ja	\$3K transferred to N7498.
11/9/2011	(\$34,000.00)	Pe I Ja	\$34K transferred to Reactor travel.
11/9/2011	(\$3,000.00)	Pe I Ja	\$3K transferred to N7326
12/14/2011	\$84,000.00	Pe I Ja	2nd CR allotment.
12/14/2011	(\$20,000.00)	Pe I Ja	See Value comments.
12/14/2011	(\$40,000.00)	Pe I Ja	\$40K Moved to N7303
1/13/2012	(\$15,000.00)	Pe I Ja	Current Balance
1/24/2012	(\$5,000.00)	Pe I Ja	See above note.
2/2/2012	\$23,000.00	Pe I Ja	See above above.
2/15/2012	(\$27,000.00)	Pe I Ja	See above note.

Value Adjustments:

Date	Amount	Who Adjusted	Comments
10/13/2011	(\$40,000.00)	Pe I Ja	Adjusted value during CR.
10/27/2011	(\$3,000.00)	Pe I Ja	\$3K transferred to N7498.
11/9/2011	(\$34,000.00)	Pe I Ja	\$34K transferred to Reactor Travel.
11/9/2011	(\$3,000.00)	Pe I Ja	\$3K transferred to N7326
12/14/2011	\$84,000.00	Pe I Ja	2nd CR Allotment
12/14/2011	(\$20,000.00)	Pe I Ja	\$20K transferred to N7498 for M&O Contract.
12/14/2011	(\$40,000.00)	Pe I Ja	\$40K moved to N7303.
1/13/2012	(\$15,000.00)	Pe I Ja	Current Balance
1/24/2012	(\$5,000.00)	Pe I Ja	Funds provided for Decomm/LLW Travel
2/2/2012	\$23,000.00	Pe I Ja	Current value after allotment and internal transfers.
2/15/2012	(\$27,000.00)	Pe I Ja	Funds transferred to other business lines in prep for budget load.

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.

The screenshot shows the 'Appropriation Management' interface with a 'Transfer' tab selected. The interface includes a filter section, input fields for transfer details, a summary table, a comments field, a transfer button, and a transfer history table.

**Filter**  
Fiscal Year: 2012 **1**

**\*Transfer Funds From:** N7294 () (2012) **2**

**\*Transfer Funds To:** Z7RCR () (2012)

**\*Amount:** 50000.00 **3**

**\*Comments:** **4**

**Transfer** **5**

**Summary Table:**

From: N7294 () (2012)		To: Z7RCR () (2012)	
Program Value:	\$192,000.00	Program Allowance:	\$142,000.00
Program Allowance Less Pending:	\$132,284.80	Program Allowance Less Actual:	\$86,094.84
		Program Allowance Less All Charges:	\$76,379.64

From: Z7RCR () (2012)		To: N7294 () (2012)	
Program Value:	\$0.00	Program Allowance:	\$50,000.00
Program Allowance Less Pending:	\$50,000.00	Program Allowance Less Actual:	\$50,000.00
		Program Allowance Less All Charges:	\$50,000.00

**Transfer History (N7294):**

Job Code Transferred From	Job Transferred To	Amount	User Transferred	Transfer Date	Comment
N7294	Z7RCR	\$50,000.00	An W Ja	10/10/2012	Comments Here
Z7RCR	N7294	\$40,000.00	Pe I Ja	10/13/2011	Transfer funds from CR Allocation to New Reactor Travel to fund Oct SC.

Record Count: 2

## 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.

Main Menu » PMDA » Appropriations Management Page Help · Full Help Document

### Appropriation Management

Appropriation Transfer Anticipated Charges Program Administration

1 Fiscal Year: 2012 2 Job Code: A7005 ( ) (2012)

Anticipated Charge:

3 Record Type: Contract Funding 4 Amount: 0

5 Add

6

Job Code	Description	Record Type	Amount	Edit
A7005		Contract Funding	\$25,000.00	

Record Count: 1

[Site Admin Menu](#)

- Choose "Select All" from the dropdown list to see all anticipated charges for all job codes.

Main Menu » PMDA » Appropriations Management Page Help · Full Help Document

### Appropriation Management

Appropriation
Transfer
Anticipated Charges
Program Administration

Fiscal Year: 2011 Job Code: --Select All--

--Select All--  
N7497 () (2011)  
N7463 () (2011)  
A7005 (Awards) (2011)  
Rec N7295 (Decommissioning and Low Level Waste Travel) (2011)  
N7498 () (2011)  
N7496 () (2011)  
N7303 (Reactor Safety Travel) (2011)  
L1415 (Decommissioning and Low Level Waste Independent Advise) (2011)  
N7462 (Fuel Facilities Travel) (2011)  
N7461 (Fuel FAC. Independent Advice) (2011)  
N7294 (New Reactors Travel) (2011)  
N7326 (ACRS Reactor Safety Independent Advise) (2011)

Job Code	Description	Edit
N7331		
N7496	Training f	

Record Count: 2

[Site Admin Menu](#)

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

Main Menu » PMDA » Appropriations Management Page Help · Full Help Document

### Appropriation Management

Appropriation
Transfer
Anticipated Charges
Program Administration

Fiscal Year: 2012 Job Code: A7005 () (2012)

Anticipated Charge:

Record Type: Contract Funding Amount: 25000.00

Delete

Cancel

Anticipated Charges for A7005:

Job Code	Description	Record Type	Amount	Edit
A7005		Contract Funding	\$25,000.00	

Record Count: 1

[Site Admin Menu](#)

## Program Administration

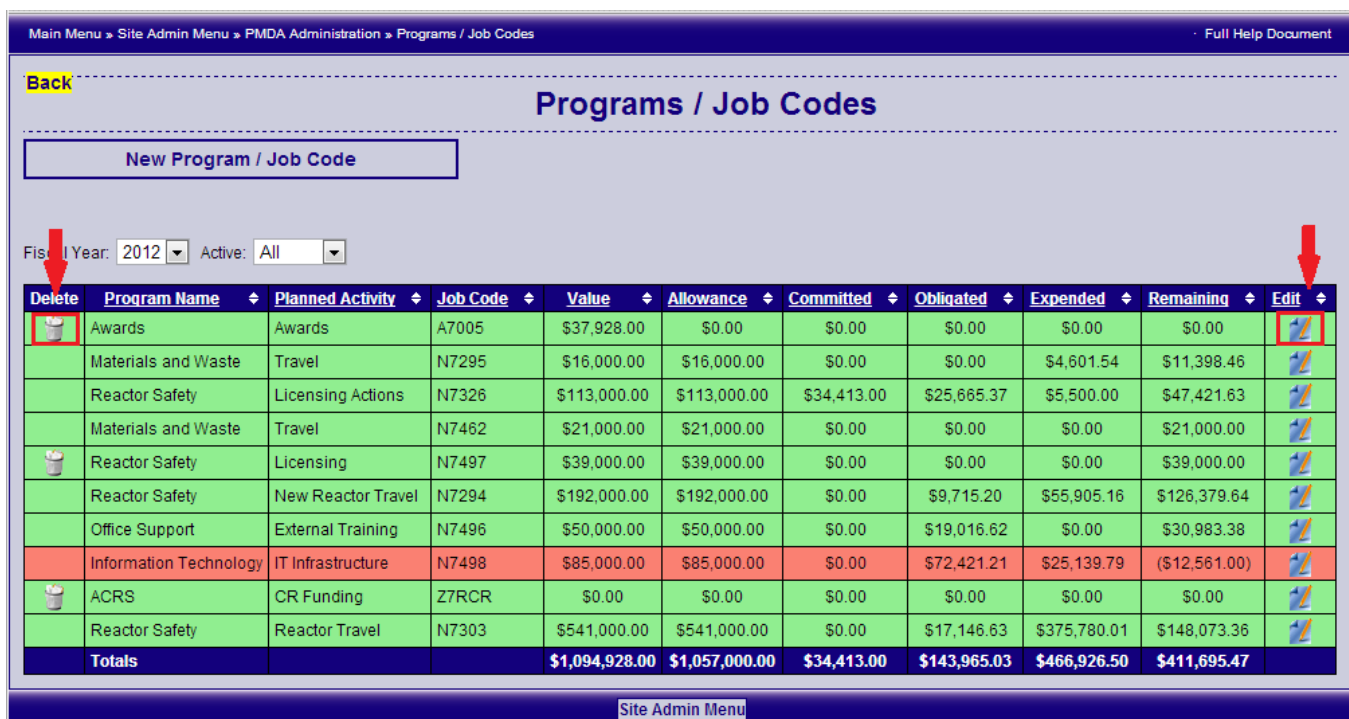
The Administration Programs/Job Codes screen and Fiscal Years screen may be accessed through the Program Administration tab of the Appropriations section.



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 a Spending Goal Percent (optional).
- 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).
- 11) Enter a Job Code (“auto-fill” feature available).
- 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”.

Main Menu » Site Admin Menu » PMDA Administration » Programs / Job Codes » Program Details Page Help · Full Help Document

[Back](#)

### Program / Job Code Details

**Program Details**

\*Program Name: 1

\*Program Area: 2

\*Planned Activity Name: 3

\*Fiscal Year: 4

\*Value: 5

\*Allowance: 6

Supervisory FTEs:  7

Non-supervisory FTEs:  8

Spending Goal Percent:  9

\*Date of Goal:  10

**Job Code Details**

\*Job Code: 11

\*BR Number: 12

\*Funding Code:  13

BOC Code: 14

Description: 15

Active: 16 ☒

\*Permissions: 17

☐ Allow Travel Expenses

☐ Allow Awards Charges

☐ Allow Visa Purchases

☐ Allow IT Purchases

☐ Allow Training Expenses

☐ Allow Transfer

☐ Allow Contract Billing

18 Save

Site Admin Menu

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.

### Program / Job Code Details

Current: \$50,200.00    New Value: \$  ✖

Comments:

Save

Date	Amount	Who Adjusted	Comments
------	--------	--------------	----------



**Program / Job Code Details**

Current: \$50,200.00    New Allowance: \$

Comments:

**Save**

Date	Amount	Value Adjusted	Comments
------	--------	----------------	----------

## 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.*

Main Menu » Site Admin Menu » PMDA Administration » Fiscal Years Page Help - Full Help Document

---

**Fiscal Year Administration**

Delete	Year	Start	Finish	Edit
	2012	10/1/2011	9/30/2012	
	2011	10/1/2010	9/30/2011	
	2010	10/1/2009	9/30/2010	
	2009	10/1/2008	9/30/2009	
	2008	10/1/2007	9/30/2008	
	2007	10/1/2006	9/30/2007	
	<b>1</b> <input style="width: 80%;" type="text"/>	<b>2</b> <input style="width: 80%;" type="text"/>	<b>3</b> <input style="width: 80%;" type="text"/>	<b>4</b> Save to Add to List Cancel

[Site Admin Menu](#)

## 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.

**Travel Records**

Travel Programs  
 FY: --Select All--

Program Name	Planned Activity	Job Code	Value	Allowance	Committed	Obligated	Expended	Remaining
Fuel Facilities	Travel	N7462	\$20,000.00	\$11,851.00	\$0.00	\$0.00	\$14,585.98	(\$2,734.98)
Reactor Safety	Travel	N7303	\$471,000.00	\$415,130.00	\$0.00	\$18,377.69	\$389,148.29	\$7,604.03
Fuel Facilities	Travel	N7462	\$35,000.00	\$35,000.00	\$0.00	\$0.00	\$28,407.80	\$6,592.20
Materials and Waste	Travel	N7295	\$16,000.00	\$16,000.00	\$0.00	\$0.00	\$4,601.54	\$11,398.46
Reactor Safety	Travel	N7303	\$420,000.00	\$420,000.00	\$0.00	\$2,000.04	\$369,624.09	\$48,375.87
New Reactors	Travel	N7294	\$184,000.00	\$184,000.00	\$0.00	\$6,818.10	\$115,001.93	\$62,179.97
Materials and Waste	Travel	N7462	\$21,000.00	\$21,000.00	\$0.00	\$0.00	\$0.00	\$21,000.00
Decommissioning and Low Level Waste	Travel	N7295	\$5,000.00	\$5,000.00	\$0.00	\$0.00	\$4,738.34	\$261.66
Reactor Safety	Licensing	N7497	\$39,000.00	\$39,000.00	\$0.00	\$0.00	\$0.00	\$39,000.00
Reactor Safety	New Reactor Travel	N7294	\$192,000.00	\$142,000.00	\$0.00	\$9,715.20	\$55,905.16	\$76,379.64
Reactor Safety	Travel	N7303	\$318,000.00	\$318,000.00	\$0.00	\$0.00	\$8,206.79	\$309,793.21
Decommissioning and Low Level Waste	Travel	N7295	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
New Reactors	Travel	N7294	\$241,000.00	\$165,100.00	\$0.00	\$1,580.52	\$161,572.03	\$1,947.45
ACRS	CR Funding	Z7RCR	\$0.00	\$50,000.00	\$0.00	\$0.00	\$0.00	\$50,000.00
Reactor Safety	Reactor Travel	N7303	\$541,000.00	\$541,000.00	\$0.00	\$17,146.63	\$375,780.01	\$148,073.36
<b>Totals</b>			<b>\$2,503,000.00</b>	<b>\$2,363,081.00</b>	<b>\$0.00</b>	<b>\$55,638.18</b>	<b>\$1,527,571.95</b>	<b>\$779,870.87</b>

New Travel Record

Existing Travel for	Justification	Month	Job Code	Status
All	All	All	All	<div style="float: right;">           Status Criteria            Authorized            Not Authorized            Vouchered            Not Vouchered            Reconciled            Not Reconciled            Cancelled            Not Cancelled         </div> <div style="clear: both;"></div>

Delete	Traveler	From Date	To Date	Destination	Trip ID	Job Code	Justification	Estimated Total	Actual Total	Edit
	Wi, Sh J.	12/13/2011	12/15/2011	Illinois, Rockville, MD	4376829	N7303	ACRS Subcommittee Meeting	\$1,103.39	\$1,069.07	
	Jo, Si D.	11/28/2011	12/3/2011	Pittsburg, PA, Rockville, MD	4656633	N7303	ACRS Full Committee Meeting	\$1,782.20	\$1,758.07	
	Ch, Br	5/23/2011	5/25/2011	McLean, VA, Charleston, SC	T120027	N7303	Other	\$1,313.40	\$1,299.40	
	Jo, Si D.	9/6/2011	9/10/2011	Pittsburg, PA, Rockville, MD	4094504	N7303	ACRS Full Committee Meeting	\$1,885.50	\$1,600.06	
	Jo, Si D.	10/5/2010	10/9/2010	Wexford, PA, Rockville, MD	1928368	N7303	ACRS Full Committee Meeting	\$1,427.00	\$1,544.76	
	Mi, Ry T.	3/1/2010	3/6/2010	Columbia, SC, Rockville, MD	907592	N7294	ACRS Full Committee Meeting	\$2,037.90	\$2,311.00	
	St, Sc	8/12/2012	8/16/2012	Charlotte, NC, Rockville, MD	5484157	N7303	ACRS Subcommittee Meeting	\$1,699.05	\$0.00	
	Mi, Ry T.	7/11/2011	7/16/2011	Columbia, SC, Rockville, MD	3584365	N7303	ACRS Full Committee Meeting	\$1,633.30	\$1,881.41	
	Gr, Wa B	10/20/2011	10/22/2011	Boston, MA, Rockville, MD	T2N0037	N7303	ACRS Subcommittee Meeting	\$1,029.64	\$1,009.15	
	Mi, Ry T.	4/22/2012	4/27/2012	Columbia, SC, Rockville, MD, Lynchburg, VA	5187812	N7294	ACRS Subcommittee Meeting	\$2,270.24	\$2,179.62	
	Gr, Wa B	6/20/2011	6/22/2011	Boston, MA, Rockville, MD	TIN0333	N7303	ACRS Subcommittee Meeting	\$880.39	\$1,023.30	
	St, Sc	1/16/2012	1/20/2012	Charlotte, NC, Rockville, MD	NRC279	N7303	ACRS Full Committee Meeting	\$2,240.25	\$2,049.32	
	Jo, St W.	4/10/2012	4/14/2012	Hot Springs, AZ, Rockville, MD	5078519	N7303	ACRS Full Committee Meeting	\$2,011.19	\$1,917.67	
	Wi, Sh J.	7/25/2011	7/28/2011	Chicago, IL, Augusta, GA	3453409	N7462	Other	\$1,173.05	\$1,210.48	
	Mi, Co L.	3/7/2011	3/12/2011	Madison, WI, Rockville, MD	2655841	N7303	ACRS Full Committee Meeting	\$2,068.38	\$2,084.98	
	Jo, St W.	10/31/2011	11/5/2011	Lake Forest, CA, Rockville, MD	4348585	N7303	ACRS Full Committee Meeting	\$2,014.34	\$1,893.33	
	Ha, Ra B.	5/9/2011	5/14/2011	Los Angeles, CA, Rockville, MD	3007452	N7303	ACRS Full Committee Meeting	\$1,830.90	\$1,822.22	
	Sa, Ba	3/9/2011	3/12/2011	Manhattan, NY, Rockville, MD	2713841	N7303	ACRS Full Committee Meeting	\$2,082.65	\$1,463.79	
	Da, Po A.	4/11/2012	4/14/2012	Albuquerque, NM, Rockville, MD	5146850	N7303	ACRS Full Committee Meeting	\$1,416.19	\$1,482.27	
	Sa, Ab I.	4/4/2011	4/10/2011	Atlanta, GA, Rockville, MD	2850341	N7294	ACRS Full Committee Meeting	\$2,412.48	\$2,001.60	
	Th, Kr S	11/16/2009	11/21/2009	Oak Ridge, TN, Rockville, MD	T9-0N0429	N7294	ACRS Subcommittee Meeting	\$2,539.79	\$2,513.09	
	Jo, Si D.	11/30/2009	12/5/2009	Wexford, PA, Rockville, MD	T757419	N7303	ACRS Full Committee Meeting	\$2,137.50	\$1,935.35	
	Ar, Gu	6/10/2010	6/11/2010	Burlington, VT, Rockville, MD, Burlington, VT	T0N1081	N7303	Interview	\$1,123.02	\$1,133.92	
	Yo, Di	7/25/2011	7/28/2011	Rockville, MD, Augusta, GA, Atlanta, GA	3536362	N7462	Other	\$1,786.85	\$1,919.13	
	St, Al	2/28/2010	3/12/2010	Rockville, MD, Arlington, TX	T0N0798	N7303	Other	\$1,246.14	\$4,891.90	

Record Count: 1046

1/42    25    1046 total

[Site Admin Menu](#)

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.*

### Travel Records

Travel Programs  
 FY: --Select All--

Program Name	Planned Activity	Job Code	Value	Allowance	Committed	Obligated	Expended	Remaining
Fuel Facilities	Travel	N7462	\$20,000.00	\$11,851.00	\$0.00	\$0.00	\$14,585.98	(\$2,734.98)
Reactor Safety	Travel	N7303	\$471,000.00	\$415,130.00	\$0.00	\$18,377.69	\$389,148.28	\$7,604.03
Fuel Facilities	Travel	N7462	\$35,000.00	\$35,000.00	\$0.00	\$0.00	\$28,407.80	\$6,592.20
Materials and Waste	Travel	N7295	\$16,000.00	\$16,000.00	\$0.00	\$0.00	\$4,601.54	\$11,398.46
Reactor Safety	Travel	N7303	\$420,000.00	\$420,000.00	\$0.00	\$2,000.04	\$369,624.09	\$48,375.87
New Reactors	Travel	N7294	\$184,000.00	\$184,000.00	\$0.00	\$6,818.10	\$115,001.93	\$62,179.97
Materials and Waste	Travel	N7462	\$21,000.00	\$21,000.00	\$0.00	\$0.00	\$0.00	\$21,000.00
Decommissioning and Low Level Waste	Travel	N7295	\$5,000.00	\$5,000.00	\$0.00	\$0.00	\$4,738.34	\$261.66
Reactor Safety	Licensing	N7497	\$39,000.00	\$39,000.00	\$0.00	\$0.00	\$0.00	\$39,000.00
Reactor Safety	New Reactor Travel	N7294	\$192,000.00	\$142,000.00	\$0.00	\$9,715.20	\$55,905.16	\$76,379.64
Reactor Safety	Travel	N7303	\$318,000.00	\$318,000.00	\$0.00	\$0.00	\$8,206.79	\$309,793.21
Decommissioning and Low Level Waste	Travel	N7295	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
New Reactors	Travel	N7294	\$241,000.00	\$165,100.00	\$0.00	\$1,580.52	\$161,572.03	\$1,947.45
ACRS	CR Funding	Z7RCR	\$0.00	\$50,000.00	\$0.00	\$0.00	\$0.00	\$50,000.00
Reactor Safety	Reactor Travel	N7303	\$541,000.00	\$541,000.00	\$0.00	\$17,146.63	\$375,780.01	\$148,073.36
<b>Totals</b>			<b>\$2,503,000.00</b>	<b>\$2,363,081.00</b>	<b>\$0.00</b>	<b>\$55,638.18</b>	<b>\$1,527,571.95</b>	<b>\$779,870.87</b>

New Travel Record

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.

Existing Travel for	Justification	Month	Job Code	Status						
<span style="border: 1px solid black; padding: 2px;">All</span>	<span style="border: 1px solid black; padding: 2px;">All</span>	<span style="border: 1px solid black; padding: 2px;">All</span>	<span style="border: 1px solid black; padding: 2px;">All</span>	<div style="float: right; text-align: right;">           Status Criteria            Authorized            Not Authorized            Vouchered            Not Vouchered            Reconciled            Not Reconciled            Cancelled            Not Cancelled         </div> <div style="clear: both;"></div> <div style="text-align: right;"> <span style="border: 1px solid black; padding: 2px 10px;">Add -&gt;</span>  <span style="border: 1px solid black; padding: 2px 10px;">&lt;- Remove</span> </div>						
Delete	Traveler	From Date	To Date	Destination	Trip ID	Job Code	Justification	Estimated Total	Actual Total	Edit
	Jo, Si D.	12/13/2011	12/15/2011	Illinois, Rockville, MD	4376829	N7303	ACRS Subcommittee Meeting	\$1,103.39	\$1,069.07	
	Jo, Si D.	11/28/2011	12/3/2011	Pittsburg, PA, Rockville, MD	4656633	N7303	ACRS Full Committee Meeting	\$1,782.20	\$1,758.07	
	Ch, Br	5/23/2011	5/25/2011	McLean, VA, Charleston, SC	Ti20027	N7303	Other	\$1,313.40	\$1,299.40	
	Jo, Si D.	9/6/2011	9/10/2011	Pittsburg, PA, Rockville, MD	4094504	N7303	ACRS Full Committee Meeting	\$1,885.50	\$1,600.06	
	Jo, Si D.	10/5/2010	10/9/2010	Wexford, PA, Rockville, MD	1928368	N7303	ACRS Full Committee Meeting	\$1,427.00	\$1,544.76	

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.

Main Menu » PMDA » Travel Records » Travel Record Detail Full Help Document

[Back](#)

## Travel Record Details

Authorized 11/27/2009 Undo
 Vouchered Complete
 Reconciled Complete
 Cancelled Undo

\*Traveler: 
 Address: 
 Phone: 97125680251

\*Fiscal Year: 
 \*Job Code:

E-Travel Document Number: 
 \*Trip ID:

\*Purpose: 
 \*Justification:

Authorization ID: 
 \*Authorization Type:

\*Departure Date: 
 \*Return Date:

\*Travel Type: ☐ Foreign ☒ Local ☐ Domestic

Mode of Travel:
 ☐ Commercial Air
 ☐ POV
 ☐ Rail
 ☐ Government Vehicle
 ☒ Rental Car
 ☐ Taxi

Retain Airfare Fee if cancelled ☐

\*Travel Mode Reason:

Duty Stations

Order	Location
From	
To	Rockville, MD
Return To	

[Add Duty Station](#)

Authorization Estimated Expense Totals:

Transport	Lodging	Subsistence	Car Rental	Local Transport	POV	Misc.	Airfare Fee	Grand Total
0.00	0.00	0.00	0.00	0.00	0.00	0.00	29.77	0.00

Actual Expense Totals:

Transport	Lodging	Subsistence	Car Rental	Local Transport	POV	Misc.	Airfare Fee	Grand Total
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Hotel Info

Reservations

Hotel	Check In	Check Out	Confirm #	Link
Bethesda North Marriott	9/8/2009	9/10/2009		

Information from Travel Request

Notes:

Additional Comments/Notes:

[Save/Update](#)

[Site Admin Menu](#)

## 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

Main Menu » PMDA » Travel Management » Travel Reservation Meeting List Page Help - Full Help Document

---

### Travel Reservation Meeting List

---

List Filter

1 \*Start: 10/10/2012 2 \*Finish: 11/10/2012 3 Travel Processed: All 4

Update

---

Meeting Dates

**10/17/2012 - 10/19/2012**

Travel Fully Processed? No  
 Book Travel: Book

Attendance by the following is anticipated:	Dates Attending:	Travel Reservation:
<b>Br Ch</b> Individual Meeting Dates: 10/18/2012-10/19/2012	Attending: 10/18/2012 to 10/19/2012	N/A
<b>Po A. Da</b> Individual Meeting Dates: 10/17/2012-10/17/2012	Attending: 10/17/2012 to 10/17/2012	N/A
<b>Bl C. De</b> Individual Meeting Dates: 10/17/2012-10/17/2012, 10/18/2012-10/19/2012, 10/19/2012-10/19/2012	Attending: 10/17/2012 to 10/19/2012	N/A
<b>Sk Go</b> Individual Meeting Dates: 10/17/2012-10/17/2012	Attending: 10/17/2012 to 10/17/2012	N/A
<b>Ar J.</b> Individual Meeting Dates: 10/17/2012-10/17/2012	Attending: 10/17/2012 to 10/17/2012	N/A
<b>Re L. Jo</b> Individual Meeting Dates: 10/17/2012-10/17/2012, 10/18/2012-10/19/2012, 10/19/2012-10/19/2012	Attending: 10/17/2012 to 10/19/2012	N/A
<b>Si D. Jo</b> Individual Meeting Dates: 10/17/2012-10/17/2012	Attending: 10/17/2012 to 10/17/2012	N/A
<b>St W. Jo</b> Individual Meeting Dates: 10/17/2012-10/17/2012, 10/18/2012-10/19/2012, 10/19/2012-10/19/2012	Attending: 10/17/2012 to 10/19/2012	N/A
<b>Bo V. Ma</b> Individual Meeting Dates: 10/19/2012-10/19/2012	Attending: 10/19/2012 to 10/19/2012	N/A
<b>Co L. Mi</b> Individual Meeting Dates: 10/17/2012-10/17/2012, 10/19/2012-10/19/2012	Attending: 10/17/2012 to 10/19/2012	N/A
<b>Ry T. Mi</b> Individual Meeting Dates: 10/17/2012-10/17/2012	Attending: 10/17/2012 to 10/17/2012	N/A
<b>Ab I. Sa</b> Individual Meeting Dates: 10/17/2012-10/17/2012	Attending: 10/17/2012 to 10/17/2012	N/A
<b>Ba Sa</b> Individual Meeting Dates: 10/17/2012-10/17/2012, 10/18/2012-10/19/2012	Attending: 10/17/2012 to 10/19/2012	N/A
<b>Sc St</b> Individual Meeting Dates: 10/17/2012-10/17/2012, 10/19/2012-10/19/2012	Attending: 10/17/2012 to 10/19/2012	N/A
<b>Sh J. Wi</b> Individual Meeting Dates: 10/17/2012-10/17/2012, 10/18/2012-10/19/2012, 10/19/2012-10/19/2012	Attending: 10/17/2012 to 10/19/2012	N/A

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.

Main Menu » PMDA » Travel Management » Travel Reservation Meeting List » Travel Reservation Details

Page Help · Full Help Document

Travel Reservation Meeting Details

10/17/2012-10/19/2012

Travel Reservation

Attendee Name: Br Ch

Role: Member

Departure Date: Start: 10/16/2012

Return Date: Finish: 10/20/2012

Book

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.

Updated: November 2012

## Travel Requests

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

Main Menu > PMDA > Travel Request Page Help · Full Help Document

### Travel Requests

Filters  
 Existing Travel for: All  
 Status: All

**New Travel Request**
1

Delete	Traveler	Convert	Submitted	From Date	To Date	Destination	Status	Record Status	Edit
<span style="color: red; font-weight: bold; font-size: 24px; vertical-align: middle;">3</span>	Ma, Ba		3/16/2011	4/25/2011	5/1/2011	NRC HQ, Rockville, MD, Albuquerque, NM, Rockville, MD	Pending		<span style="color: red; font-weight: bold; font-size: 24px; vertical-align: middle;">2</span>
	Jo, La	<span style="color: red; font-weight: bold; font-size: 24px; vertical-align: middle;">4</span>	8/19/2010	9/11/2010	9/19/2010	Rockville, MD, Dana Point, CA	Approved		
	An, Ch		8/4/2010	8/15/2010	8/21/2010	Bethesda, MD, Kansas City, Rockville, MD	Approved		
	Gi, Sh		8/18/2011	8/23/2011	8/24/2011		Approved	Vouchered	
	Ke, Ho		6/16/2010	7/26/2010	7/30/2010	Rockville, MD, Pasco, WA, Arlington, TX	Approved		
	We, Wa		6/1/2011	7/25/2011	7/28/2011	Washington, dc, Augusta, ga	Pending		
	Ch, Br		7/15/2010	9/26/2010	9/29/2010	BWI, Orlando	Pending		
	Ja, Ri		6/27/2012	8/13/2012	8/17/2012	Rockville, Timbuktu	Pending		
	Gu, Ir		3/12/2010	3/8/2010	3/10/2010		Approved	Reconciled	
	Il, Be		10/6/2010	10/12/2010	10/12/2010	rockville, md, pittsburgh, pa	Pending		
	Sa, Ab I.		11/25/2009	9/22/2009	9/23/2009		Approved	Vouchered	
	Ja, Pe I		8/31/2011	8/31/2011	9/6/2011	Rockville, MD, Atlanta, GA	Pending		
	Ch, An		5/4/2010	7/25/2010	8/1/2010	Dulles Airport, Va, Fort Lauderdale, FL	Approved		
	Ma, Bo V.		11/20/2009	10/3/2009	10/10/2009		Approved	Reconciled	
	Jo, Fl H		7/13/2011	7/25/2011	7/28/2011	Burke, VA, Augusta, GA	Pending		
	Je, Ga M.		11/24/2009	11/16/2009	11/21/2009		Approved	Reconciled	
	Ka, Ga		6/14/2011	7/25/2011	7/28/2011	HQ-Rockville, MD, Site Visit-Augusta, GA, Region II - Atlanta, GA	Pending		
	De, Wi A.		6/15/2011	6/20/2011	6/22/2011	Rockville, MD, Augusta, GA, Darnestown, MD	Pending		
	Ho, No		9/27/2011	9/30/2011	10/1/2011	Home, New York City	Pending		
	Ho, No		8/16/2010	9/12/2010	9/18/2010		Approved		
	Ch, Br		5/25/2011	6/19/2011	6/21/2011	Baltimore, MD, Wilmington, NC	Pending		
	Br, Ol G		6/28/2010	7/26/2010	7/30/2010	Rockville, MD, Pasco Tri Cities, WA, Dallas Ft. Worth, TX	Approved		
	Ho, No		5/12/2011	5/16/2011	5/16/2011	Home, New York City	Pending		
	Ca, Sa		8/30/2011	9/27/2011	9/29/2011	Rockville, MD, Gainesville, FL	Pending		
	Ma, Ba		4/13/2010	4/24/2010	4/30/2010	Regan National, Denver, CO	Approved		

Record Count: 85

1/4    25

Site Admin Menu

- 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".

**Back**

---

### Travel Request Details

---

\*Traveler: **1** AC, Tr

\*Purpose: **2** International Travel

\*Mode of Travel: **4** ☐ Taxi to/from Airport ☐ Own Car ☐ Rail ☐ Commercial Air ☐ Rental Car ☐ Government Vehicle ☐ Taxi

\*Date Submitted: **3** 10/10/2012

\*Type: **5** ☐ Local ☐ Foreign ☐ Domestic

\*Fiscal Year: **6** 2007

Approval-Has Supervisor's Signature: No

Registration/Conference External Fees: ☐

Request Laptop: ☐ Laptop for International Travel ☐ ACRS Laptop

\*Departure Date:  **7** \*Return Date:

Personal Days Used: ☐

Personal Day Data:

Duty Stations

Order	Location
From	<input type="text"/>
To	<input type="text"/>
Return To	<input type="text"/>

**8**

[Add Duty Station](#)

Hotel Info

Delete	Hotel	Name	Address	Phone	Contact	Nightly Rate	# Nights	Edit
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	165	1	<input type="button" value="Save to Add to List"/> <input type="button" value="Cancel"/>

Additional Comments:

**9**

[Site Admin Menu](#)

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.

**Back**

### Travel Request Details

\*Traveler:  \*Date Submitted:

\*Purpose:  \*Type: ☐ Local ☐ Foreign ☒ Domestic

☒ Taxi to/from Airport ☐ Own Car ☐ Rail  
\*Mode of Travel: ☒ Commercial Air ☐ Rental Car ☐ Government Vehicle  
☐ Taxi

\*Fiscal Year:   
Approval-Has Supervisor's Signature: No  
Registration/Conference External Fees:

Request Laptop: ☐ Laptop for International Travel ☒ ACRS Laptop  
\*Departure Date:  \*Return Date:

Duty Stations

Order	Location
From	NRC HQ, Rockville, MD
To	Albuquerque, NM
Return To	Rockville, MD

[Add Duty Station](#)

Personal Days Used: ☒

Personal Day Data: May fly out Sunday, instead of Friday.

Hotel Info

Delete	Hotel	Name	Address	Phone	Contact	Nightly Rate	# Nights	Edit
<input type="checkbox"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	165	1	<input type="button" value="Save to Add to List"/> <input type="button" value="Cancel"/>

Additional Comments: I can use help in making the flight reservation. Prefer in and out of Regan national (can use the Metro)

1 ↑ 2 →

[Site Admin Menu](#)

## ***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.

**Manage Visa Requests**

Filter:

Fiscal Year: --Select All-- Status: --Select All-- Requestor: Irani, Guita

Funding Source: --Select All-- Month: --Select All--

**Create New**

Delete	Cancel	Request #	Requestor	Submission	Funding Source	Requested	Actual	Status	Edit
		5	Irani, Guita	12/22/2009	453453	\$150.00	\$0.00	Denied	

Record Count: 1

1/1 25

**Site Admin Menu**

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.

Main Menu > PMDA > Procurement > Visa > Visa Requests > Visa Request Details

Page Help · Full Help Document

**Back**

**Visa Request Details**

\*Requestor: AC, Co

\*Items: 1

Delete	Item	Cost	Edit
	<div><div>*Item Name:</div><div>*Item Description:</div><div>Vendor:</div><div>*Justification:</div><div>Required Date:</div><div>Notes:</div><div>Property Tag #:</div></div>	<div><div>Item Quantity:</div><div>Item Cost:</div><div>Shipping &amp; Handling:</div><div>Item Total:</div></div>	<div><div>Save to Add to List</div><div></div></div>

**Submit**

**+**

**Site Admin Menu**

## 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.


Main Menu » PMDA » Procurement » Visa » Visa Requests » Visa Request Details Page Help · Full Help Document

[Back](#)

---

### Visa Request Details

Cancel






Cancel

\*Requestor: Ja, Ri

Approval: **Approved**   Mgr Approval: ☒ Approve ☐ Deny

\*Items:

Delete	Item	Cost	Funding and Dates	Actual Amount	Reconciled/Anticipated	Edit
	<div style="border: 1px solid black; padding: 2px;"><div>Name: Softalk Phone Cord Detangler</div><div>Description: Cord Detangler</div><div>Vendor: Staples Advantage</div><div>Justification: Cord keeps twisting. JRiner and A. Chapeton</div><div>Required Date: 12/9/2011</div><div>Notes:</div><div>Property Tag #:</div></div>	<div style="border: 1px solid black; padding: 2px;"><div>Item Quantity: 5.00</div><div>Item Cost: \$5.49</div><div>Shipping: \$0.00</div><div>Item Total: \$27.45</div></div>	<div style="border: 1px solid black; padding: 2px;"><div>Funding Source: BCC7R2012-0261</div><div>Billing Cycle: January</div><div>Billing Fiscal Year: 2012</div><div>Billing Date: 12/13/2011</div><div>Delivery Date: 12/13/2011</div><div>Sale Date: 12/13/2011</div><div>Bank Card Holder: An, Ch</div></div>	\$27.45	<div style="border: 1px solid black; padding: 2px;"><div>Anticipated: <input type="checkbox"/> No</div><div>Reconciled: <input type="checkbox"/> Yes</div></div>	<div style="text-align: center;">↓</div> 




Save

[Site Admin Menu](#)

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.

[Back](#)




### Visa Request Details

  
 Cancel

\*Requestor: AC, Co

Approval: Approved

\*Items:

Delete	Item	Cost	Funding and Dates	Actual Amount	Reconciled/Anticipated	Edit
1	Item Name: Training Course Book(s) Item Description: Training Course Book(s) Vendor: Provider Name Justification: Training Required Date: 10/03/2012 Notes: Property Tag #:	Item Quantity: 1.00 Item Cost: 10.00 Shipping & Handling: 0.00 Item Total: 10.00	Funding Source: N7326 () (2012) Billing Cycle: October Billing Fiscal Year: 2013 Billing Date: Delivery Date: Sale Date: Bank Card Holder: An, Ch	0.00	Anticipated: <input type="checkbox"/> Anticipated Reconciled: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	3  
	Name: Training Course Description: Training Course Vendor: Provider Name Justification: Training Required Date: 10/3/2012 Notes: 12345- Property Tag #:	Item Quantity: 1.00 Item Cost: \$25.00 Shipping: \$0.00 Item Total: \$25.00	Funding Source: N7326 Billing Cycle: Billing Fiscal Year: Billing Date: Delivery Date: Sale Date: Bank Card Holder:	\$0.00	Anticipated: No Reconciled: No	4 

[Save](#) 5

+

Site Admin Menu

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.

Main Menu » PMDA » Procurement » Visa » Approve Visa Requests Page Help · Full Help Document

---

### Approve Visa Requests

Filter  
Fiscal Year: 2012 Status: --Select All--

Request Number	Type	Requestor	Submission Date	Required By Date	Amount Requested	Approvals Received	Status	Edit
449	Manager	Ja, Ri	12/7/2011	12/9/2011	\$27.45	Manager Approved: Yes	Approved	
506	Manager	Na, Mi A	8/7/2012	8/10/2012	\$199.90	Manager Approved: Yes	Approved	
513	Manager	Al, Be	8/14/2012	8/29/2012	\$83.99	Manager Approved: Yes	Approved	
489	Manager	Na, Mi A	6/15/2012	5/11/2012	\$14.55	Manager Approved: Yes	Approved	
502	Manager	Ja, Pe I	7/17/2012	7/24/2012	\$899.99	Manager Approved: Yes	Approved	


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.

Main Menu » PMDA » Procurement » Visa » Visa Requests » Visa Request Details Page Help · Full Help Document

---

[Back](#)



### Visa Request Details




\*Requestor: Ja, Ri

Approval: Approved Mgr Approval: ☒ Approve ☐ Deny

\*Items:

Delete	Item	Cost	Funding and Dates	Actual Amount	Reconciled/Anticipated	Edit
	<div>Name: Softalk Phone Cord Detangler</div> <div>Description: Cord Detangler</div> <div>Vendor: Staples Advantage</div> <div>Justification: Cord keeps twisting. JRiner and A. Chapeton</div> <div>Required Date: 12/9/2011</div> <div>Notes:</div> <div>Property Tag #:</div>	<div>Item Quantity: 5.00</div> <div>Item Cost: \$5.49</div> <div>Shipping: \$0.00</div> <div>Item Total: \$27.45</div>	<div>Funding Source: BCC7R2012-0251</div> <div>Billing Cycle: January</div> <div>Billing Fiscal Year: 2012</div> <div>Billing Date: 12/13/2011</div> <div>Delivery Date: 12/13/2011</div> <div>Sale Date: 12/13/2011</div> <div>Bank Card Holder: An, Ch</div>	\$27.45	<div>Anticipated: <input type="checkbox"/> No</div> <div>Reconciled: <input type="checkbox"/> Yes</div>	

[Save](#) 

Site Admin Menu



## 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.











Main Menu » PMDA » Procurement » Visa » Visa Request Invoice Processing Page Help · Full Help Document

### Visa Request Invoice Processing

Visa Requests Reports

Filter

Fis. Year: --Select All-- Month: October Bill. Cycle: --Select-- Rec'd: --All-- Card Holder: --Select All--

#	Requestor	Qty	Name	Vendor	Estimate	Billing Dt	Delivery Dt	Sale Dt	Actual	Reconciled/ Anticipated	Edit	View
58	Vi, Br	1.00	Encryption Software for Mac OS	CDW	\$472.00	10/12/2009	10/10/2009	10/1/2009	\$472.00	Reconciled: Yes Anticipated: No	 2	
5	An, Ch	1.00	Monthly Charges for Wireless cards for laptops	Verizon	\$172.04	10/16/2009	10/18/2009	10/18/2009	\$172.04	Reconciled: Yes Anticipated: No		
338	Ho, No	1.00	ANS Winter Meeting	American Nuclear Society	\$730.00	10/19/2010	10/19/2010	10/19/2010	\$730.00	Reconciled: Yes Anticipated: No		
321	Th, Br J	1.00	Legal paper, electrical staplers and coat racks	FedGov Supply	\$388.43	10/1/2010	10/1/2010	10/1/2010	\$388.43	Reconciled: Yes Anticipated: No		
315	An, Ch	1.00	HP ink for printer & headsets	Staples	\$399.92	10/1/2010	10/1/2010	10/1/2010	\$399.92	Reconciled: Yes Anticipated: No		

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 Request Invoice Processing

Visa Requests
Reports

Filter

Fis. Year: --Select All--  
 Month: October  
 Bill. Cycle: --Select--  
 Rec'd: --All--  
 Card Holder: --Select All--

#	Requestor	Qty	Name	Vendor	Estimate	Billing Dt	Delivery Dt	Sale Dt	Actual	Reconciled/ Anticipated	Edit	View
58	Vi, Br	1.00	Encryption Software for Mac OS	CDW	\$472.00	10/12/2009	10/10/2009	10/1/2009	\$472.00	Reconciled: Yes Anticipated: No		
5	An, Ch	1.00	Monthly Charges for Wireless cards for laptops	Verizon	\$172.04	10/16/2009	10/18/2009	10/18/2009	172.04	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="checkbox"/> Anticipated		
338	Ho, No	1.00	ANS Winter Meeting	American Nuclear Society	\$730.00	10/19/2010	10/19/2010	10/19/2010	\$730.00	Reconciled: Yes Anticipated: No		

## 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.

Main Menu » PMDA » Procurement » Visa » Visa Requisition Management

Page Help · Full Help Document

### Visa Requisition Management

Requisition Filter

Fiscal Year: --Select All--

New Visa Requisition

Delete	Requisition #	Type	Description	Job Code	Funding	Amount Obligated	Amount Spent	Amount Remaining	Active Status	Edit
	7R2011-0529	IT	Purchase IT Supplies and Materials	N7463	\$1,300.00	\$0.00	\$0.00	\$1,300.00	Yes	
	RQ7010BC018	NON-IT	VISA funds for non-IT purchases	N7326	\$18,500.00	\$559.96	\$14,276.04	\$3,664.00	Yes	
	BCC-7R-2011-0529	IT	Purchase IT Supplies and Materials	N7463	\$4,800.00	\$0.00	\$4,738.96	\$61.04	Yes	
	RQ7010BC008	IT	VISA Funds for IT purchases	N7425	\$36,000.00	\$630.00	\$35,781.10	(\$411.10)	Yes	
	BCC7R2012-0261	NON-IT	Purchase non-IT Supplies and Materials	N7326	\$5,500.00	\$0.00	\$4,493.31	\$1,006.69	Yes	
	BCC 7R2011-1916	IT	IT Supplies and Materials	N7498	\$6,700.00	\$0.00	\$6,255.54	\$444.46	Yes	
	BCC 7R2012-0183	IT	Purchase IT Supplies and Materials	N7498	\$6,000.00	\$790.00	\$5,047.74	\$162.26	Yes	
	12345	IT	Items	N7326	\$0.00	\$0.00	\$0.00	\$0.00	No	
	BCC-7R-2011-0151	NON-IT	Non-It	N7326	\$6,200.00	\$0.00	\$4,977.94	\$1,222.06	Yes	

Visa Cardholder Summary

Statement: October 2012

Card Holder	Spent	Available	Statement
An, Ch	\$0.00	\$10,000.00	10/14/2012-11/13/2012
Br, Ha K	\$0.00	\$10,000.00	10/14/2012-11/13/2012
Sh, Me A	\$0.00	\$10,000.00	10/14/2012-11/13/2012

Site Admin Menu

## 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.

Visa Cardholder Summary

Statement:

Card Holder	Spent	Available	Statement
An, Ch	\$0.00	\$10,000.00	10/14/2012-11/13/2012
Br, Ha K	\$0.00	\$10,000.00	10/14/2012-11/13/2012
Sh, Me A	\$0.00	\$10,000.00	10/14/2012-11/13/2012

Site Admin Menu

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.

Main Menu > PMDA > Procurement > Visa > Visa Requisition Management

Page Help · Full Help Document

### Visa Requisition Management

Requisition Filter

Fiscal Year:

New Visa Requisition

Delete	Requisition #	Type	Description	Job Code	Funding	Amount Obligated	Amount Spent	Amount Remaining	Active Status	Edit
	7R2011-0529	IT	Purchase IT Supplies and Materials	N7463	\$1,300.00	\$0.00	\$0.00	\$1,300.00	Yes	
	RQ7010BC018	NON-IT	VISA funds for non-IT purchases	N7326	\$18,500.00	\$559.96	\$14,276.04	\$3,664.00	Yes	
	BCC-7R-2011-0529	IT	Purchase IT Supplies and Materials	N7463	\$4,800.00	\$0.00	\$4,738.96	\$61.04	Yes	

Main Menu » PMDA » Procurement » Visa » Visa Requisition Management Page Help · Full Help Document

---

## Visa Requisition Management

---






Requisition Filter:

Fiscal Year: 2011

---

Details for Requisition: BCC-7R-2011-0529

Funding:

Amount	Date Requested	Requested By	Requisition #	Job Code	Status	Edit
\$500.00	12/15/2010	An, Ch	BCC-7R-2011-0529	N7463	Active	
\$800.00	1/13/2011	An, Ch	BCC-7R-2011-0529	N7463	Active	
\$500.00	2/7/2011	An, Ch	BCC-7R-2011-0529	N7463	Active	
\$2,000.00	3/29/2011	An, Ch	BCC-7R-2011-0529	N7463	Active	
\$1,000.00	5/16/2011	An, Ch	BCC-7R-2011-0529	N7463	Active	

[Add Funding/Form 30](#)

---

Visa Cardholder Summary

Statement: October 2012

Card Holder	Spent	Available	Statement
An, Ch	\$0.00	\$10,000.00	10/14/2012-11/13/2012
Br, Ha K	\$0.00	\$10,000.00	10/14/2012-11/13/2012
Sh, Me A	\$0.00	\$10,000.00	10/14/2012-11/13/2012

[Site Admin Menu](#)

Select an edit button next to any of the funding records shown to be directed to the Visa Requisition Details screen for that requisition.

Main Menu » PMDA » Procurement » Visa » Visa Requisition Management Page Help · Full Help Document

---

## Visa Requisition Management

---



Requisition Filter:

Fiscal Year: --Select All--

---

Details for Requisition: 7R2011-0529

Funding:

Amount	Date Requested	Requested By	Requisition #	Job Code	Status	Edit
\$800.00	1/13/2011	An, Ch	7R2011-0529	N7463	Active	
\$500.00	2/7/2011	An, Ch	7R2011-0529	N7463	Active	

[Add Funding/Form 30](#)

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.

Main Menu » PMDA » Procurement » Visa » Visa Requisition Management » Visa Requisition Details Page Help - Full Help Document

[Back](#)

### Visa Requisition Details

**Details** Funding Requests

Requisition Details

*Requisition Number:	7R2011-0529					
*Requisition Type:	IT					
*Type of Service:	Other (Specify)					
*Fiscal Year:	2010					
*Funding Source (Job Code):						
Amount:	Approved Amount:	1300.00	1	Pending Amount:	0	2
Expenses:	Requests Pending Against:	0	3	Requests Spent Against:	0	4
	Total Spent or Obligated:	0	5	Remaining Available:	1300.00	6
*Description:	Purchase IT Supplies and Material:					
Notes:						

[Save Requisition Details](#)

[Site Admin Menu](#)

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.

Main Menu » PMDA » Procurement » Visa » Visa Requisition Management » Visa Requisition Details Page Help · Full Help Document

[Back](#)

### Visa Requisition Details

Details
Funding
Requests

Delete	Amount	Date Requested	Requested By	Requisition #	Job Code	Status	Edit
	\$800.00	1/13/2011	An, Ch	7R2011-0529	N7463	Active	
	\$500.00	2/7/2011	An, Ch	7R2011-0529	N7463	Active	

**Total Funding Approved:**  
1300.00

Add Funding/New Form 30

[Site Admin Menu](#)

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

Main Menu » PMDA » Procurement » Visa » Visa Requisition Management » Visa Requisition Details Page Help · Full Help Document

[Back](#)

### Visa Requisition Details

Details
Funding
Requests

Filter:

Month: --Select All--

Request #	Requestor	Submission Date	Required Date	Description	Requested	Actual	Status	Reconciled	Edit
6	Ke, Fr	5/17/2011	10/20/2009	Chiller Pen	\$532.00	\$0.00	Approved	No	
7	An, Ch	2/23/2010	12/14/2009	Mouse	\$119.95	\$94.53	Approved	Yes	
8	Th, Br J	1/21/2010	12/29/2009	Cables for the Meeting Rooms	\$31.80	\$31.80	Approved	Yes	
8	Th, Br J	1/21/2010	12/29/2009	Cables needed for the Meeting Rooms	\$59.97	\$84.97	Approved	Yes	
9	Th, Br J	1/19/2010	12/31/2009	Name plates for the ACRS Members	\$112.50	\$197.50	Approved	Yes	

To create a new visa requisition:

From the Visa Requisition Management Screen:

1. Click the “New Visa Requisition” button.

Main Menu » PMDA » Procurement » Visa » Visa Requisition Management Page Help · Full Help Document

---

### Visa Requisition Management

---

Requisition Filter

Fiscal Year: --Select All--

**New Visa Requisition**



Delete	Requisition #	Type	Description	Job Code	Funding	Amount Obligated	Amount Spent	Amount Remaining	Active Status	Edit
	7R2011-0529	IT	Purchase IT Supplies and Materials	N7463	\$1,300.00	\$0.00	\$0.00	\$1,300.00	Yes	
	RQ7010BC018	NON-IT	VISA funds for non-IT purchases	N7326	\$18,500.00	\$559.96	\$14,276.04	\$3,664.00	Yes	
	BCC-7R-2011-0529	IT	Purchase IT Supplies and Materials	N7463	\$4,800.00	\$0.00	\$4,738.96	\$61.04	Yes	
	RQ7010BC008	IT	VISA Funds for IT purchases	N7425	\$36,000.00	\$630.00	\$35,781.10	(\$411.10)	Yes	



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.

Main Menu » PMDA » Procurement » Visa » Visa Requisition Management » Visa Requisition Details Page Help · Full Help Document

[Back](#)

## Visa Requisition Details

**Details**

**Requisition Details**

*Requisition Number:	<input type="text"/>	1
*Date of Request:	<input type="text"/>	
*Due Date:	<input type="text"/>	
*Requisition Type:	IT	2
*Type of Service:	Building Alterations and Services	3
*Requestor:	Ja, An W	
*Fiscal Year:	2007	4
*Funding Source (Job Code):		5
Amount:	0.00	6
*Description:	<input type="text"/>	7
Notes:	8	

9

[Site Admin Menu](#)

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 screenshot displays the 'Visa Funding Details' web application. At the top, a navigation bar includes 'Main Menu > PMDA > Procurement > Visa > Visa Requisition Management > Visa Requisition Details > Visa Funding Detail' and a 'Page Help · Full Help Document' link. A 'Back' button is located in the top left. The main title 'Visa Funding Details' is centered. Below the title are three tabs: 'Requisition Details', 'Funding Details' (which is active), and 'Forms'. The 'Funding Details' tab contains a form with the following fields: '\*Requisition Number' (54321), '\*Date of Request' (10/03/2012), '\*Due Date' (10/26/2012), '\*Requestor' (Ja, An W), '\*Funding Source (Job Code)' (N7326 () (2012)), '\*Amount' (25000.00), 'Active' (No), and '\*Description' (Job Request). A 'Notes' section is at the bottom of the form. Above the form, there are four buttons: 'Sent Form 30 to CFO', 'Scanned Form 30', 'Closed', and 'Cancel'. Each button has a red 'X' icon and a 'Complete' or 'Cancel' sub-button. The 'Sent Form 30 to CFO' and 'Scanned Form 30' buttons are highlighted with red boxes. A 'Save' button is located at the bottom of the form. A 'Site Admin Menu' link is at the bottom of the page.

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.

The screenshot displays the 'Visa Requisition Details' page with the 'Funding' tab selected. The page includes a breadcrumb trail at the top: 'Main Menu » PMDA » Procurement » Visa » Visa Requisition Management » Visa Requisition Details'. A 'Back' link is in the top left, and 'Page Help · Full Help Document' is in the top right. Below the title, there are three tabs: 'Details', 'Funding' (highlighted in green), and 'Requests'. A table lists requisition details:

Delete	Amount	Date Requested	Requested By	Requisition #	Job Code	Status	Edit
	\$25,000.00	10/3/2012	Ja, An W	54321	N7326	Pending	

Below the table, the 'Total Funding Approved:' is shown as '0' in a text box. A red arrow points to a button labeled 'Add Funding/New Form 30'. At the bottom, there is a 'Site Admin Menu' link.

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”.

Main Menu » PMDA » Procurement » Visa » Visa Requisition Management » Visa Requisition Details » Visa Funding Detail Page Help · Full Help Document

**Back**

### Visa Funding Details

Requisition Details **Funding Details** Forms

Sent Form 30 to CFO 
Scanned Form 30 
Closed 
Cancel








*Requisition Number:	54321-Pending	<b>1</b>
*Date of Request:	10/16/2012	<b>2</b>
*Due Date:	10/16/2012	<b>3</b>
*Requestor:	Ja, An W	<b>4</b>
*Funding Source (Job Code):	N7326 () (2012)	<b>5</b>
*Amount:	0	<b>6</b>
Active:	No	
*Description:	Job Request	<b>7</b>
Notes:	<b>8</b>	

**9**

Site Admin Menu

## Contracts







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

Status: <input type="text" value="All"/> Starting Year: <input type="text" value="All"/> Filter Contract Totals for RFPA's with Fiscal Year: <input type="text" value="All"/>													
Initiate RFPA													
Delete	Name	Contractor	Orig RFPA#	# Yrs	Strt	End	Allocated	Ceiling	Remaining Ceiling	Invoiced	Paid	Un-costed	Details
	Contract D157	Webworld Technologies	NRC-DR-11-08-307	3	6/1/2008	6/17/2011	\$752,455.20	\$626,821.80	(\$125,633.40)	\$664,433.11	\$664,433.11	\$88,022.09	
	Contract 5C46	Verizon Wireless	ACR-09 431	3	8/30/2009	8/31/2012	\$12,381.12	\$12,381.12	\$0.00	\$11,732.00	\$12,076.08	\$305.04	
	Contract D259	Verizon Wireless	DR-10-0160-ACR-11-015-ACR-11-023	2	8/9/2010	8/8/2012	\$20,215.68	\$20,215.68	\$0.00	\$19,157.68	\$20,000.00	\$215.68	
	Contract A2A7	TBD	ACR-12-023	3	9/1/2012	8/31/2013	\$34,413.00	\$344,129.97	\$309,716.97	\$0.00	\$0.00	\$34,413.00	
	Contract 3AD3	SBC Southern New England Telephone Company, Inc.	ACR08305	3	6/1/2008	5/31/2011	\$3,300.00	\$3,300.00	\$0.00	\$3,300.00	\$3,300.00	\$0.00	
	Contract 2A5B	RFCUNY - City College, NY	ACR-08-311	3	8/18/2008	8/17/2011	\$73,736.27	\$81,881.00	\$8,144.73	\$86,014.44	\$73,736.27	\$0.00	

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

To edit an existing contract (change details, add/edit RFPA's, 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.

Status: <input type="text" value="All"/> Starting Year: <input type="text" value="All"/> Filter Contract Totals for RFPA's with Fiscal Year: <input type="text" value="All"/>													
Initiate RFPA													
Delete	Name	Contractor	Orig RFPA#	# Yrs	Strt	End	Allocated	Ceiling	Remaining Ceiling	Invoiced	Paid	Un-costed	Details
	Contract D157	Webworld Technologies	NRC-DR-11-08-307	3	6/1/2008	6/17/2011	\$752,455.20	\$626,821.80	(\$125,633.40)	\$664,433.11	\$664,433.11	\$88,022.09	
	Contract 5C46	Verizon Wireless	ACR-09 431	3	8/30/2009	8/31/2012	\$12,381.12	\$12,381.12	\$0.00	\$11,732.00	\$12,076.08	\$305.04	
	Contract D259	Verizon Wireless	DR-10-0160-ACR-11-015-ACR-11-023	2	8/9/2010	8/8/2012	\$20,215.68	\$20,215.68	\$0.00	\$19,157.68	\$20,000.00	\$215.68	
	Contract A2A7	TBD	ACR-12-023	3	9/1/2012	8/31/2013	\$34,413.00	\$344,129.97	\$309,716.97	\$0.00	\$0.00	\$34,413.00	
	Contract 3AD3	SBC Southern New England Telephone Company, Inc.	ACR08305	3	6/1/2008	5/31/2011	\$3,300.00	\$3,300.00	\$0.00	\$3,300.00	\$3,300.00	\$0.00	

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".

The screenshot shows the 'RFPA' tab in a 'Contract Details' window. The form is titled 'Contract Information' and contains various input fields and sections. Red boxes and numbers 1 through 9 highlight specific areas of interest:

- 1**: Points to the 'Original RFPA Number' dropdown menu, which currently shows '<New>'.
- 2**: Points to the 'RFPA Title' text input field.
- 3**: Points to the 'POP Start Date' and 'POP End Date' date pickers.
- 4**: Points to the 'Requested Contract Start Date' date picker.
- 5**: Points to the 'Base Period Number of Months' spinner field.
- 6**: Points to the 'Number of Option Period' spinner field.
- 7**: Points to a table of fiscal year values.
- 8**: Points to the 'Contract Option Years and Ceiling' section at the bottom of the form.
- 9**: Points to the 'Save' button at the bottom right of the form.

The table of fiscal year values (highlighted by box 7) is as follows:

First FY	Second FY	Third FY	Fourth FY	Fifth FY
0.00	0.00	0.00	0.00	0.00

The 'Contract Option Years and Ceiling' section (highlighted by box 8) contains a table with columns for 'Year' and 'Ceiling'.

Year	Ceiling
1	
2	
3	
4	
5	

[Back](#)

Contract Details RFPA Contract Invoices

Save

Cancel

## Contract Information

## Certification of Funds

## List of Attachments

## Personal Services and Inherently Governmental Functions

## Contract Option Years and Ceiling

Overall Ceiling 0.00

Period	Contract Ceiling	From Date	To Date	Fiscal Year	Edit
Base	\$0.00	10/16/2012			

## Form 400 and Attached Files

Save

Cancel

[Site Admin Menu](#)

The Contract Details page includes four tabs.

The overview tab gives summary data about the ceilings, RFPAs and fiscal years.

Main Menu » PMDA » Procurement » Contracts » Contract Detail Page Help · Full Help Document

Overview **Contract Details** Contract Funding Contract Invoices

**Contract Ceilings:**

Period	Contract Ceiling	Fiscal Year
Base	\$266,208.00	2008
1	\$213,465.00	2009
2	\$147,148.80	2010

**RFPAs:**

RFP#	Funding Amount	POP Start Date	POP End Date	Status
NRC-DR-11-08-307	\$93,000.00	7/15/2008	6/17/2009	Active
NRC-DR-11-08-307	\$99,000.00	6/1/2008	5/30/2009	Active
NRC-DR-11-08-307	\$61,561.00	7/15/2008	6/17/2009	Active
NRC-DR-11-08-307	\$74,000.00	7/15/2008	6/17/2009	Active
NRC-DR-11-08-307	\$70,000.00	6/18/2009	7/17/2009	Active
NRC-DR-11-08-307	\$30,000.00	6/18/2009	7/17/2009	Active
NRC-DR-11-08-307	\$50,000.00	6/18/2009	6/17/2010	Active
NRC-DR-11-08-307	\$20,000.00	6/18/2009	6/17/2010	Active
NRC-DR-11-08-307	\$43,465.00	6/18/2009	6/17/2010	Active
NRC-DR-11-08-307	\$10,280.20	1/1/2010	6/17/2010	Active
NRC-DR-11-08-307 -	\$54,000.00	1/18/2010	6/17/2010	Active
NRC-DR-11-08-307	\$147,149.00	6/18/2010	6/17/2011	Active
NRC-DR-11-08-307 - ACR-11-002	\$0.00	7/18/2008	6/17/2012	Active

**Fiscal Year Details:**

Year	Ceiling	Allocated	Spent	Remaining
2008	\$266,208.00	\$266,000.00	\$266,000.00	\$0.00
2009	\$213,465.00	\$231,561.00	\$231,561.00	\$0.00
2010	\$147,148.80	\$254,894.20	\$166,872.11	\$88,022.09
2011	\$0.00	\$0.00	\$0.00	\$0.00

Site Admin Menu



The Contract Details tab contains the details that apply to all RFPA's for the contract. These can be updated as necessary by changing the data and clicking "Save".

Overview **Contract Details** Contract Funding Contract Invoices

Save Cancel

**Contract Information**

Contract Number: NRC-DR-11-08307 Previous Contract Number: GS35F0652N Previous Contract Expiration Date:

Contract Title: Contract D157 Office/Division/Branch: ACRS Project Officer: Da De

Start Date: 6/18/2008 End Date: 6/17/2012 Requested Start Date: 06/29/2008

Base Period Number of Months: 12 Office Point of Contact: Ad Da Phone 3014156889 Mailstop T2-E26 Email Desiree.Davis

Number of Option Period: 2 Contract Specialist: contract specialist Contract Status: Active ☐ Cancelled

Contractor: Webworld Technologies Add Total Contract Ceiling: \$626,821.80

Available (Obligated) Contract Funding: \$752,455.20 Funding Spent: \$664,433.11 Obligated Funding Remaining: \$88,022.09

First FY	Second FY	Third FY	Fourth FY	Fifth FY
266208.00	213465.60	147148.80	0.00	0.00

Contract Notes:

Save Cancel

**Contract Option Years and Ceiling**

**Form 400 and Attached Files**

Site Admin Menu

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 screenshot shows the 'Contract Funding' tab selected in the 'Contract Detail' section. The breadcrumb trail is 'Main Menu > PMDA > Procurement > Contracts > Contract Detail'. The page has tabs for 'Overview', 'Contract Details', 'Contract Funding' (active), and 'Contract Invoices'. A 'Fiscal Year' dropdown is set to '2011'. Below this is a table with columns: Delete, RFPA#, Sort, FFS, Start, End, Amount, Remaining, Yr, B&R#, BOC, Job Code, and Status. One row is visible with RFPA# 'NRC-DR-11-08-307 -ACR-11-002', Start '7/18/2008', End '6/17/2012', Amount '\$0.00', Remaining '\$0.00', Yr '2011', B&R# '07R15333391', Job Code 'N7461 (Fuel FAC. Independent Advise) (2010)', and Status 'Active'. A 'Total Amount: \$0.00 Record Count: 1' is shown at the bottom right of the table. Below the table is a button labeled 'Add Funding/Initiate RFPA'. At the bottom of the page is a 'Site Admin Menu' link.

Delete	RFPA#	Sort	FFS	Start	End	Amount	Remaining	Yr	B&R#	BOC	Job Code	Status
	NRC-DR-11-08-307 -ACR-11-002			7/18/2008	6/17/2012	\$0.00	\$0.00	2011	07R15333391		N7461 (Fuel FAC. Independent Advise) (2010)	Active

Total Amount: \$0.00 Record Count: 1

[Add Funding/Initiate RFPA](#)

[Site Admin Menu](#)

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.

The screenshot shows the 'Contract Funding Set Up' screen. The breadcrumb trail is 'Main Menu > PMDA > Procurement > Contracts > Contract Detail > Contract Funding Set Up'. The page has tabs for 'Contract Details', 'RFPA' (active), and 'Contract Invoices'. There are 'Save' and 'Cancel' buttons at the top. The 'Contract Information' section is collapsed. The 'Certification of Funds' section is expanded, showing an 'Add Fund Line' button and a table with columns: Delete, Amount, Job Code, B&R Number, BOC Number, Appropriation Number, Sort, and Edit. One row is visible with Amount '\$0.00', Job Code 'N7461 (Fuel FAC. Independent Advise) (2010)', B&R Number '07R15333391', and Sort '0'. Below this are sections for 'List of Attachments', 'Personal Services and Inherently Governmental Functions', 'Contract Option Years and Ceiling', and 'Form 400 and Attached Files'. At the bottom are 'Save' and 'Cancel' buttons and a 'Site Admin Menu' link.

Delete	Amount	Job Code	B&R Number	BOC Number	Appropriation Number	Sort	Edit
	\$0.00	N7461 (Fuel FAC. Independent Advise) (2010)	07R15333391			0	

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.

Main Menu » PMDA » Procurement » Contracts » Contract Detail » Contract Funding Set Up Page Help · Full Help Document

**Back**

Contract Details **RFPA** Contract Invoices

**Save** **Cancel**

---

**Contract Information**

RFPA Sent To CFO 3/21/2011	RFPA Scanned 3/21/2011	Sent to Contracts 3/21/2011	Scanned Contract 3/21/2011	Close	Cancel
<b>Undo</b>	<b>Undo</b>	<b>Undo</b>	<b>Undo</b>	<b>Complete</b>	<b>Cancel</b>

Original RFPA Number (prefix):  Append RFPA Number:

RFPA Number:  FFS Number:  Fiscal Year:

RFPA Title:  POP Start Date:  POP End Date:

Fee/Non-fee: ☐ Fee ☒ Non-fee

Type of Action Requested:

Special Instructions:

RFPA Notes:

---

**Certification of Funds**

**List of Attachments**

**Personal Services and Inherently Governmental Functions**

**Contract Option Years and Ceiling**

**Form 400 and Attached Files**

**Save** **Cancel**

Site Admin Menu

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.

Main Menu » PMDA » Procurement » Contracts » Contract Detail
Page Help · Full Help Document

Overview
Contract Details
Contract Funding
Contract Invoices

2008

Delete	Number	Date	Due	Year	Inv. \$	Paid \$	Paid	Approval	RFPA	Fund Line	Job Code	
<input type="checkbox"/>	ACRS-08	2/15/2009	3/20/2009	2008	\$26,967.43	\$26,967.43	Yes	3/17/2009	NRC-DR-11-08-307	x0200	N7331 (Reactor Safety) (2008)	
	ACRS-09	3/10/2009	3/30/2009	2008	\$27,071.41	\$27,071.41	Yes	3/18/2009	NRC-DR-11-08-307	x0200	N7331 (Reactor Safety) (2008)	
	ACRS-05	11/7/2008	11/27/2008	2008	\$23,847.80	\$23,847.80	Yes	11/20/2008	NRC-DR-11-08-307	x0200	N7326 (Reactor Safety) (2008)	
	ACRS-11	6/5/2009	6/30/2009	2008	\$36,291.64	\$36,291.64	Yes	6/15/2009	NRC-DR-11-08-307	x0200	N7326 (Reactor Safety) (2008)	
	ACRS-04	10/7/2008	10/27/2008	2008	\$10,710.71	\$10,710.71	Yes	11/4/2008	NRC-DR-11-08-307	x0200	N7326 (Reactor Safety) (2008)	
	ACRS-07	1/8/2009	2/4/2009	2008	\$30,225.70	\$30,225.70	Yes	2/4/2009	NRC-DR-11-08-307,NRC-DR-11-08-307	x0200	N7331 (Reactor Safety) (2008),N7326 (Reactor Safety) (2008)	
	ACRS-03	9/14/2008	9/24/2008	2008	\$1,351.84	\$1,351.84	Yes	9/22/2008	NRC-DR-11-08-307	x0200	N7326 (Reactor Safety) (2008)	
	ACRS-01	7/10/2008	7/15/2008	2008	\$3,223.61	\$3,223.61	Yes	9/21/2009	NRC-DR-11-08-307	x0200	N7326 (Reactor Safety) (2008)	
	ACRS-02	8/17/2008	8/27/2008	2008	\$24,263.75	\$24,263.75	Yes	8/27/2008	NRC-DR-11-08-307	x0200	N7326 (Reactor Safety) (2008)	
	ACRS-10	4/7/2009	4/23/2009	2008	\$37,747.46	\$37,747.46	Yes	4/21/2009	NRC-DR-11-08-307	x0200	N7326 (Reactor Safety) (2008),N7331 (Reactor Safety) (2008)	
	ACRS-06	12/15/2008	3/3/2009	2008	\$21,282.78	\$21,282.78	Yes	2/24/2009	NRC-DR-11-08-307	x0200	N7326 (Reactor Safety) (2008)	
	ACRS-12	7/2/2009	8/15/2009	2008	\$33,808.65	\$33,808.65	Yes	8/6/2009	NRC-DR-11-08-307	x0200	N7326 (Reactor Safety) (2008),N7326 (Reactor Safety) (2009)	

Total Invoice Amount: \$276,792.78 Record Count: 12

Add Invoice

Site Admin Menu

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".

Main Menu » PMDA » Procurement » Contracts » Contract Detail » Invoice Entry Page Help · Full Help Document

**Back**

Contract Number: NRC-DR-11-08307

Invoice Number: **1** Invoice Date: **2** Due Date: **3** Fiscal Year: 2007 **4**

Invoice Amount: 0.00 **5** Actual Amount Paid: 0 **6** ☐ Has Been Paid **7** Approval Date: **8**

RFPA	FY	POP Start Date	POP End Date	Remaining Amount	Job Code	Use?	\$ Used
NRC-DR-11-08-307	2010	6/18/2009	6/17/2010	\$2,250.37	N7331 (New Reactor Licensing) (2010)	<input type="checkbox"/>	0
NRC-DR-11-08-307 -	2010	1/18/2010	6/17/2010	\$791.64	N7326 (ACRS Reactor Safety Independent Advise) (2010)	<input type="checkbox"/>	0
NRC-DR-11-08-307	2010	6/18/2010	6/17/2011	\$31,980.08	N7331 (New Reactor Licensing) (2010)	<input type="checkbox"/>	0
				\$53,000.00	N7326 (ACRS Reactor Safety Independent Advise) (2010)	<input type="checkbox"/>	0

[Update Totals and Remaining Amount](#)

Invoice Notes:

**10**

**11**

[Site Admin Menu](#)