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 FOIAonline

NRC FORM 464 Part I
(06-2020)

U.S. NUCLEAR REGULATORY COMMISSION

RESPONSE TO FREEDOM OF INFORMATION ACT (FOIA) REQUEST

NRC -	RESPONSE NUMBER
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. You may fax an appeal to (301) 415-5130. Please be sure to include on your submission that it is a "FOIA Appeal." Only a pre-registered user may file an appeal through FOIA Online, https://foiaonline.gov/foiaonline/action/public/home. A user who has not registered an account prior to filing the initial FOIA request may still submit an appeal by one of the above mentioned options.

PART I.C -- REFERENCES AND POINTS OF CONTACT

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

If we have denied your request, you have the right to seek dispute resolution services from the NRC's Public Liaison or the Office of Government Information Services (OGIS). To seek dispute resolution services from OGIS, you may e-mail OGIS at ogis@nara.gov, send a fax to (202) 741-5789, or send a letter to: Office of Government Information Services, National Archives and Records Administration, 8601 Adelphi Road, College Park, MD 20740-6001. For additional information about OGIS, please visit the OGIS website at https://www.archives.gov/ogis.

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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'

Table of Contents

Updated: November 2012

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

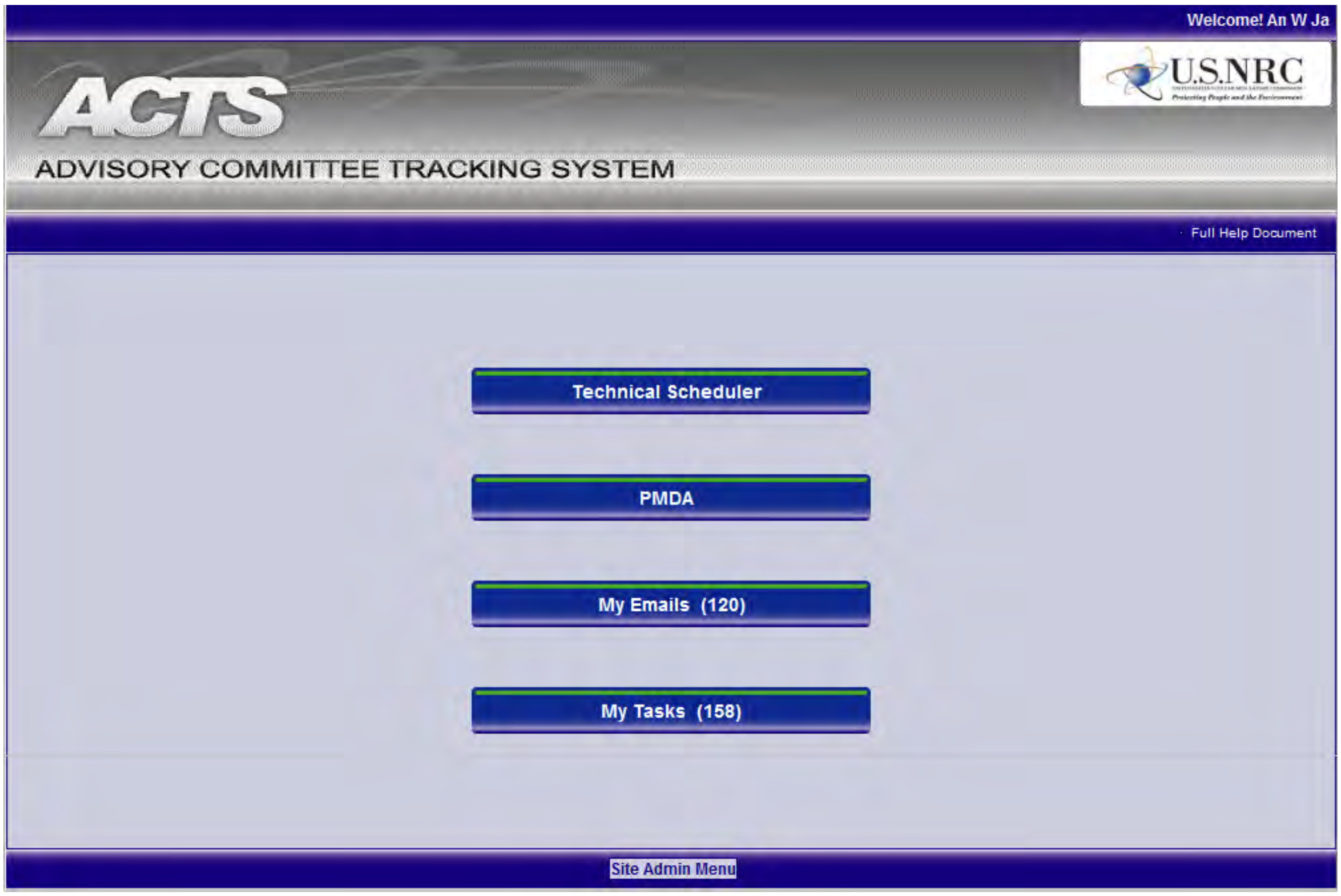
The PMDA Module includes the following:

- 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

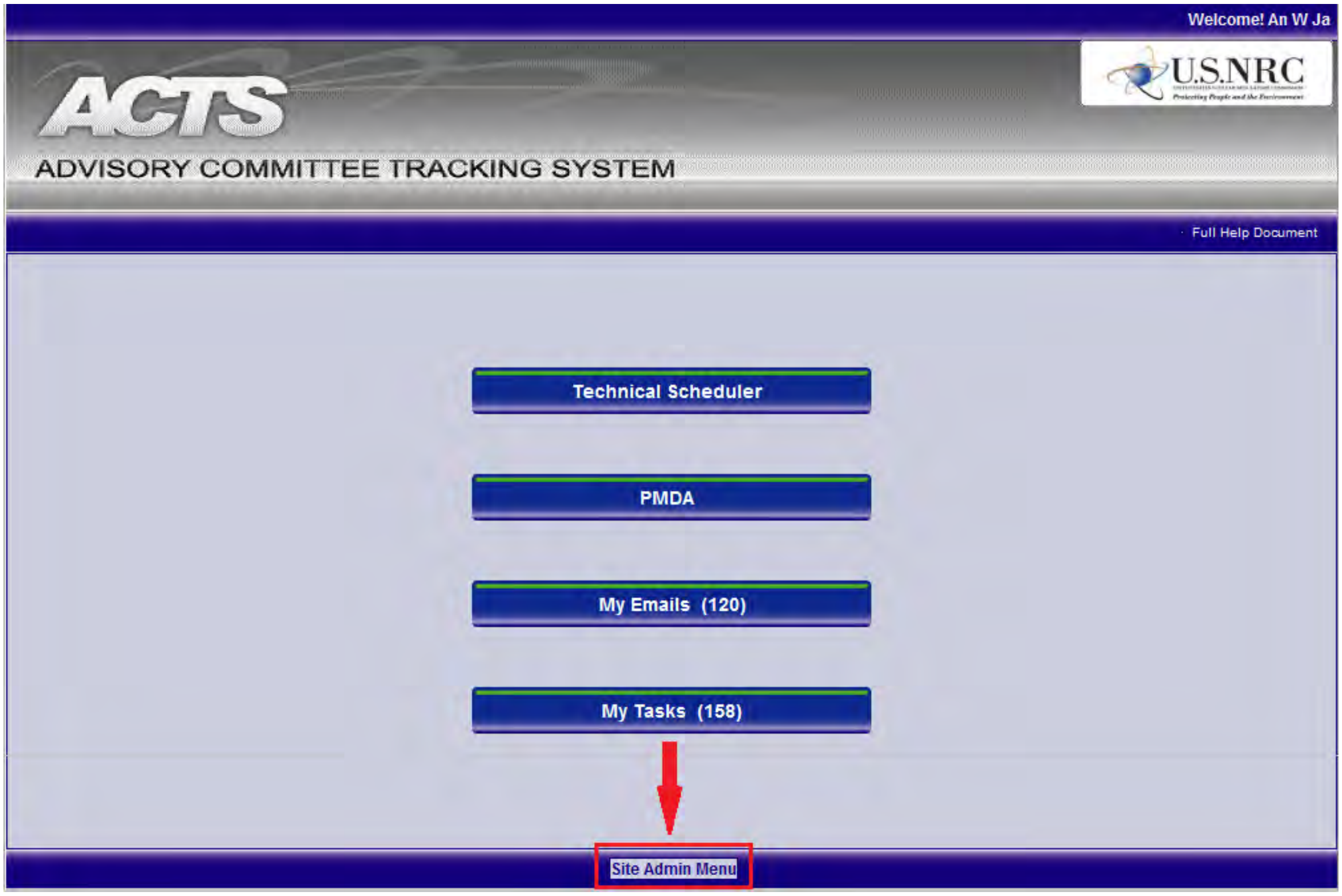
Logging In

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

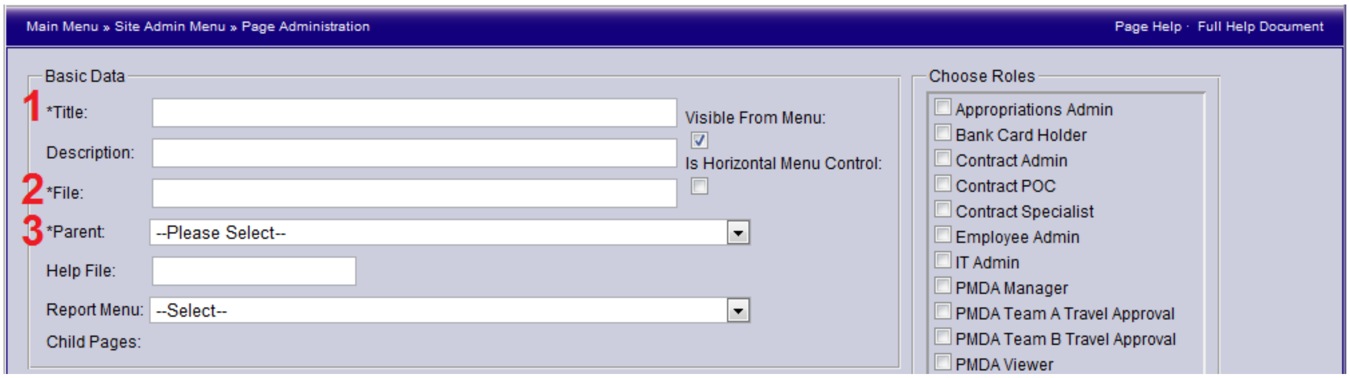
Main Menu » Site Admin Menu
Full Help Document
2
Role Management
Meeting Location Management
4
User Administration
Subcommittee Management
5
3
Cognizant Office Management
Alert Management
Hotel Management Admin
Email Template Administration
PMDA Administration
Page Administration
1
6
Maintenance Items
Report Menu Administration
Report Administration
Sequence Administration
Database Upgrade
Audit Log
Site Admin Menu

Page Administration

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

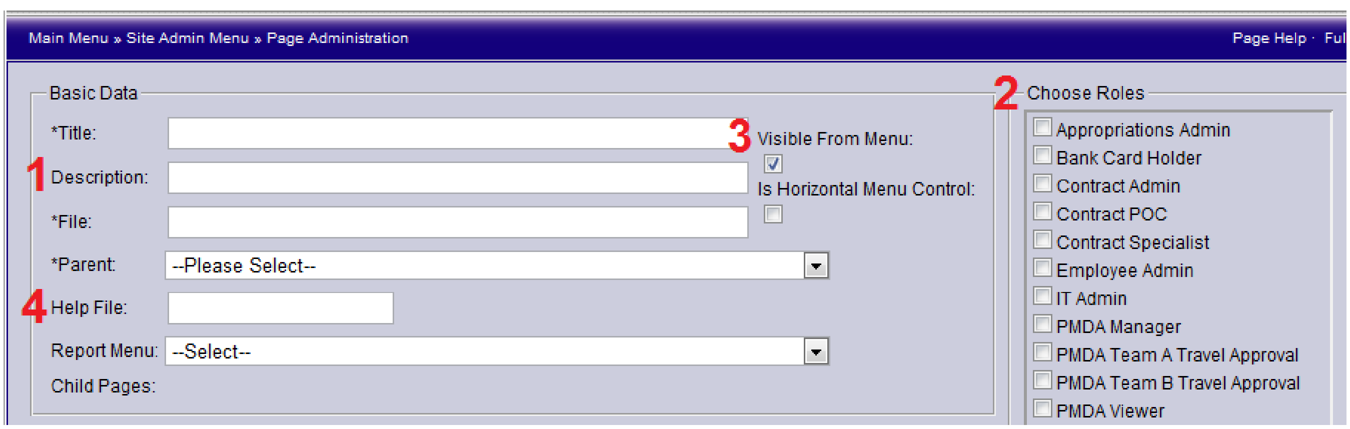
Each page requires:

1. a title
2. the relative path to the page
3. the "parent" page in the page hierarchy



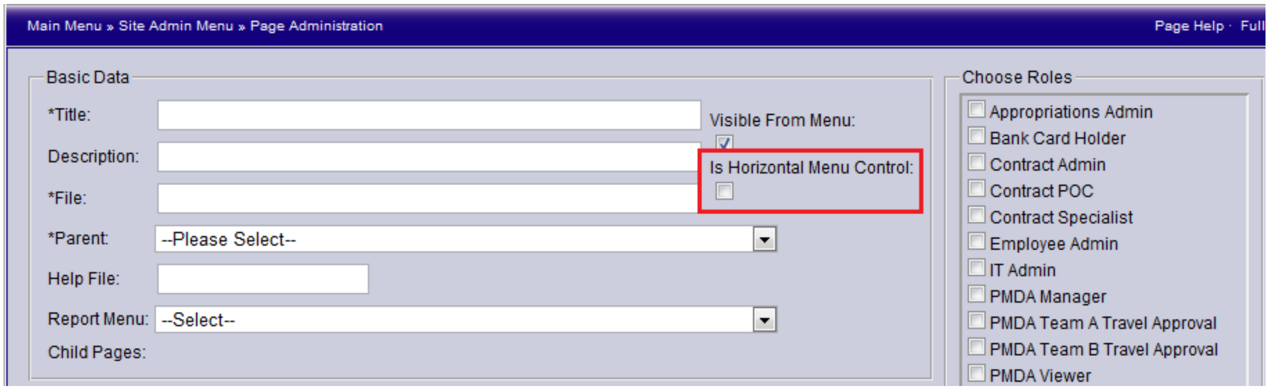
Each page may optionally have:

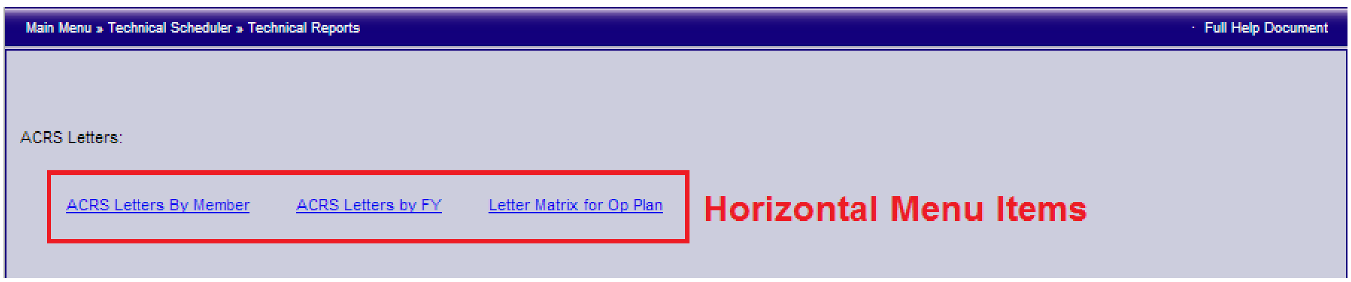
1. a description
2. limited access to specific roles (if no roles are selected, all roles are allowed access)
3. a designation indicating whether the page will be visible in menus
4. the name of the help file in the /help directory



Page Administration may also be used to set up horizontal menus placed on certain pages, such as within the Technical Scheduler. This allows items on these menus to be configured by a WebACTs administrator as needs change and evolve over time.

To set up a horizontal menu, the user needs only select the “Is Horizontal Menu Control” check box. The rest of the settings are the same.

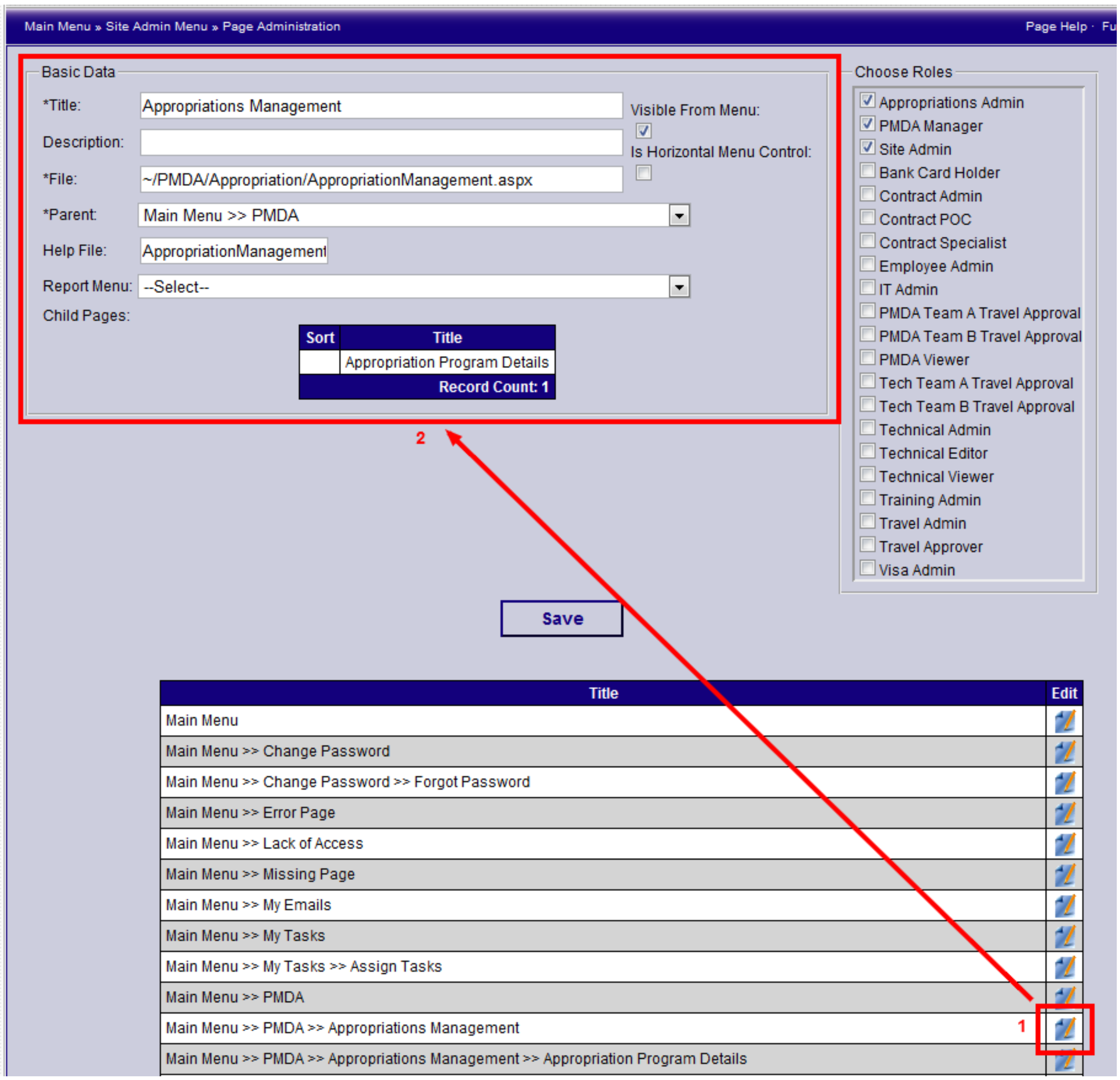




Page Edits

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

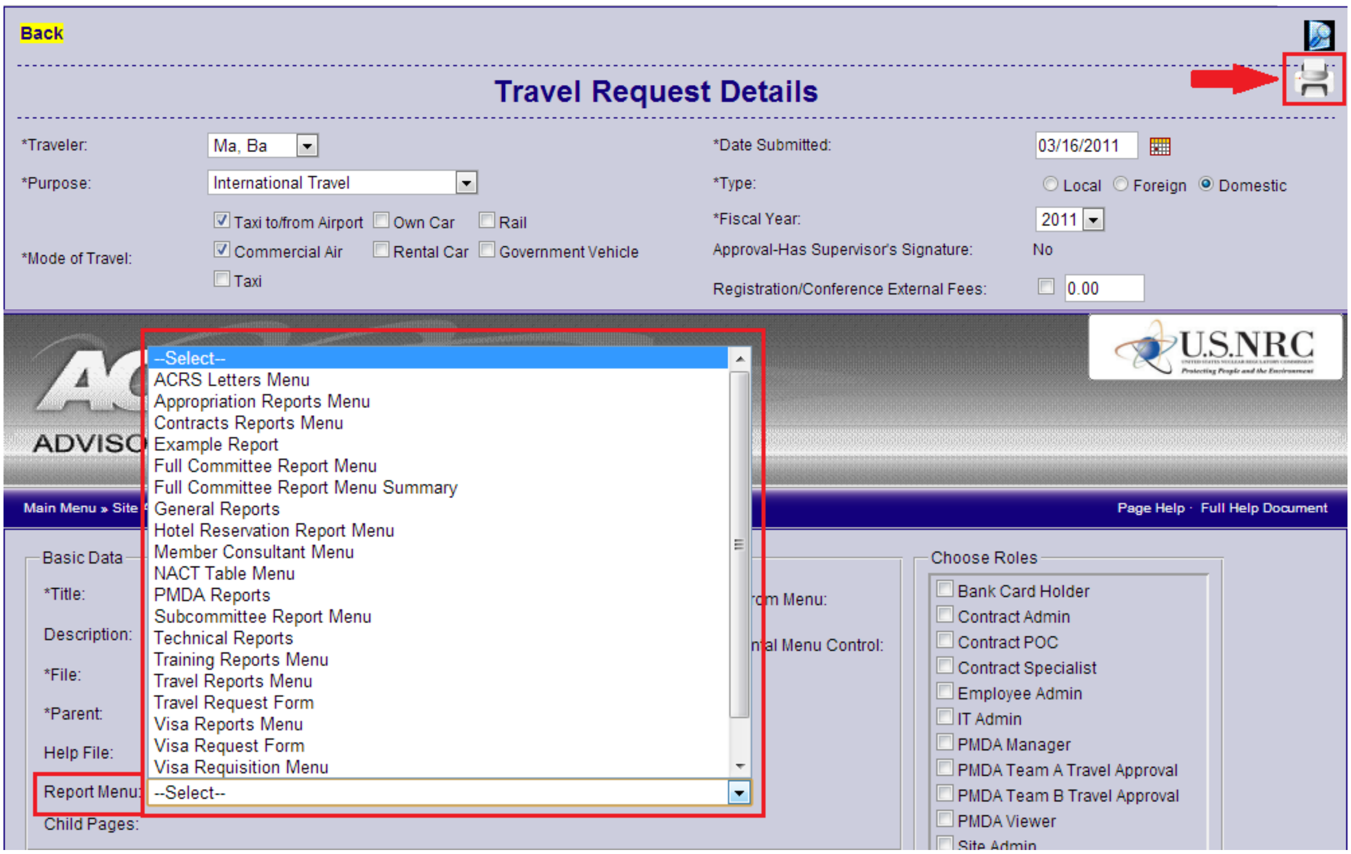
Note: A user cannot delete pages once they have been entered. To remove a page from the menu, uncheck the box Visible from Menu.



Report Button:

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

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

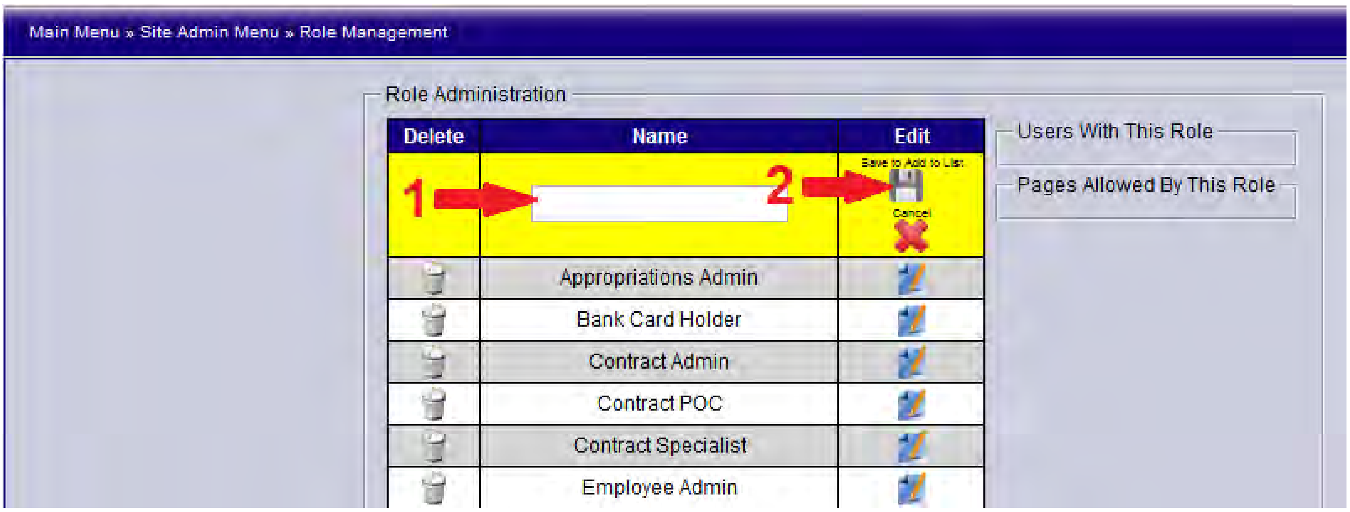


Role Administration

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

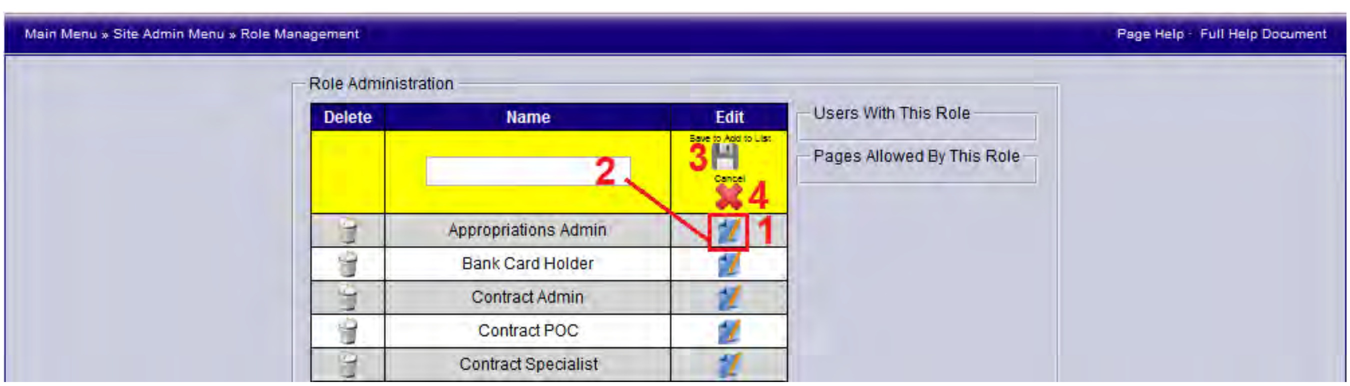
To enter a new role:

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



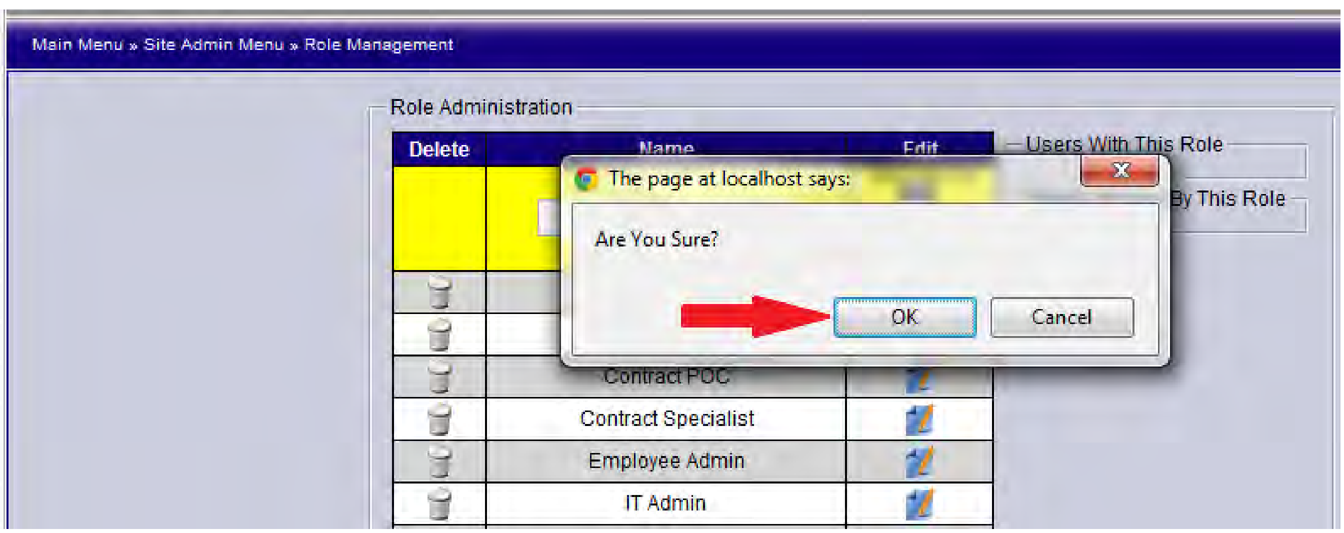
Warning: Editing roles should be done with extreme caution. Many features of the system are tied to these roles and their names, so changing a role's name could have far-reaching consequences. To edit an existing role:

1) Click the edit icon next to the appropriate role.
2) Edit the role name.
3) Click the save icon.
4) The cancel icon may be used to abandon any changes prior to saving.



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

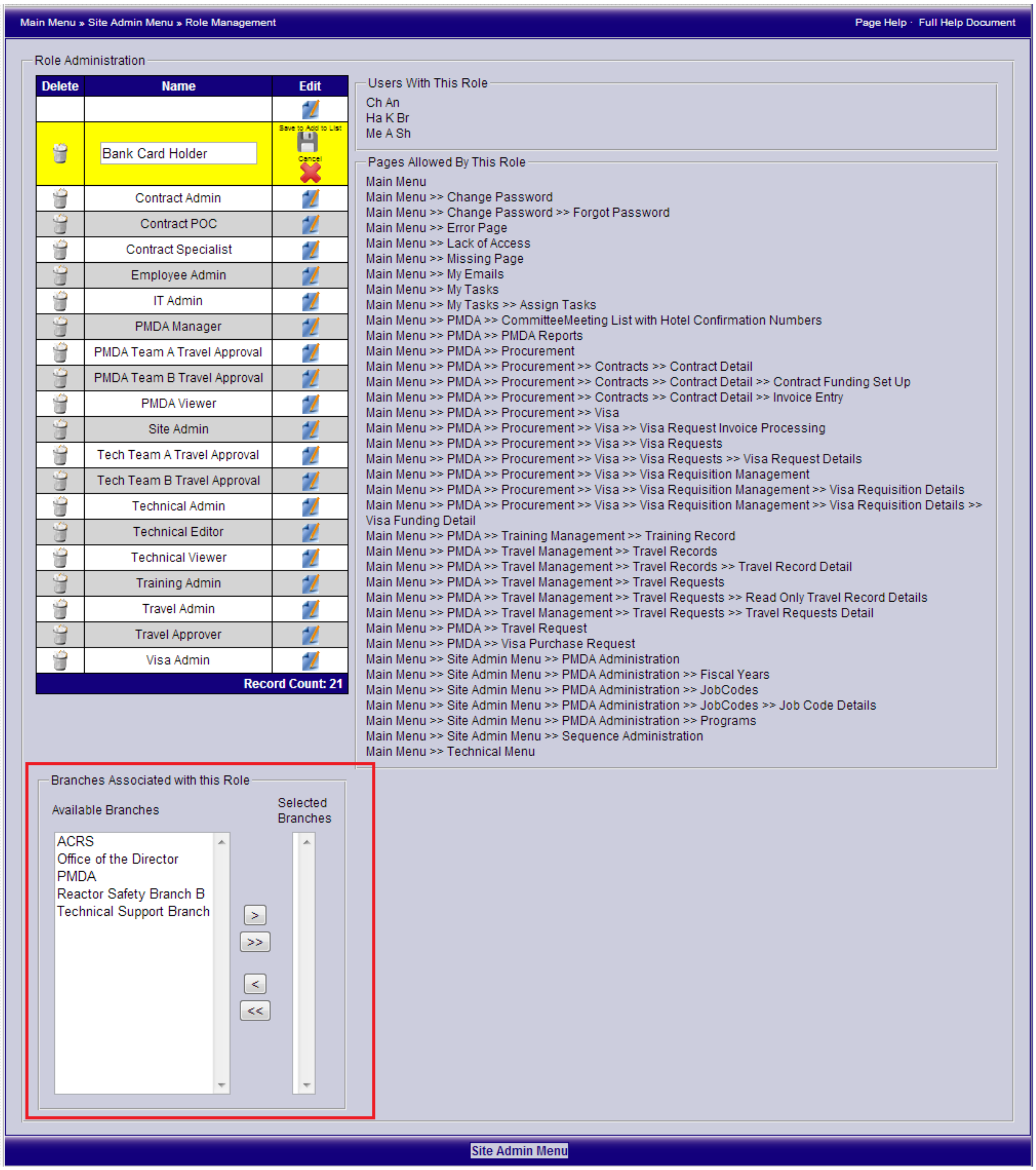
1) Click the delete icon next to the role that should be deleted.
2) Click “OK” in the confirmation pop up window.



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.

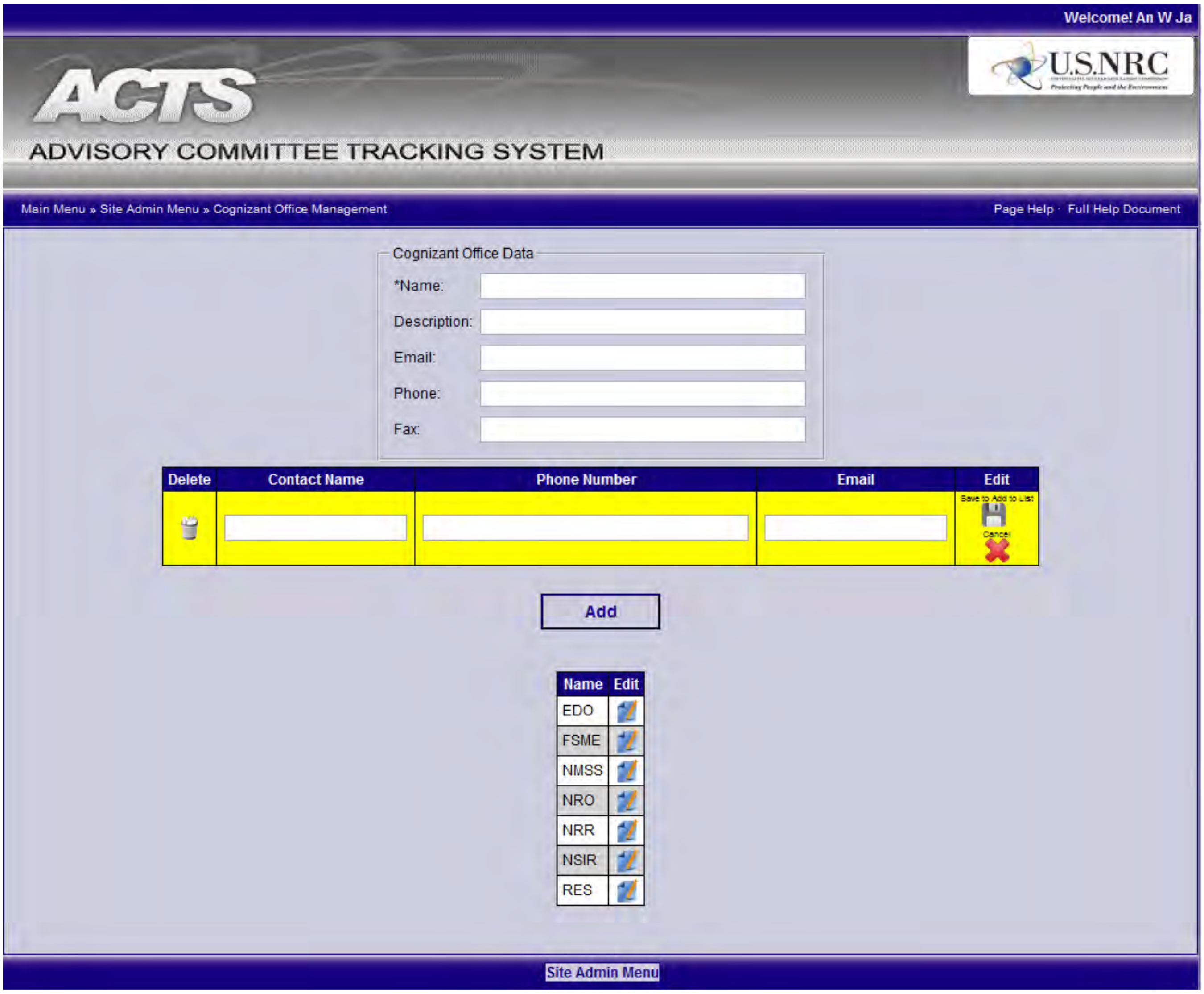
For example, assume a role called "Branch A Approver" has been created, and that role is associated with Branch A. If an alert is created which emails people in the Branch A Approver role when a new travel request is created, the alert system will check to ensure that the person making the request is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



Updated: November 2012

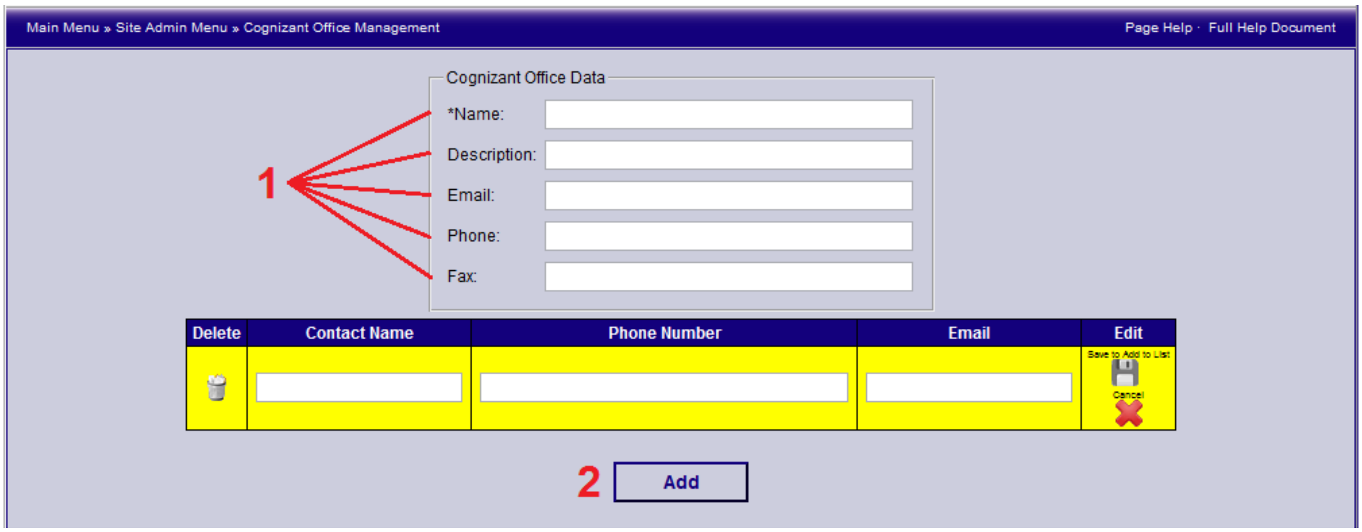
Cognizant Office Management

Cognizant offices are assigned to each agenda item of a meeting from a dropdown list of choices. Those choices are configured using the Cognizant Office Management screen.



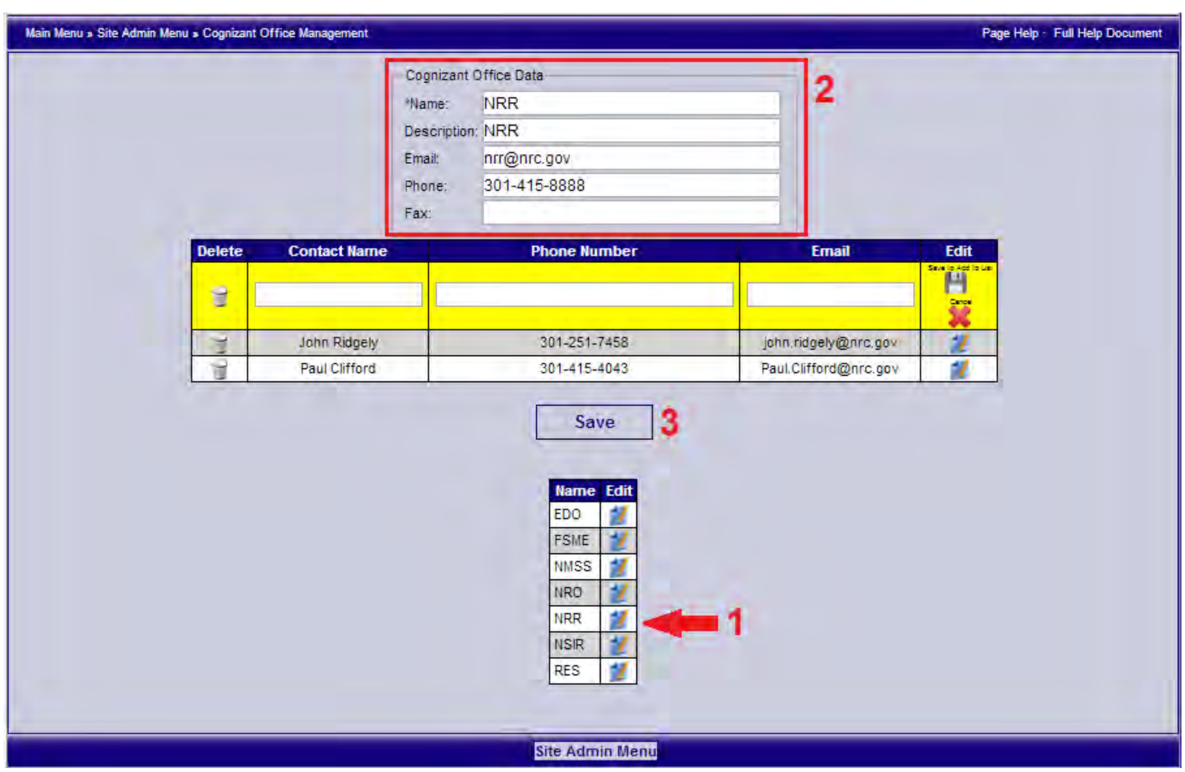
To enter a new Cognizant Office:

1) Enter the name/abbreviation of the Cognizant Office.
2) Enter a short description of the Cognizant Office.
3) Enter a contact email address.
4) Enter a contact phone number.
5) Enter a contact fax number.
6) Click “Add”.



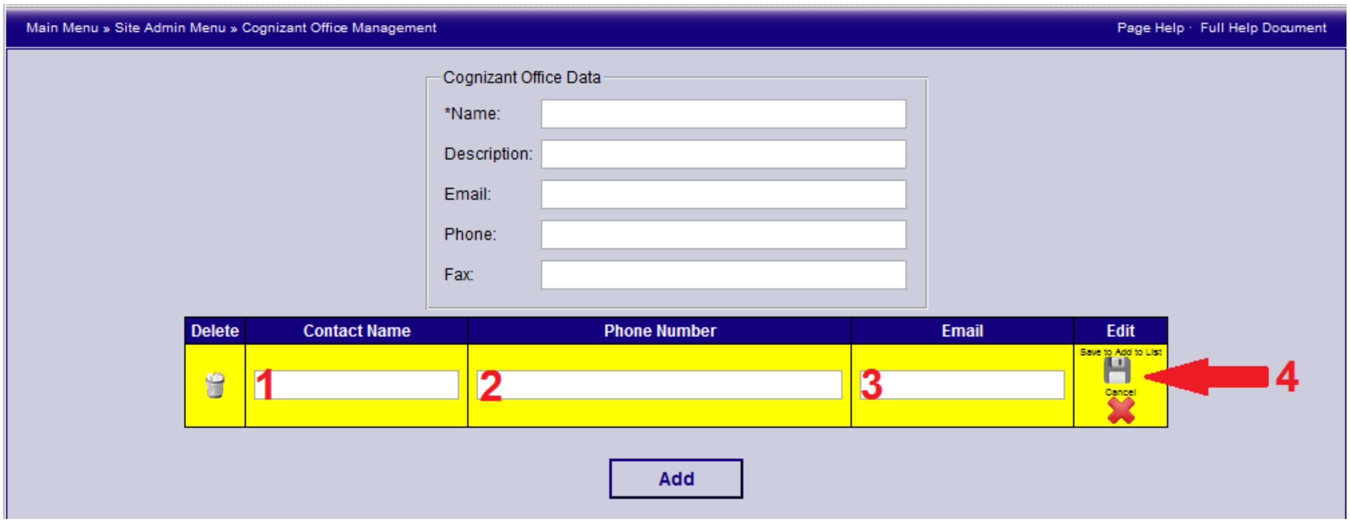
To edit a Cognizant Office:

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



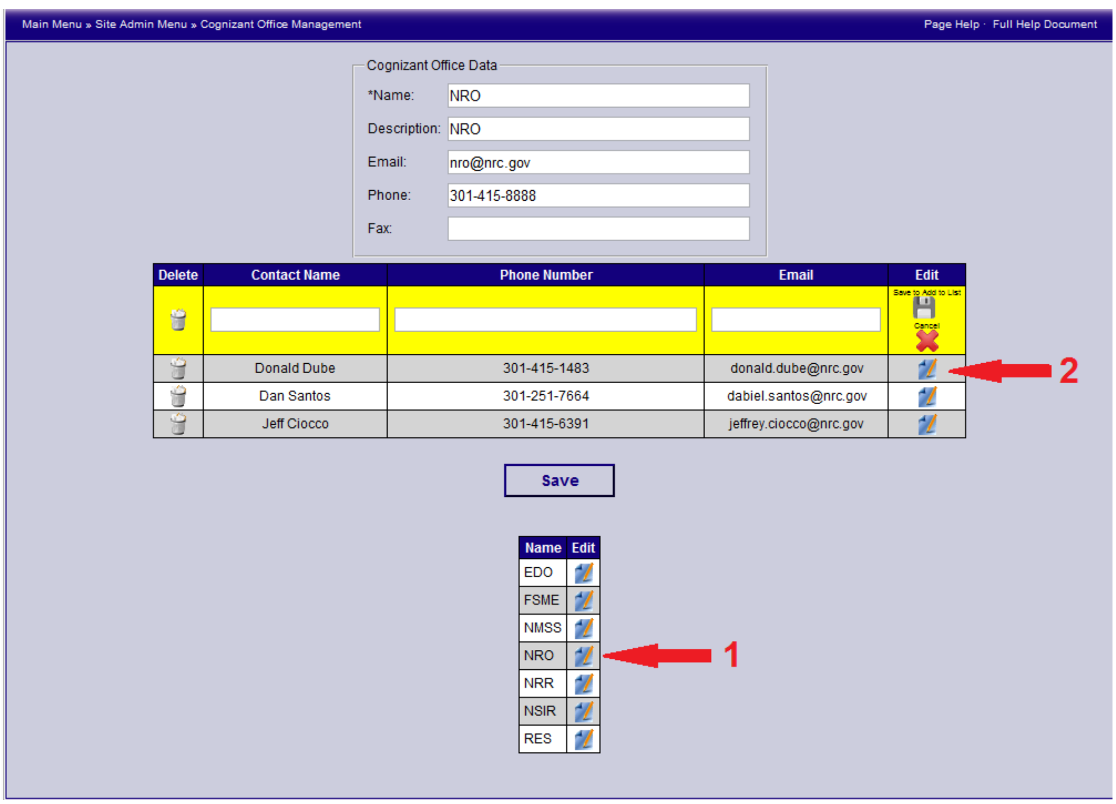
To enter contacts for a Cognizant Office:

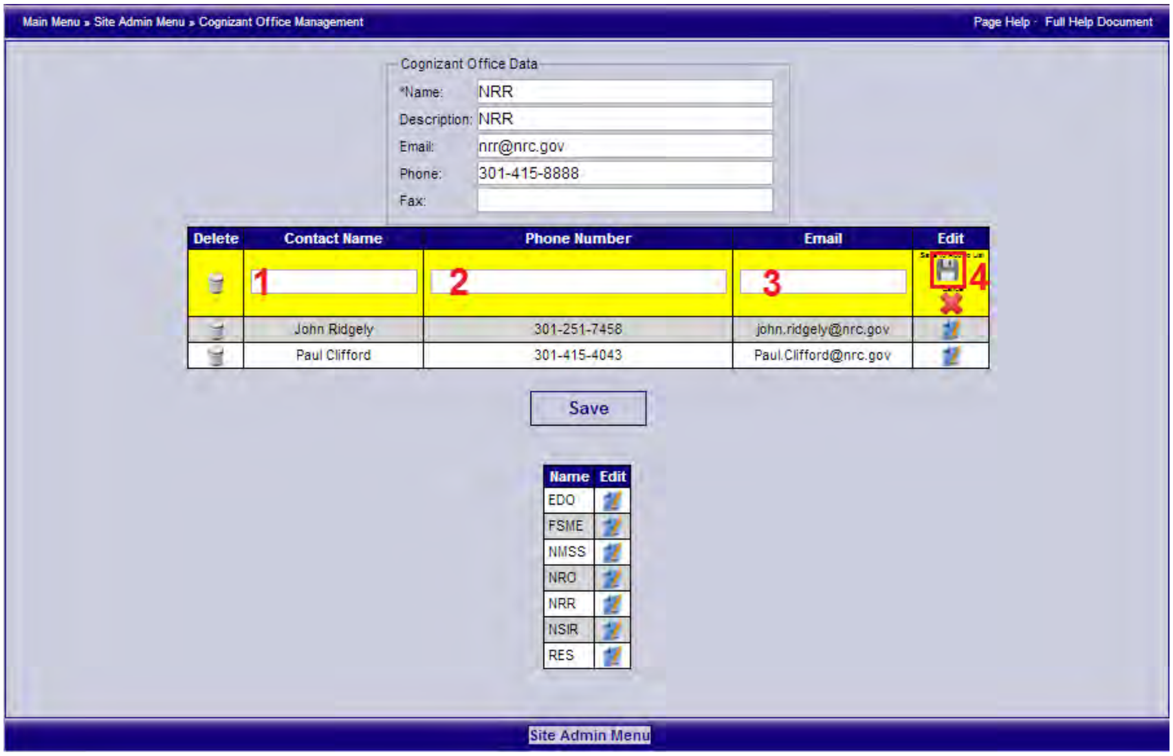
1) Enter the contact's name.
2) Enter a phone number for the contact.
3) Enter an email for the contact.
4) Click the "Save" icon.



To edit a contact for a Cognizant Office:

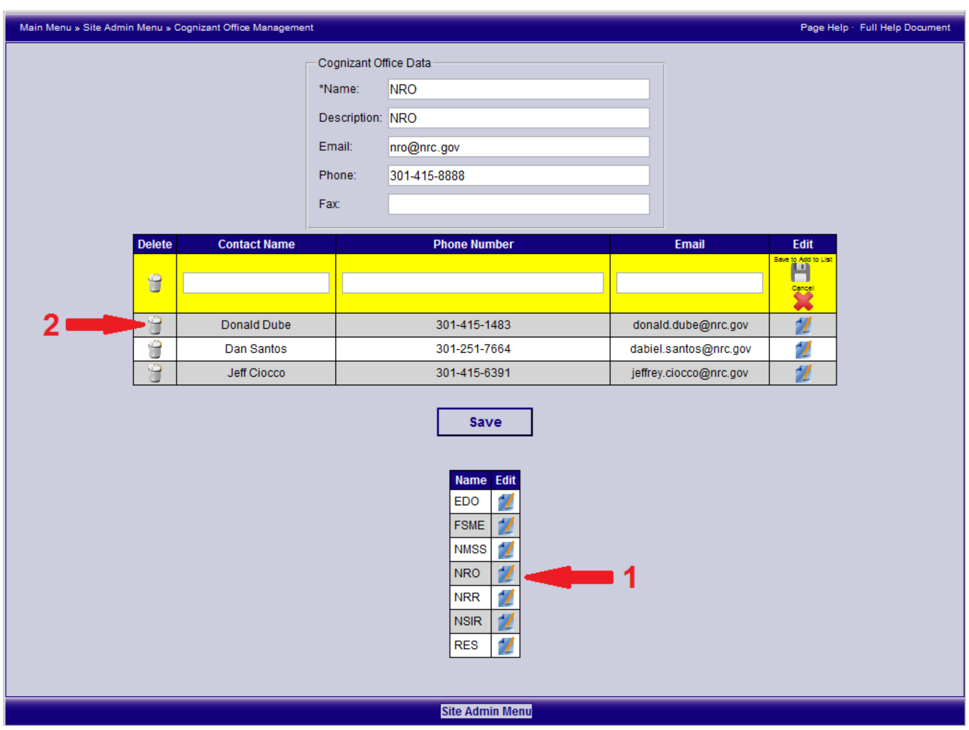
1) Click the edit icon to select the Cognizant Office.
2) Click the edit icon next to the contact to be edited.
3) Edit the information as needed.
4) Click the "Save" icon.





To delete a contact for a Cognizant Office:

1) Make sure the Cognizant Office has been selected.
2) Click the delete icon next to the contact to be deleted.

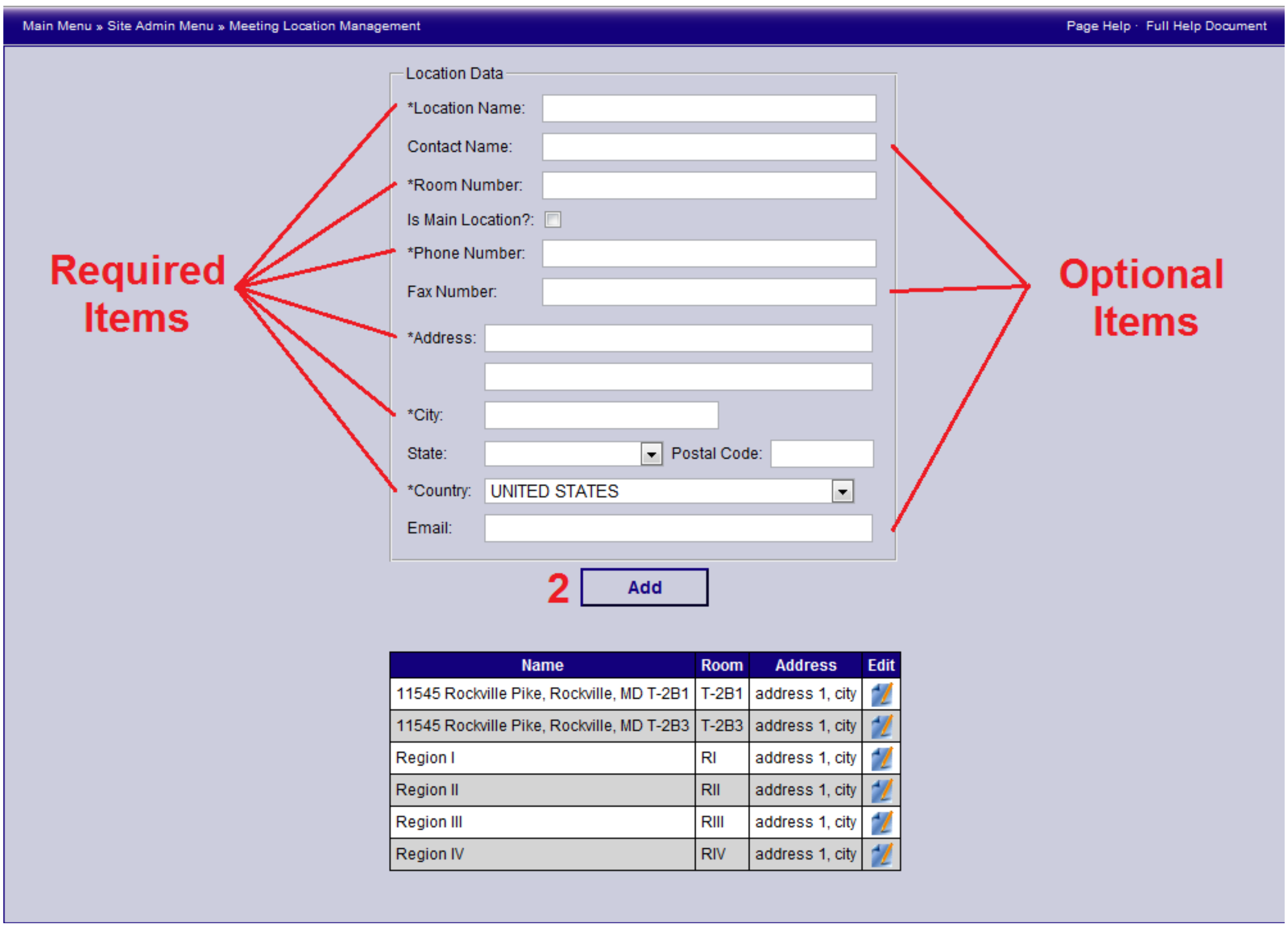


Meeting Location Management

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

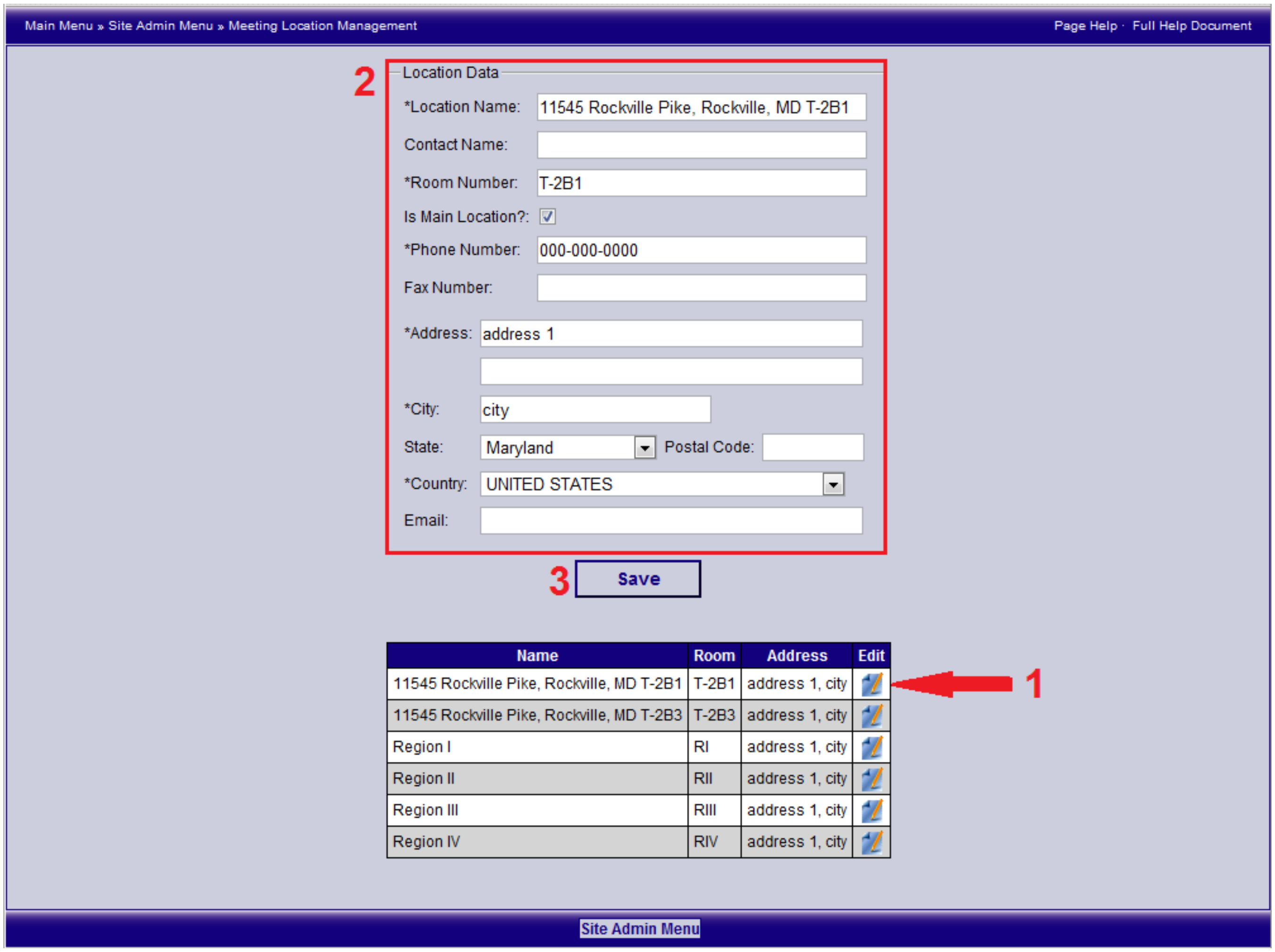
To enter a new location:

1) Enter a name for the location.
2) Enter a contact name for the location.
3) Enter a room number.
4) Enter a contact phone number.
5) Enter an address.
6) Enter a contact email address.
7) Click "Add".



To edit a meeting location:

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

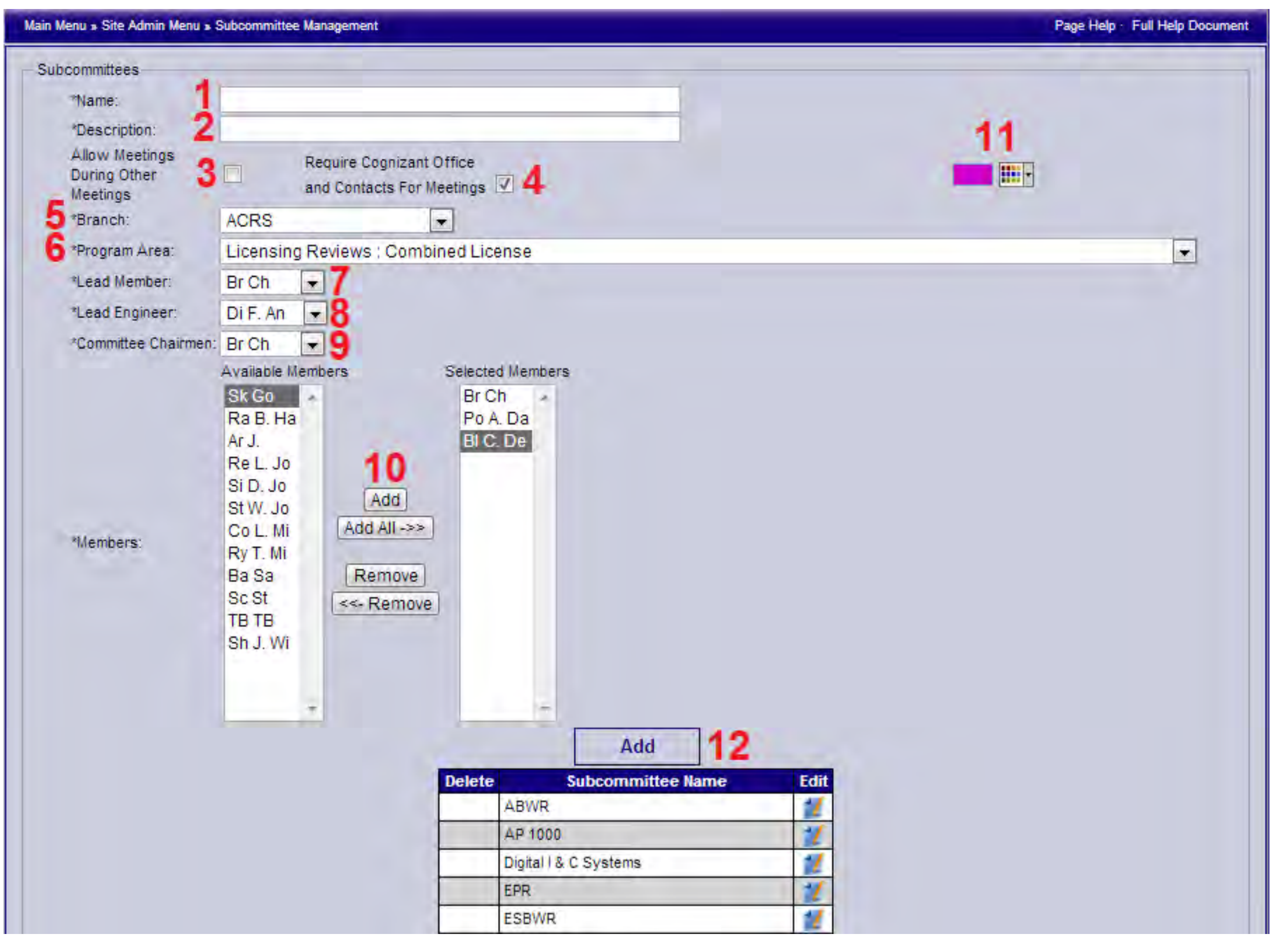


Subcommittee Management

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

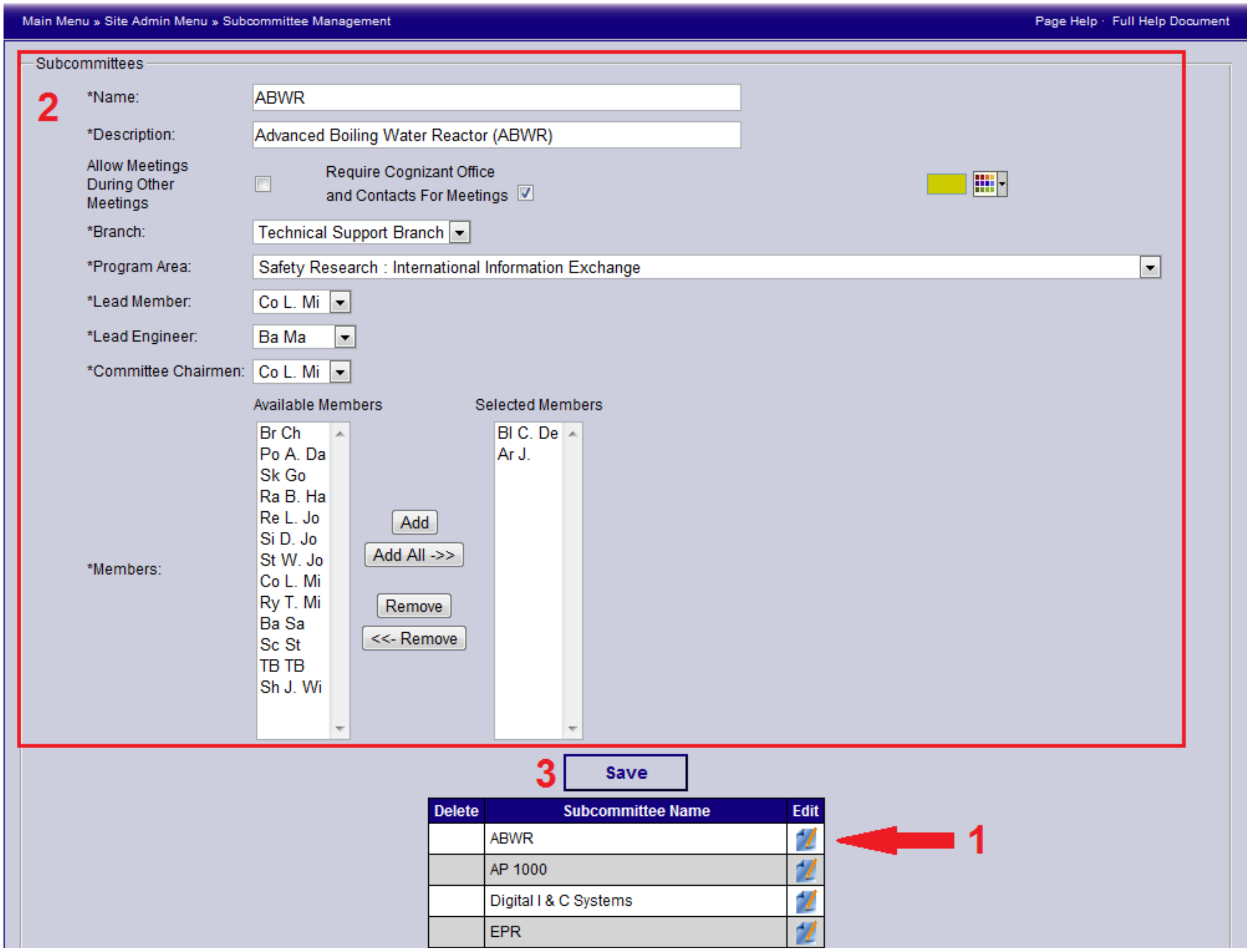
To enter a new subcommittee:

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



To edit an existing subcommittee:

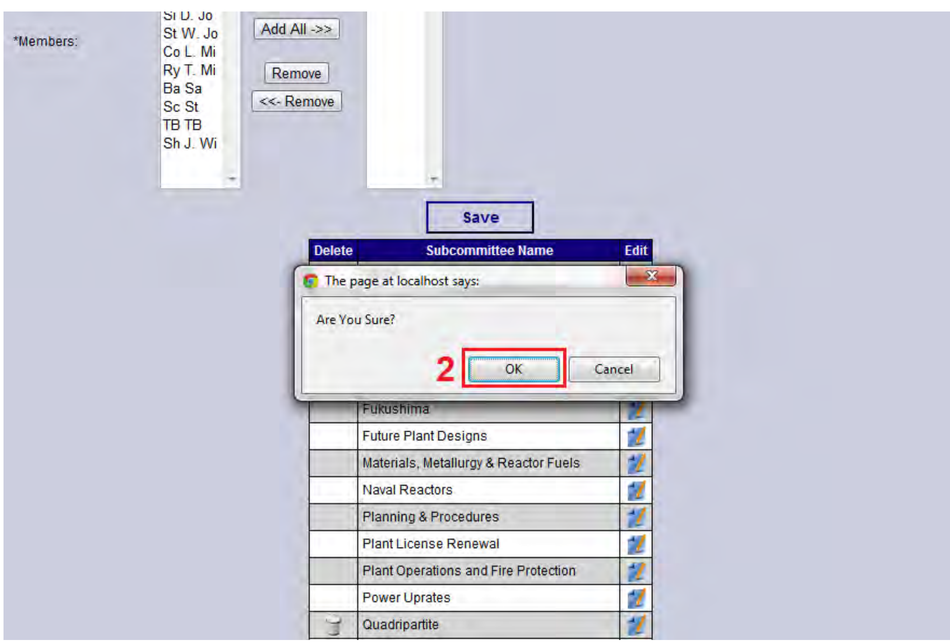
1) Click the appropriate edit icon in the list of subcommittees.
2) Edit the information as needed.
3) Click "Save".



To delete/deactivate a subcommittee:

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

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



Sequence Administration

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

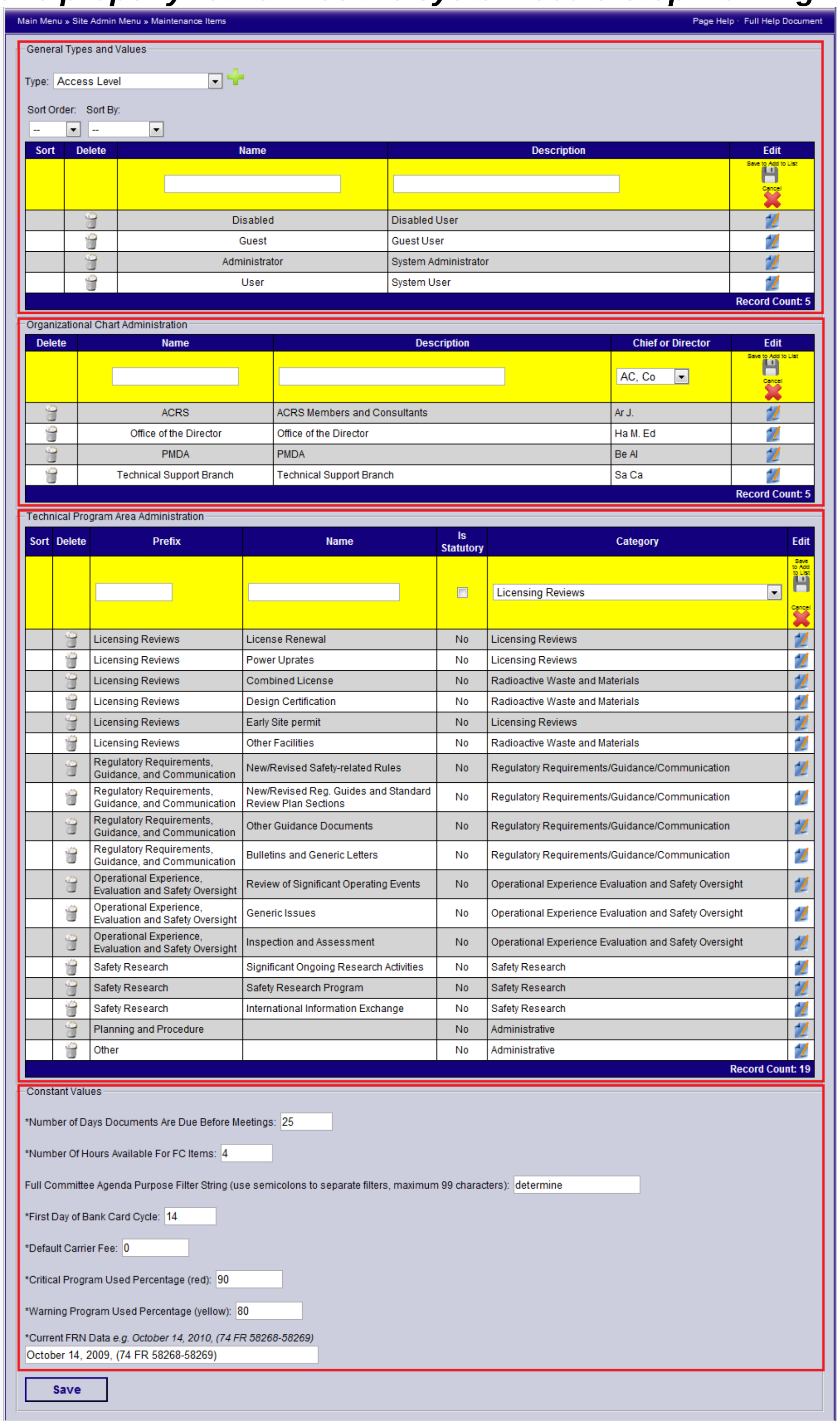
Examples of sequences maintained include RFPA Approval, Travel and Training.

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

Settings and other Maintenance Items

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

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



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
				Save to Add to List / Cancel
		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
			AC, Co	Save to Add to List / Cancel
	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
					Licensing Reviews	Save to Add to List / Cancel
		Licensing Reviews	License Renewal	No	Licensing Reviews	
		Licensing Reviews	Power Uprates	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: 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)*

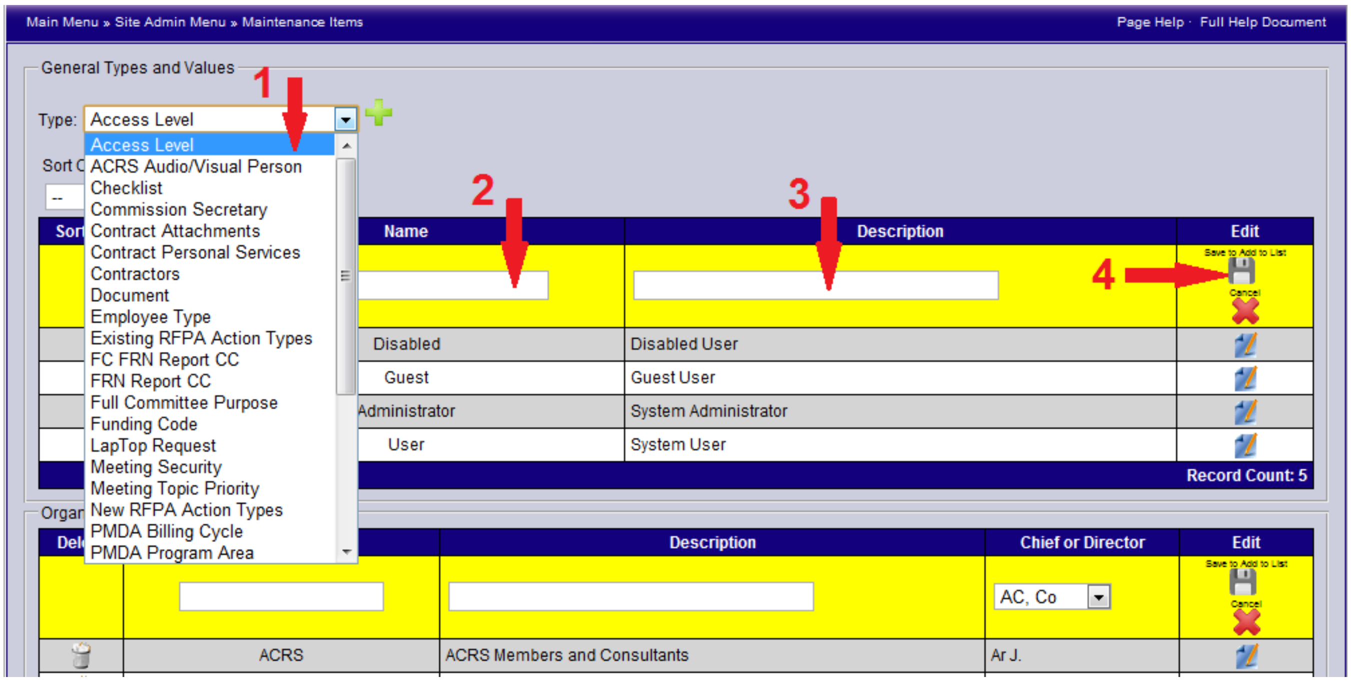
October 14, 2009, (74 FR 58268-58269)

Save

The first section contains the various types of settings and those individual settings.

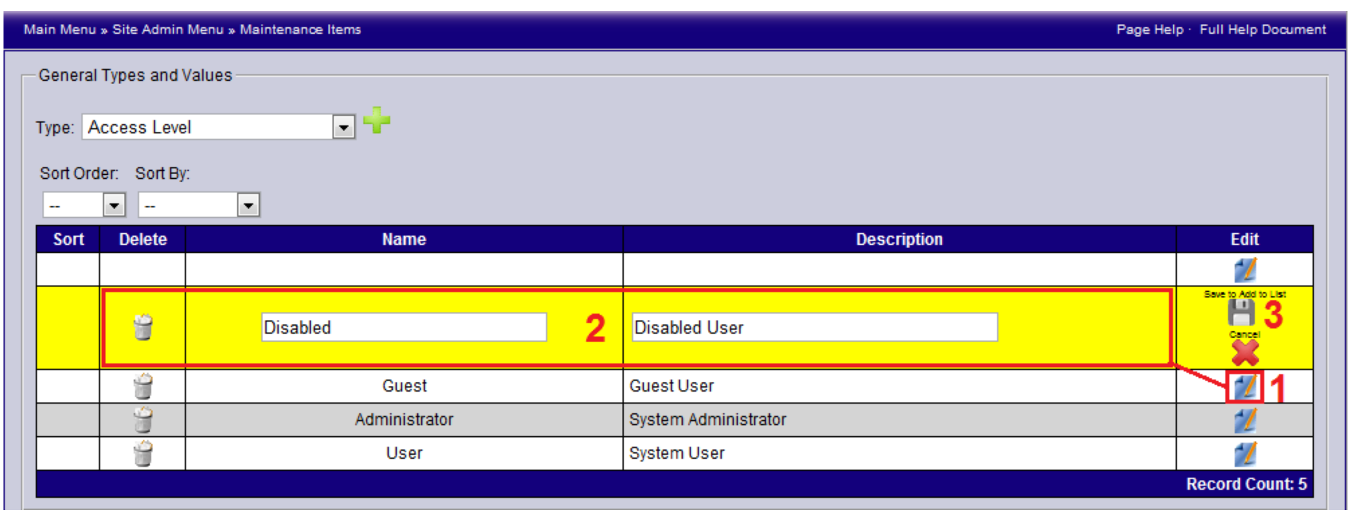
To add a setting:

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



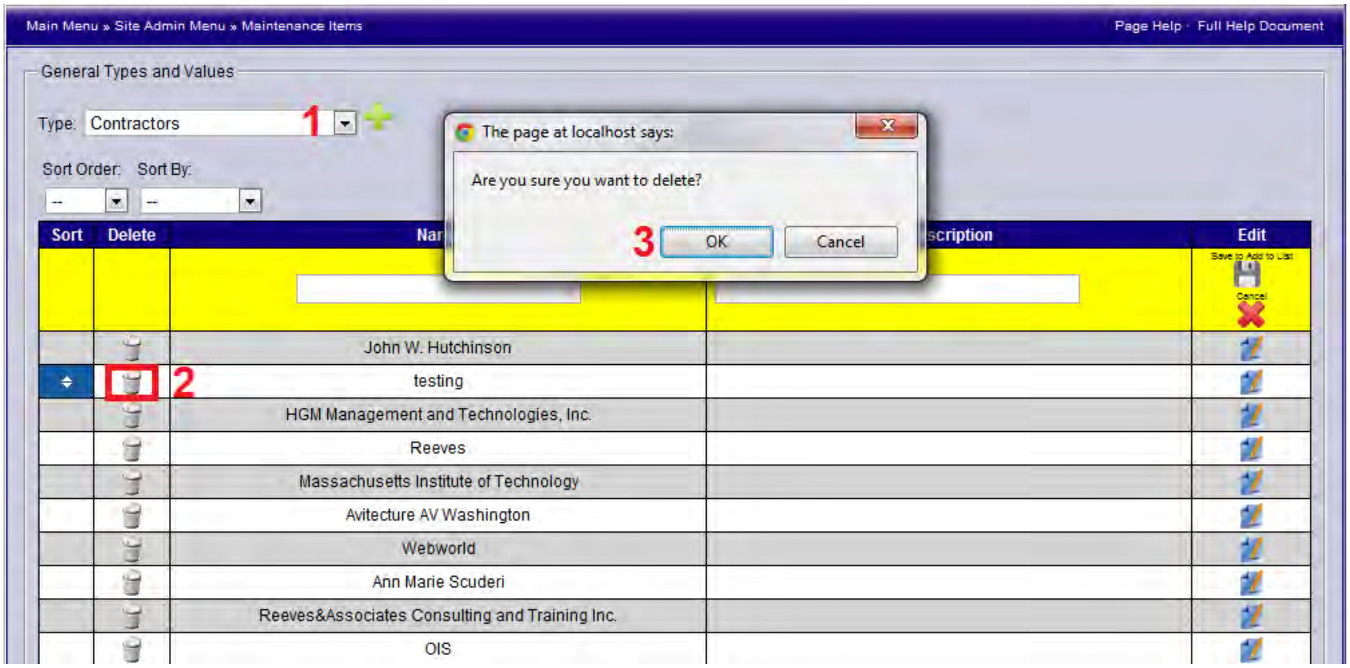
To edit a setting:

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



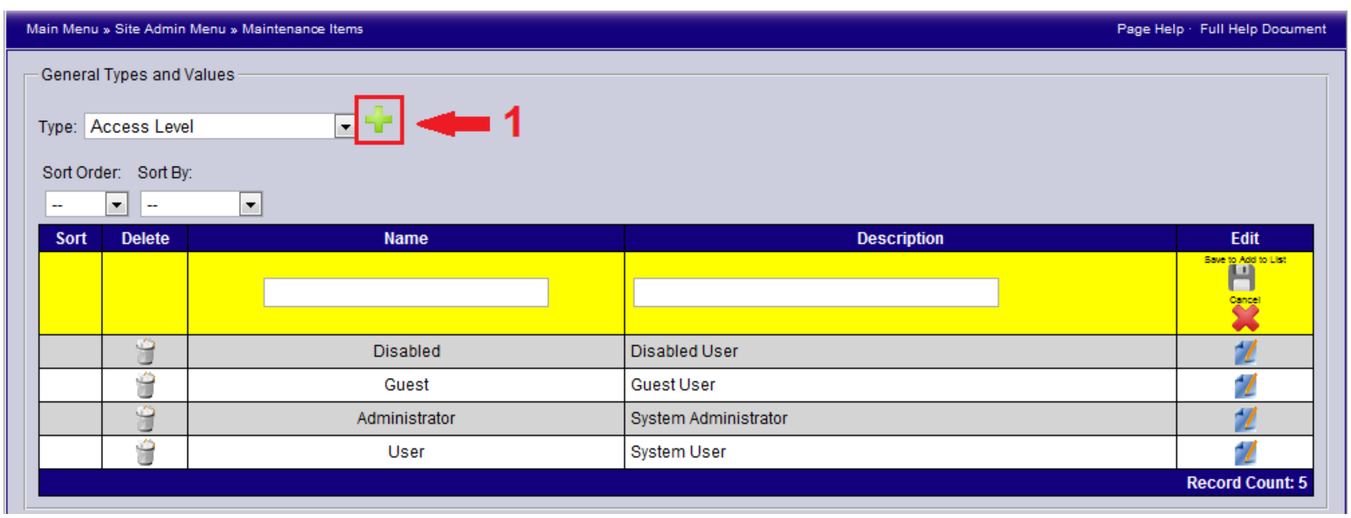
To delete a setting:

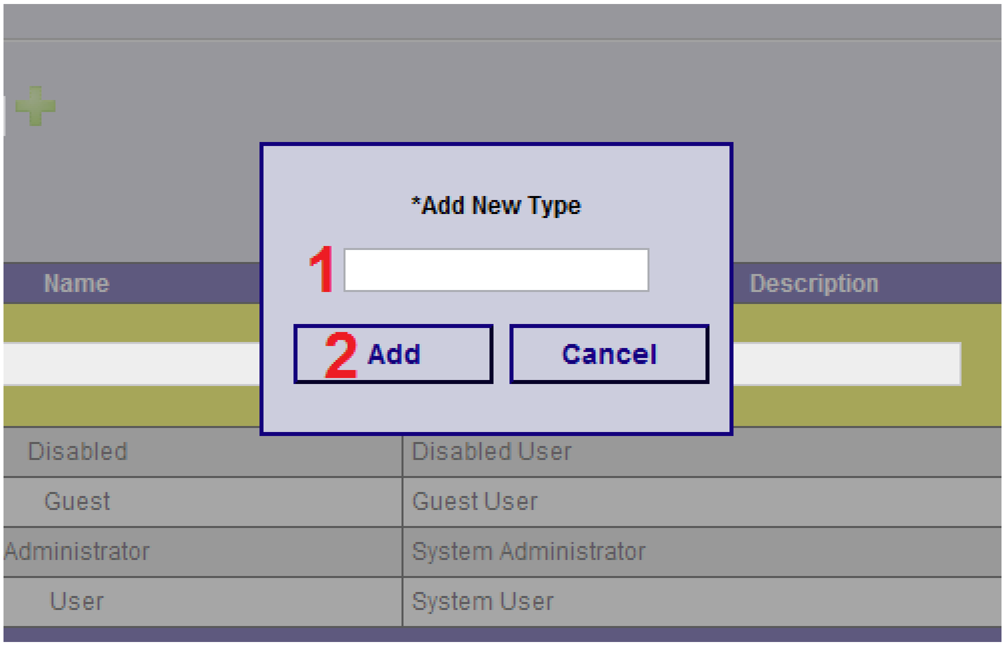
1. Choose the appropriate type of setting in the dropdown list.
2. Click the appropriate delete icon.
3. Confirm the deletion.



To add a new type of setting:

1. Click the + symbol next to the dropdown list.
2. Enter the type of setting.
3. Click the "Add" button.

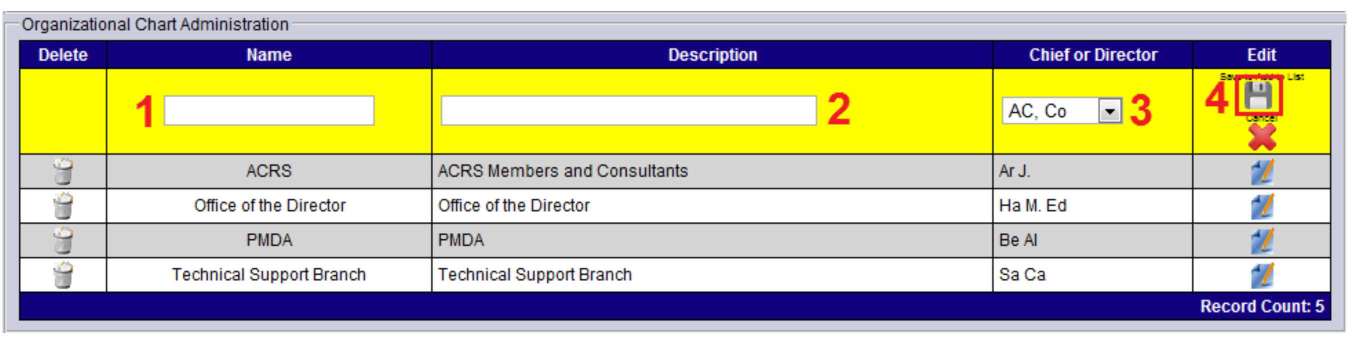




The second section is the Organizational Chart Administration, where the branches are managed.

To add a new branch:

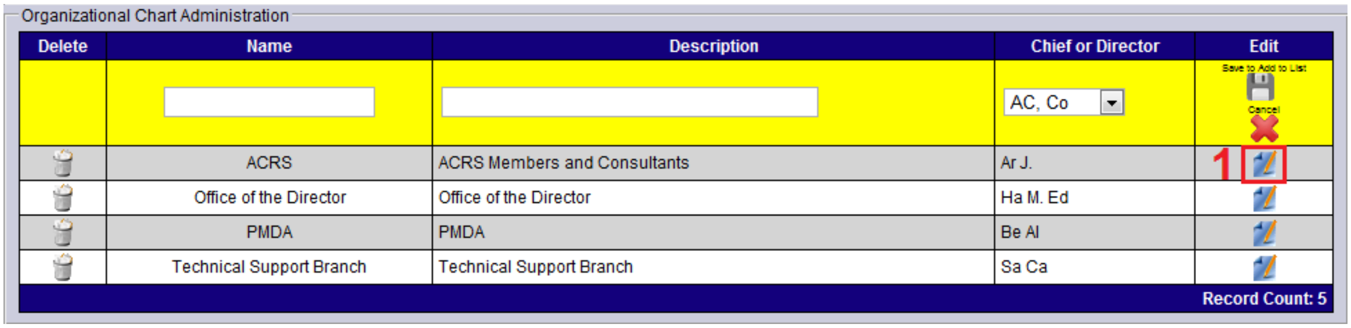
1. Add the name of the branch.
2. Add a short description.
3. Select who heads the branch.
4. Click the “Save” icon.


Organizational Chart Administration

Delete	Name	Description	Chief or Director	Edit
	1	2	AC, Co 3	4
	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

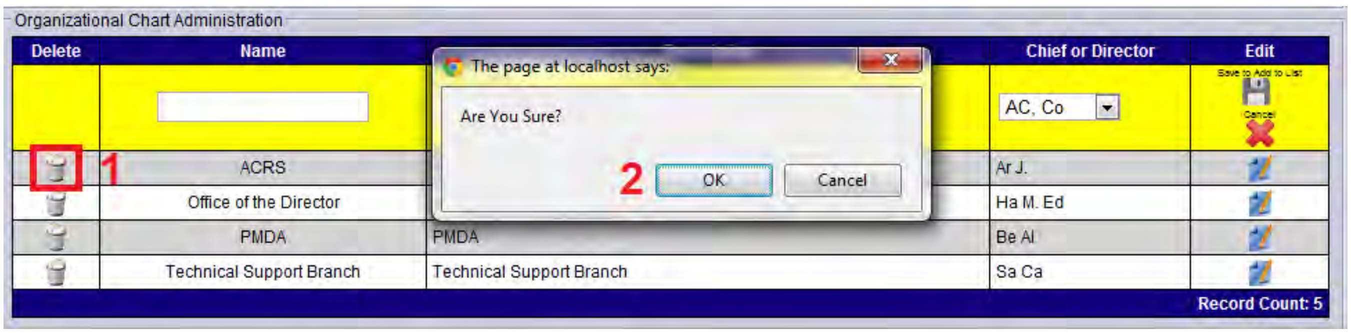
To edit a branch:

1. Click the edit icon next to the branch to be edited.
2. Edit the data.
3. Click the “Save” icon.



To delete a branch:

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



The third section is the Technical Program Area Administration. This section is used to add to and edit the various program areas that are available for topics and subcommittees to be assigned to.

To add a new program area:

1. Enter the prefix.
2. Enter the name.
3. Select if it's required by statute.
4. Select the category of program area (this list of categories is controlled by the first section of settings).
5. Click the "Save" icon.

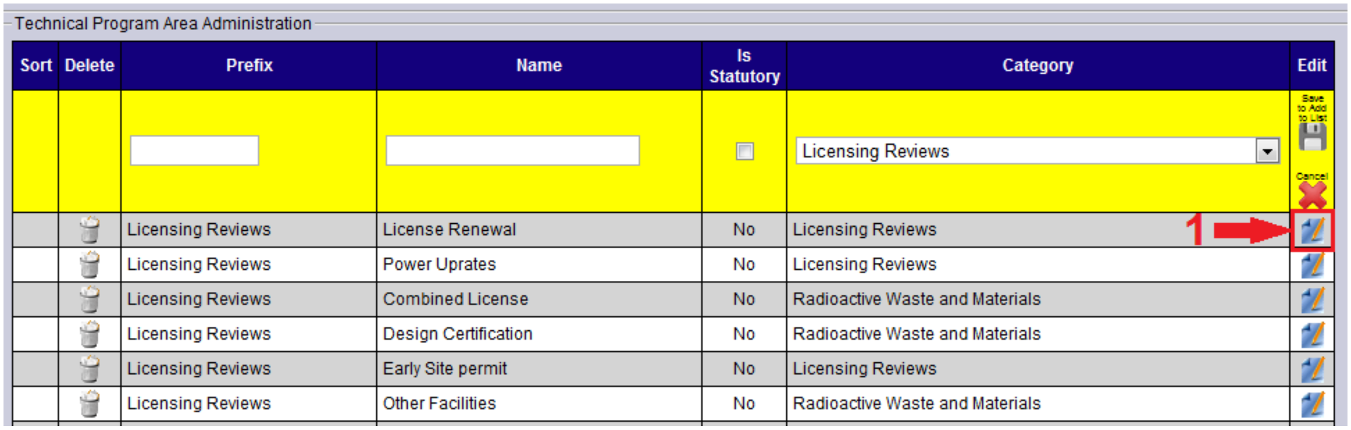
Technical Program Area Administration

Sort	Delete	Prefix	Name	Is Statutory	Category	Edit
		1	2	3	Licensing Reviews 4	5 Save to Add to List Cancel
		Licensing Reviews	License Renewal	No	Licensing Reviews	
		Licensing Reviews	Power Uprates	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

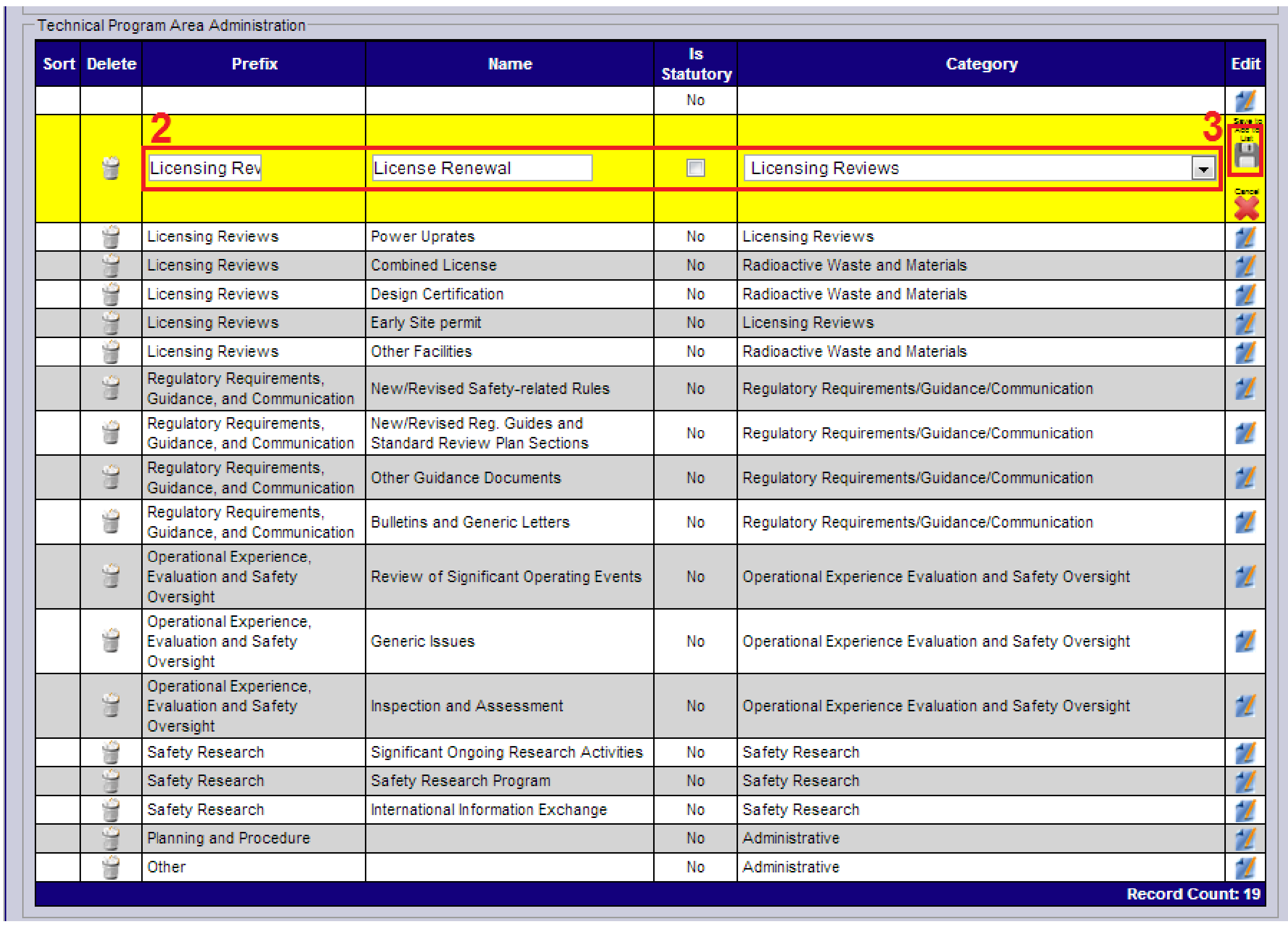
To edit a program area:

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
					Licensing Reviews	
		Licensing Reviews	License Renewal	No	Licensing Reviews	1
		Licensing Reviews	Power Uprates	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	



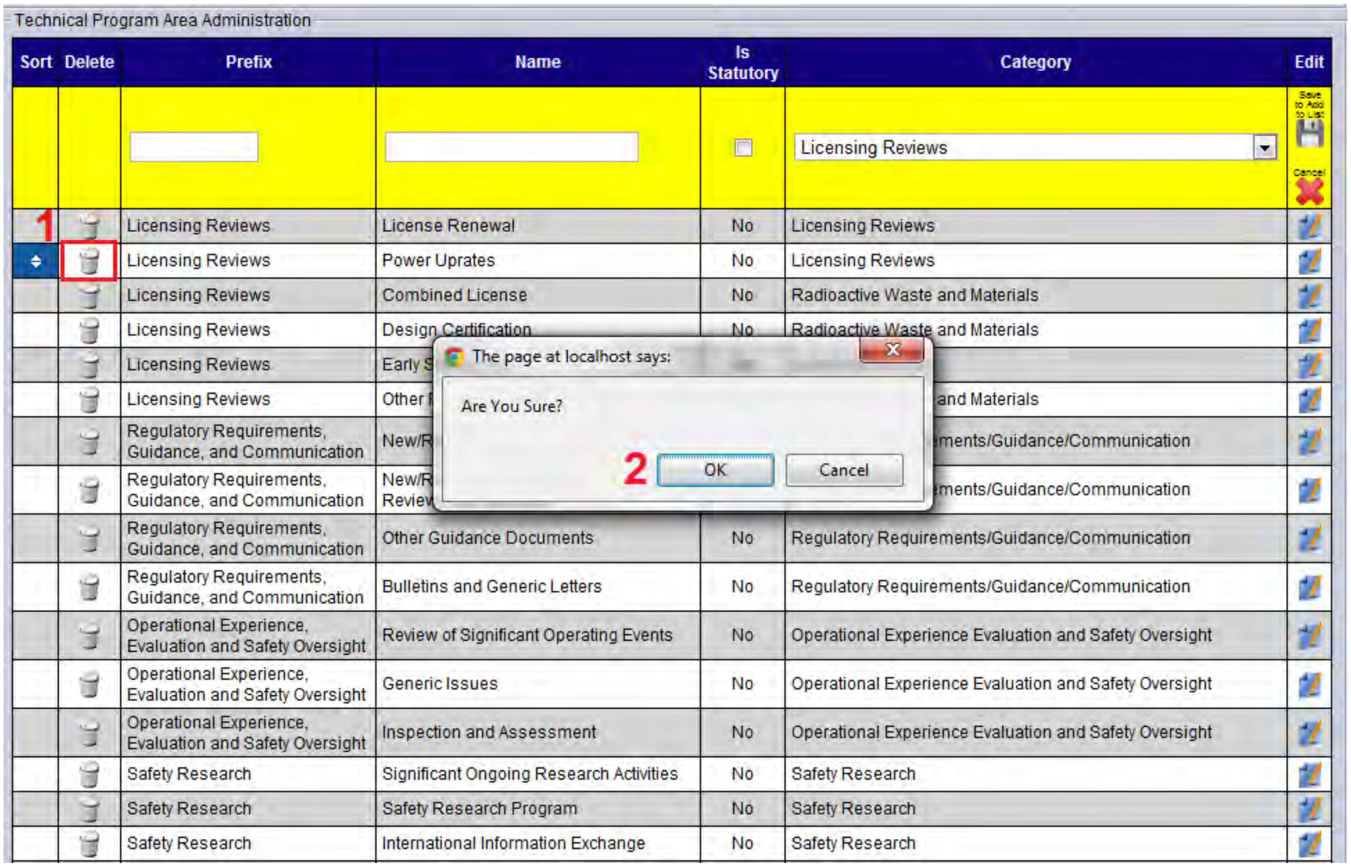
Technical Program Area Administration

Sort	Delete	Prefix	Name	Is Statutory	Category	Edit
				No		
		2 Licensing Rev	License Renewal		Licensing Reviews	3
		Licensing Reviews	Power Uprates	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
					Licensing Reviews	Save to Add to List / Cancel
1		Licensing Reviews	License Renewal	No	Licensing Reviews	
		Licensing Reviews	Power Uprates	No	Licensing Reviews	
		Licensing Reviews	Combined License	No	Radioactive Waste and Materials	
		Licensing Reviews	Design Certification	No	Radioactive Waste and Materials	
		Licensing Reviews	Early S			
		Licensing Reviews	Other		and Materials	
		Regulatory Requirements, Guidance, and Communication	New/R		ments/Guidance/Communication	
		Regulatory Requirements, Guidance, and Communication	New/R Review		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 fourth section controls the various defaults used by the system.

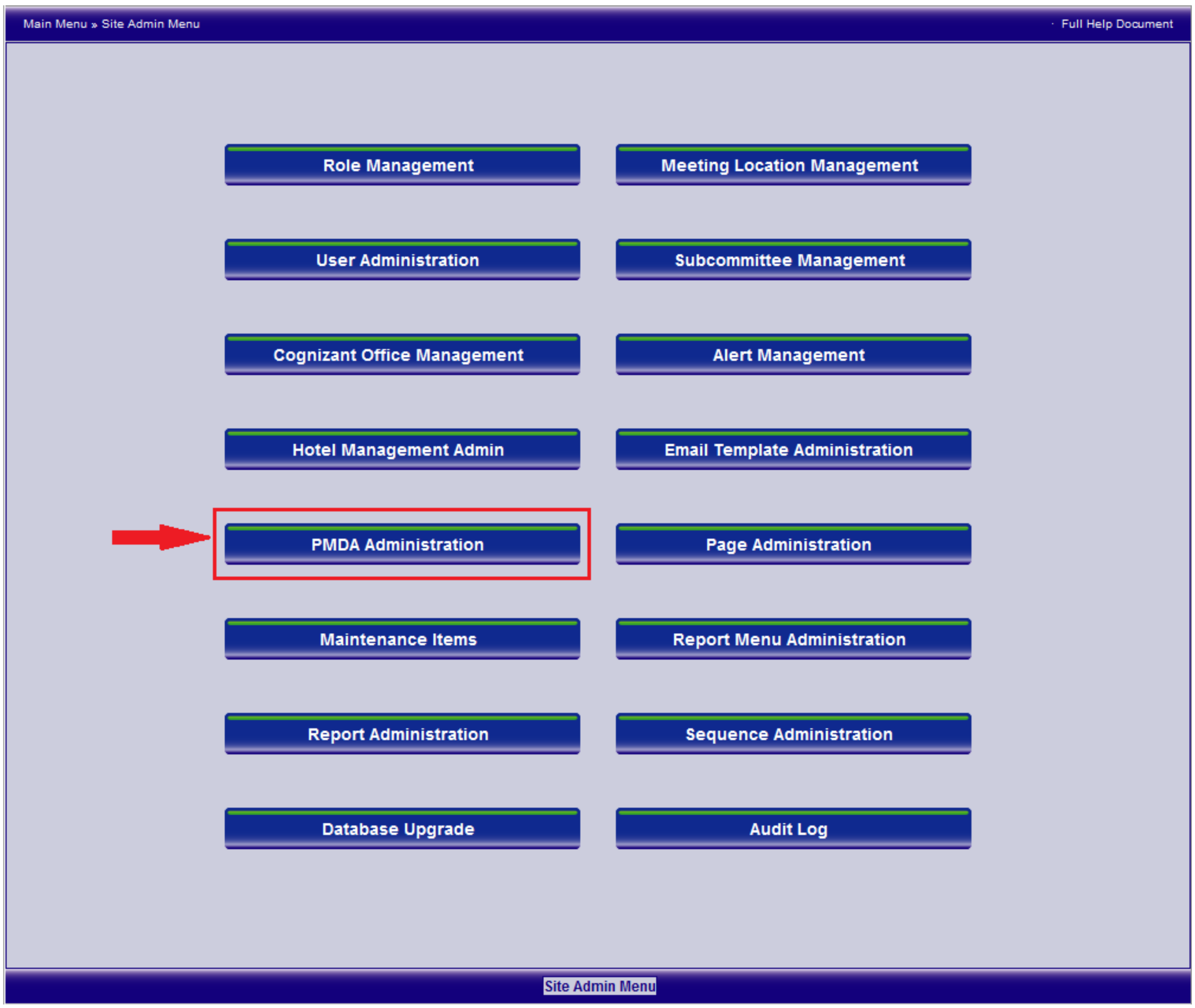
These settings are edited by changing the numbers and clicking “Save”.

Other Settings

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

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

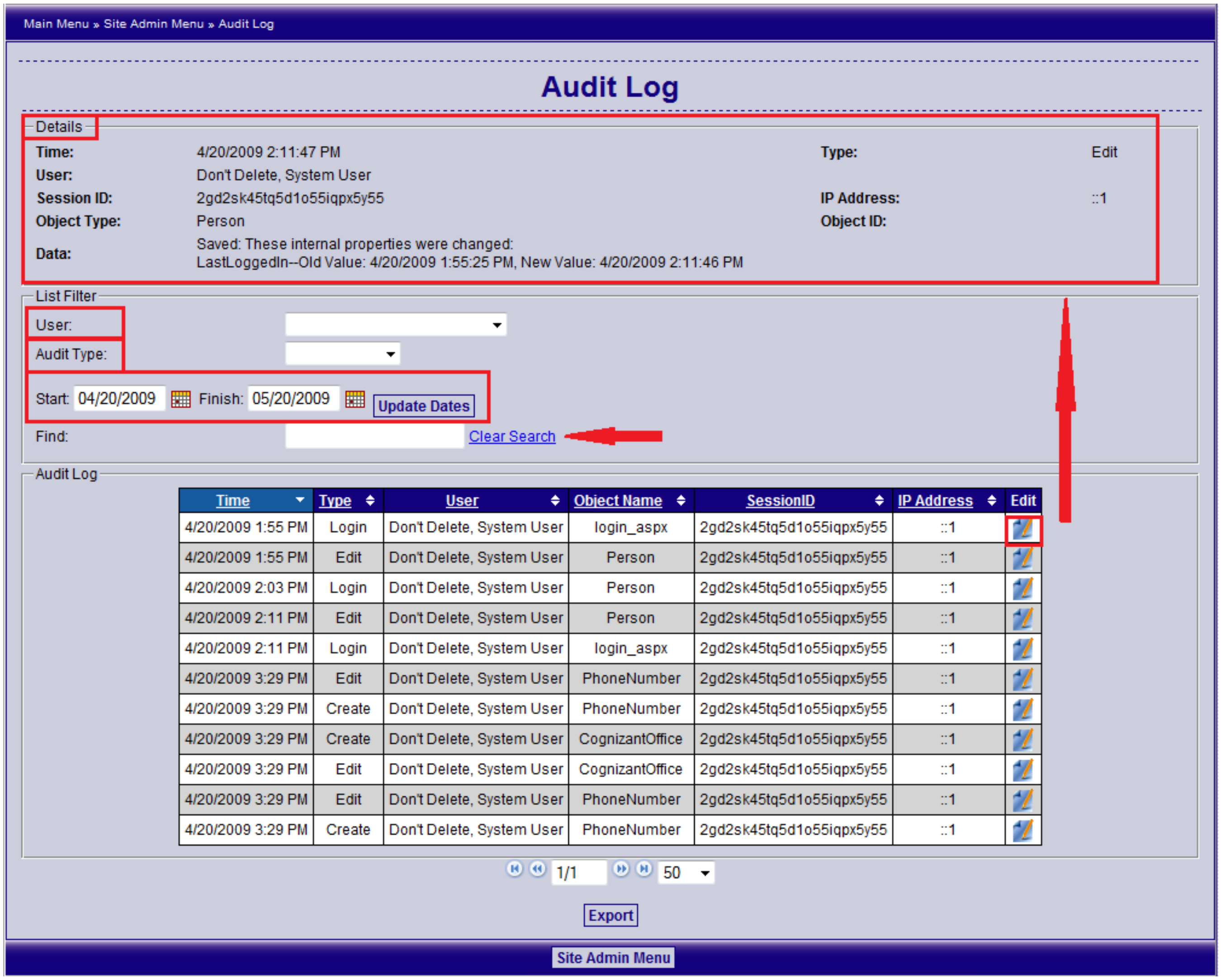
Within the Site Admin portion of WebACTs, a button is available for PMDA Administration, which links to the screens to administer Programs/Job Codes as well as Fiscal Years.



Audit Log

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

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



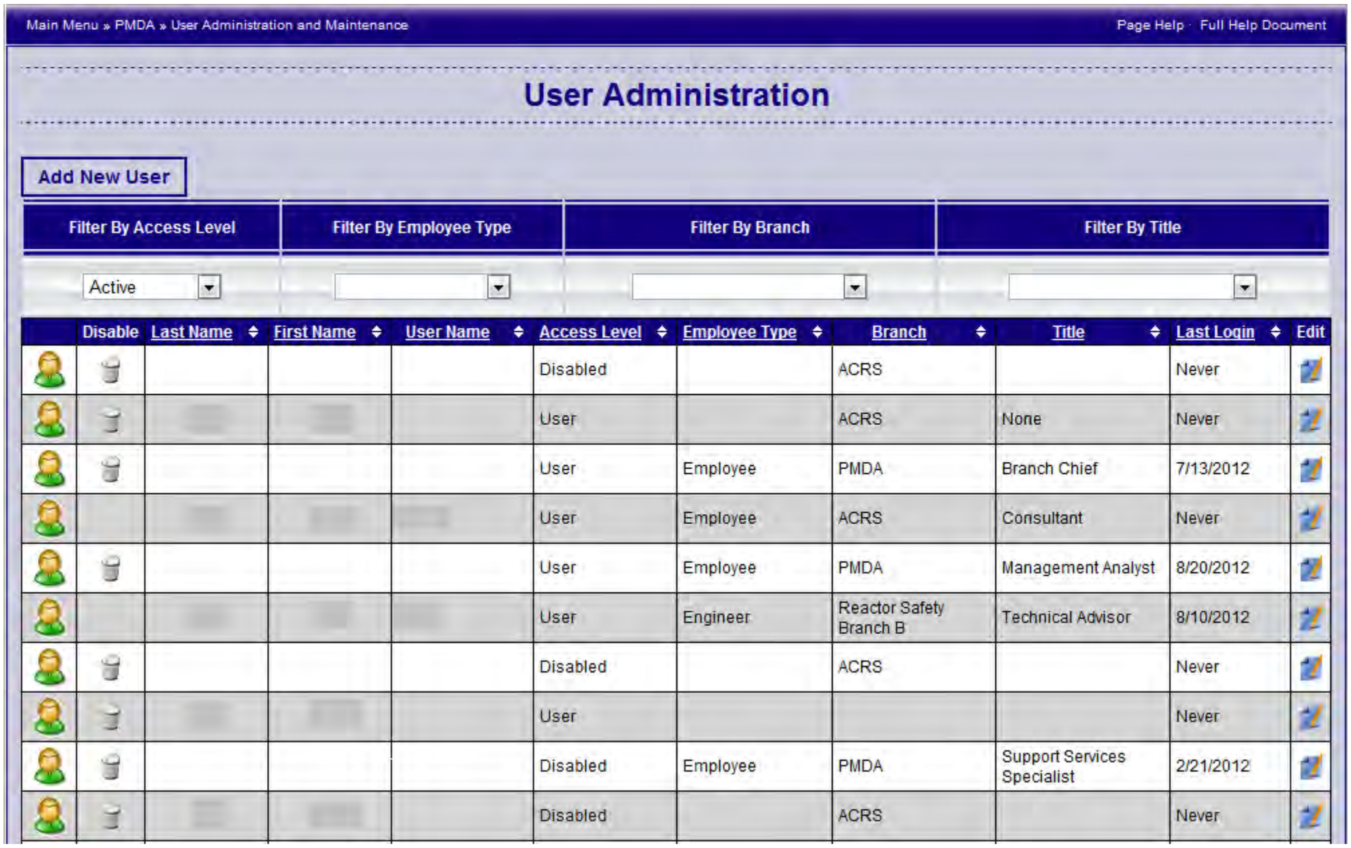
The Audit Log provides a paged list of each of these audit records and has options to filter the list by:

- User
- Audit Type
- Date Range

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

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

Users



Main Menu » PMDA » User Administration and Maintenance

Page Help · Full Help Document

User Administration

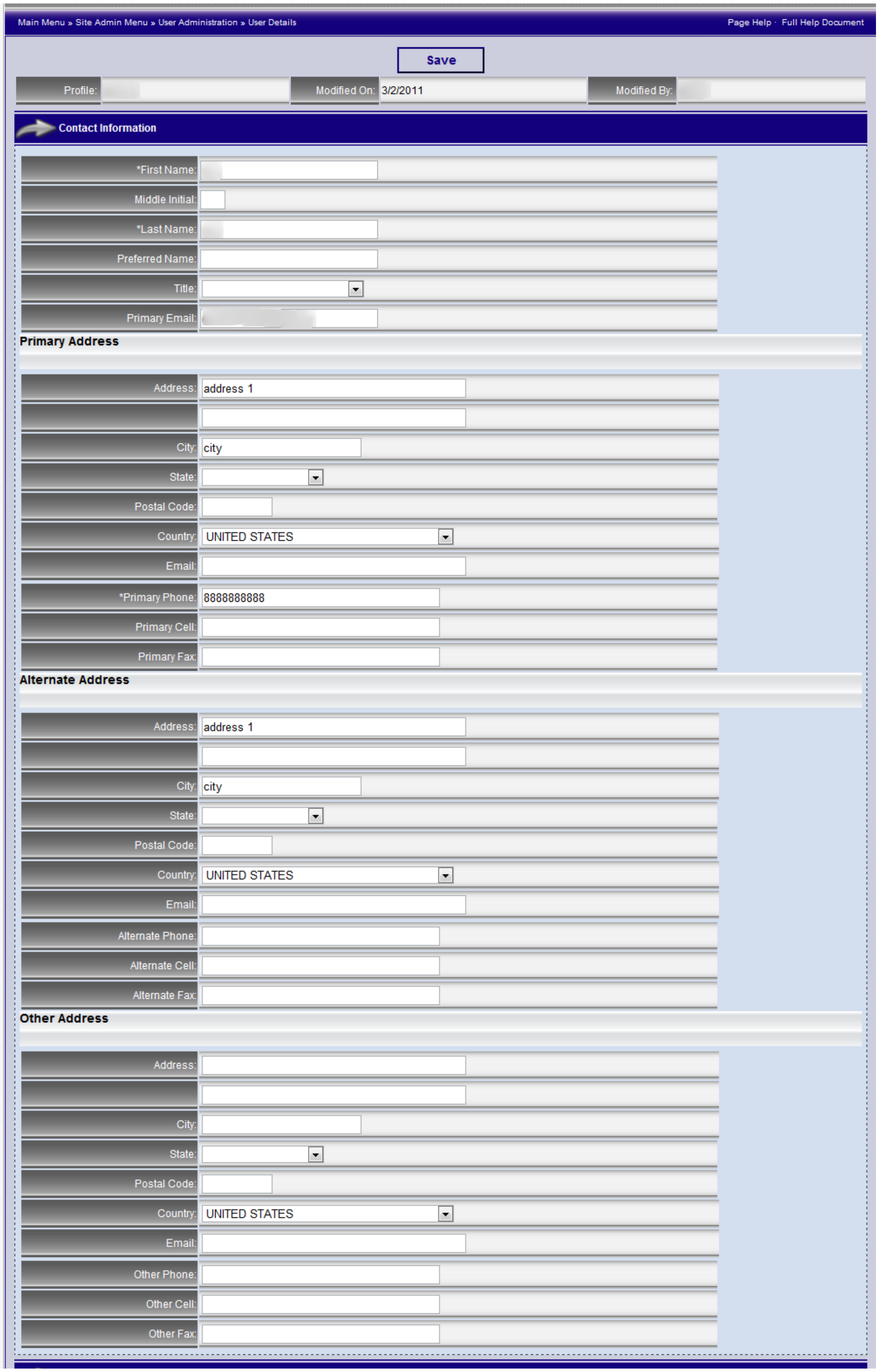
Add New User

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

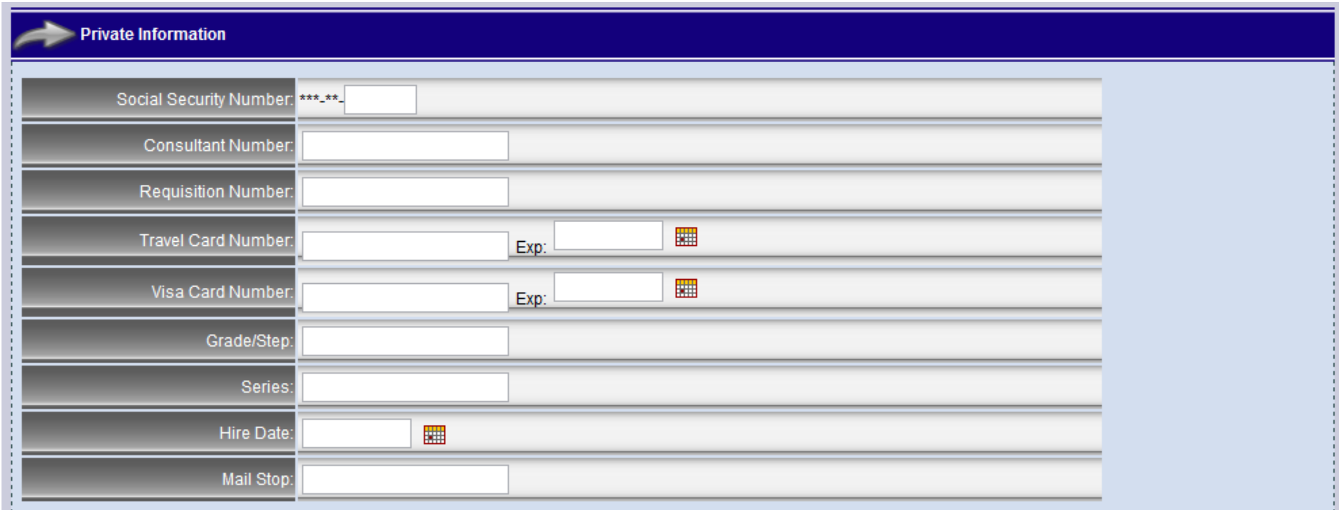
	Disable	Last Name	First Name	User Name	Access Level	Employee Type	Branch	Title	Last Login	Edit
					Disabled		ACRS		Never	
					User		ACRS	None	Never	
					User	Employee	PMDA	Branch Chief	7/13/2012	
					User	Employee	ACRS	Consultant	Never	
					User	Employee	PMDA	Management Analyst	8/20/2012	
					User	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:

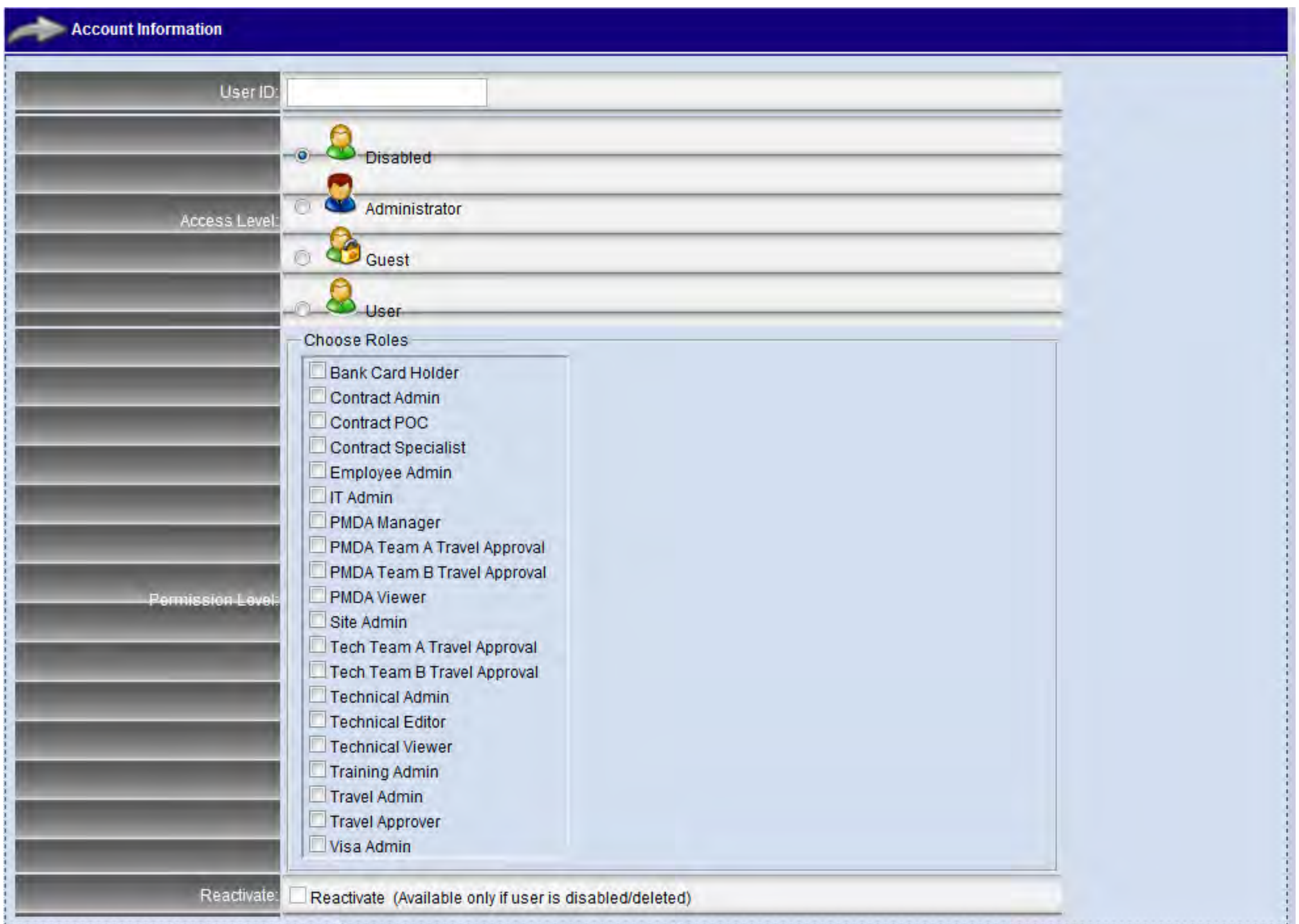
- Contact information (primary address, etc.).



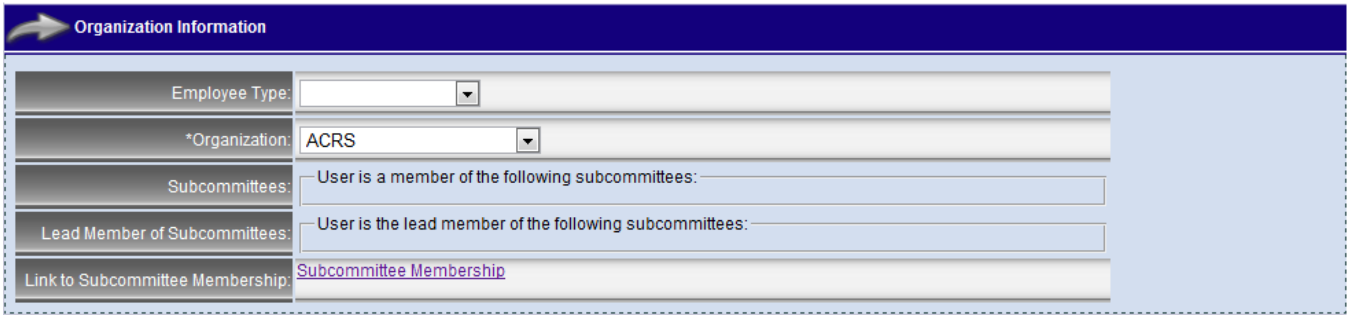
- Private information (hire date, visa card number, etc.)



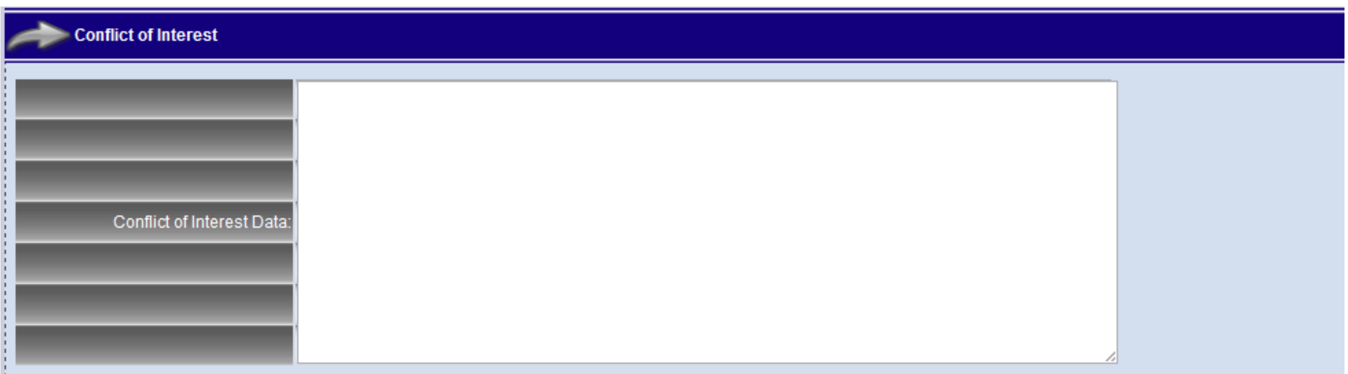
- Account information (roles and access levels)



- Organization information (type of user and branch)



- Any conflicts of interest

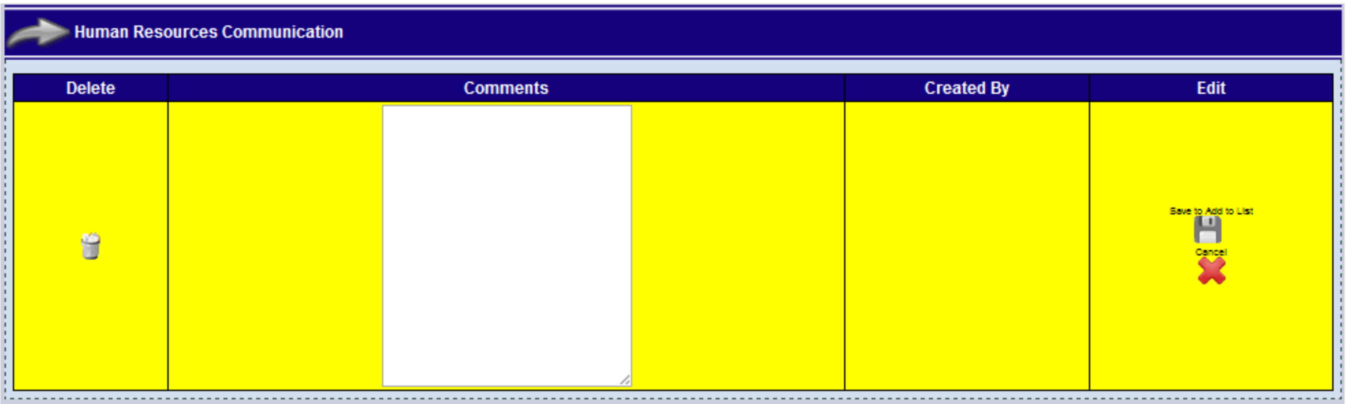


- Checklists done

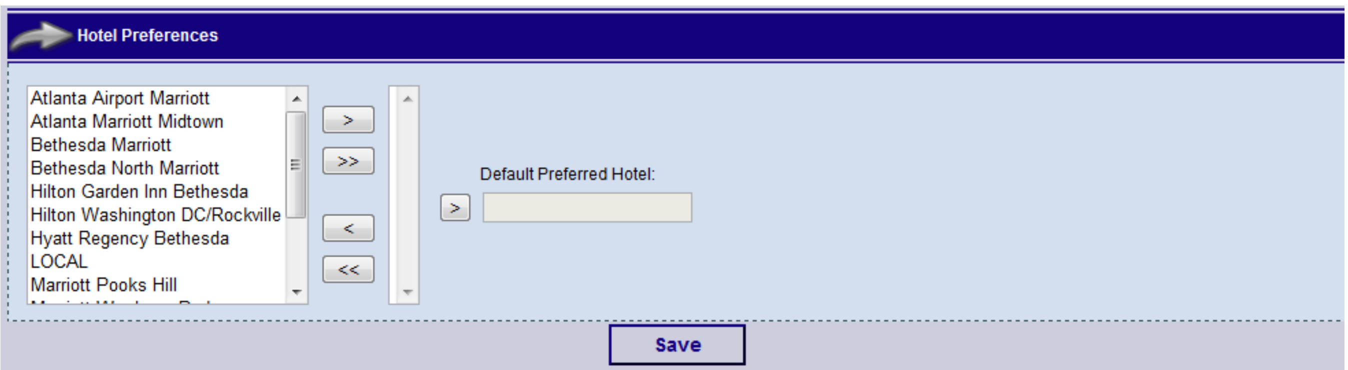
Checklists

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		

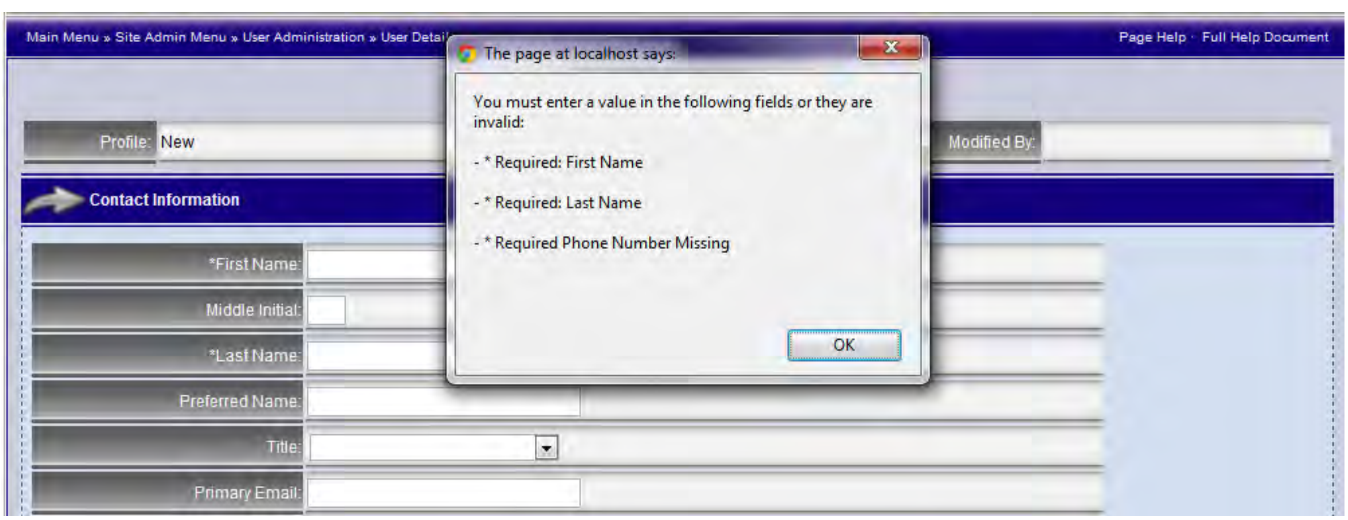
- Any Human Resources communications



- Hotel Preferences



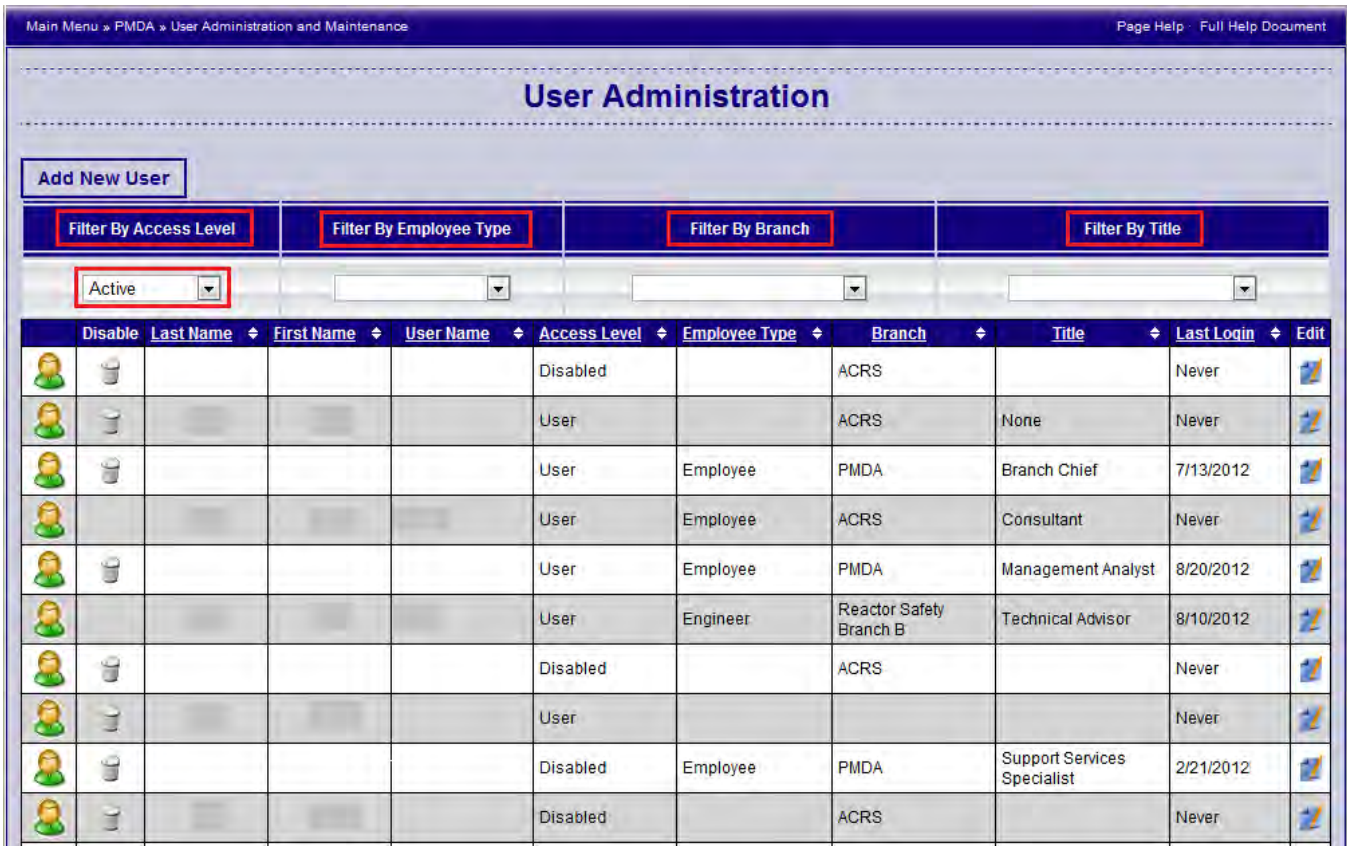
This data is all entered and edited using the User Details page. If any required fields have not been entered, the user record will not be saved and there will be a message at the top of the screen reflecting the issue.



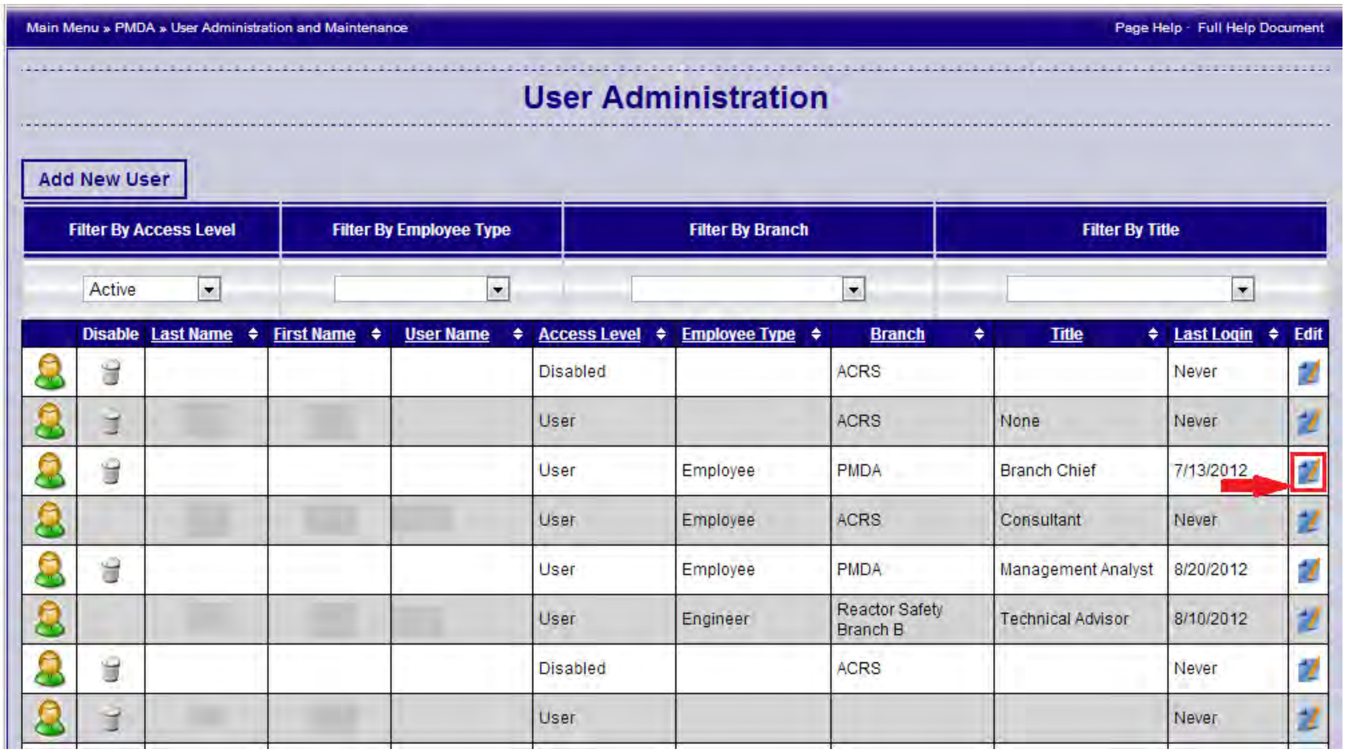
The User Details page is reached by going through the User Administration page, which provides a filterable list of all users.

This list can be filtered by:

- Access Level
- Employee Type
- Branch
- Title
- Status (active vs. inactive)

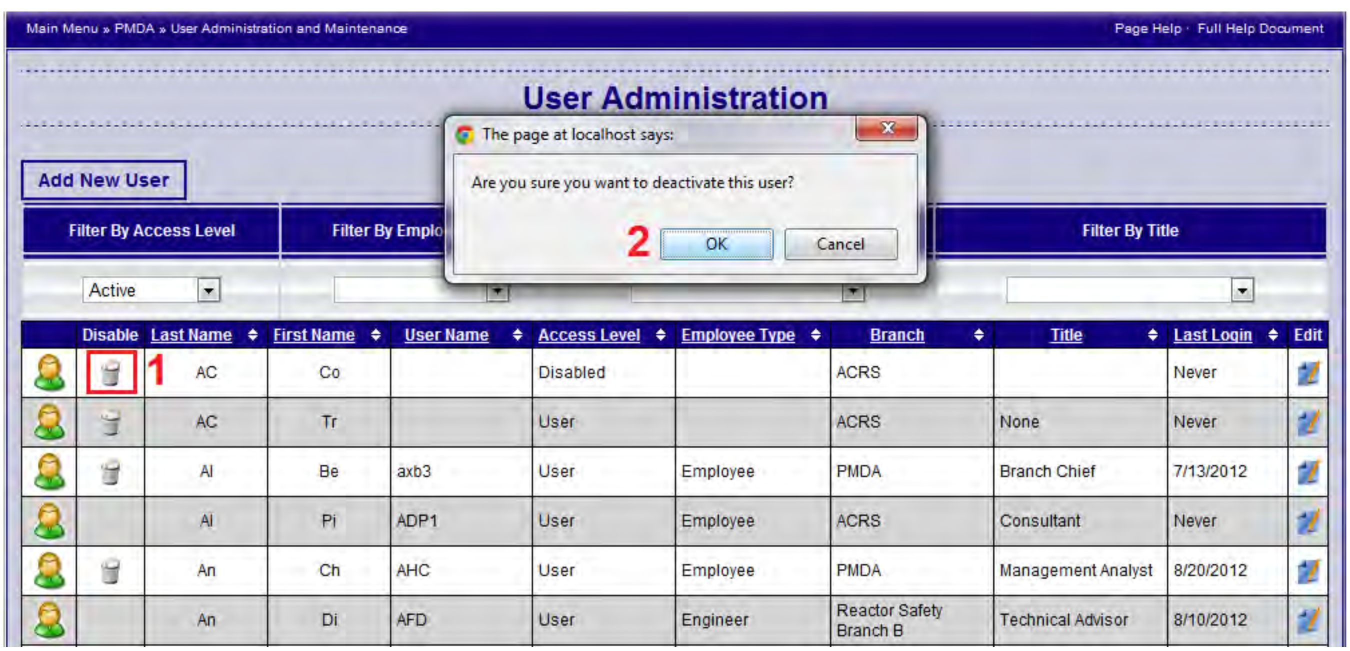


To view/edit a user's details, click on the edit icon next to their name.



To deactivate a user:

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

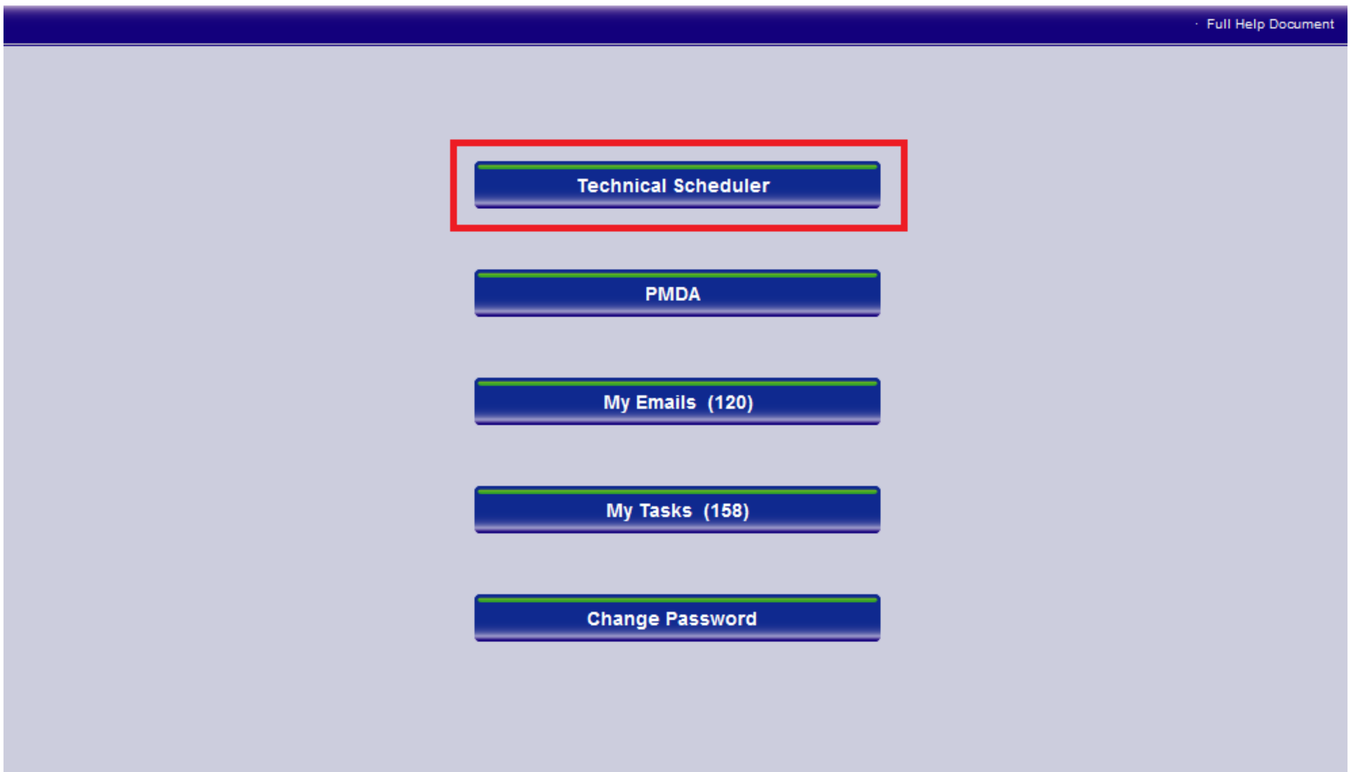


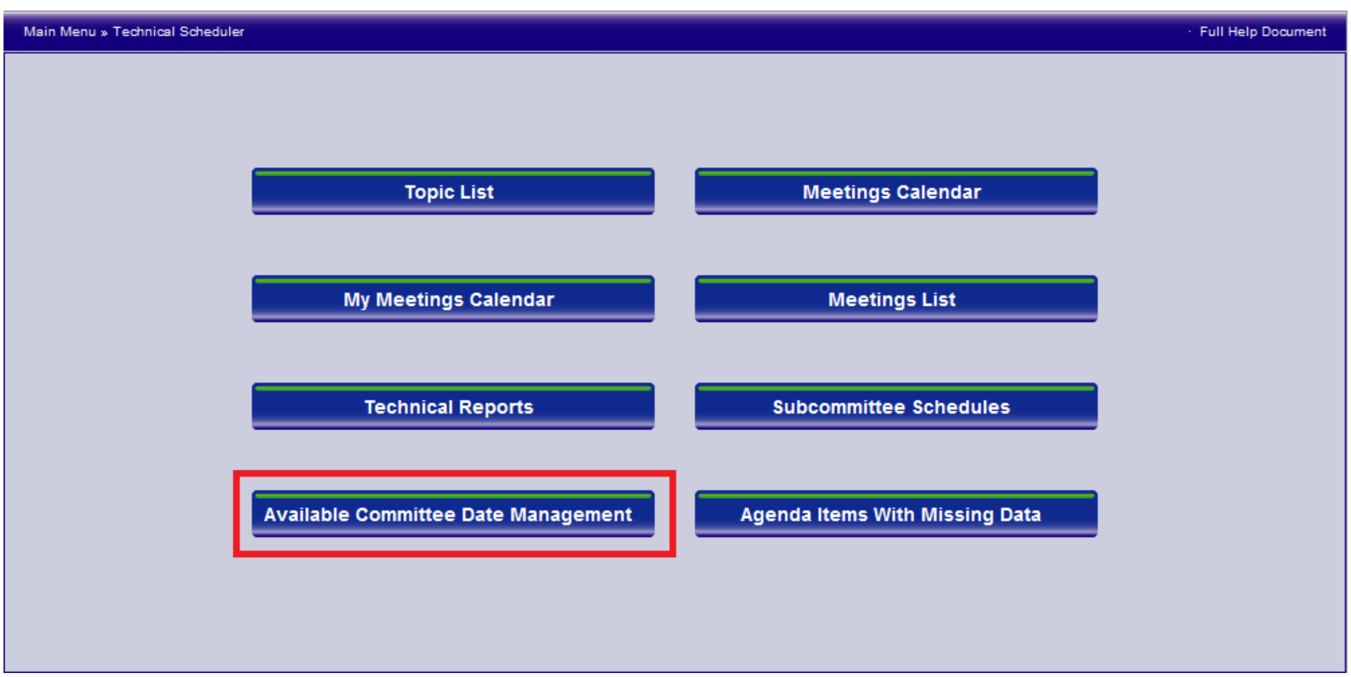
Note: Items with a delete icon next to them are not already deactivated and have no future meetings assigned.

Technical Scheduler

Available Committee Dates

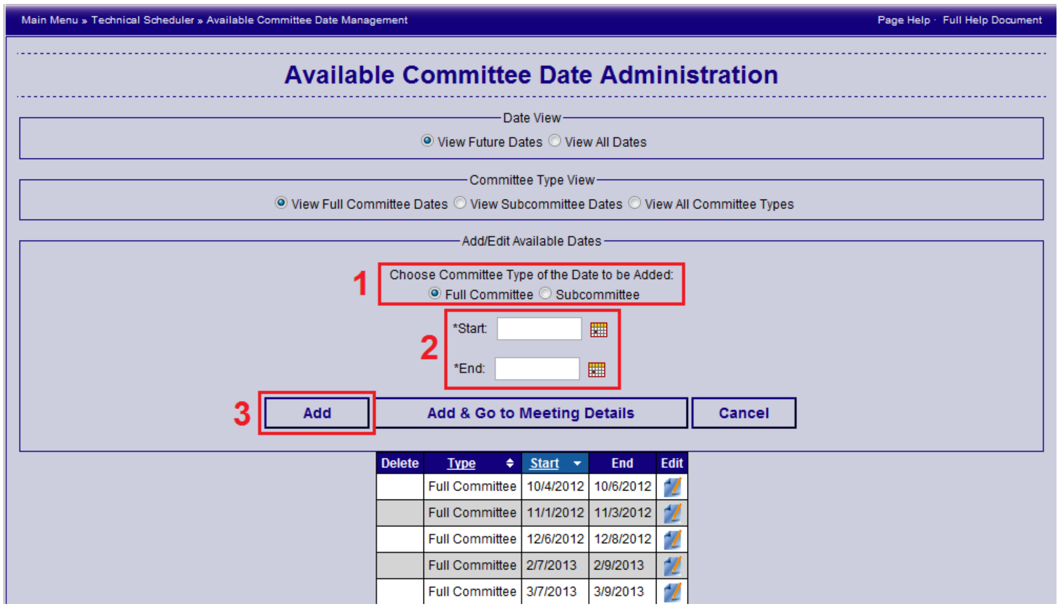
The Available Committee Date Management is used to create periods when either subcommittee or full committee meetings can be set up. This section is for branch chiefs and other users with “Technical Admin” privileges.





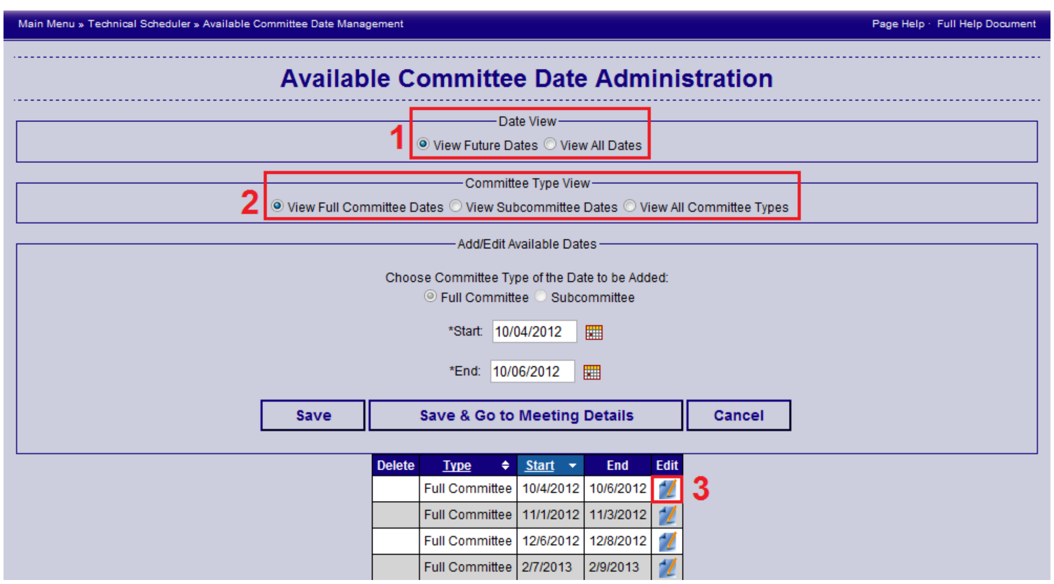
To add a new available date range:

1. Choose the type of meeting to allow; either subcommittee or full committee.
2. Enter the first and last dates that should allow that type of meeting.
3. Click “Add”.



To edit an existing date range:

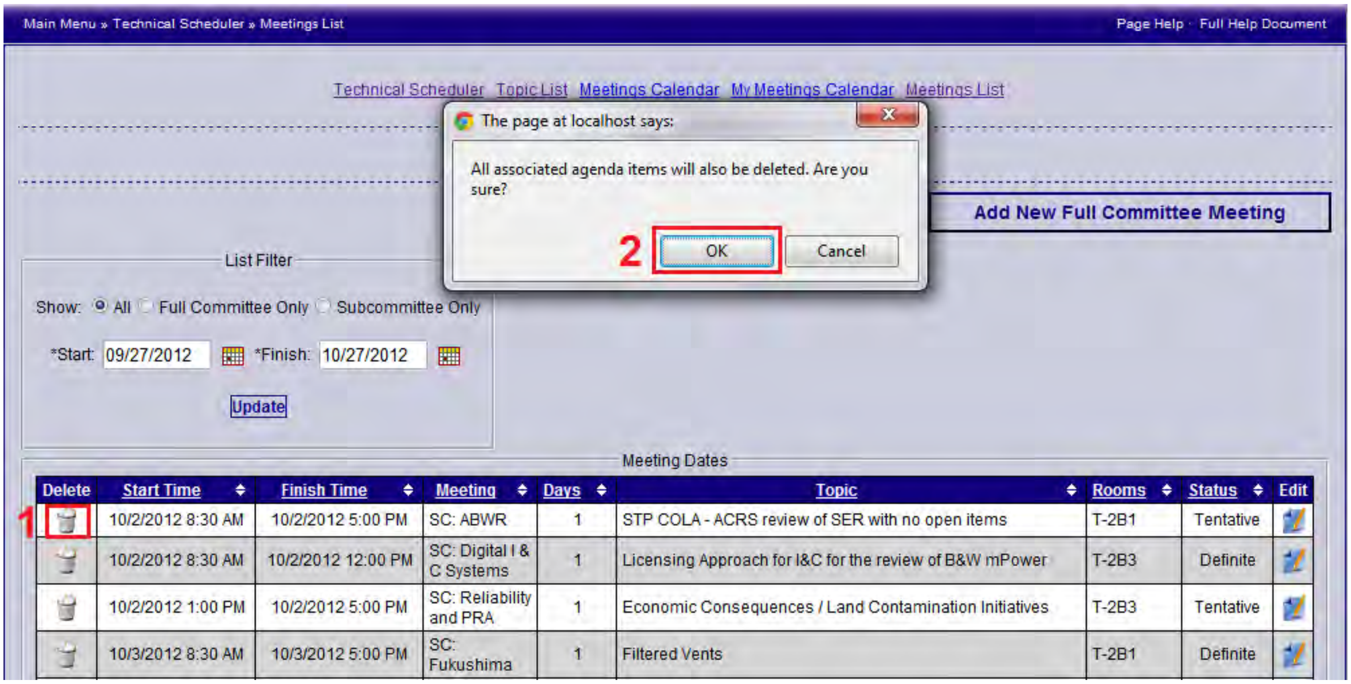
1. Select the proper meeting type in the Committee Type View area and the right time period using the Date View area.
2. Click the edit icon next to the range to be edited.
3. Change the data as needed.
4. Click “Save”.



To delete a date range:

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

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



Topic Management

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

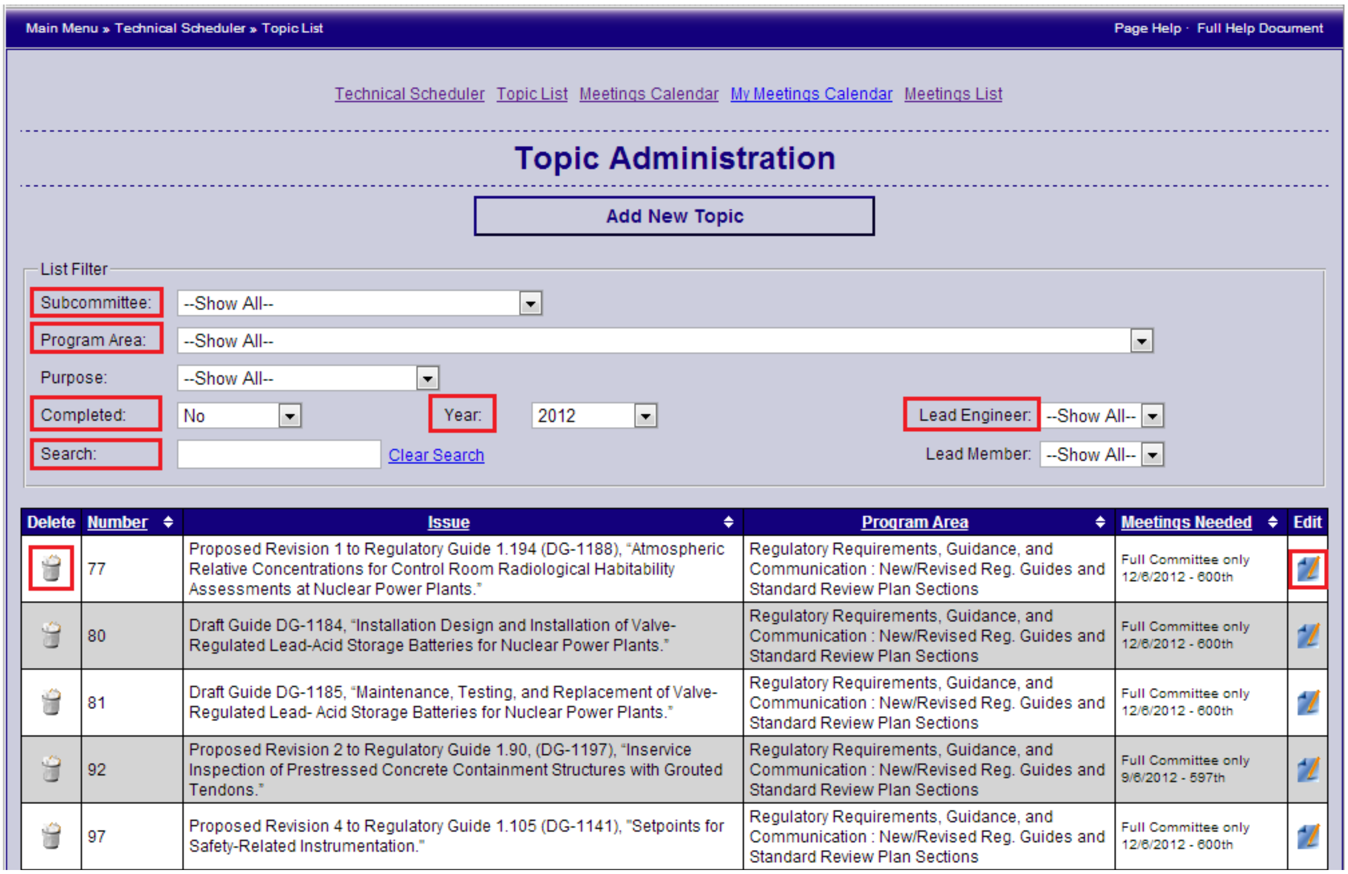
Topic List

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.

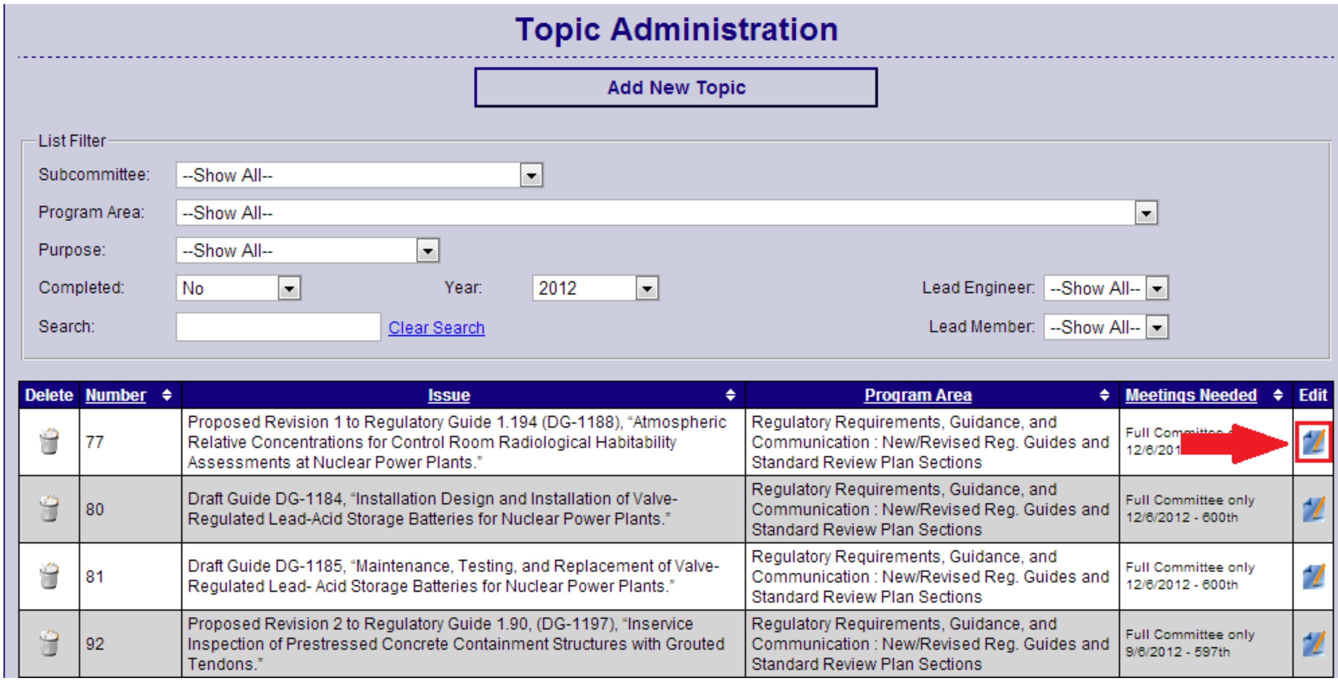
The list can also be further searched to find topics with specific keywords.



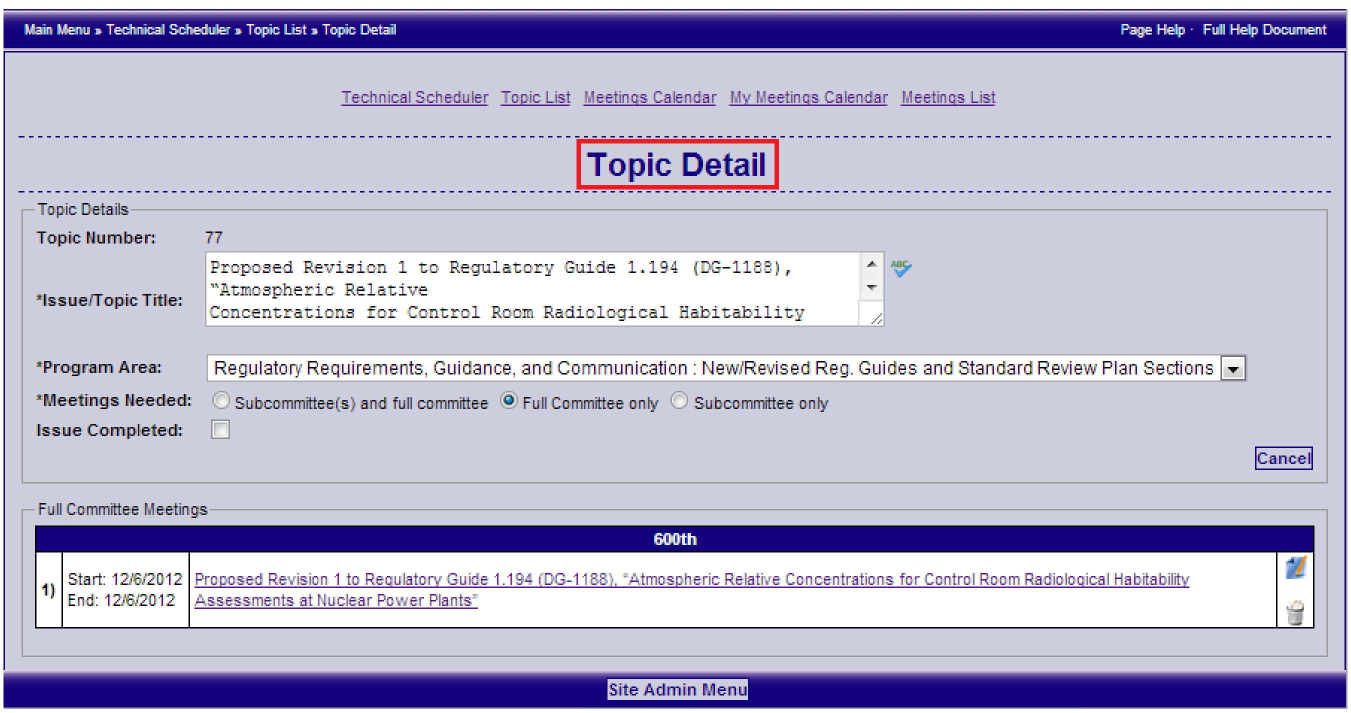
Delete	Number	Issue	Program Area	Meetings Needed	Edit
	77	Proposed Revision 1 to Regulatory Guide 1.194 (DG-1188), "Atmospheric Relative Concentrations for Control Room Radiological Habitability Assessments at Nuclear Power Plants."	Regulatory Requirements, Guidance, and Communication : New/Revised Reg. 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

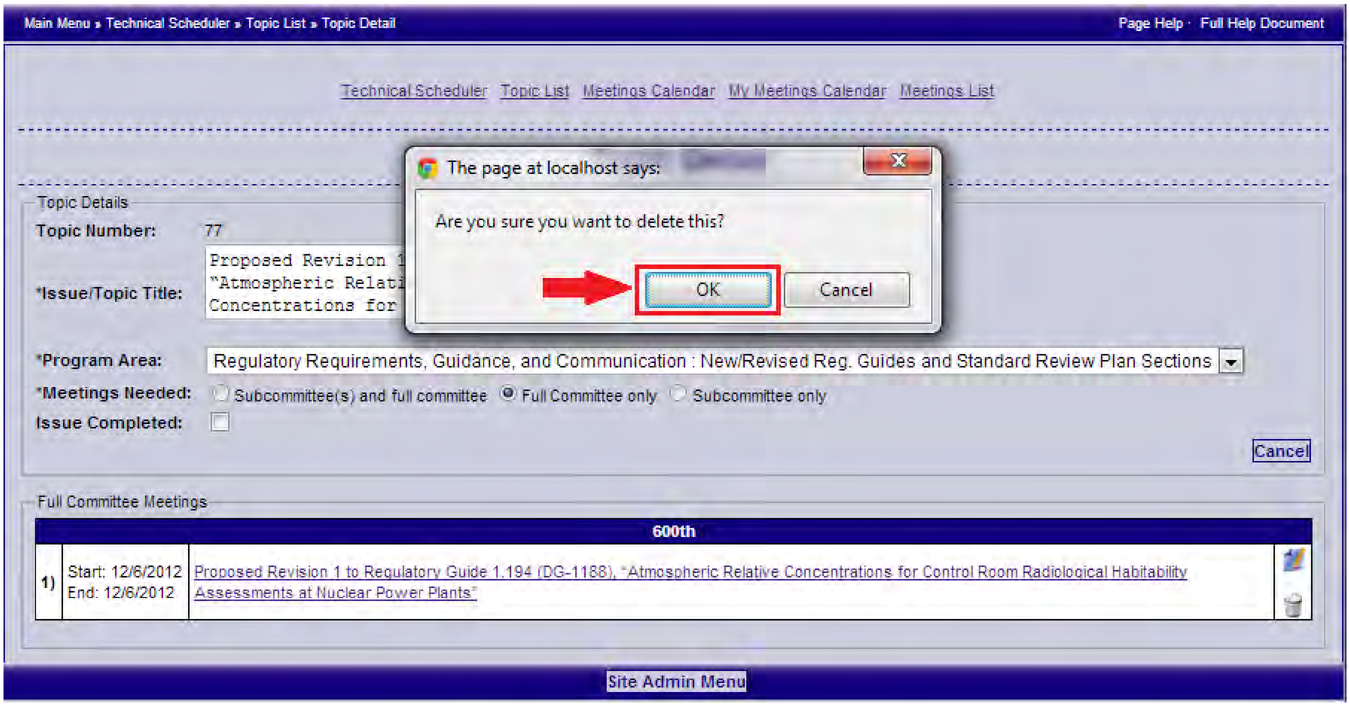


2. You will then be brought to the topic detail page.



To delete a topic

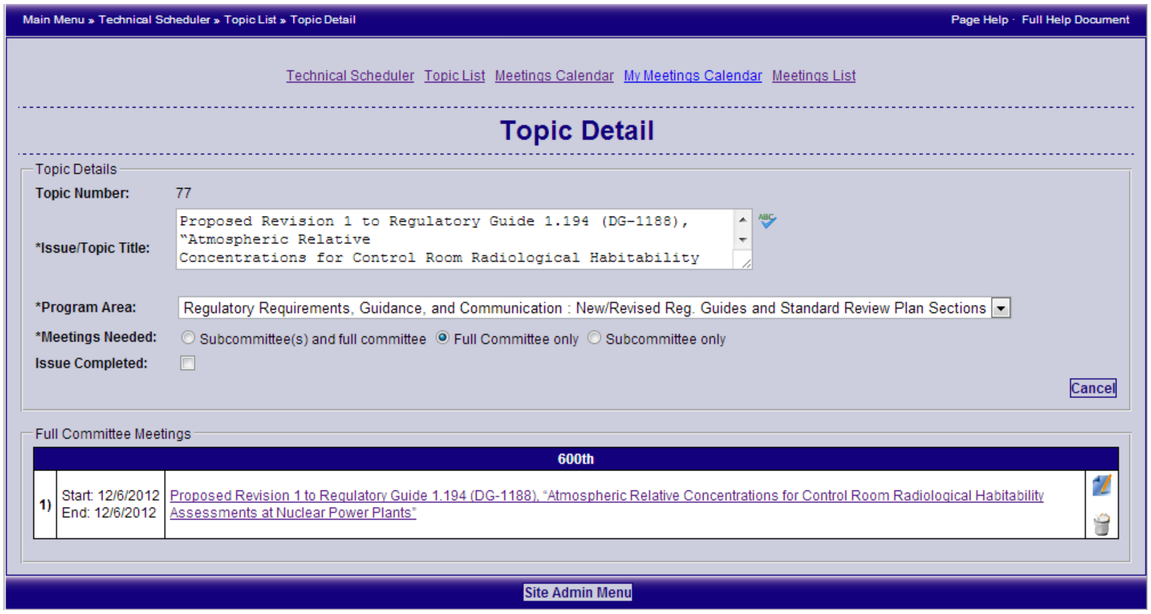
1. Click the delete icon
2. Confirm the deletion



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

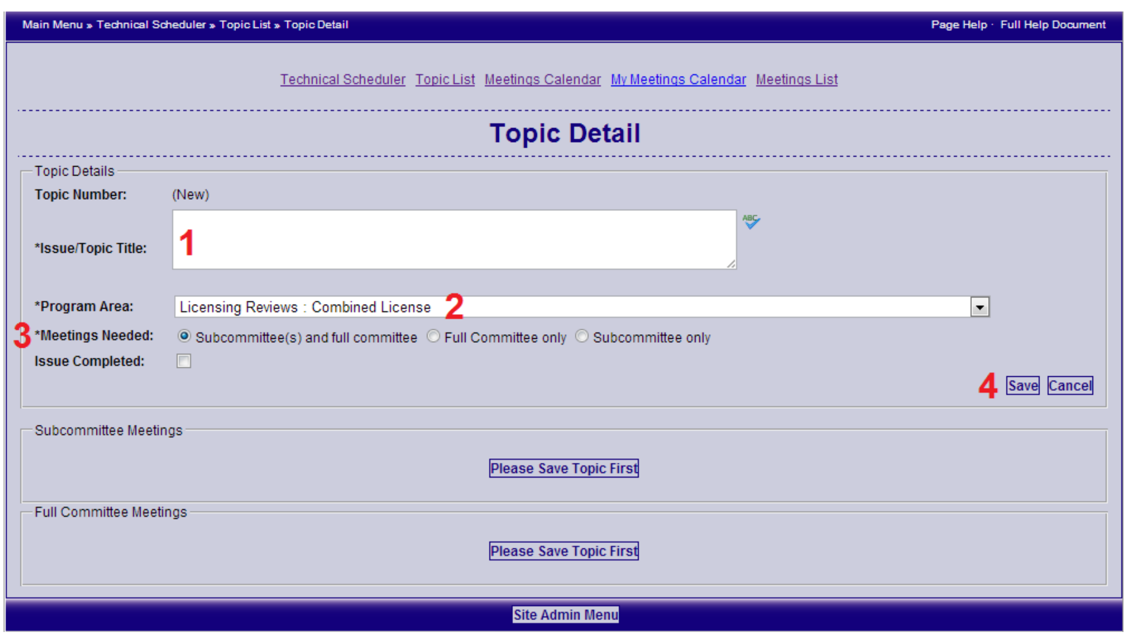
Topic Detail

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



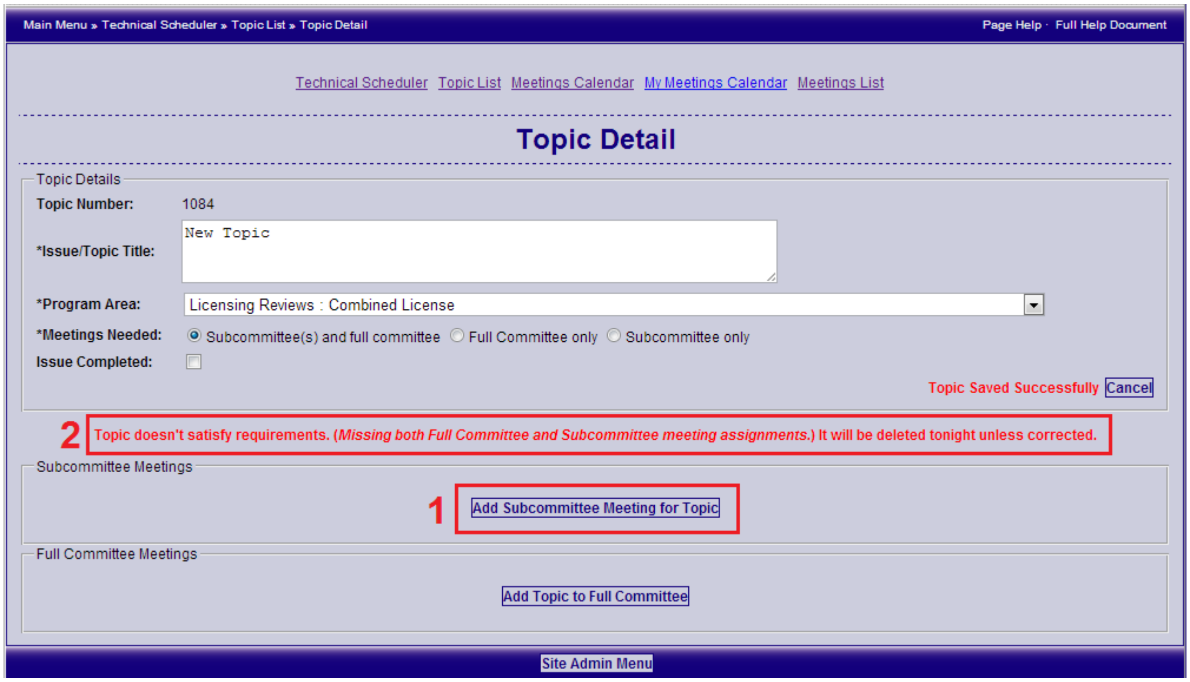
To add/edit a Topic:

1. Enter the Topic.
2. Select the applicable Technical Program Area.
3. Select the type of committee meetings needed.
4. Click “Save”.



Add Agenda Items as needed

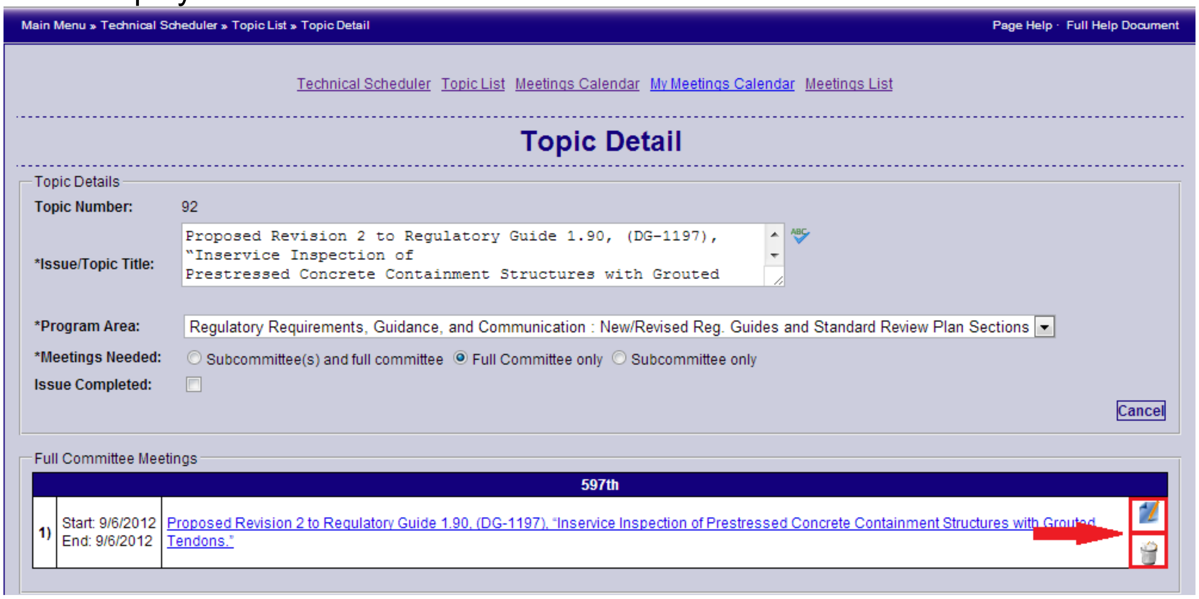
Note: If, by the end of the day, a Topic doesn't have agenda items to satisfy the requirements set by the Meetings Needed administrative setting, it will be deleted. For example, if a Topic is supposed to have both a full committee meeting and a subcommittee meeting, but only has a subcommittee meeting set up, an error message will be displayed and the Topic will be cleared from the system.

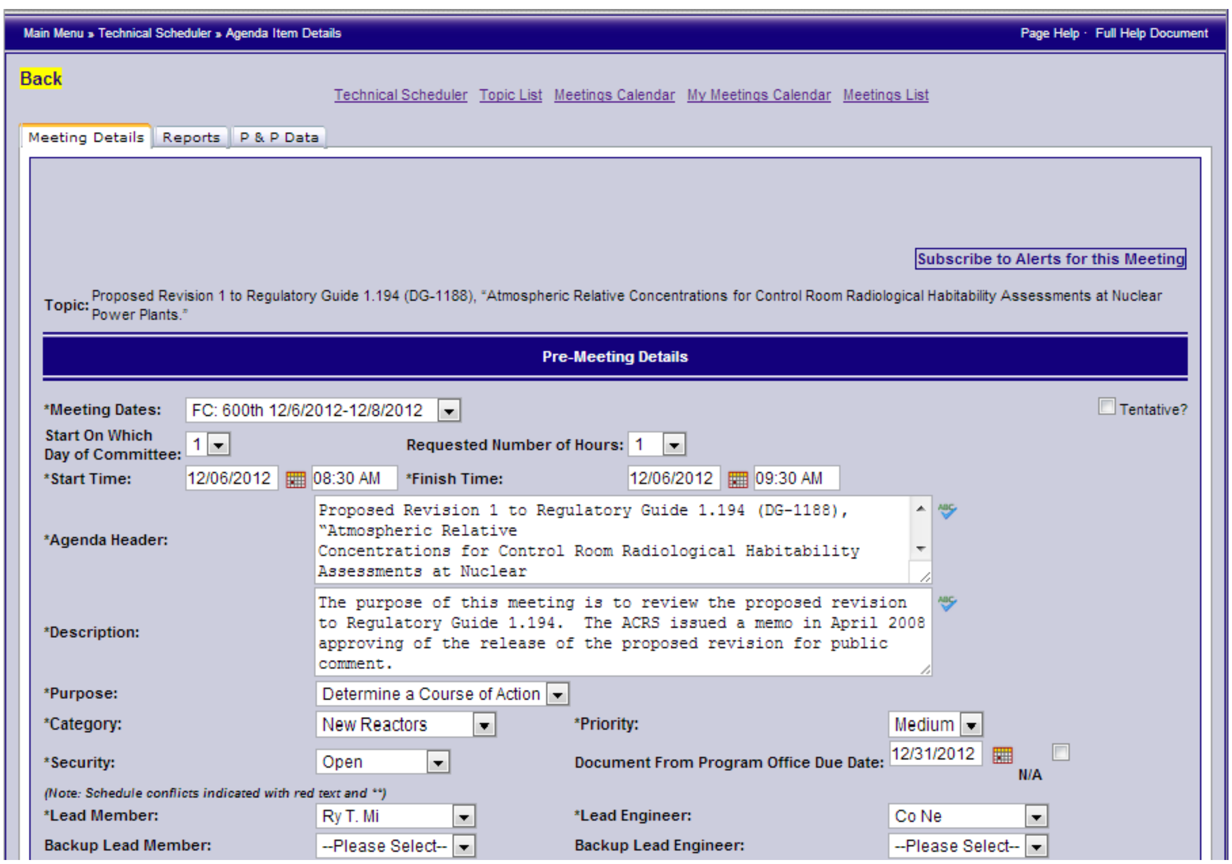


To edit an associated agenda item:

1. Click the appropriate edit icon.
2. You are now taken to the meeting details page.

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

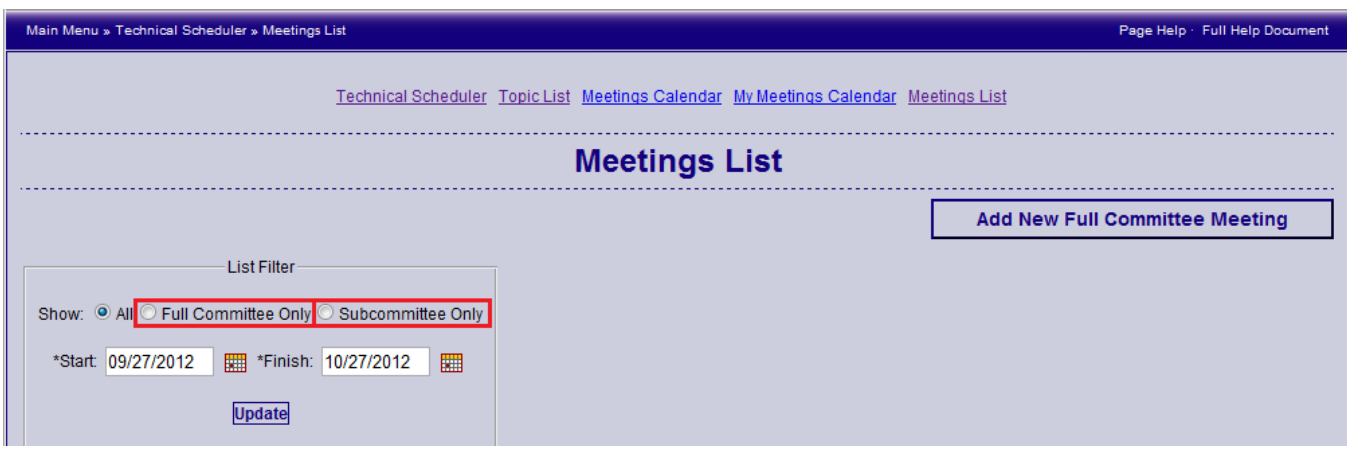




Meetings and Agenda Items

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

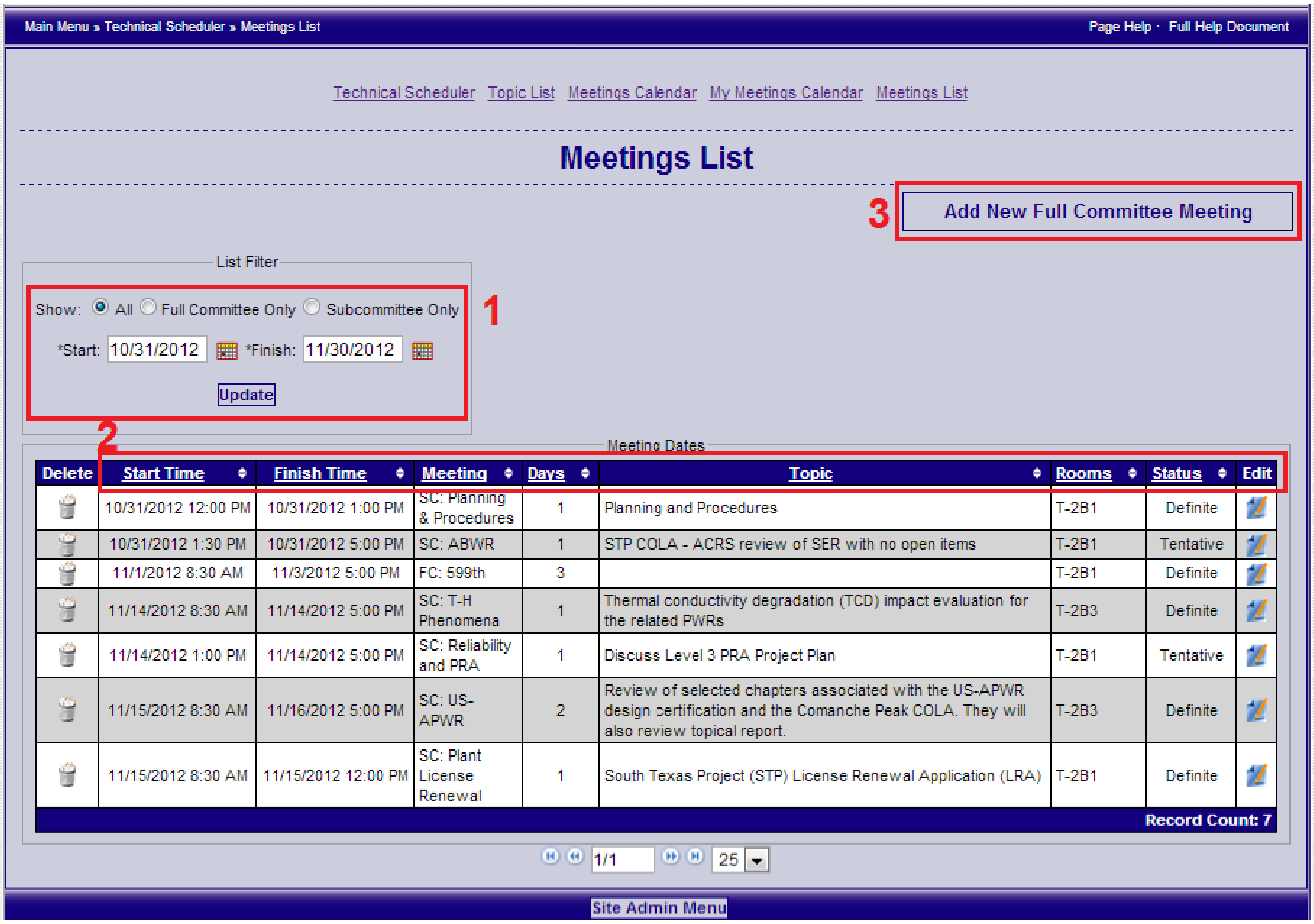
There are two kinds of meetings, full committee meetings and subcommittee meetings. Each type of meeting has its own set of rules.



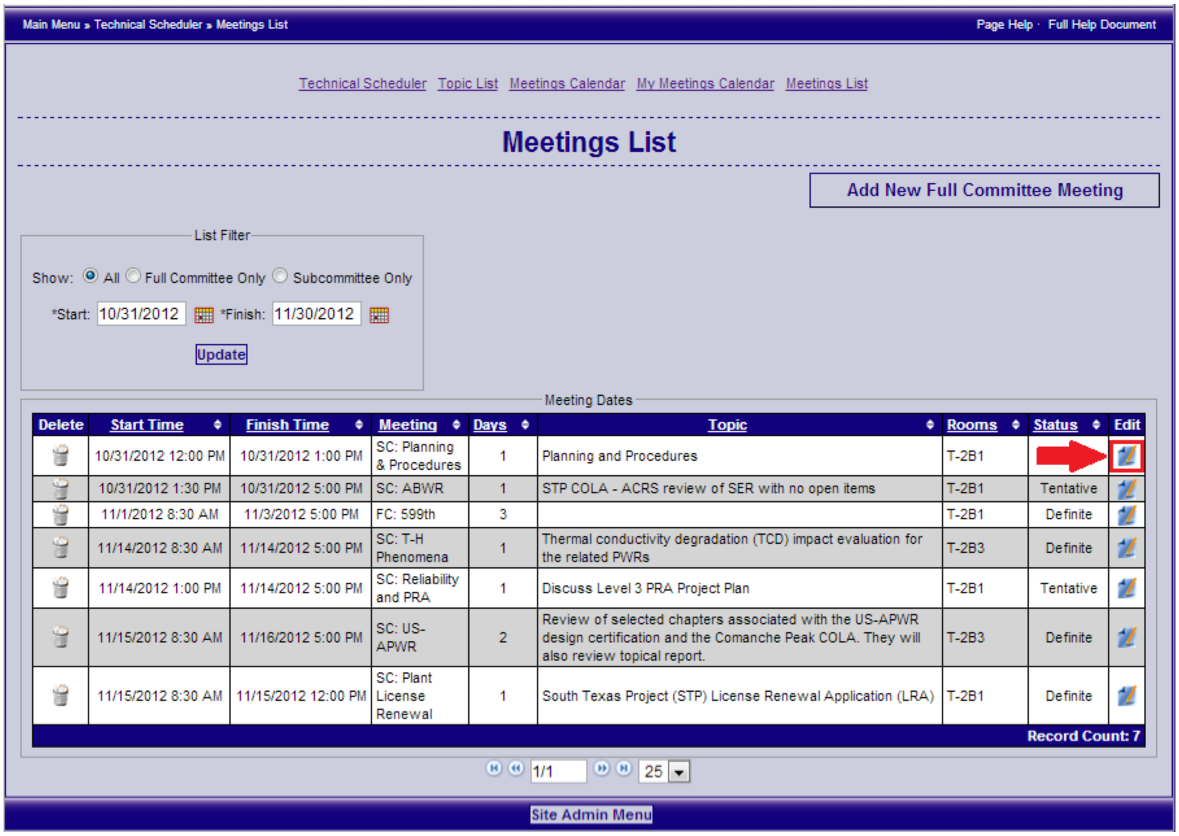
Meeting List

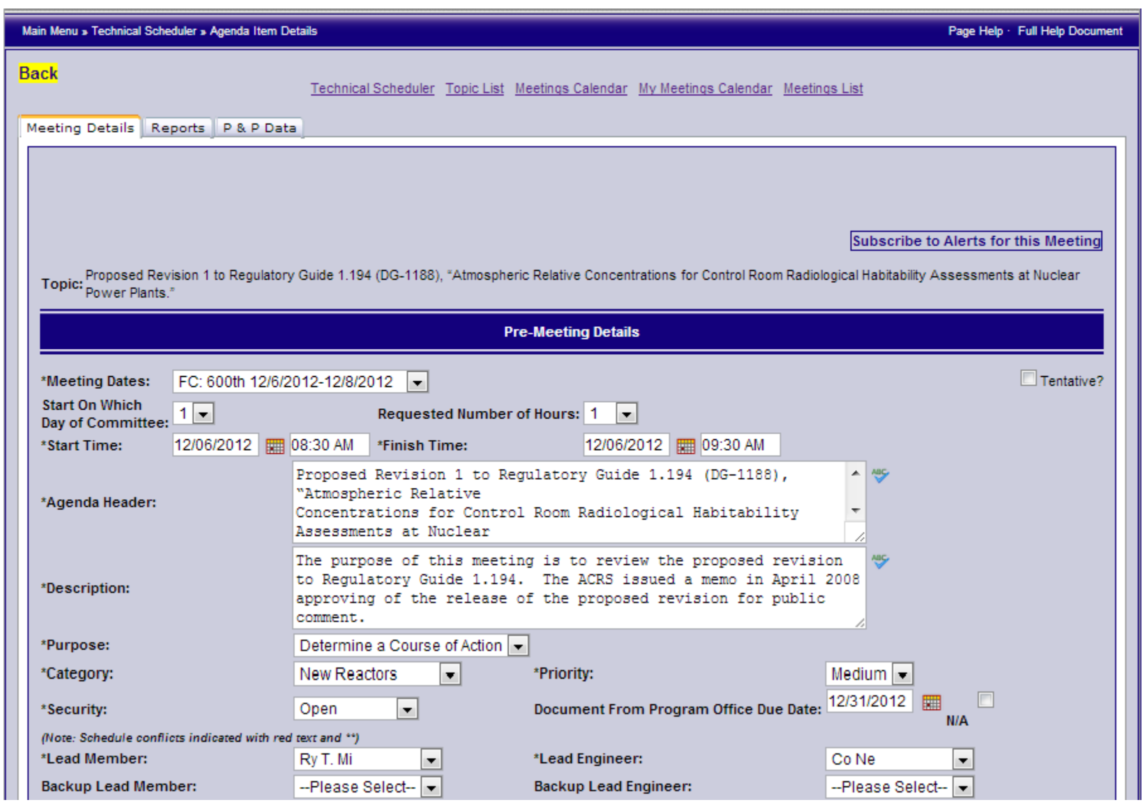
The Meeting List is a list of committee meetings which includes the following information and capabilities:

1) The list can be filtered by committee type as well as date range.
2) The list can be sorted by clicking on the header of any column that contains an up or down arrow.
3) The page also includes (if the user has sufficient access rights) a button to add a new Full Committee meeting.

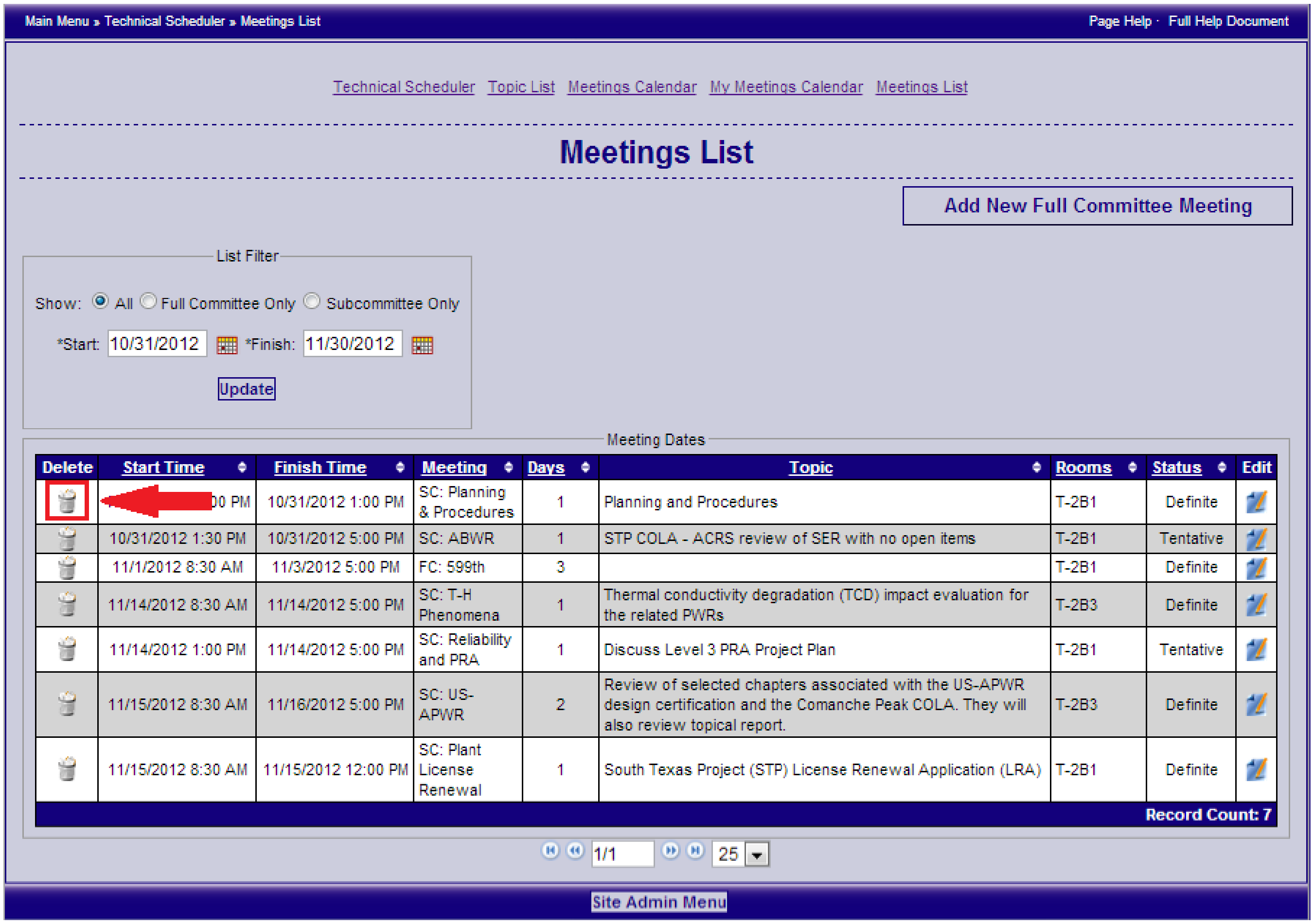


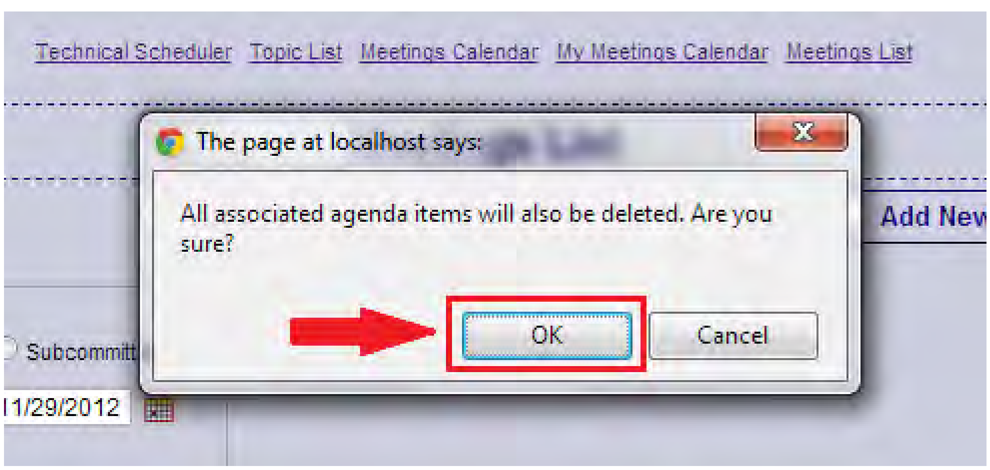
1) To view/edit an existing meeting, click the appropriate edit icon.





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

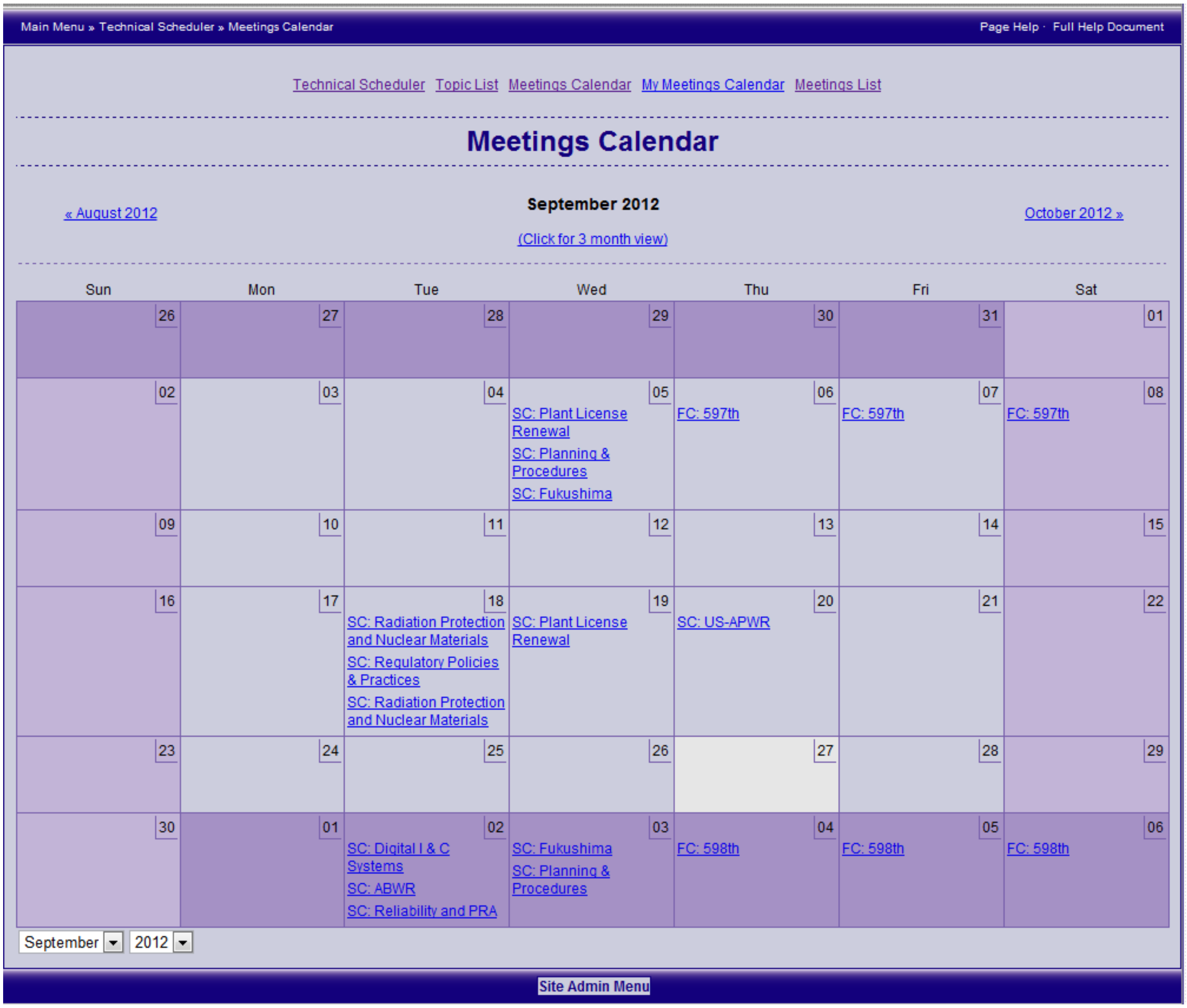




Meeting Calendars

WebACTs provides several different calendar views of meetings.

One view is a single month calendar of all meetings.

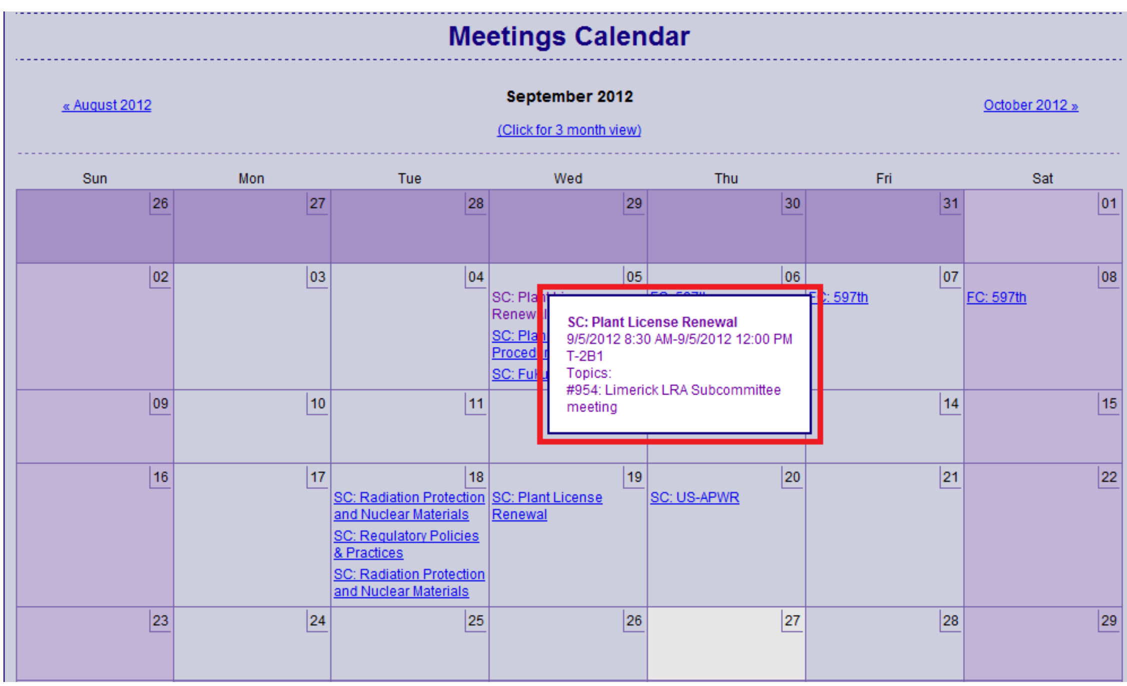


The calendar may also be viewed three months at a time.

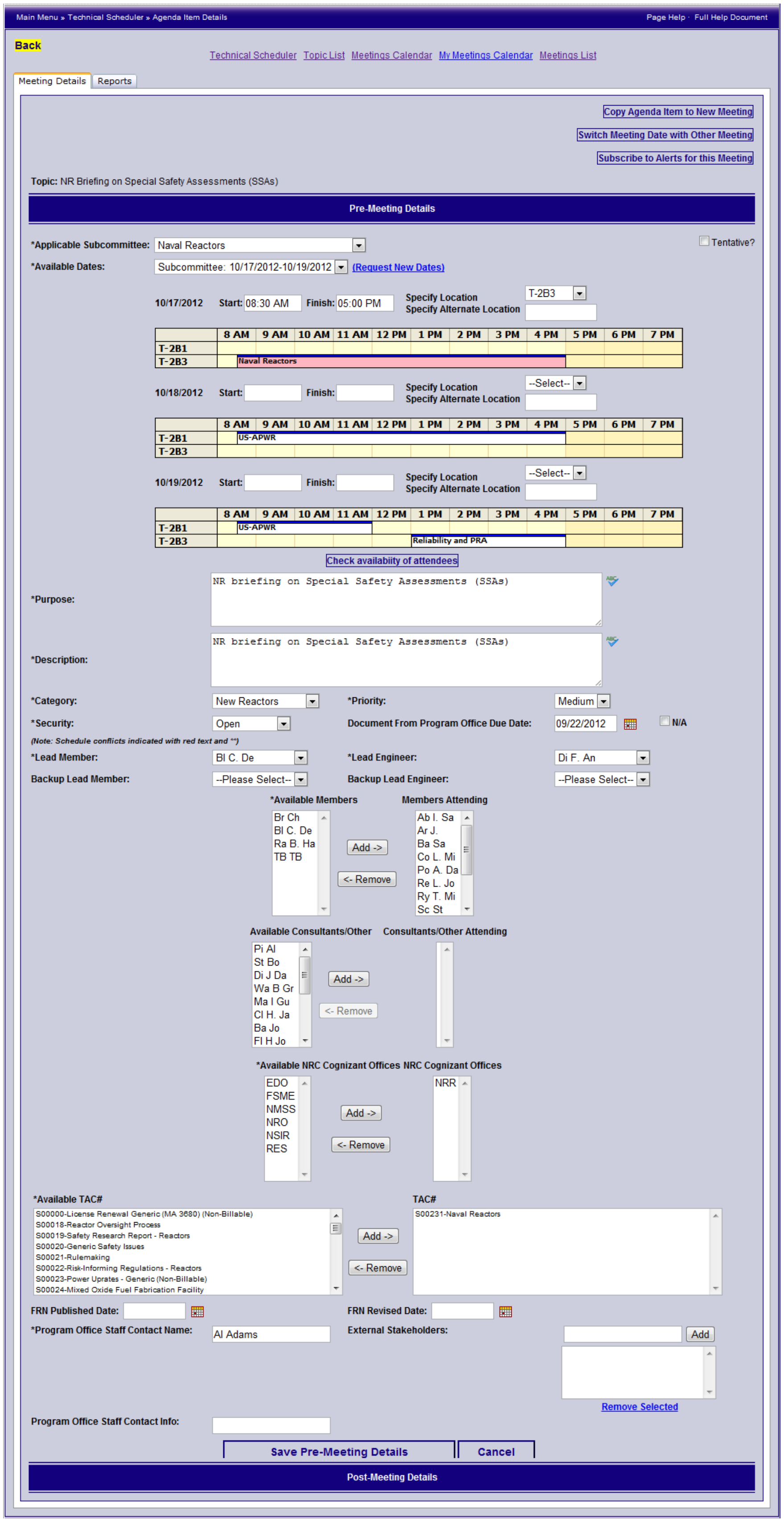
Updated: November 2012

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

Each of the meetings on the calendar can be hovered over to get more details or clicked on to be taken to the appropriate page with full details.

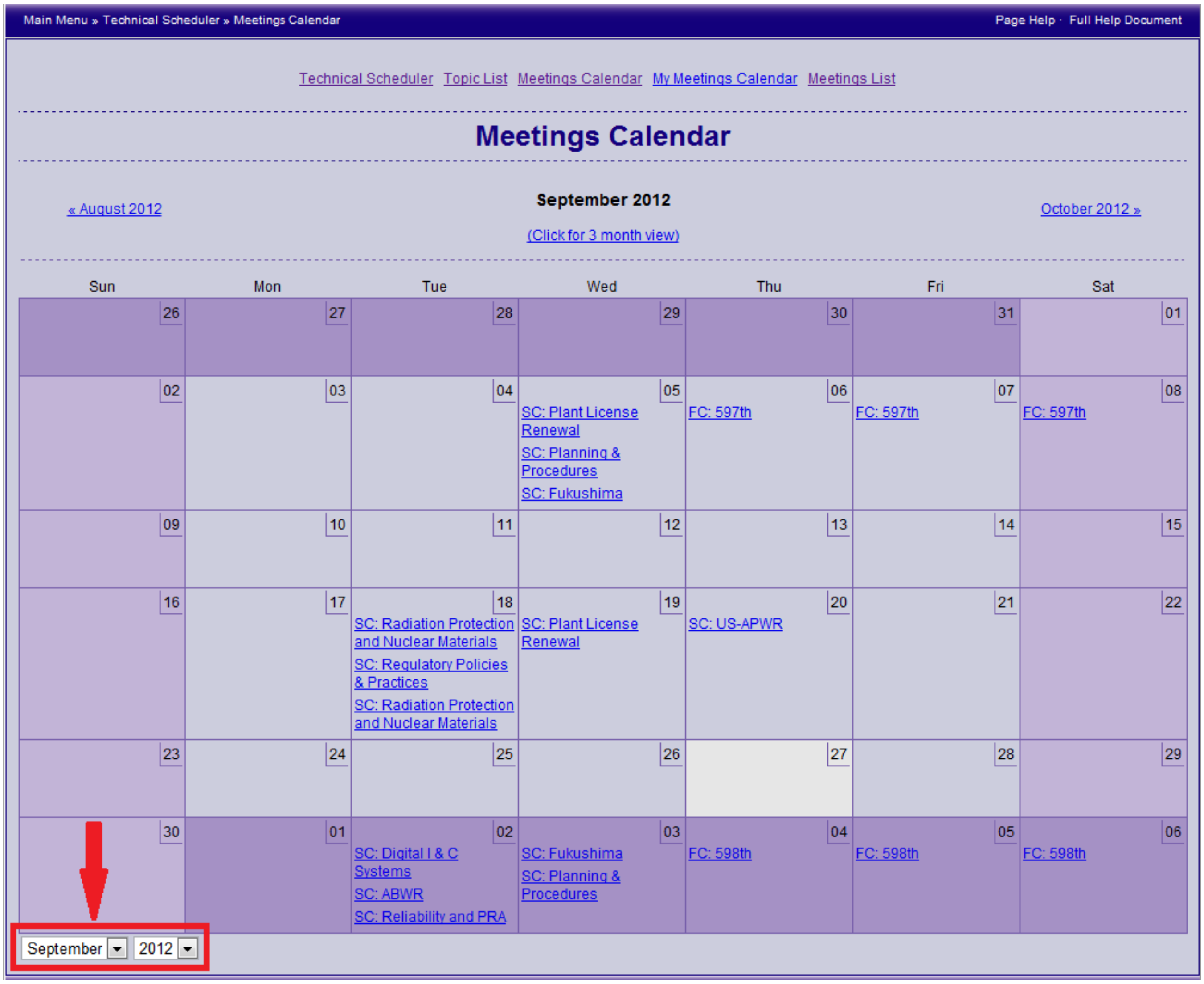


Here is a view of full meeting details:



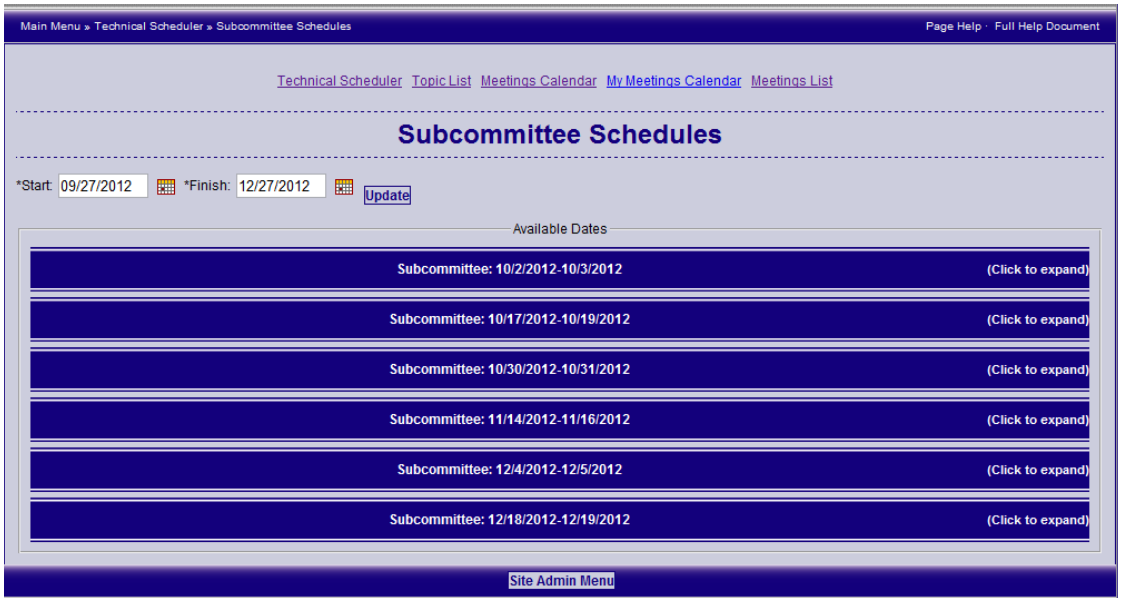
Updated: November 2012

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

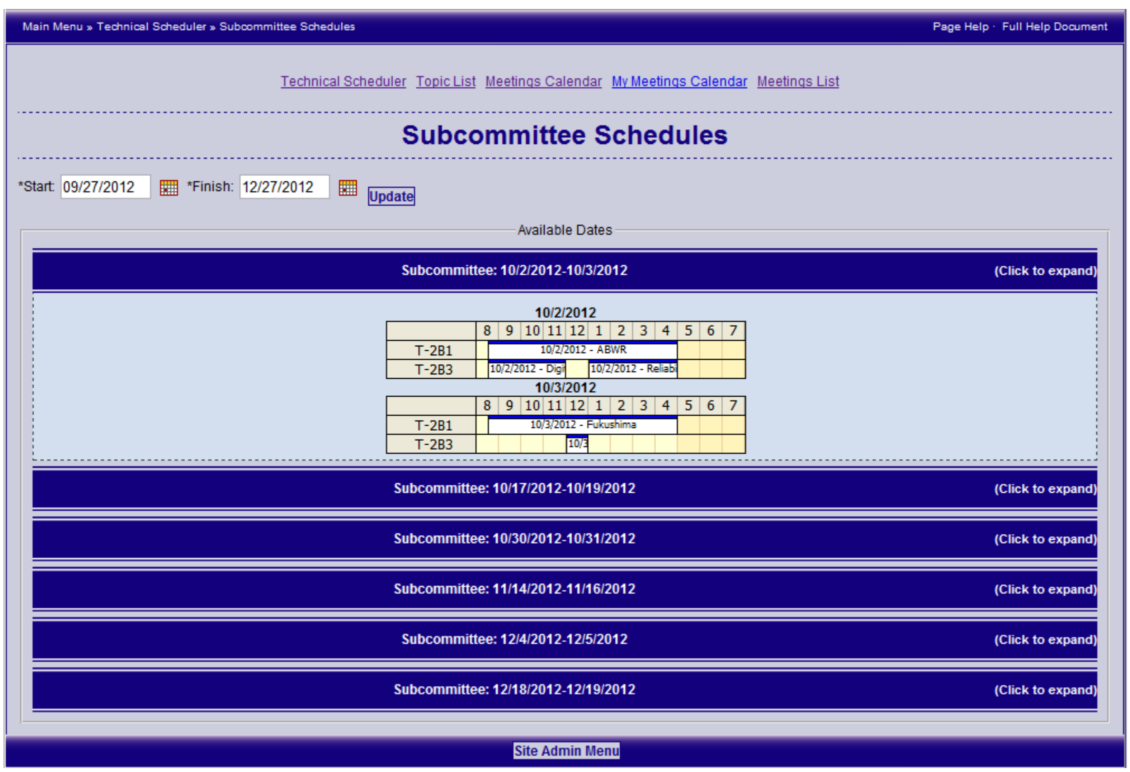


Subcommittee Schedule

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.



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

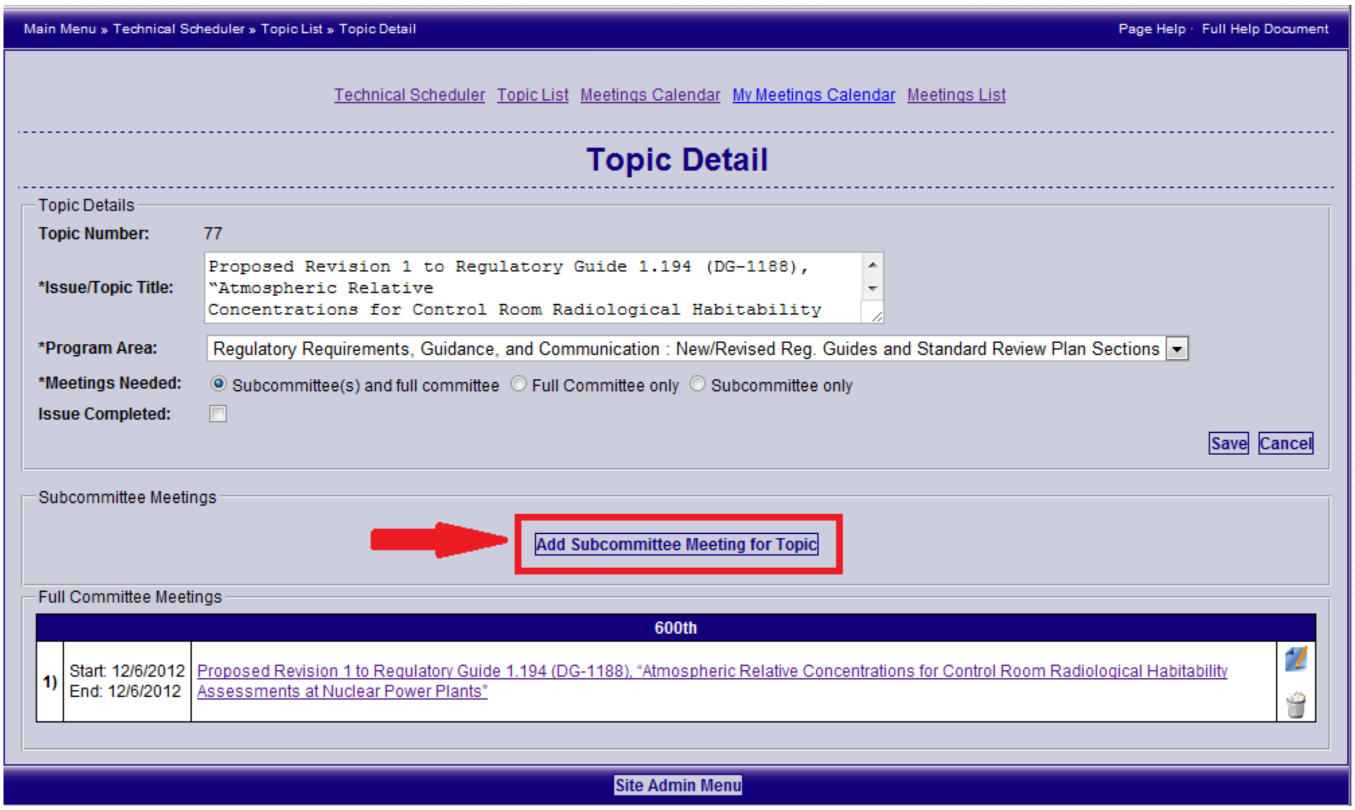


Subcommittee Agenda Item

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

To create a new subcommittee meeting agenda item:

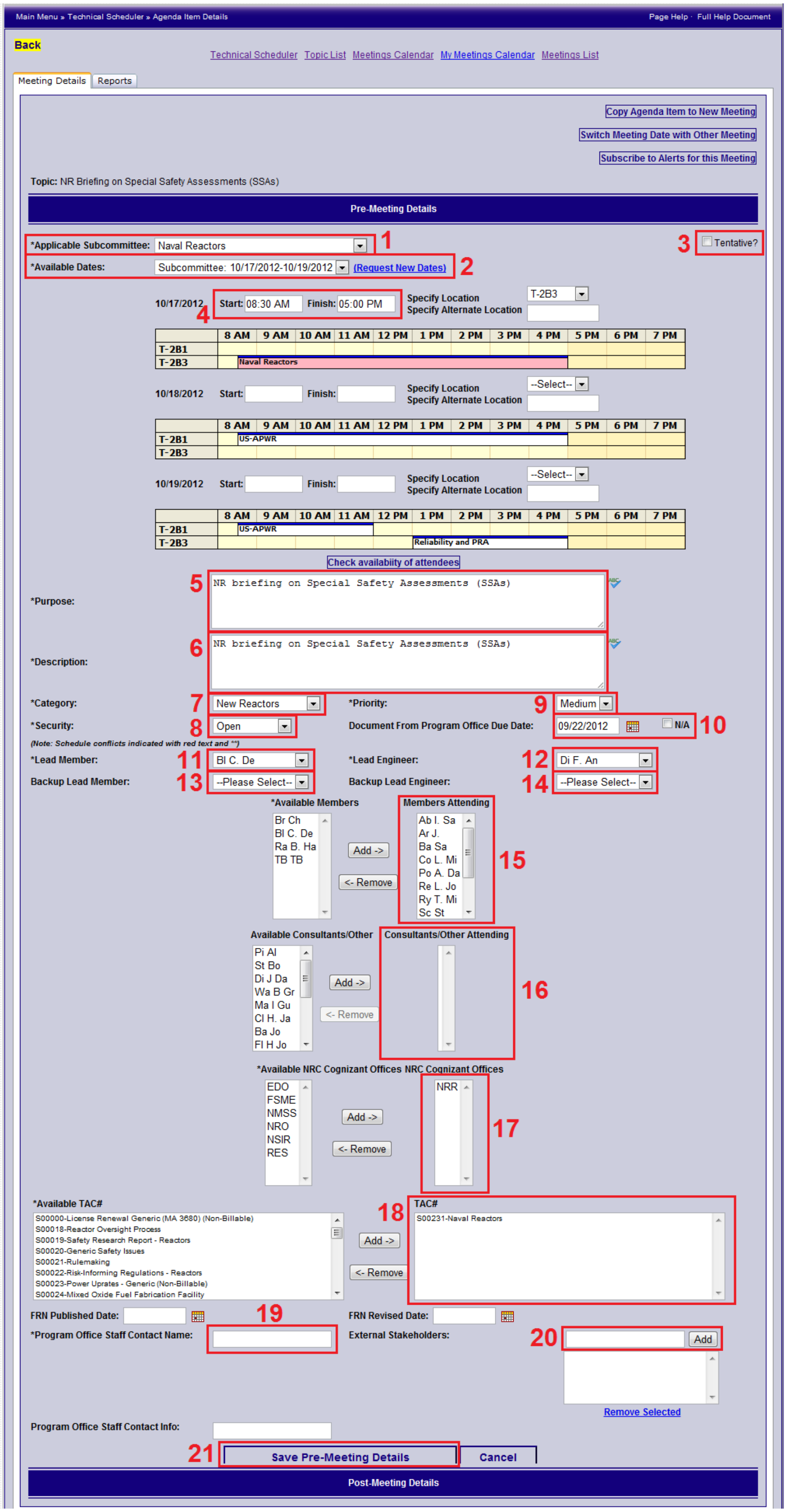
1. Go to the Topic Detail page:
   1. Click the “Add Subcommittee Meeting for Topic” button.



On the Agenda Item Detail page:

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

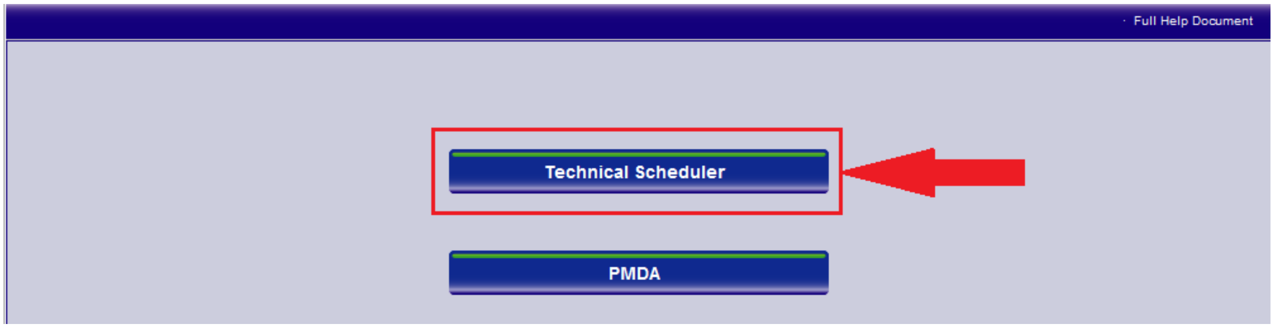
Note: If any errors occur during saving, or required fields have not been entered, validation messages will appear on the screen to alert the user.

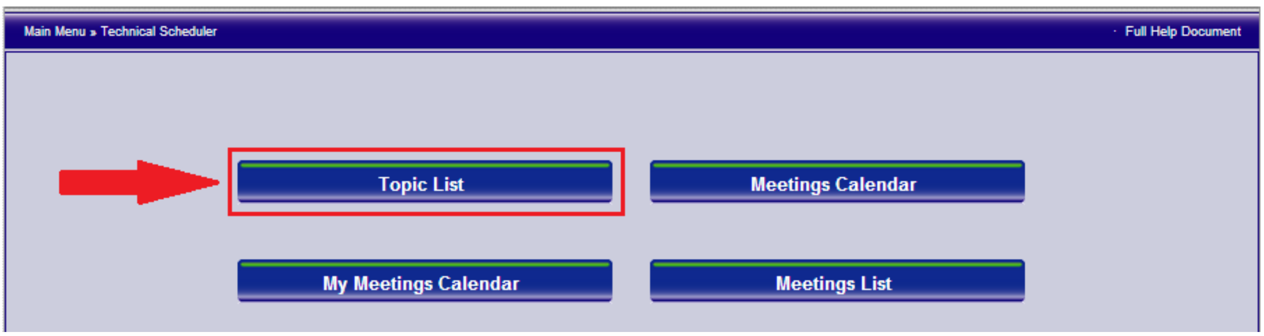


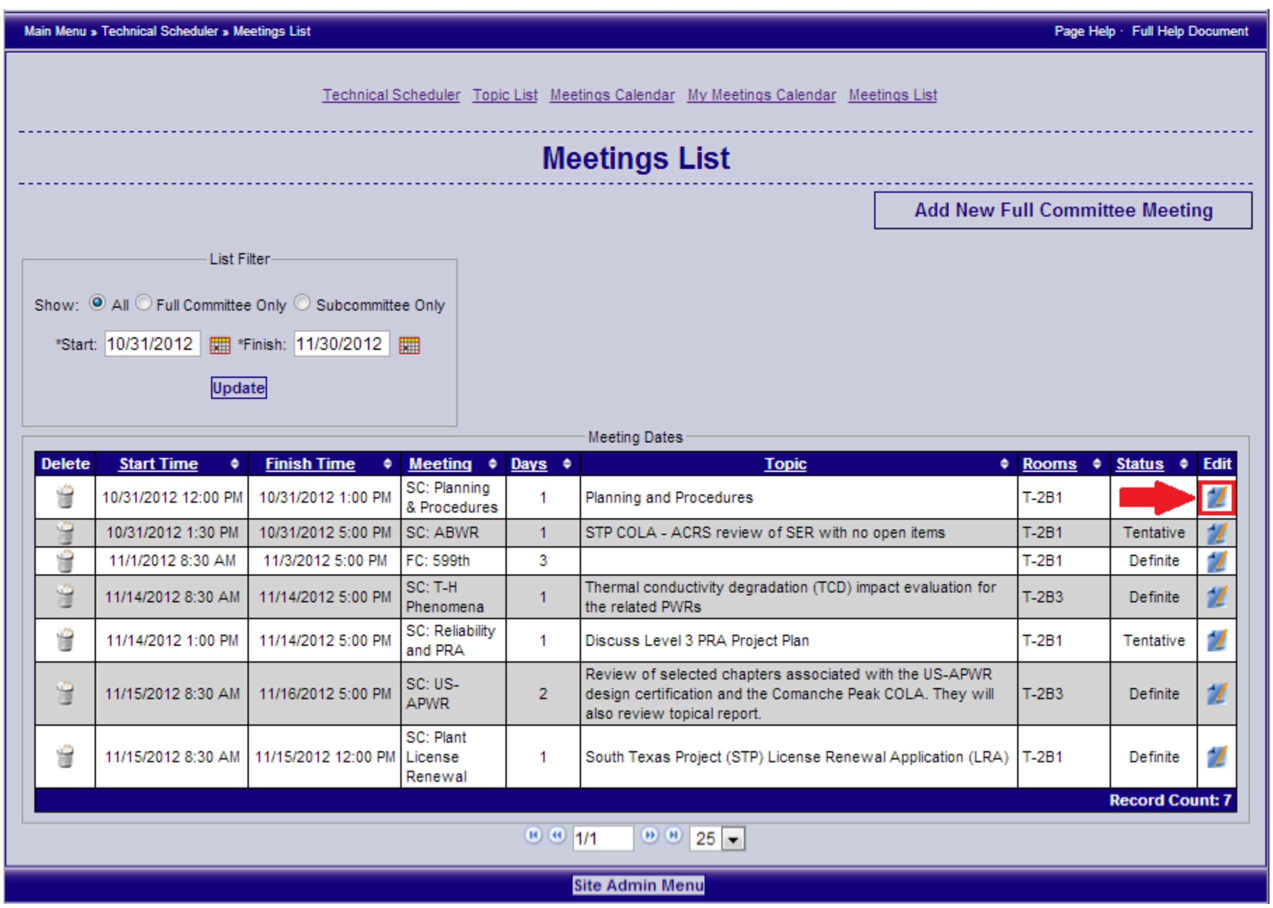
Main Menu » Technical Scheduler » Agenda Item Details
Page Help · Full Help Document
Back
Technical Scheduler Topic List Meetings Calendar My Meetings Calendar Meetings List
Meeting Details
Reports
Copy Agenda Item to New Meeting
Switch Meeting Date with Other Meeting
Subscribe to Alerts for this Meeting
Topic: NR Briefing on Special Safety Assessments (SSAs)
Pre-Meeting Details
*Applicable Subcommittee: Naval Reactors
1
3
Tentative?
*Available Dates: Subcommittee: 10/17/2012-10/19/2012 (Request New Dates)
2
10/17/2012 Start: 08:30 AM Finish: 05:00 PM
4
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 Naval Reactors
10/18/2012 Start: Finish:
Specify Location --Select--
Specify Alternate Location
T-2B1 US-APWR
T-2B3
10/19/2012 Start: Finish:
Specify Location --Select--
Specify Alternate Location
T-2B1 US-APWR
T-2B3 Reliability and PRA
Check availability of attendees
5
*Purpose: NR briefing on Special Safety Assessments (SSAs)
6
*Description: NR briefing on Special Safety Assessments (SSAs)
*Category: 7 New Reactors
*Priority: 9 Medium
*Security: 8 Open
Document From Program Office Due Date: 09/22/2012 N/A 10
(Note: Schedule conflicts indicated with red text and "*")
*Lead Member: 11 Bl C. De
*Lead Engineer: 12 Di F. An
Backup Lead Member: 13 --Please Select--
Backup Lead Engineer: 14 --Please Select--
*Available Members
Br Ch
Bl C. De
Ra B. Ha
TB TB
Add ->
<- Remove
Members Attending
Ab I. Sa
Ar J.
Ba Sa
Co L. Mi
Po A. Da
Re L. Jo
Ry T. Mi
Sc St
15
Available Consultants/Other
Pi Al
St Bo
Di J Da
Wa B Gr
Ma I Gu
Cl H. Ja
Ba Jo
Fl H Jo
Add ->
<- Remove
Consultants/Other Attending
16
*Available NRC Cognizant Offices
EDO
FSME
NMSS
NRO
NSIR
RES
Add ->
<- Remove
NRC Cognizant Offices
NRR
17
*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 Uprates - Generic (Non-Billable)
S00024-Mixed Oxide Fuel Fabrication Facility
18
Add ->
<- Remove
TAC#
S00231-Naval Reactors
FRN Published Date:
19
FRN Revised Date:
*Program Office Staff Contact Name:
External Stakeholders:
20
Add
Remove Selected
Program Office Staff Contact Info:
21
Save Pre-Meeting Details
Cancel
Post-Meeting Details

To edit a subcommittee meeting or enter post-meeting details:

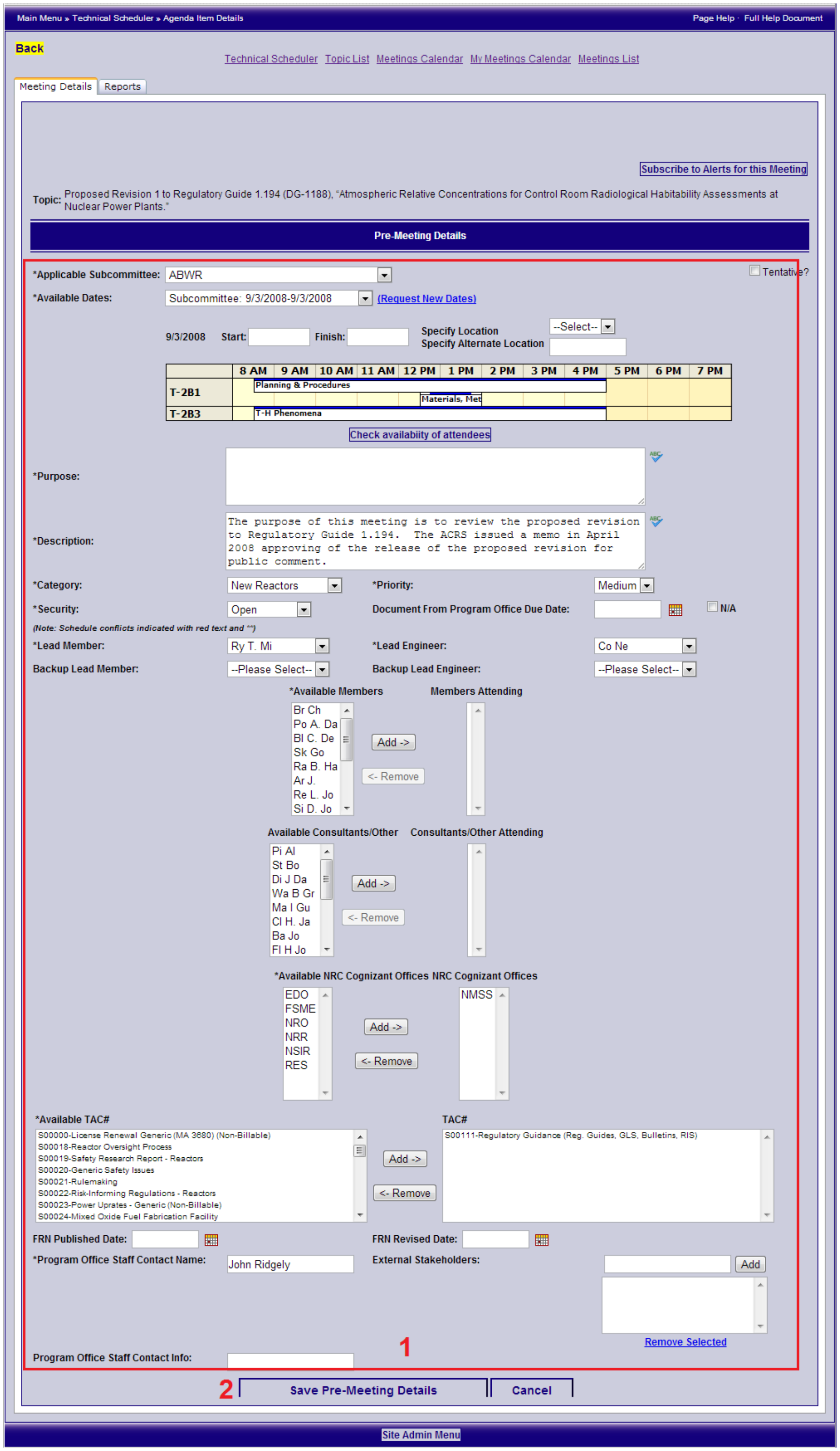
1. From the Meeting Details page, located under the “Technical Scheduler”, “Topic List”, Edit Details:



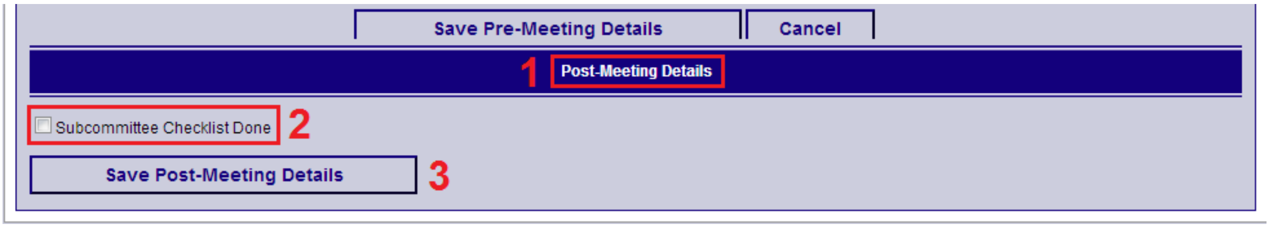




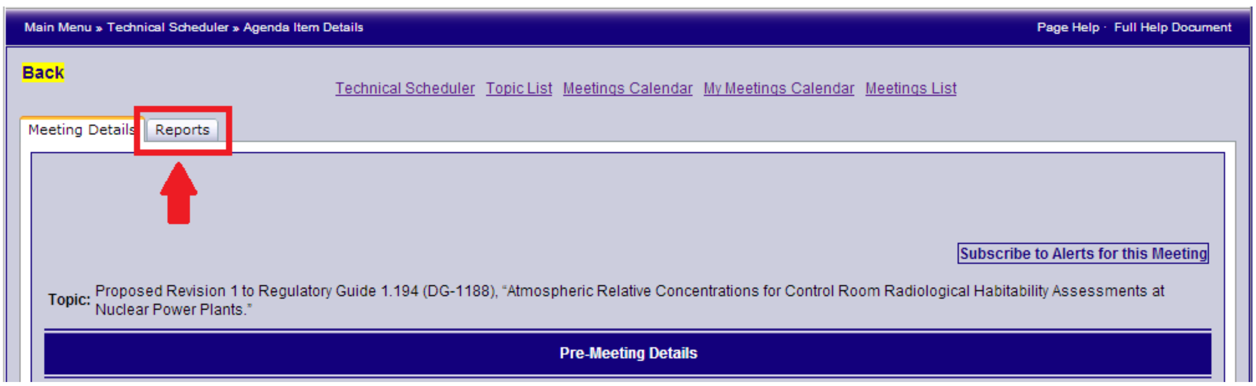
1. Change any pre-meeting data as needed.
2. Click “Save Pre-Meeting Details”.



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

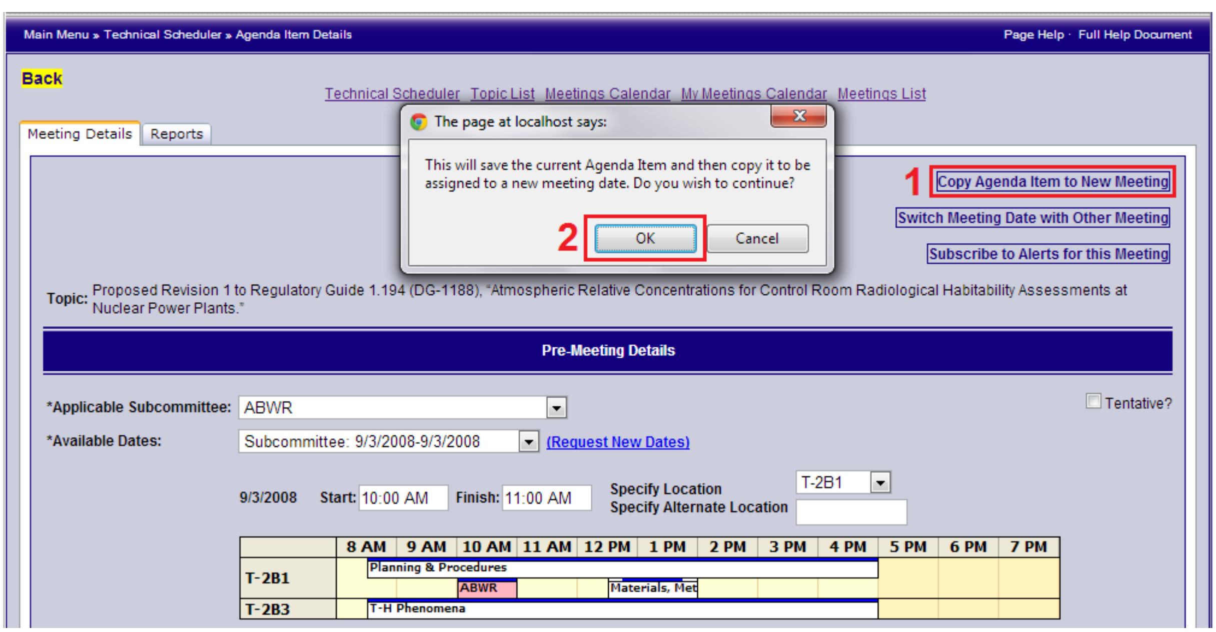


This page also has a Reports tab which contains any reports available for this subcommittee meeting.



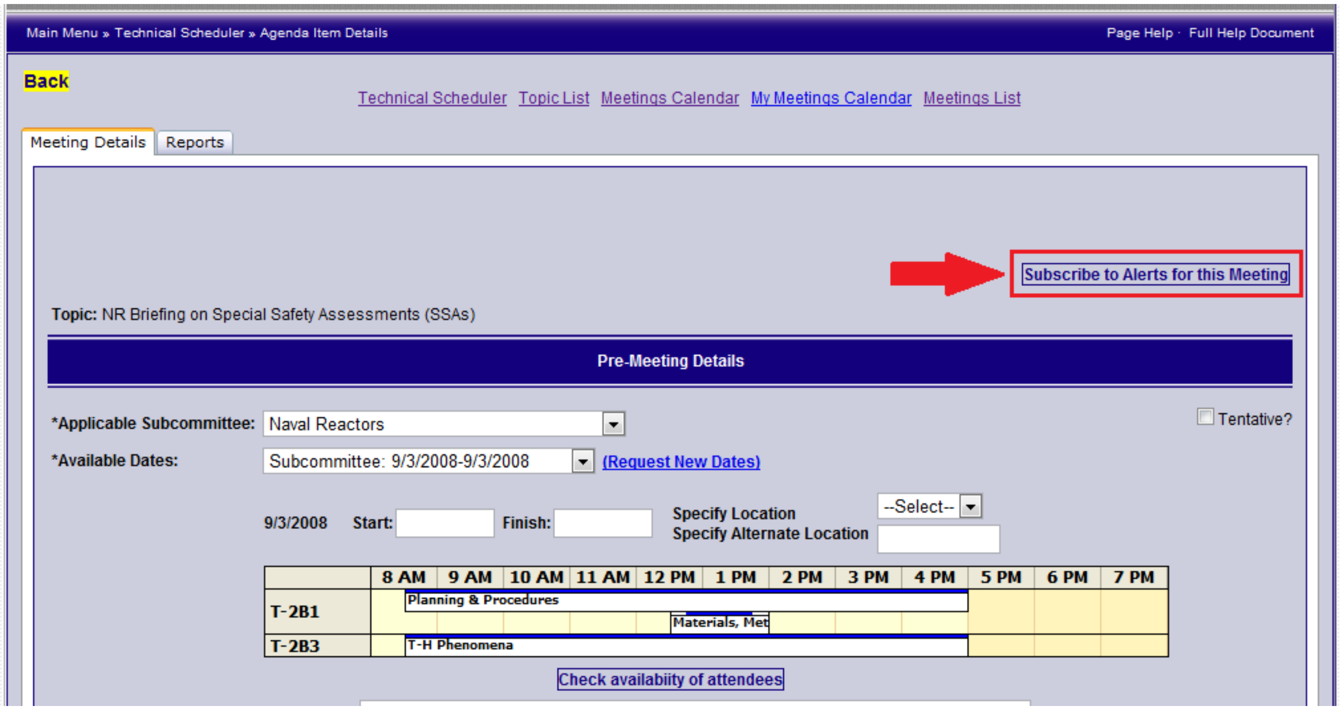
To copy the details of a subcommittee meeting to a new meeting date:

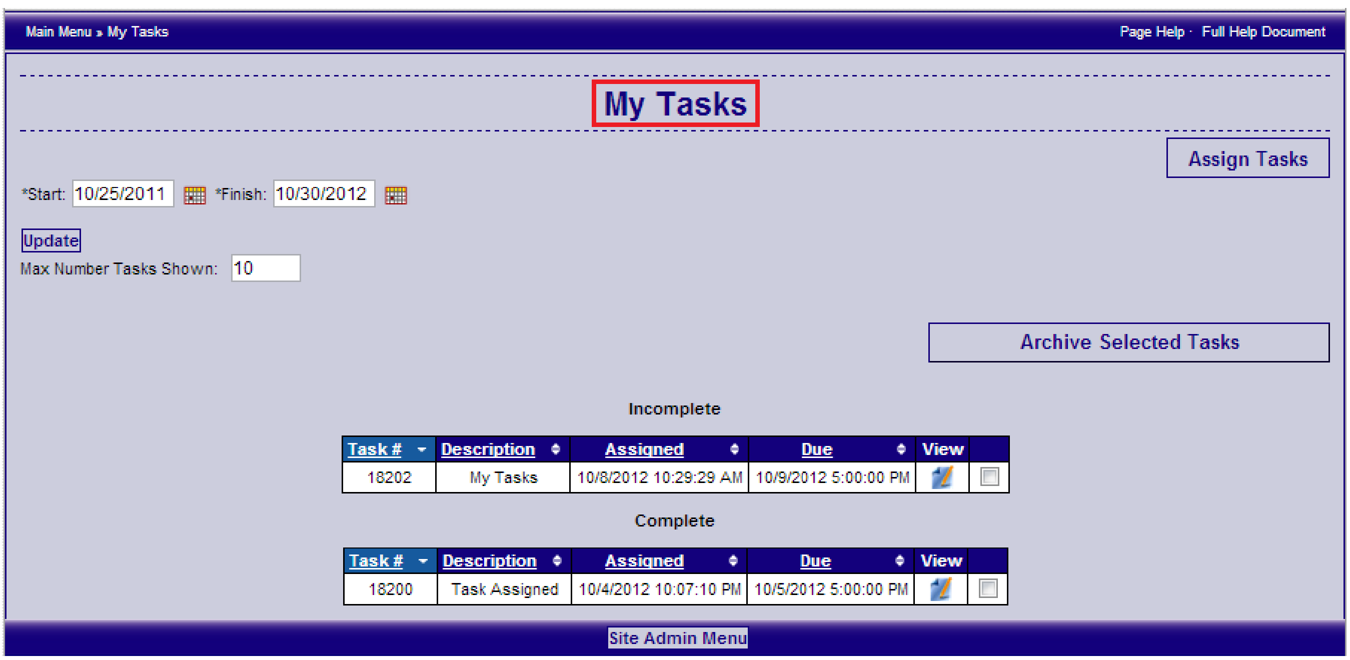
1. Click on the “Copy Agenda Item to New Meeting” button.
2. Confirm that you wish to continue.
3. All the attributes of the meeting, including members, subcommittee, purpose, etc., will be copied to a new meeting on the date that you select.



To subscribe to alerts for a meeting:

1. Click the “Subscribe to Alerts for this Meeting” button.
2. Changes and updates to the meeting will automatically be sent to your “My Tasks” area.





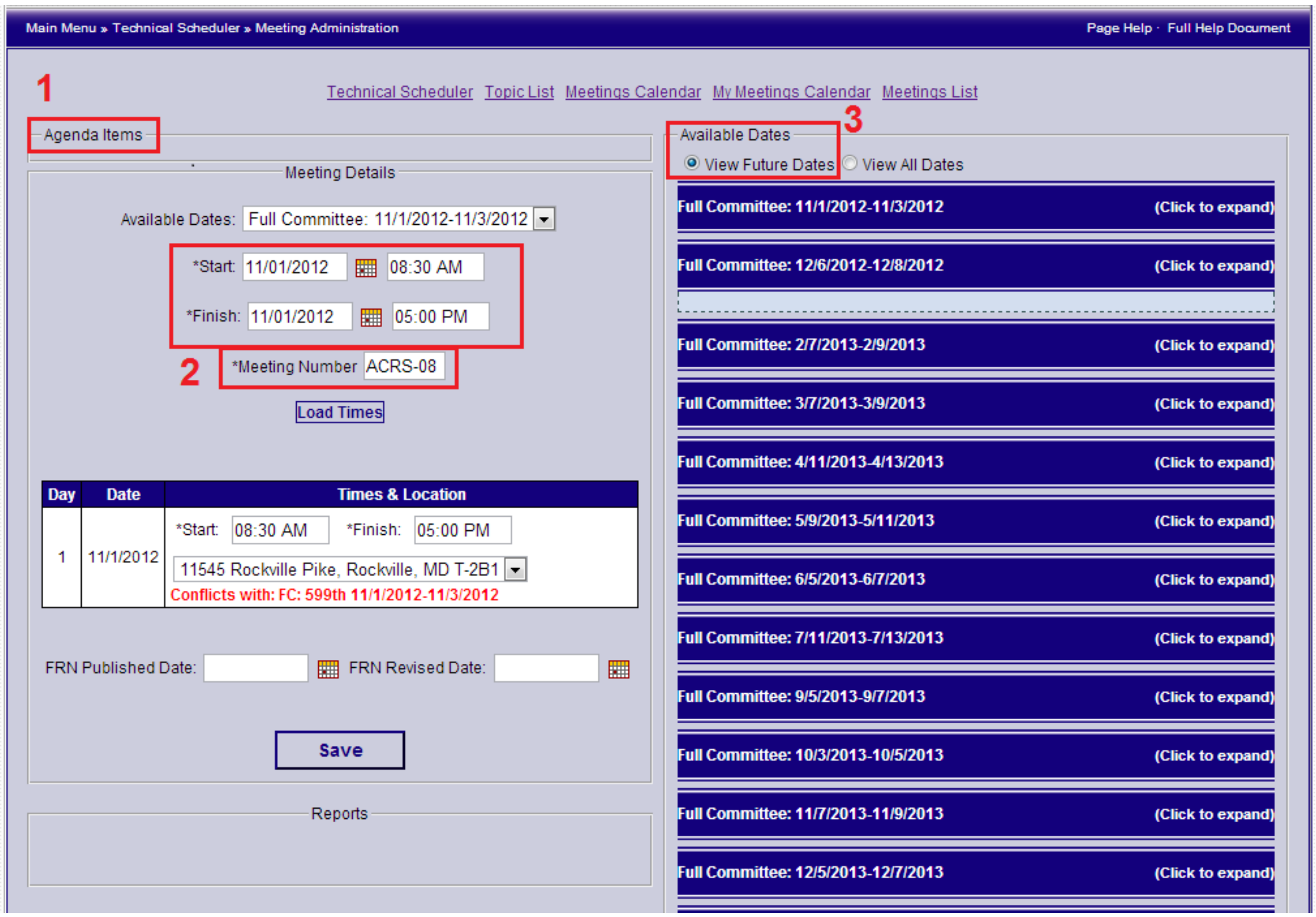
Updated: November 2012

Full Committee Meeting

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

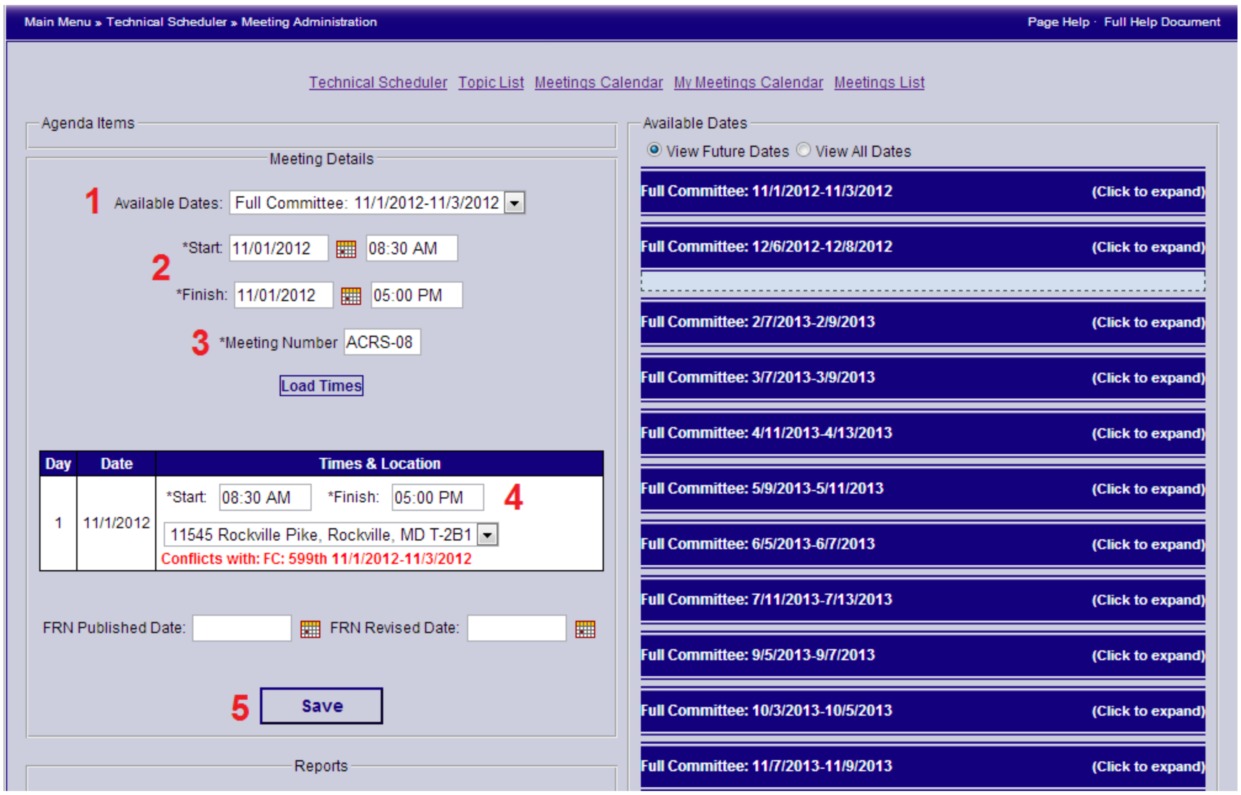
This page includes:

1. A list of agenda items for the meeting.
2. The meeting number and times.
3. A list of all future Full Committee meetings and available date ranges.



To add a new meeting:

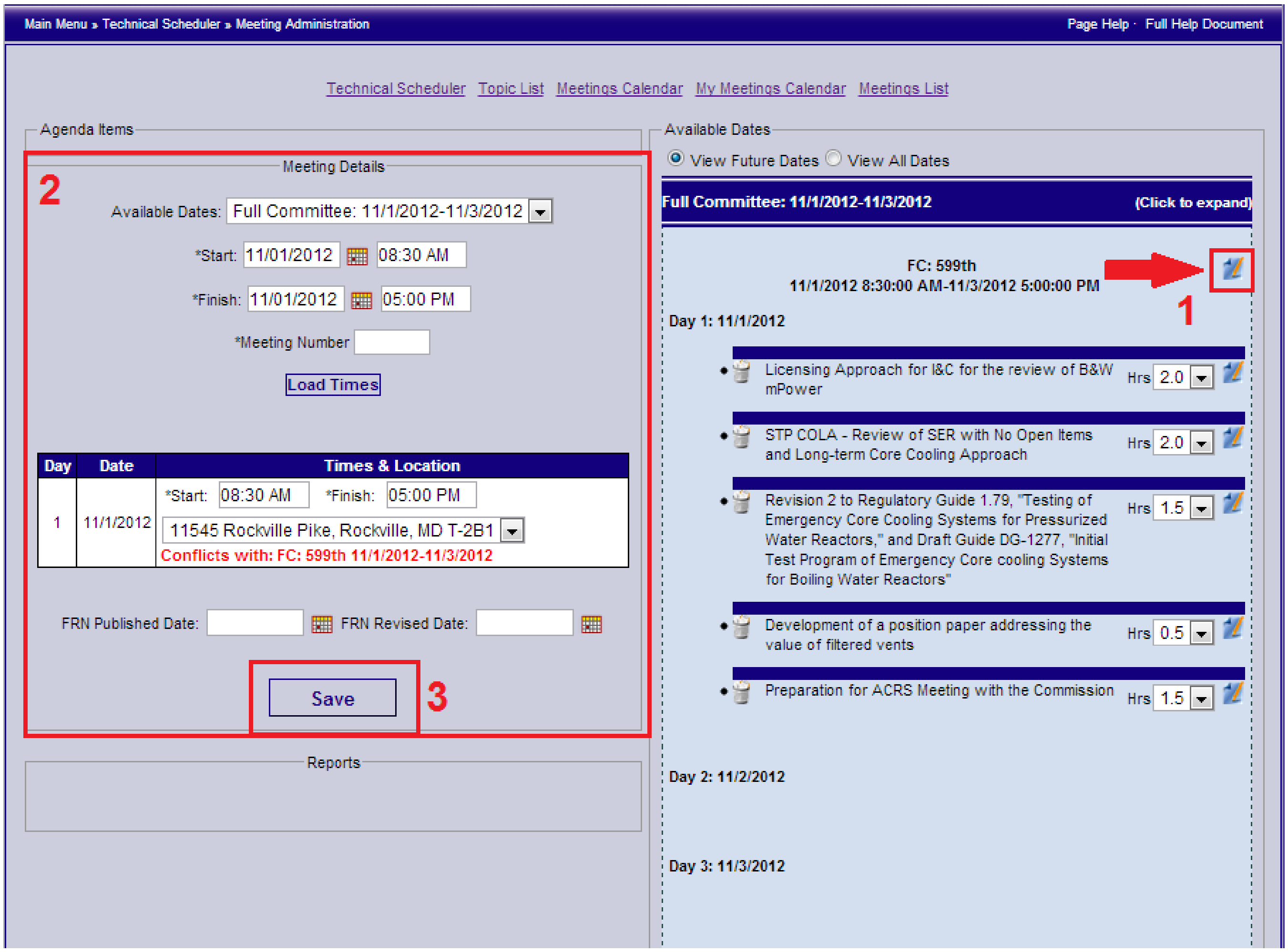
1. Select the available committee date range that you would like to schedule the meeting within.
2. Choose the start and end dates and times of the meeting.
3. Enter the meeting number
4. Enter the start and finish times for each day of the meeting.
5. Click “Save”.



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

To edit a meeting:

1. Choose the meeting from the Meetings List or a Meeting Calendar or the list of Full Committee meetings on the right side of this page.
2. Edit the necessary data
3. Click Save



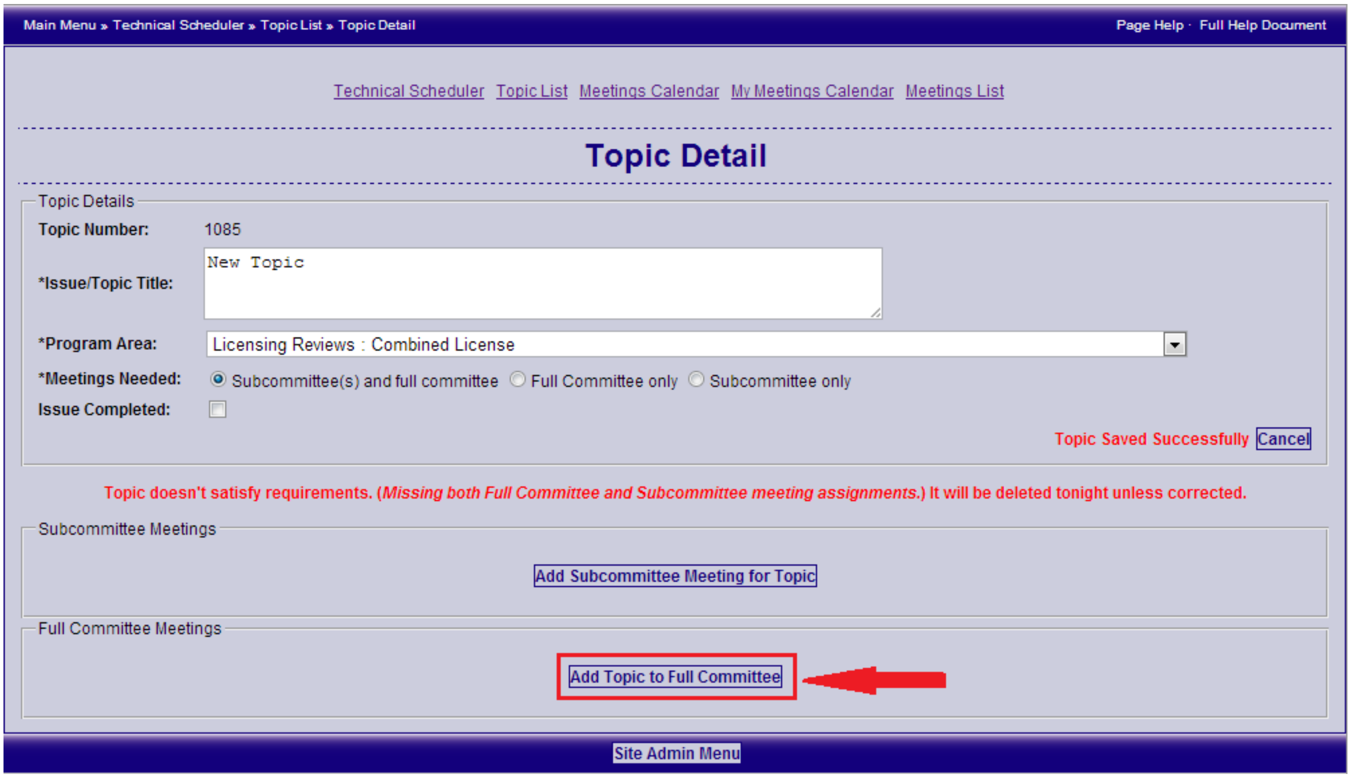
Full Committee Agenda Items

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

To create a new full committee meeting agenda item:

Go to the Topic Detail page:

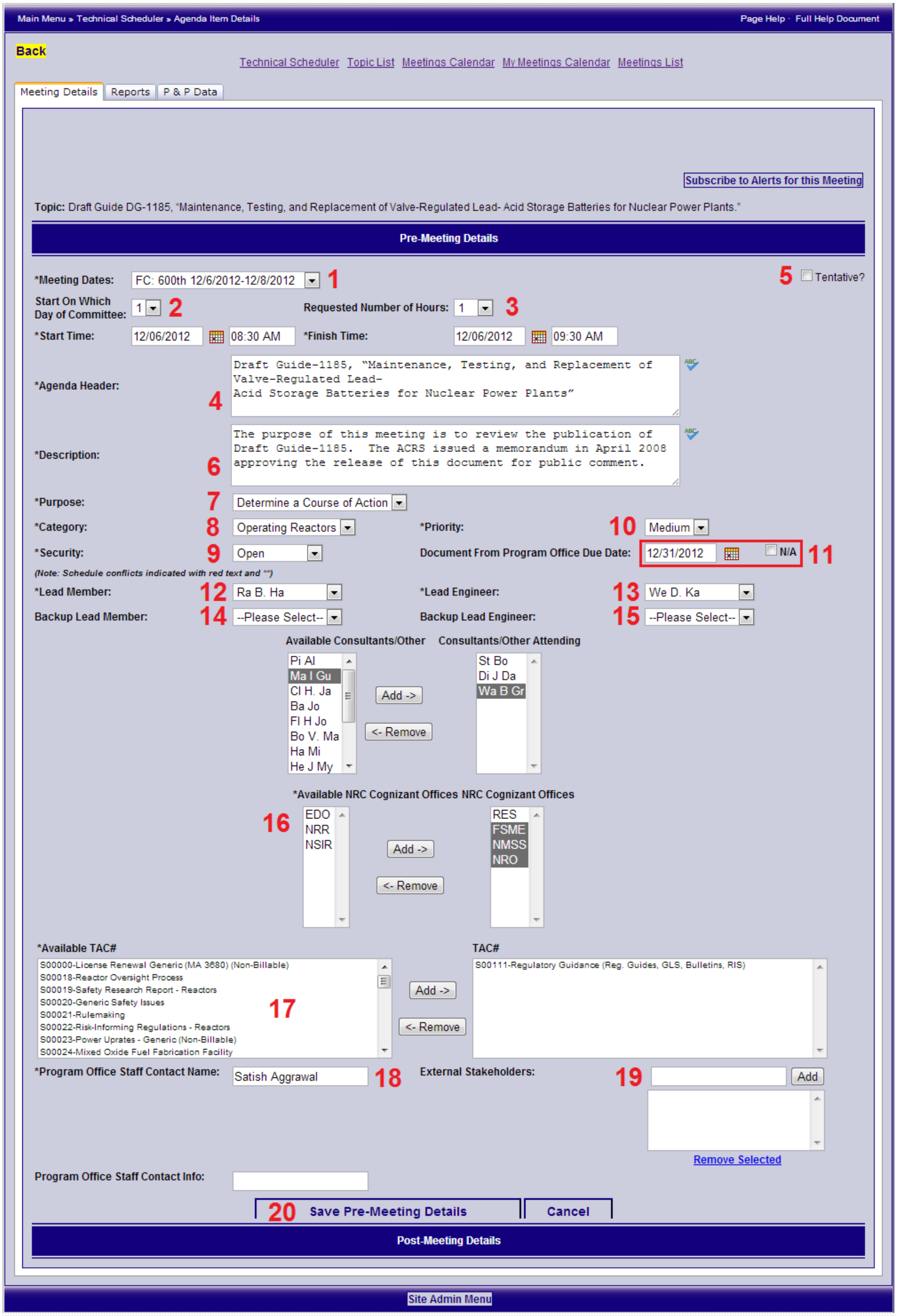
1. Click the “Add Topic to Full Committee” button.



On Agenda Item Detail page:

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

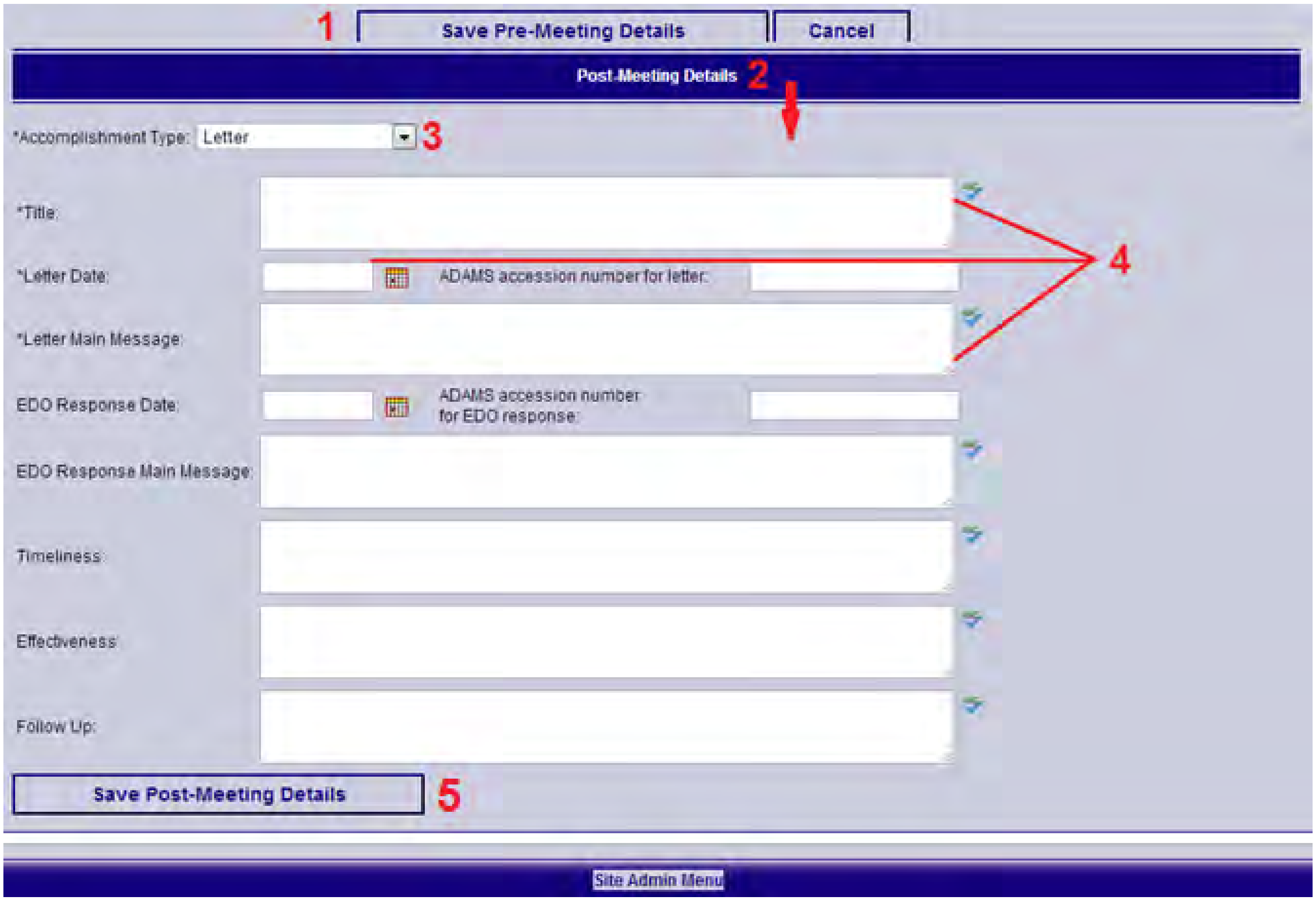
Note: If any errors occur during saving, or required fields have not been entered, validation messages will appear on the screen to alert the user.



Updated: November 2012

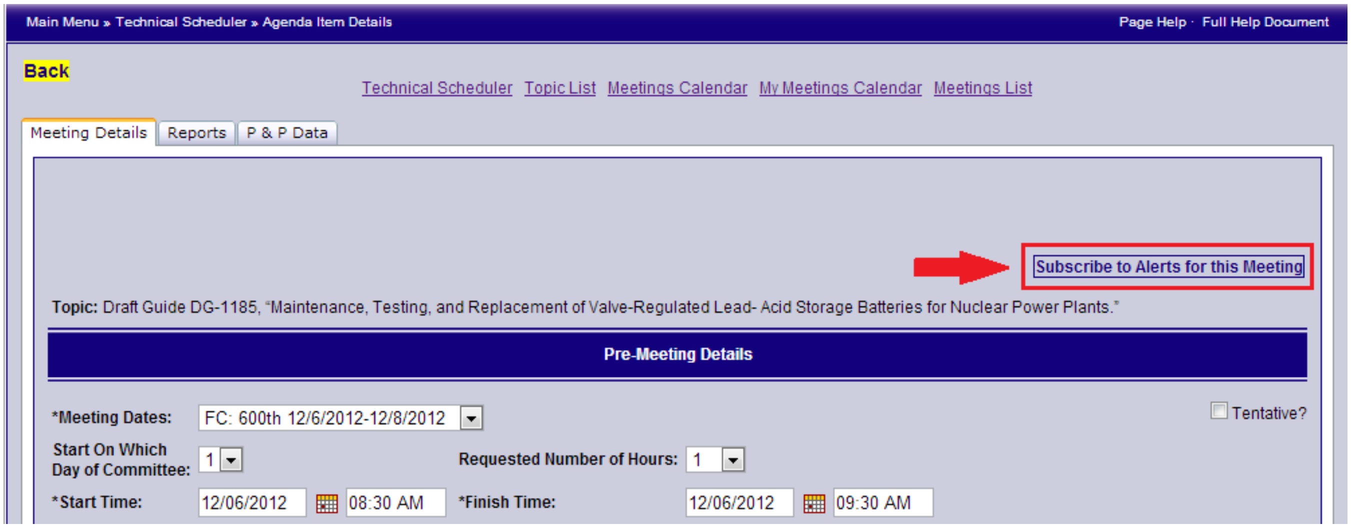
To edit a full committee meeting or enter post-meeting details:

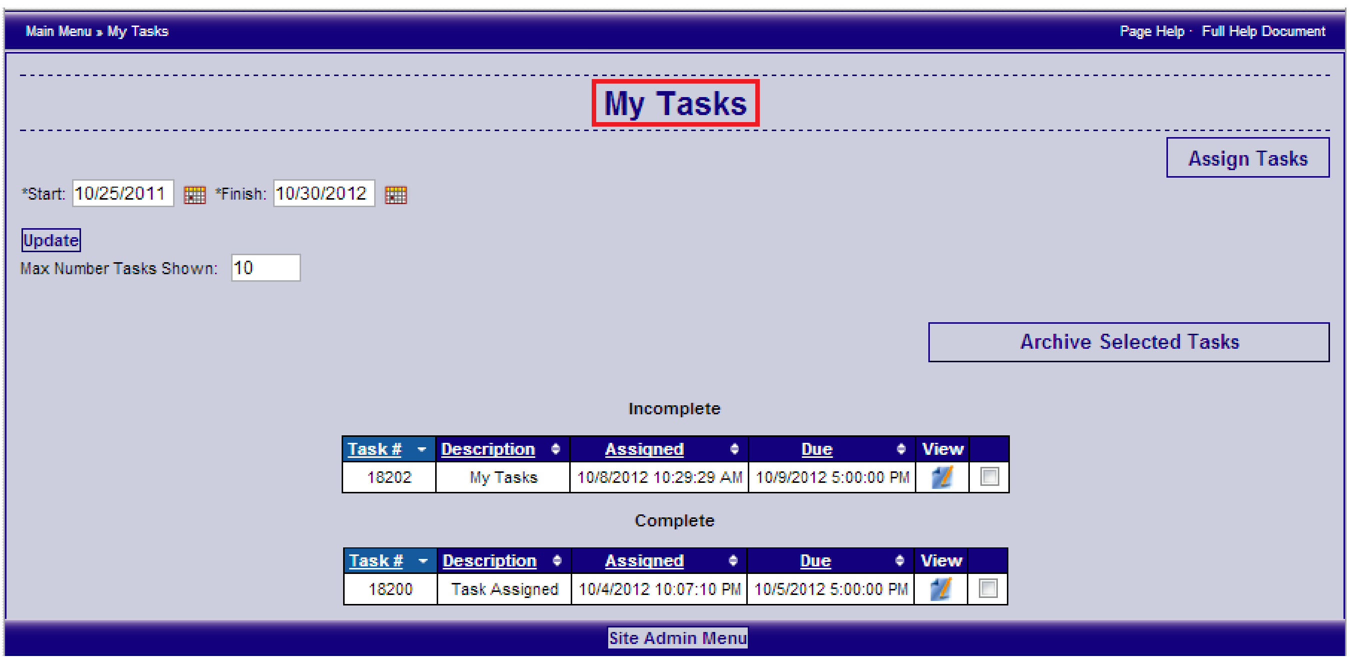
1. Change any pre-meeting data as needed.
2. Click on the “Post-Meeting Details” header to expand the post-meeting details section.
3. Choose the appropriate accomplishment type.
4. Fill in the requested data
5. Click the “Save Post-Meeting Details” button. Pre-Meeting details will also be saved.



To subscribe to alerts for a meeting:

1. Click the “Subscribe to Alerts for this Meeting” button.
2. Changes and updates to the meeting will automatically be sent to your “My Tasks” area, alerting you of the update for the particular meeting.





This page also has a reports tab containing any reports available for the agenda item:

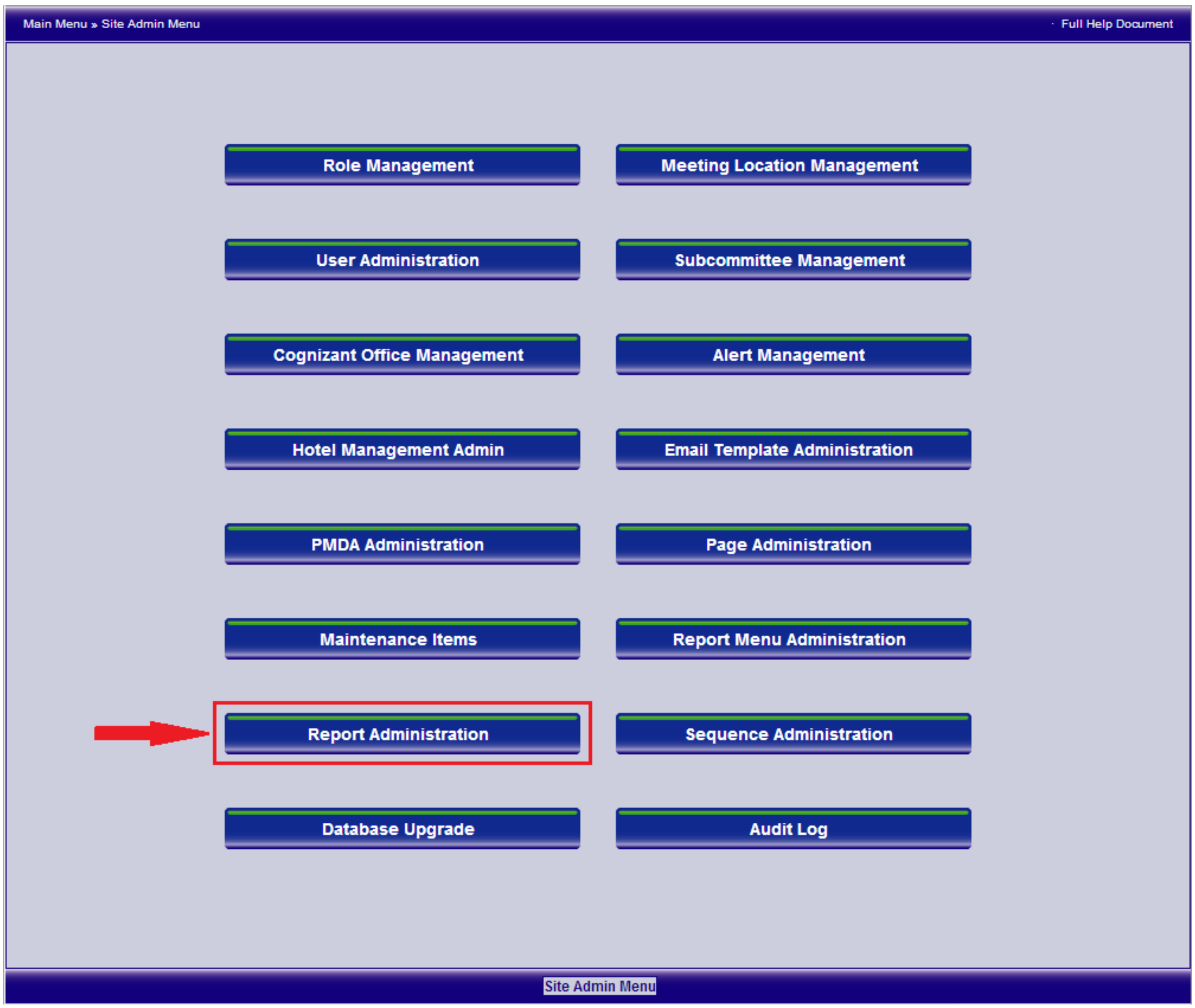
Reports

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

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

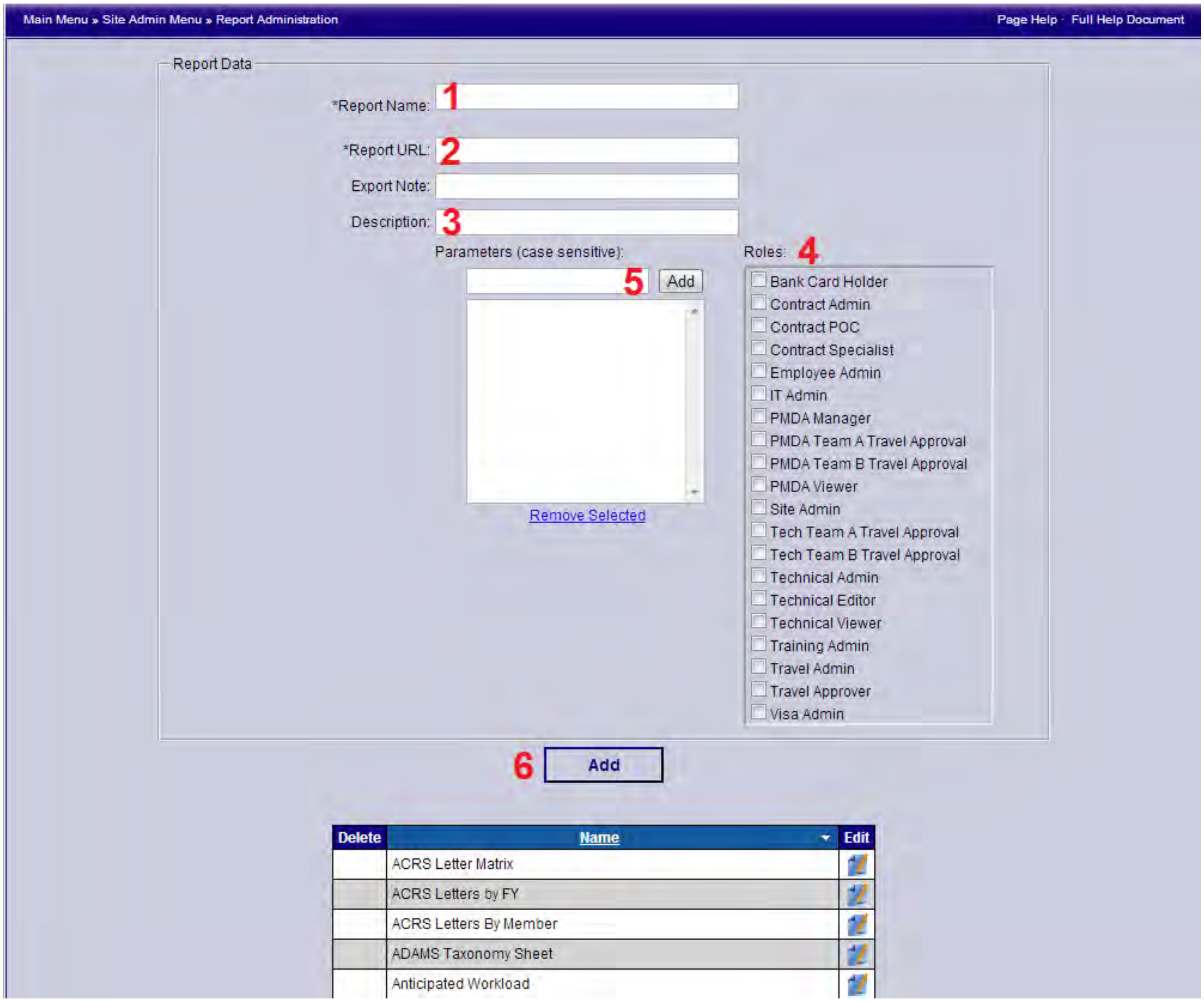
Adding/Editing Individual Reports

Reports are entered into the system using the Report Administration screen in the Site Admin section. This tells WebACTs where the report is located on the SSRS (SQL Server Reporting Services) report server so that it can be imported and displayed when requested.



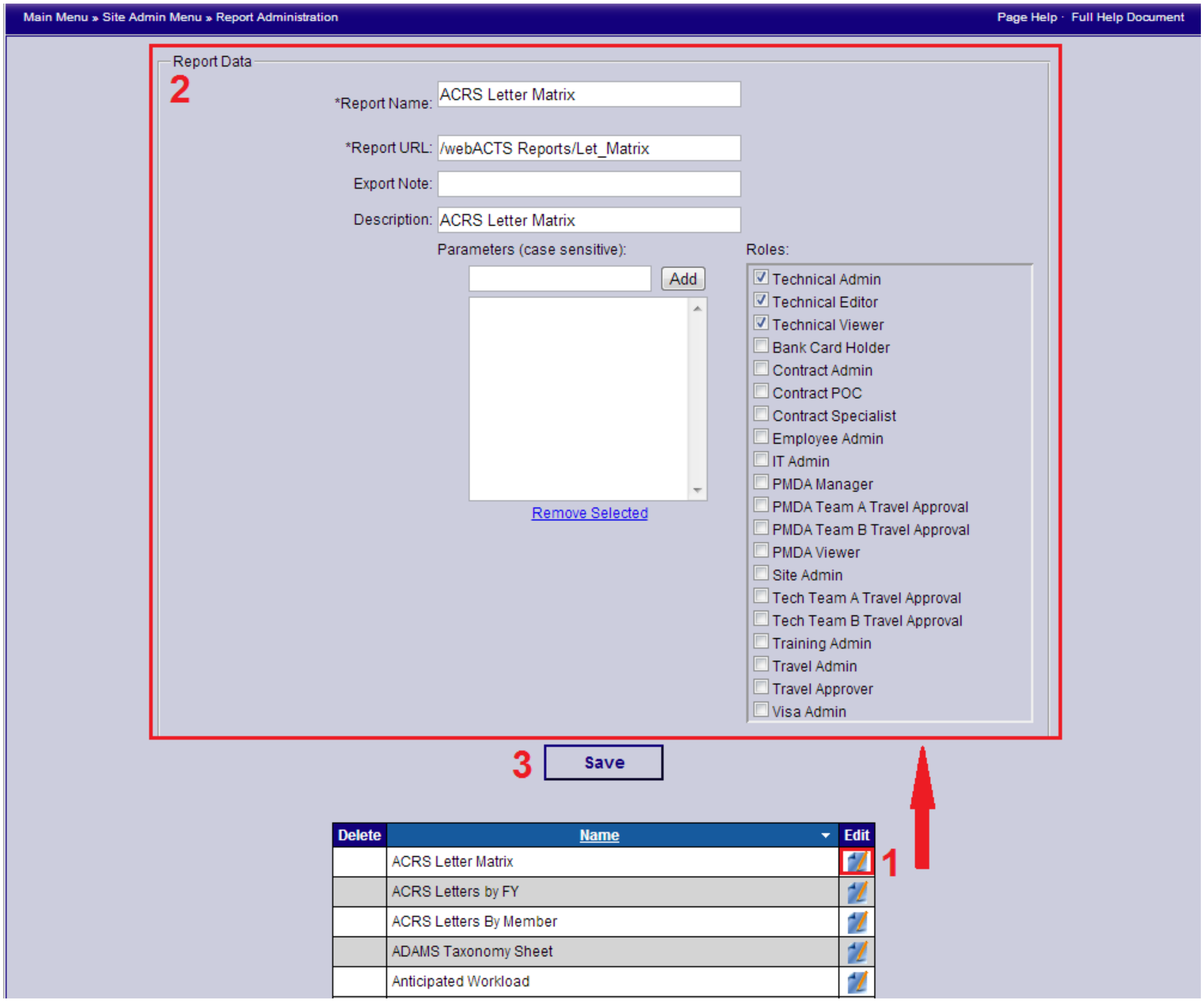
To add a new report:

1. Add the report's name—this is what will be used when a link to the report is displayed.
2. Add the relative URL to the report on the report server (e.g. /coi).
3. Enter a brief description.
4. Select all roles allowed to view the report.
5. Enter each parameter the report accepts.
    - Add Parameter: Type parameter and click the small "Add" button.
    - Remove Parameters: Select parameters to remove and click "Remove Selected".
6. Click "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”.

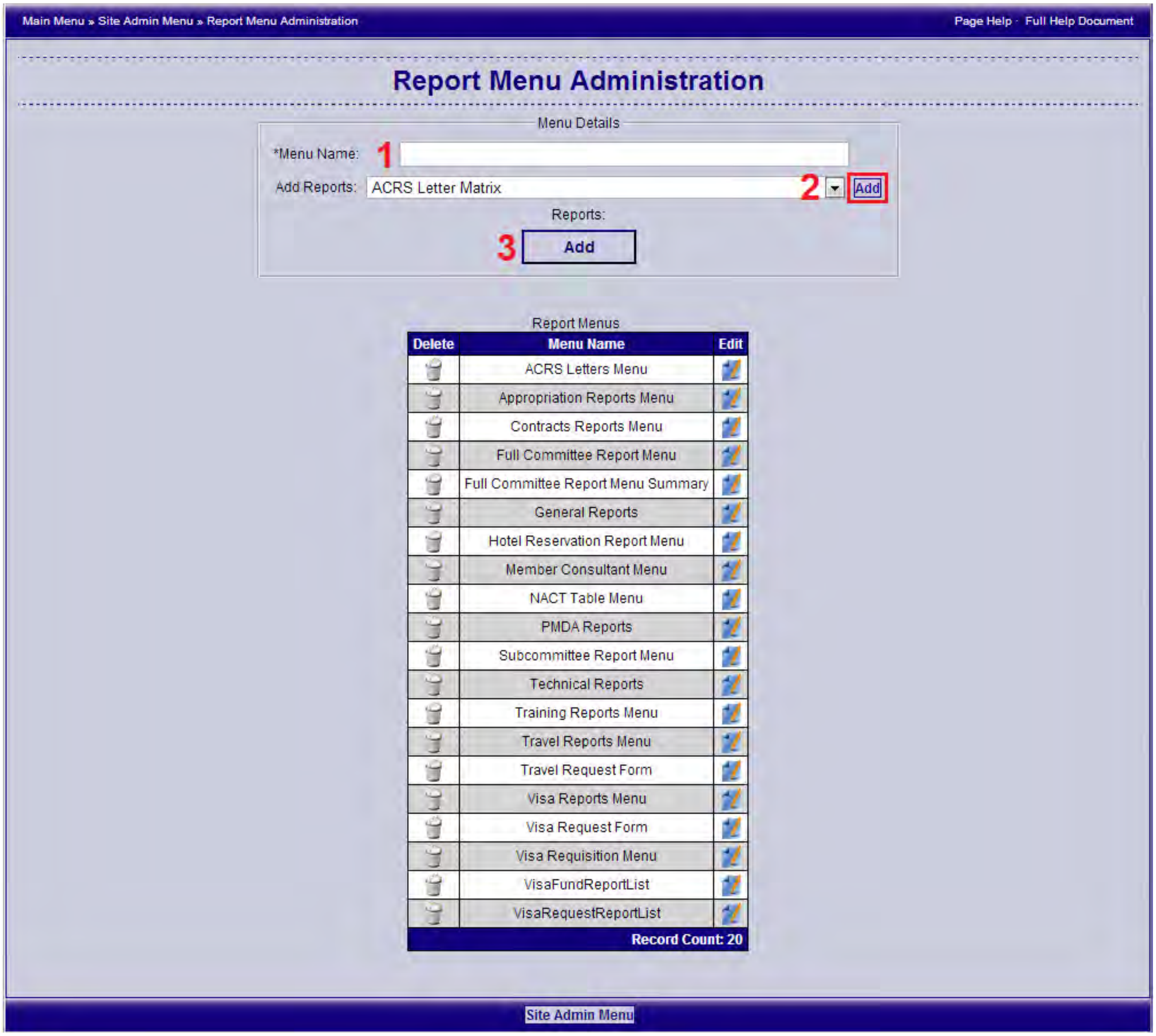


Adding/Editing Report Menus

Report menus are set up and configured by means to the Report Menu Administration page, but they need to be programmatically added to any pages on which they appear.

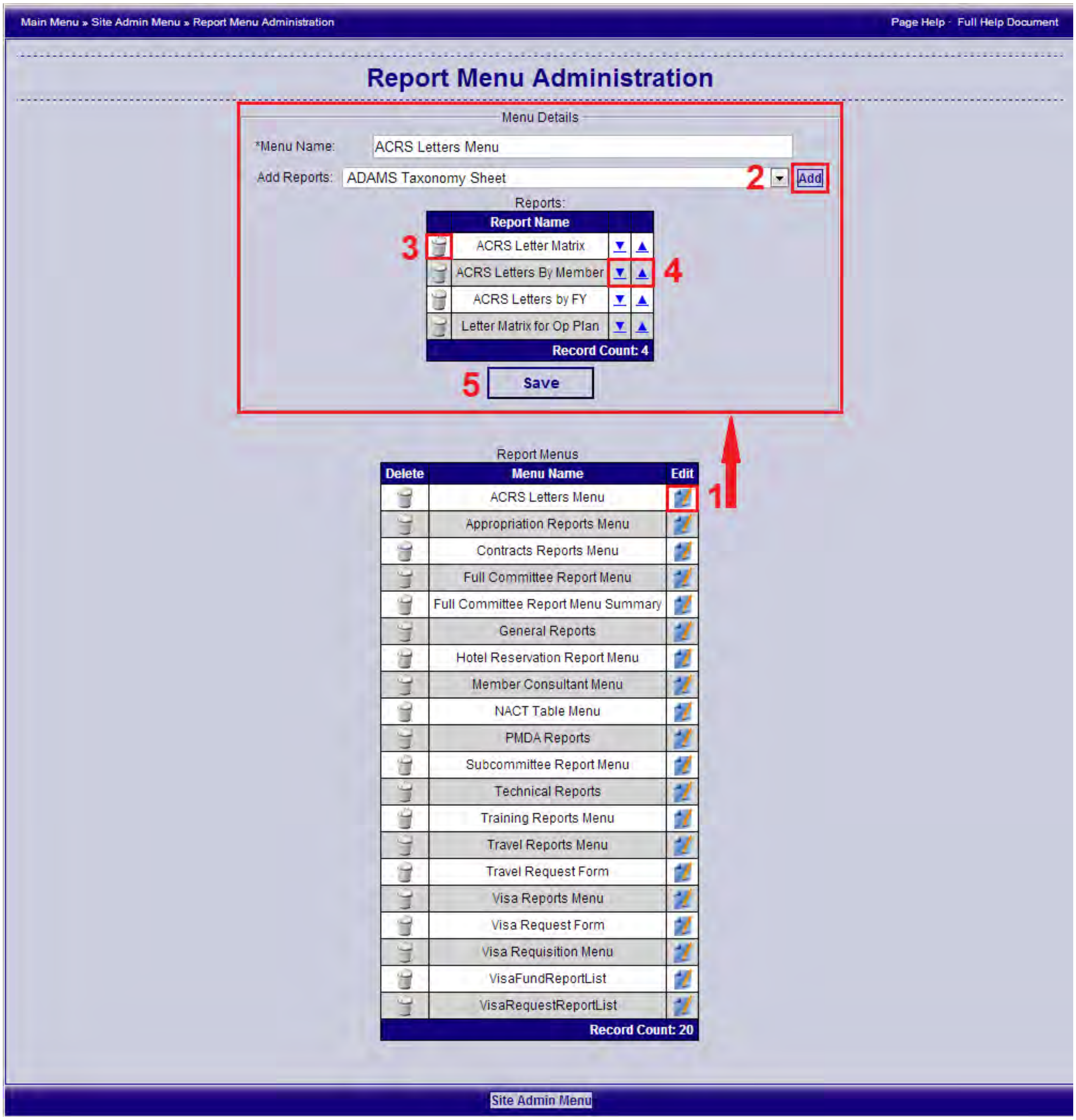
To set up a new Report Menu:

1. Enter the name of the menu.
2. Select each report that should be included and click the small “Add” button.
3. Once all reports have been added, click the large “Add” button.



To edit an existing Report Menu:

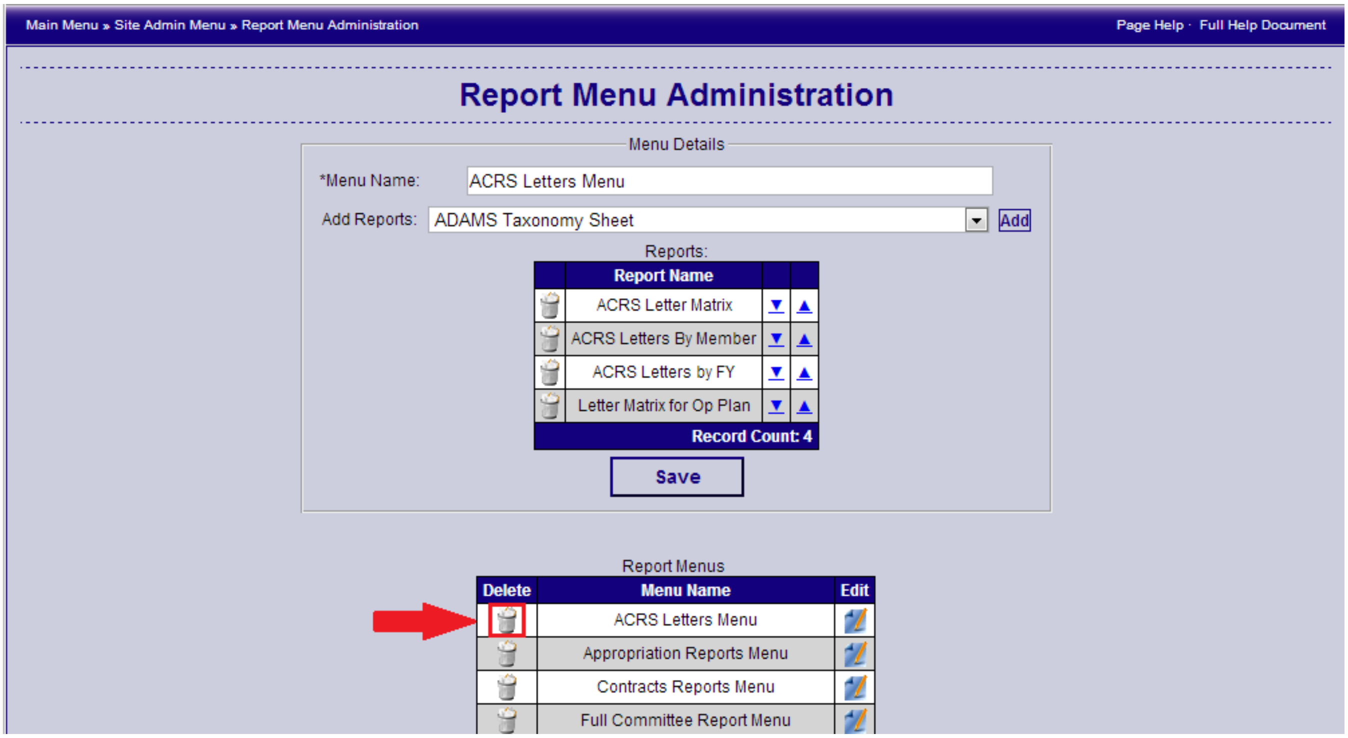
1. Click the edit icon next to the Report Menu to be edited.
2. Add any newly needed reports by selecting and clicking the small "Add" button.
3. Remove any unneeded reports by clicking the delete icon.
4. Re-order the reports using the up and down arrows.
5. Click "Save".



To delete a Report Menu:

1. Click the delete icon.

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



Hotel Reservations

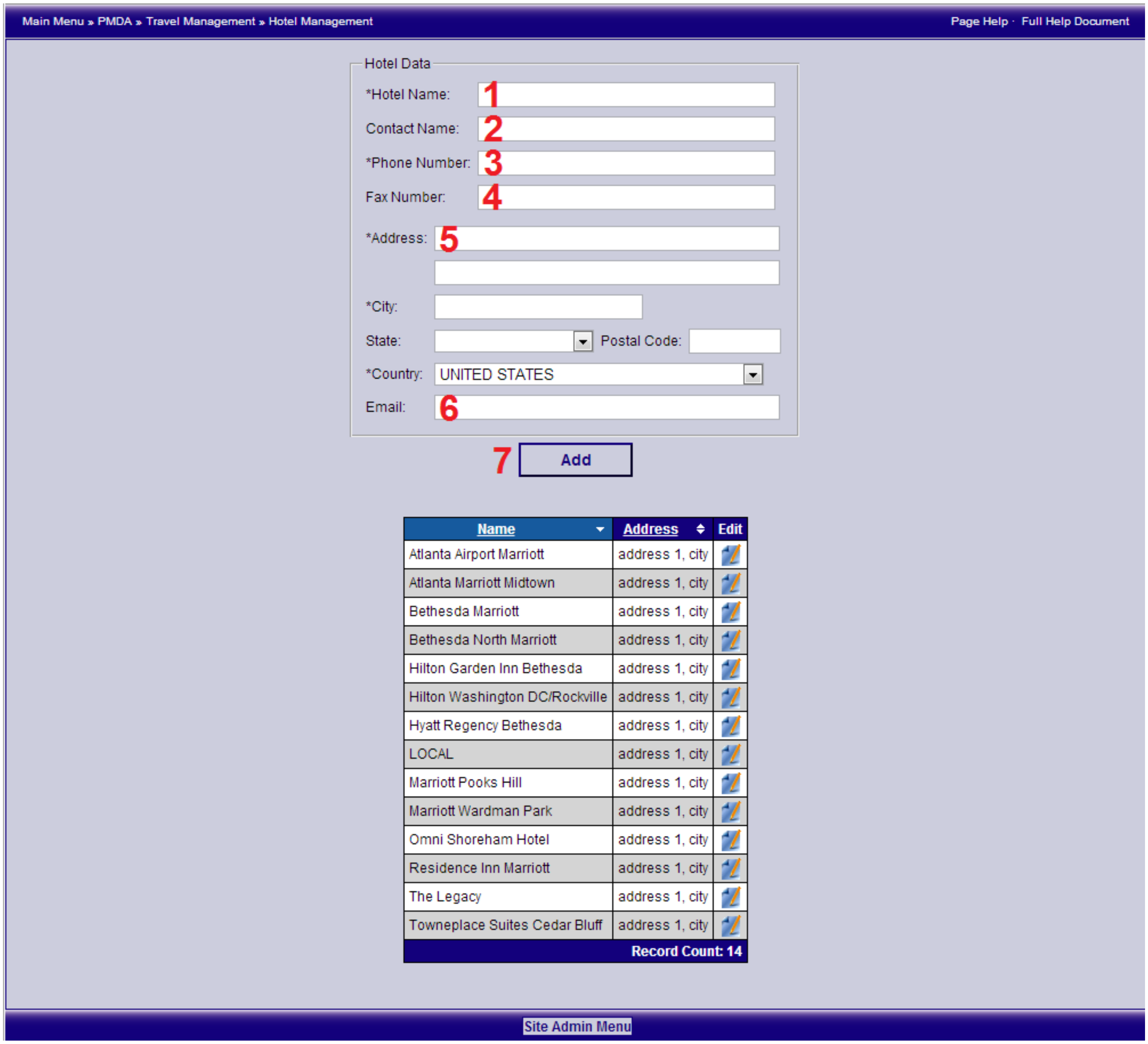
WebACTs keeps track of each member who is attending each committee meeting. To facilitate this process, it also tracks each member's hotel reservations.

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.

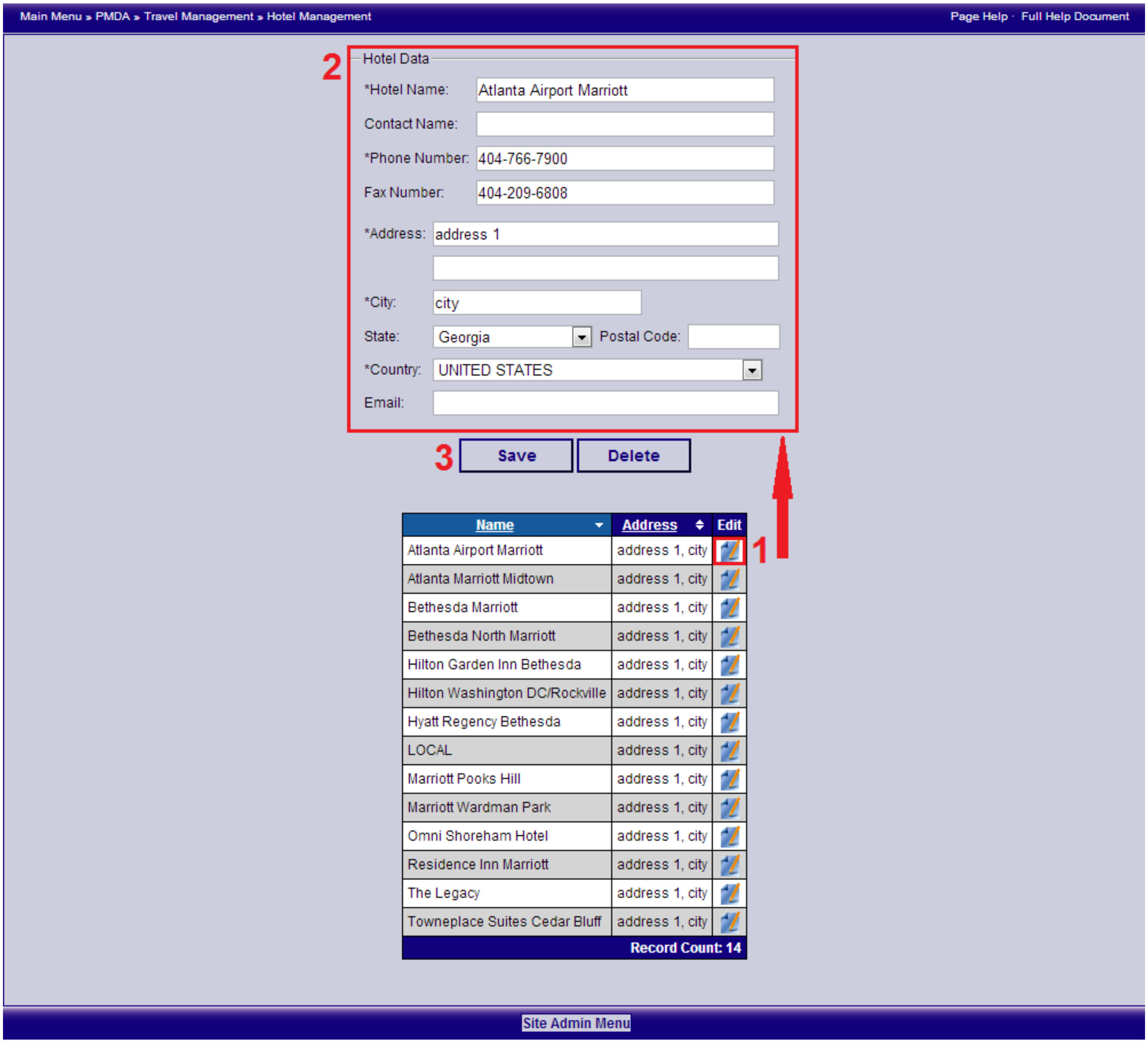
To add a new hotel:

- 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”.


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

To edit an existing hotel:

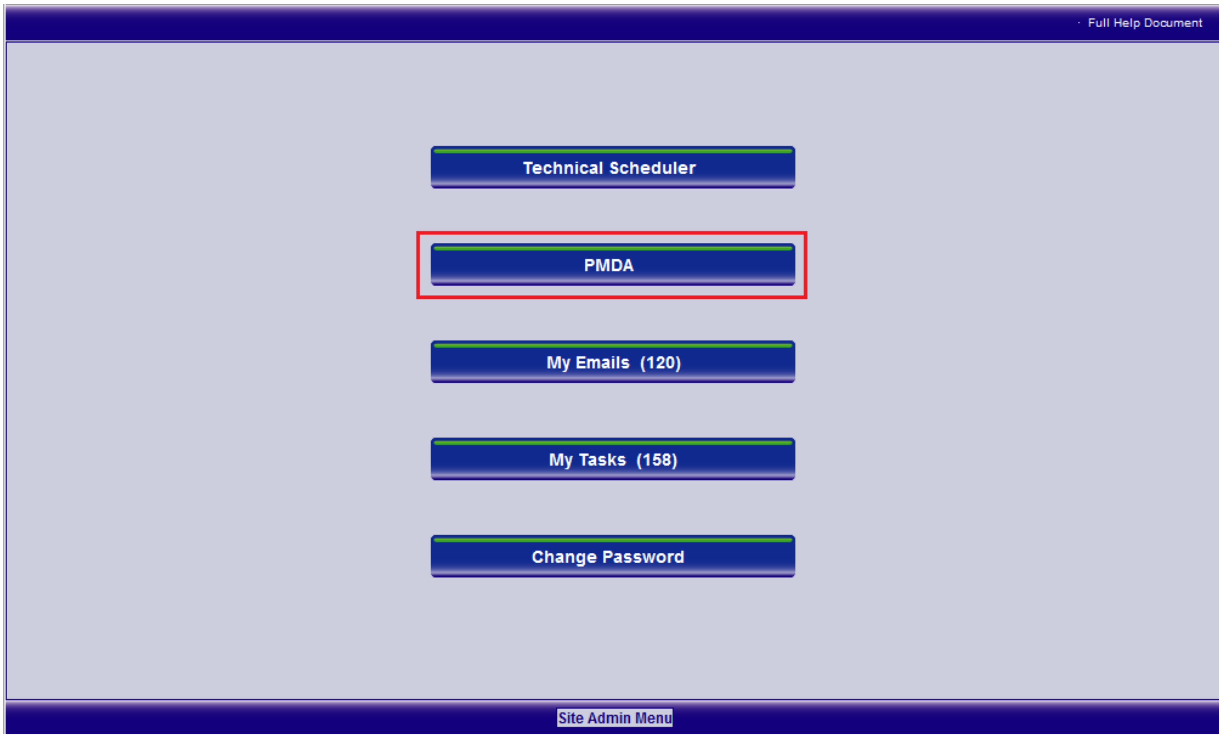
1. Click on the applicable edit icon in the list of hotels.
2. Edit the information as needed.
3. Click “Save”.

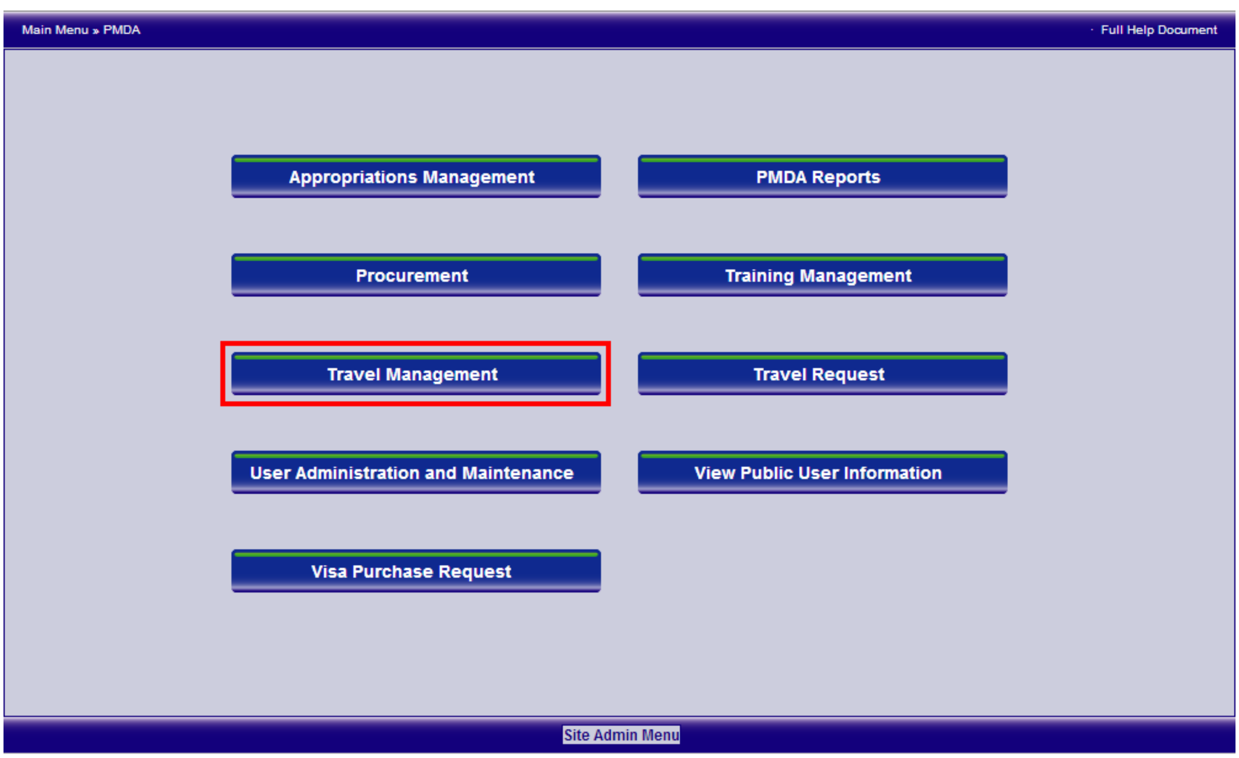


Note: Hotels can’t be deleted once saved as they are needed for historical data purposes.

Hotel Reservations

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





To edit the hotel reservations for that meeting:

- Click “Reserve”.

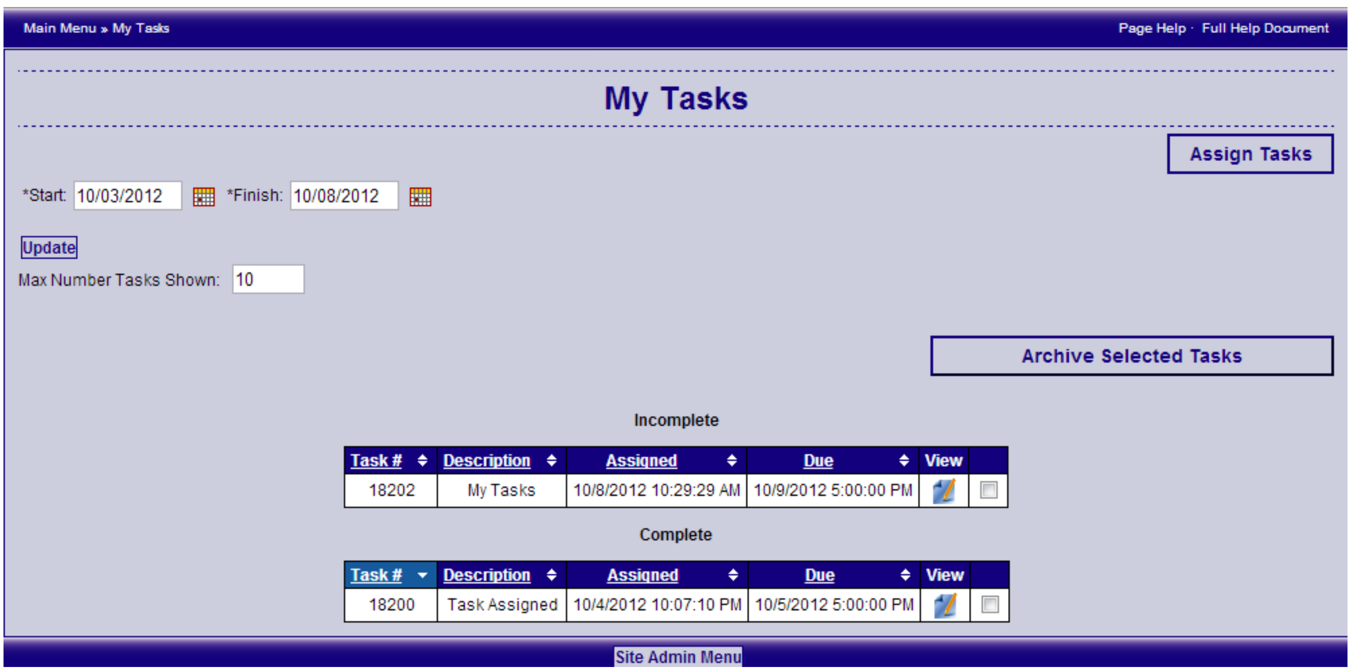
- Fill in the appropriate information for each member on the next page:
  1. Whether the member requires a reservation.
  2. Which hotel the reservation should be for.
  3. The check-in date.
  4. The check-out date.
  5. Confirmation number.
  6. Any other notes.
  7. Click “Save”.

Tasks

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

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

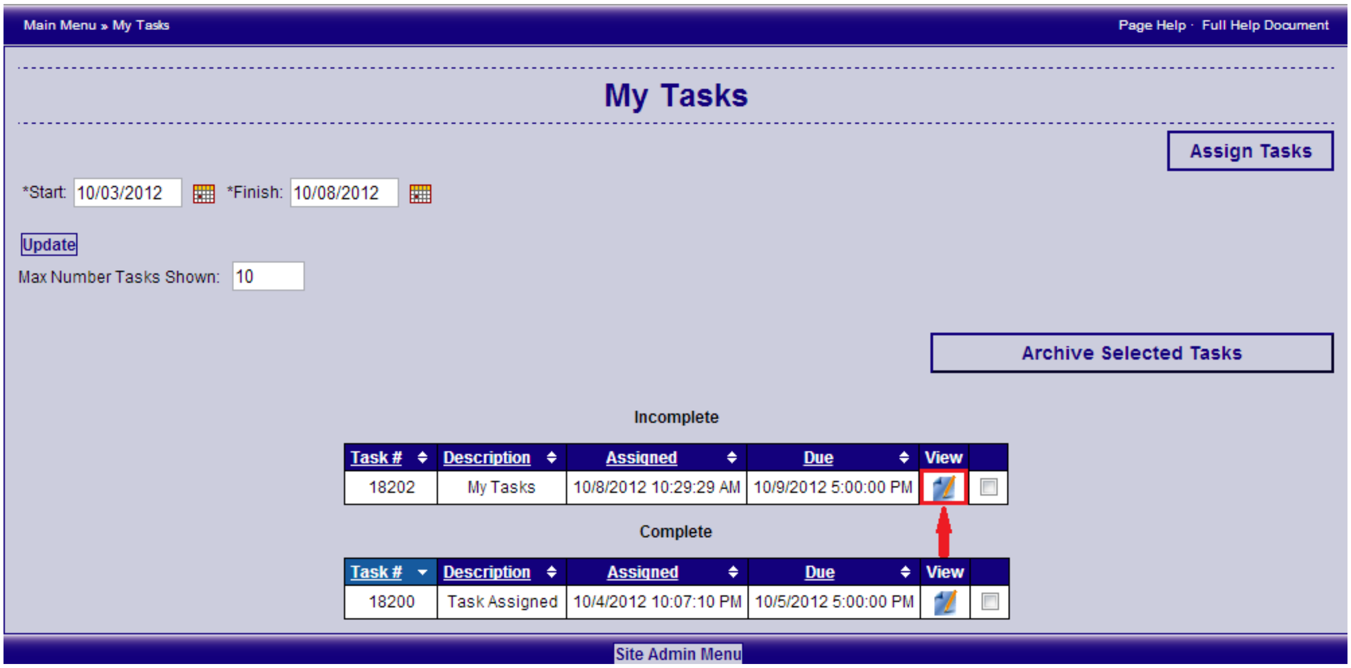
My Tasks Page



Each user has a list of all tasks they are responsible for, as well as a list of tasks they have completed (which haven't been archived).

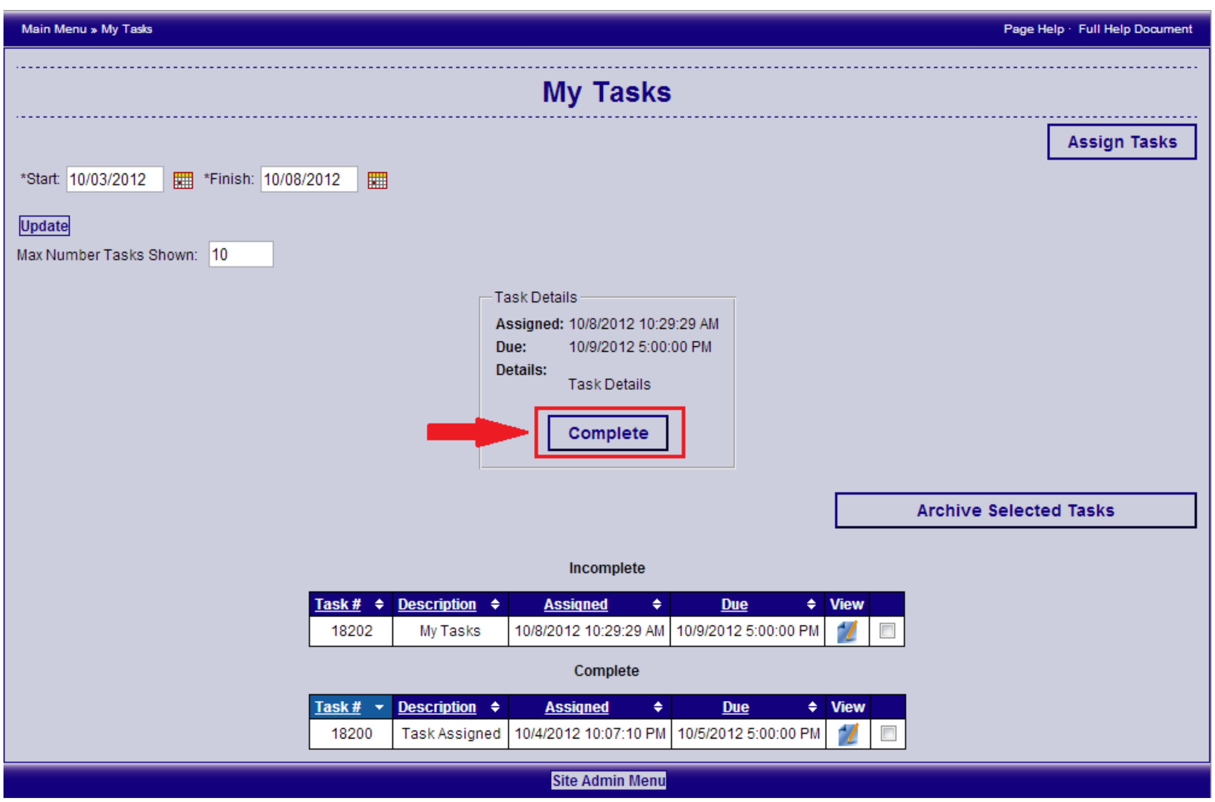
To view the details of a task:

- Click the edit icon.



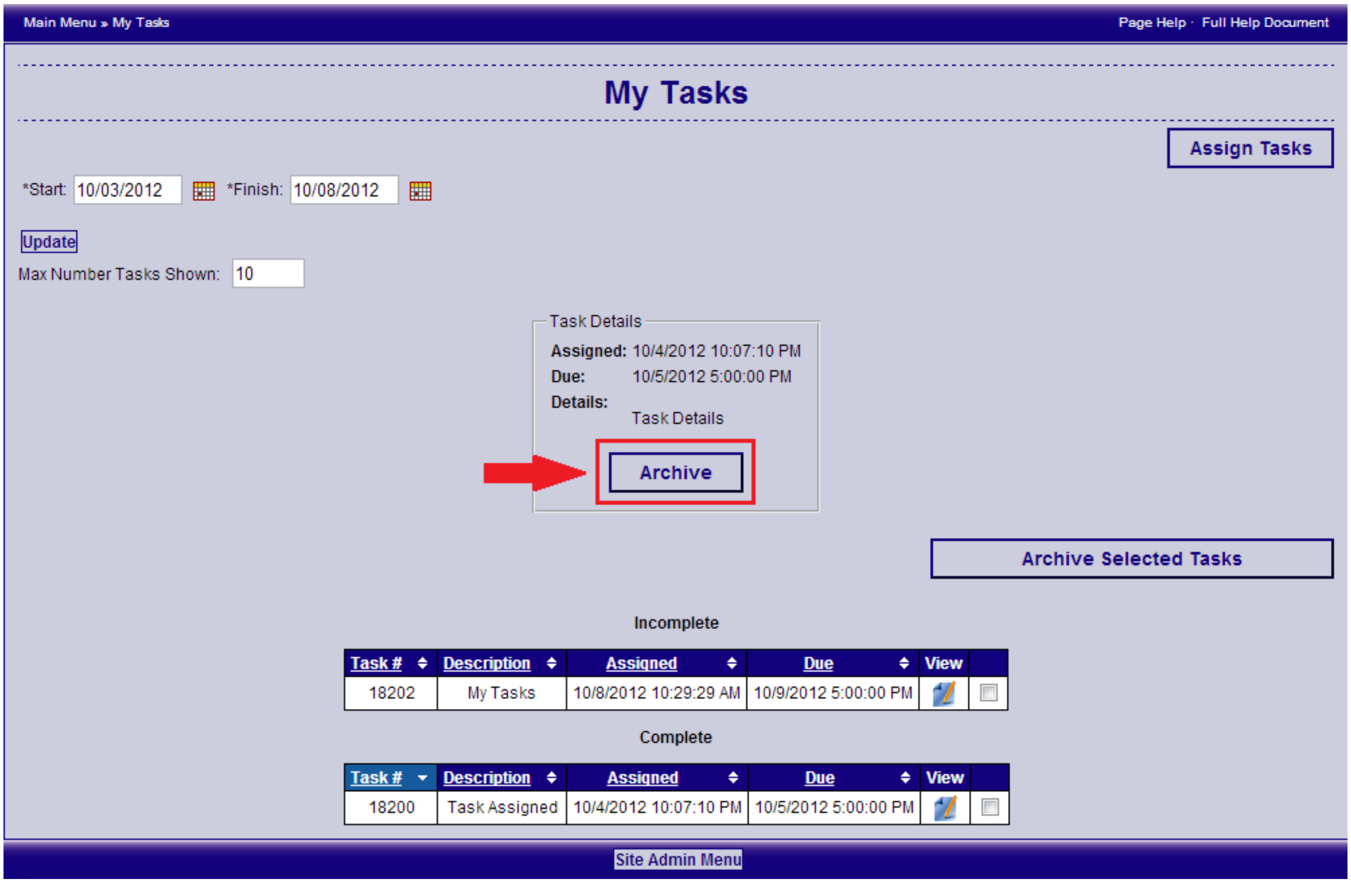
To mark an incomplete task as completed:

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



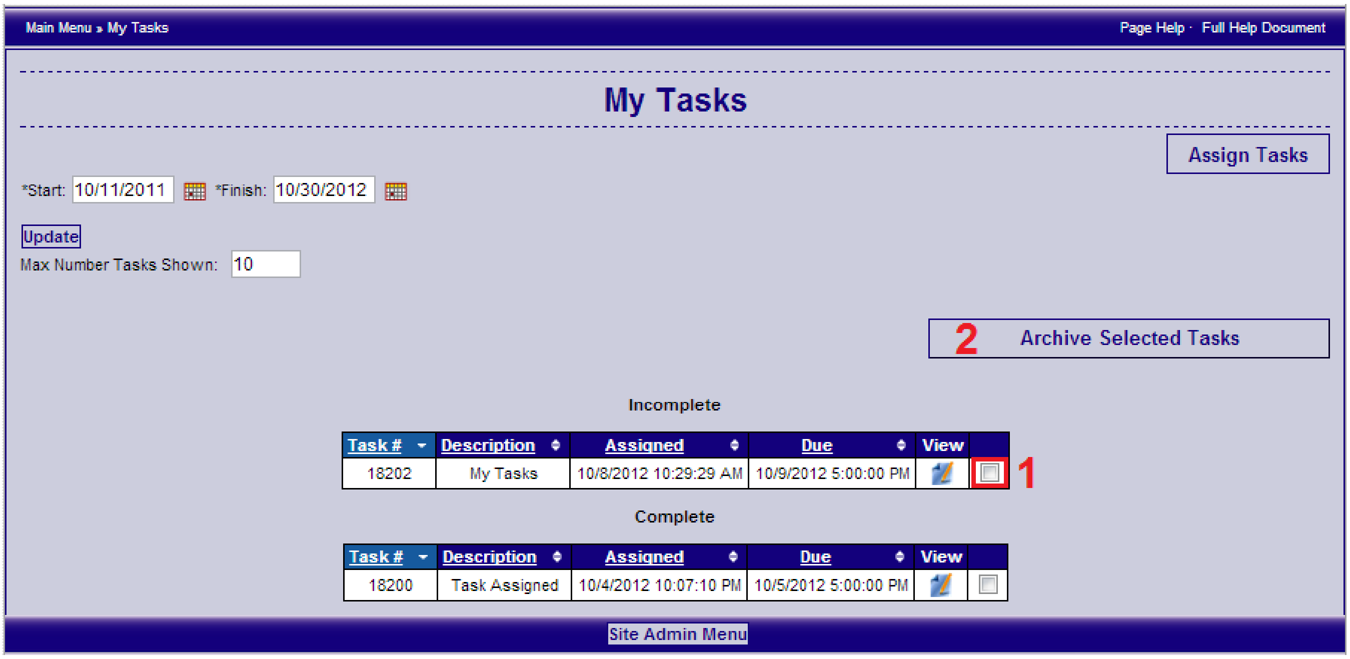
To archive a completed task:

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



Tasks may also be archived by:

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

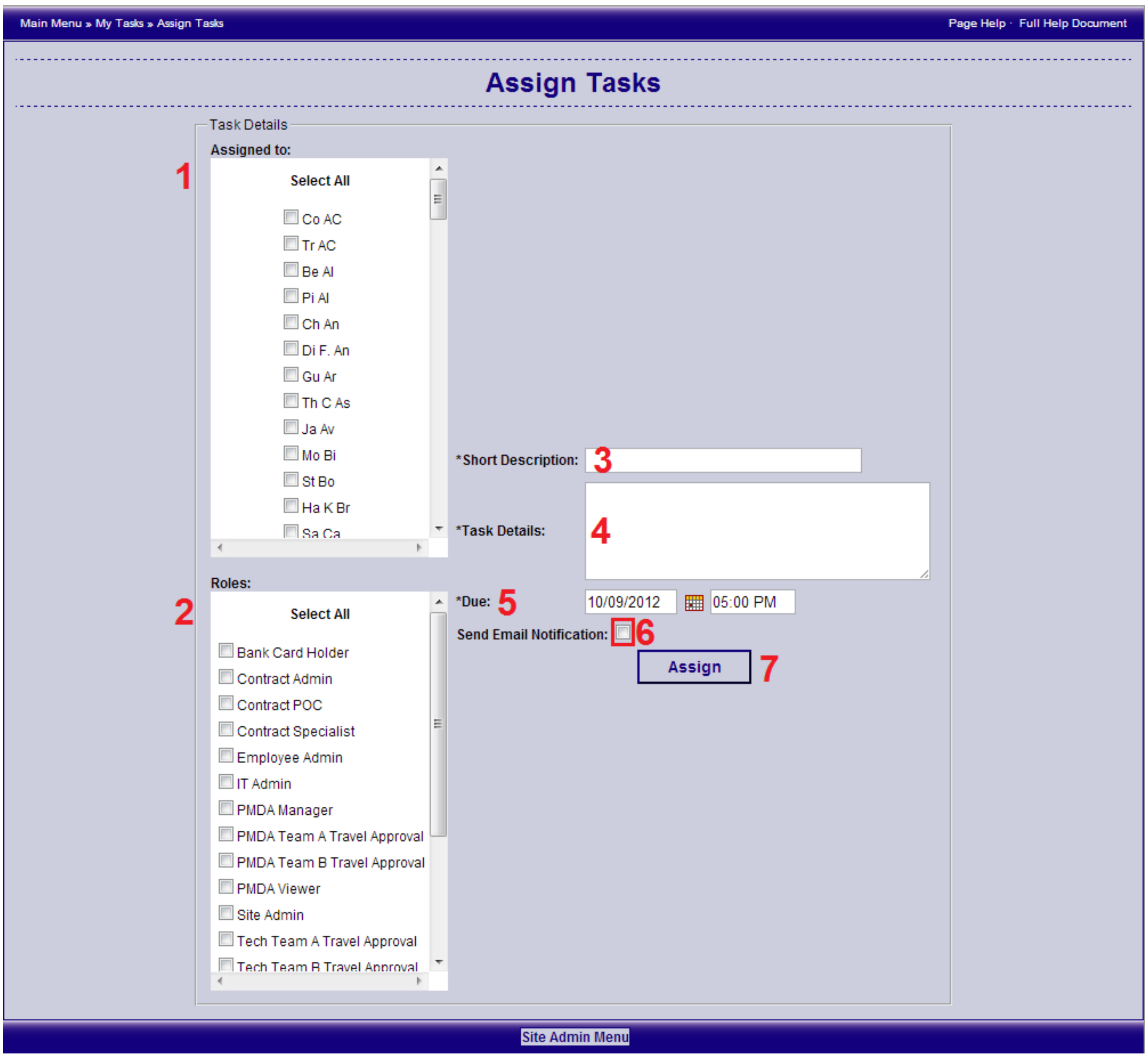


Assign Tasks

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

To assign a task:

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

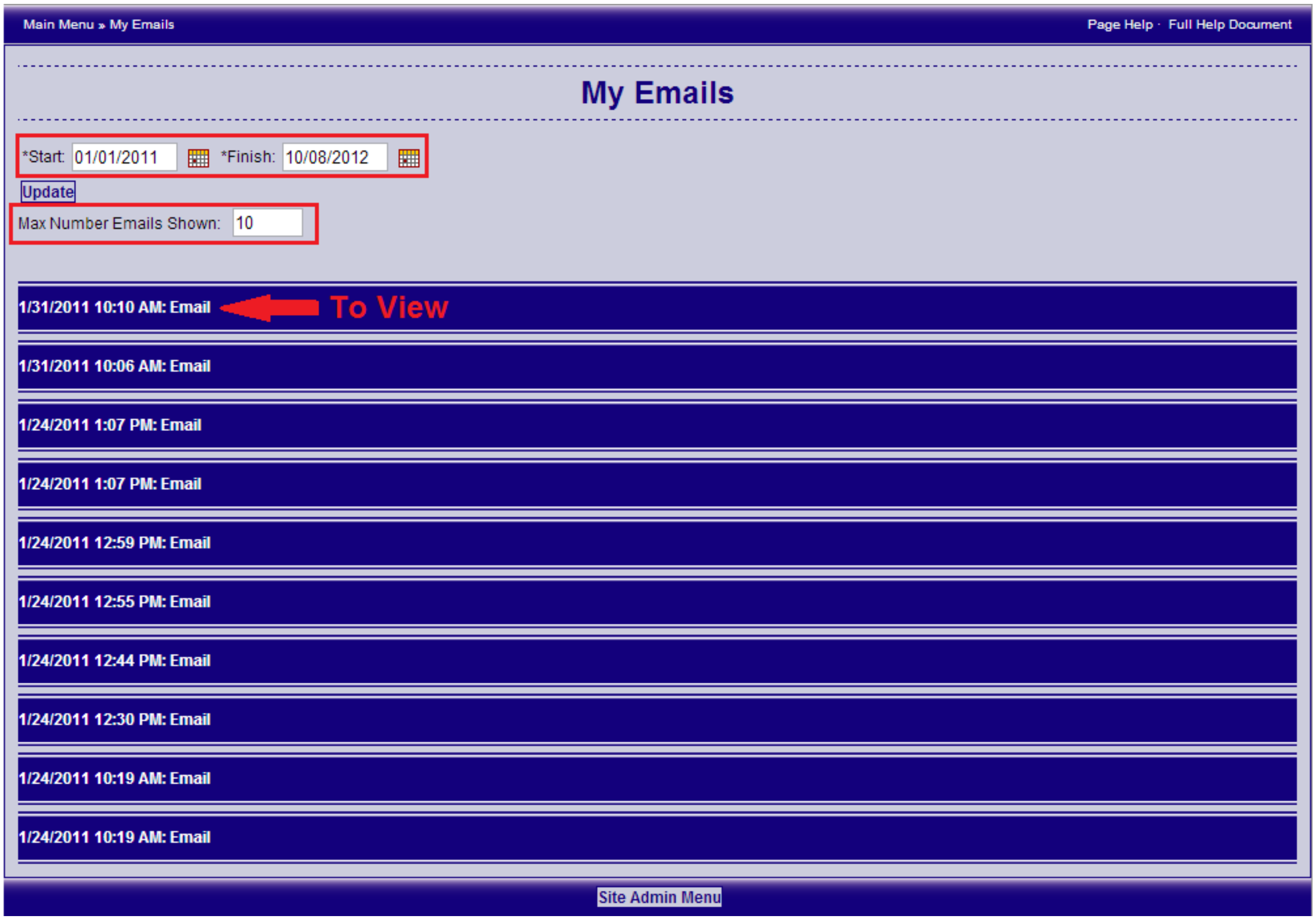


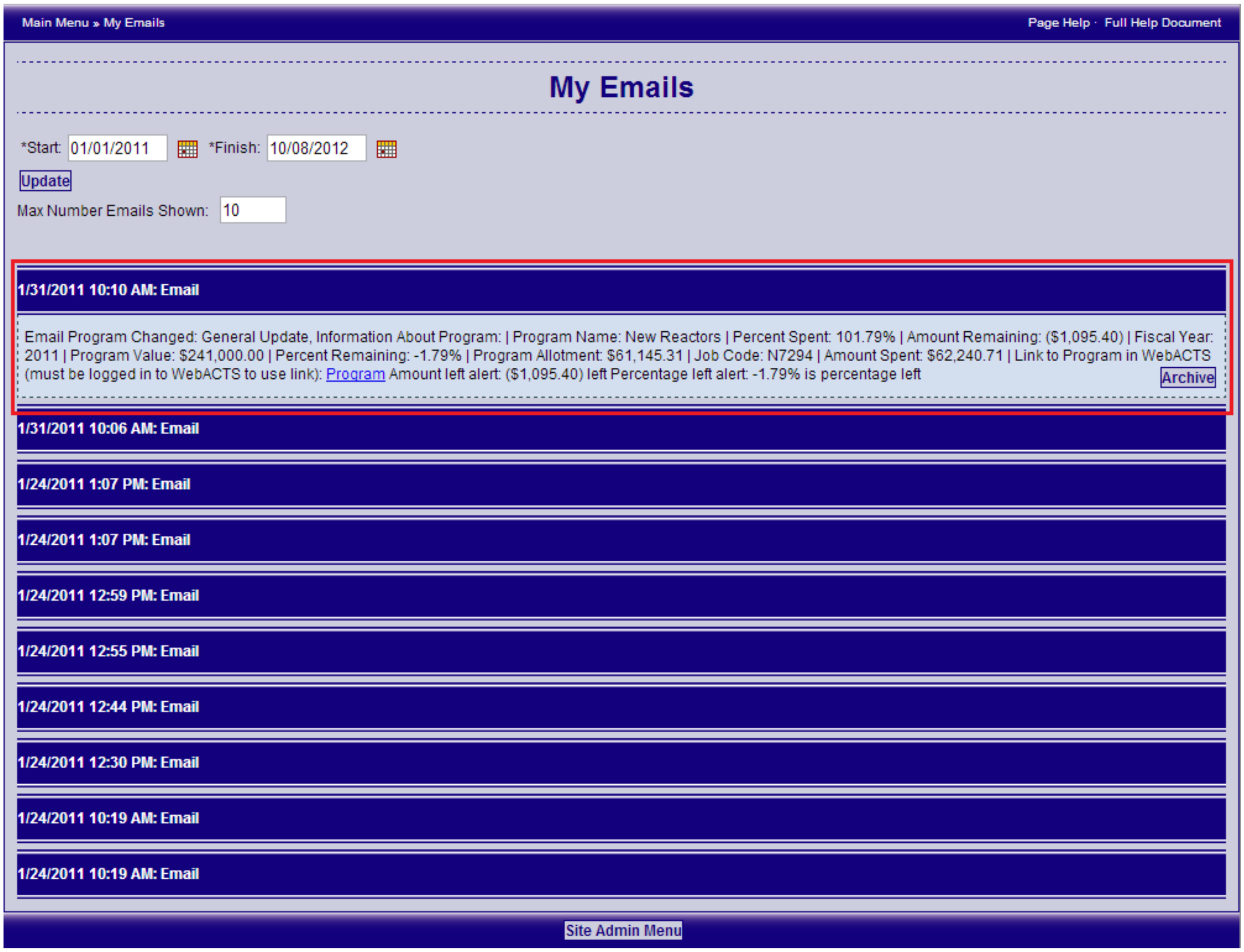
Emails

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.



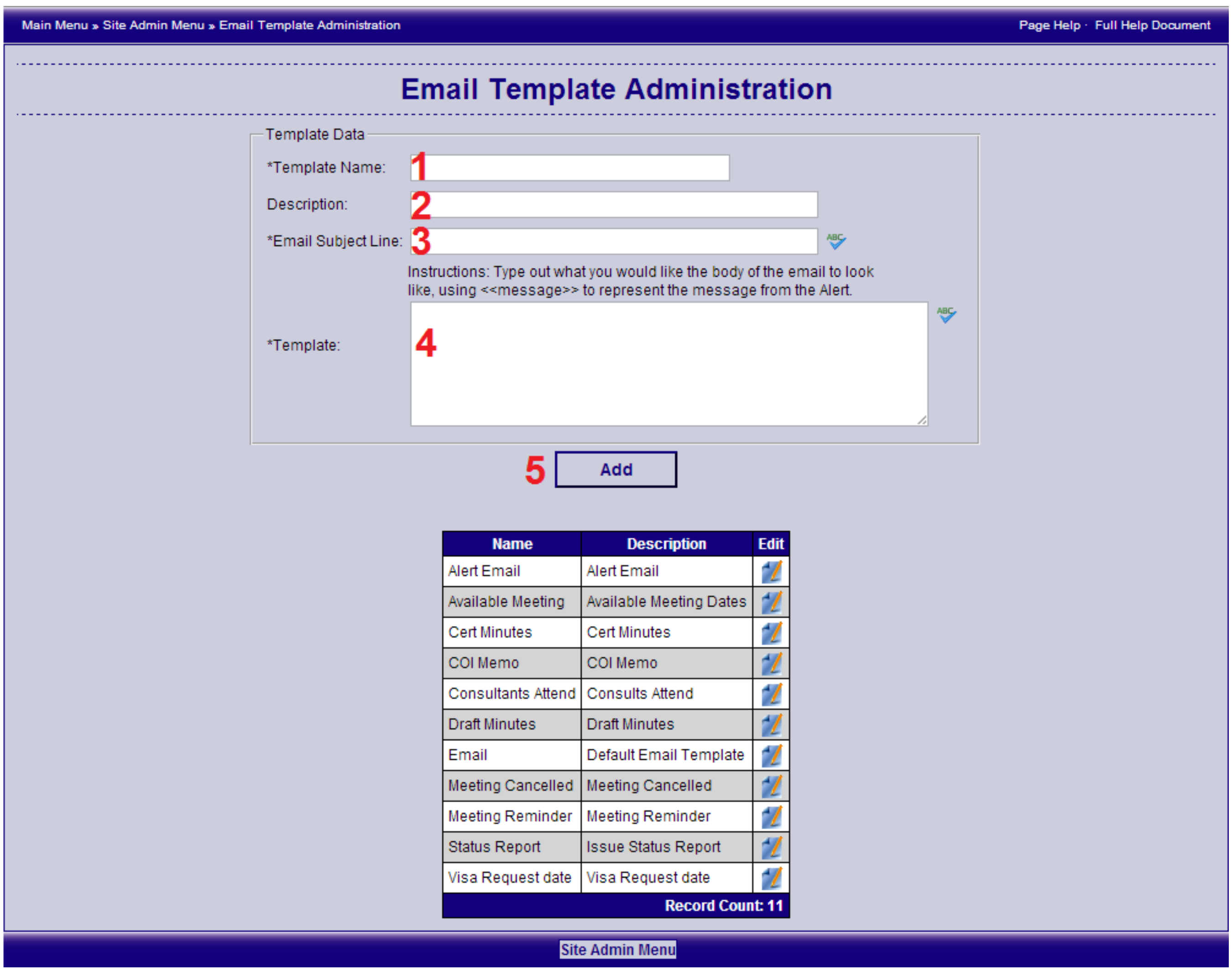

Main Menu » My Emails
Page Help · Full Help Document
My Emails
*Start: 01/01/2011 *Finish: 10/08/2012
Update
Max Number Emails Shown: 10
1/31/2011 10:10 AM: Email
Email Program Changed: General Update, Information About Program: | Program Name: New Reactors | Percent Spent: 101.79% | Amount Remaining: ($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.

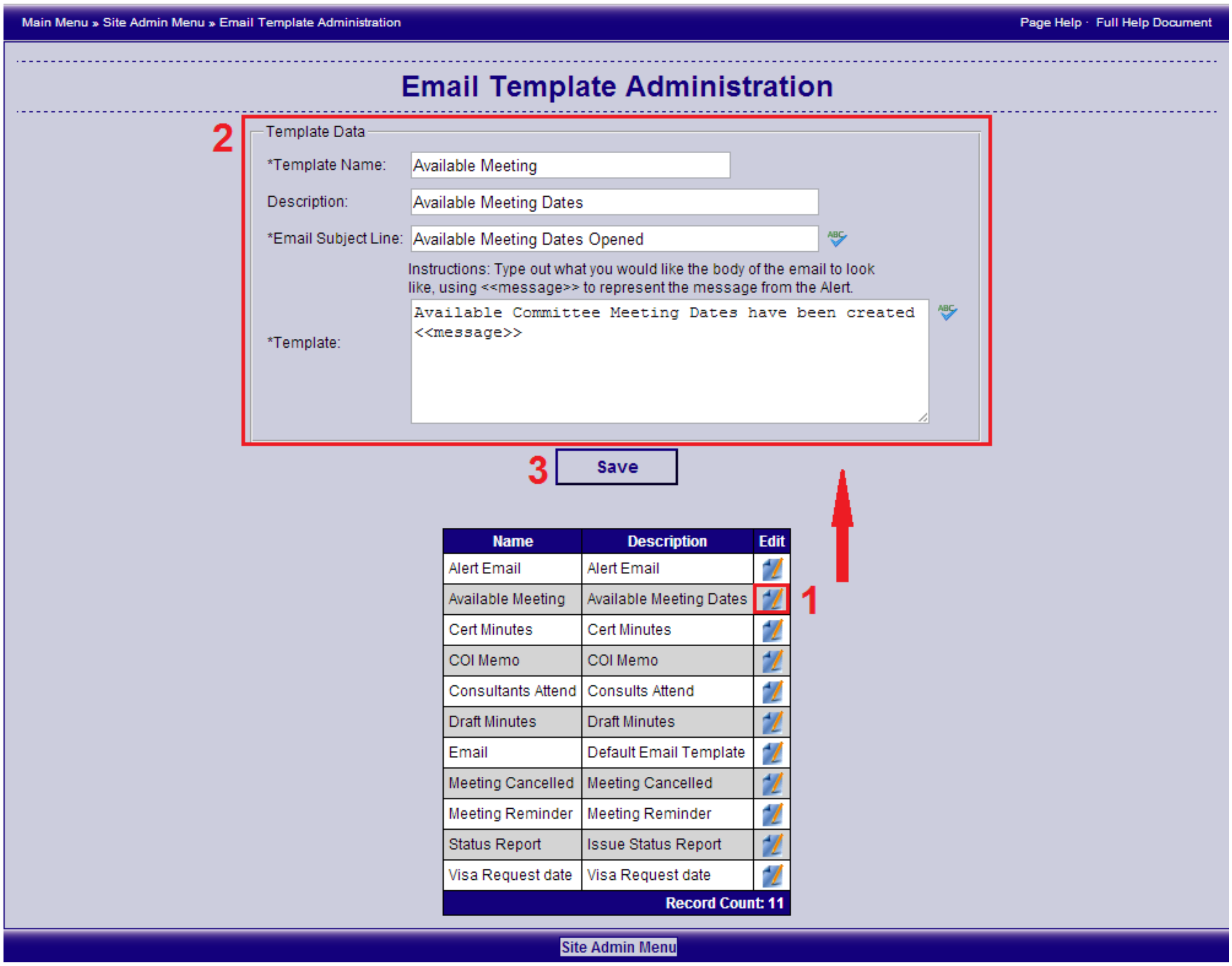
To add a new Email Template:

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”.



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”.



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.

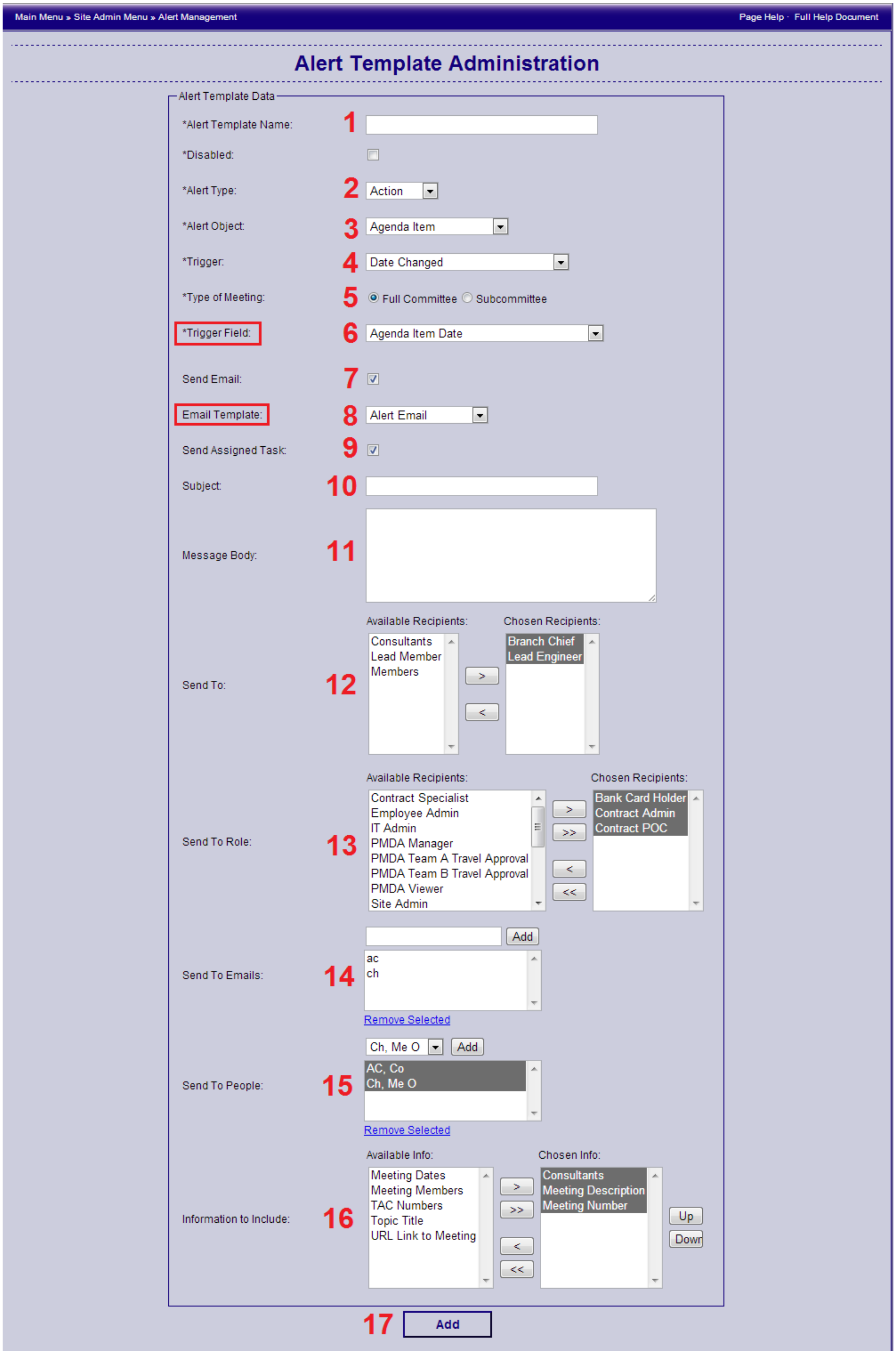
The “History Alert” type records a history of actions performed upon an entity so a record may be kept of those actions, and the data may be used throughout the system and in reports. For example, a History Alert may be recorded in the system whenever a Reserved Date is cancelled.

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.



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
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
Send To People:
15
Ch, Me O
Add
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
Up
Down
17
Add

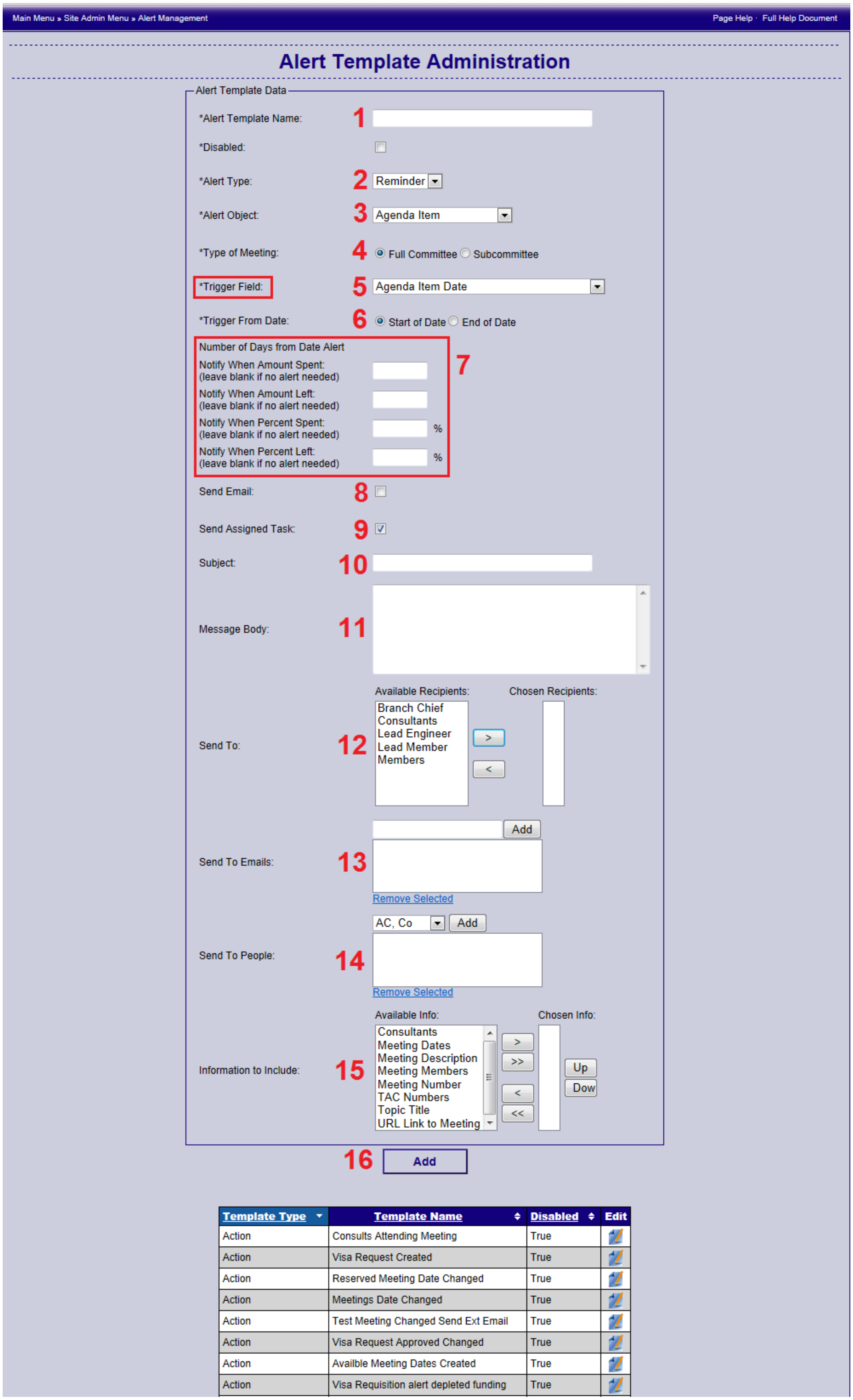
To edit or delete an existing Action Alert Template:

1. Click the edit icon next to the appropriate template.
2. Change the data as needed.
3. Click the “Save” or “Delete” button.

Updated: November 2012

Reminder Alert Template:
To add a new Reminder Alert Template:

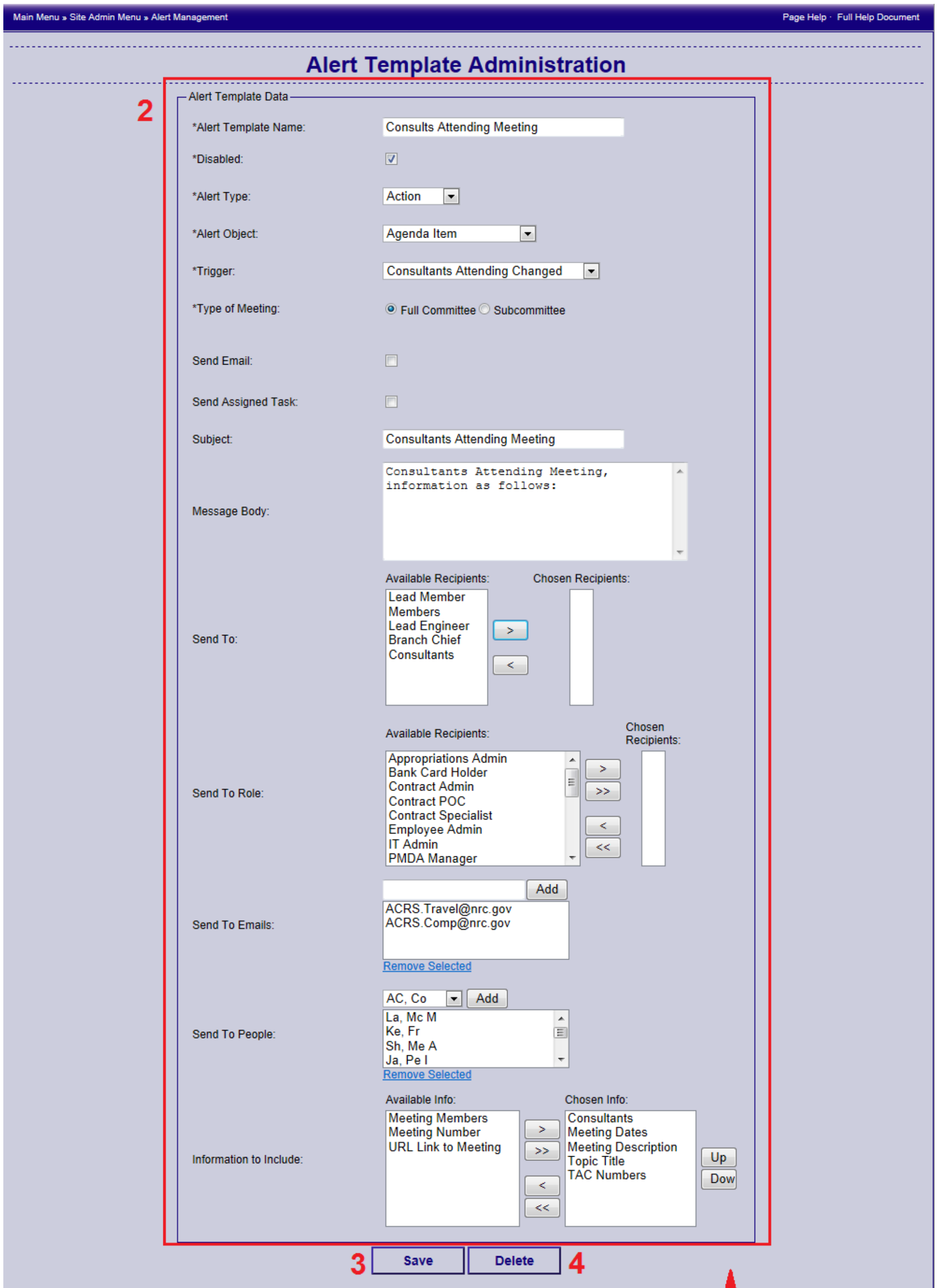
1. Enter an Alert Template name.
2. Choose “Reminder” as the alert type.
3. Choose the object the alert will act upon: Agenda Item, Reserved Meeting Date, or Hotel Reservation.
4. Choose the type of meeting the object applies to: Full Committee or Subcommittee. This will update the names of trigger fields, 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.



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:

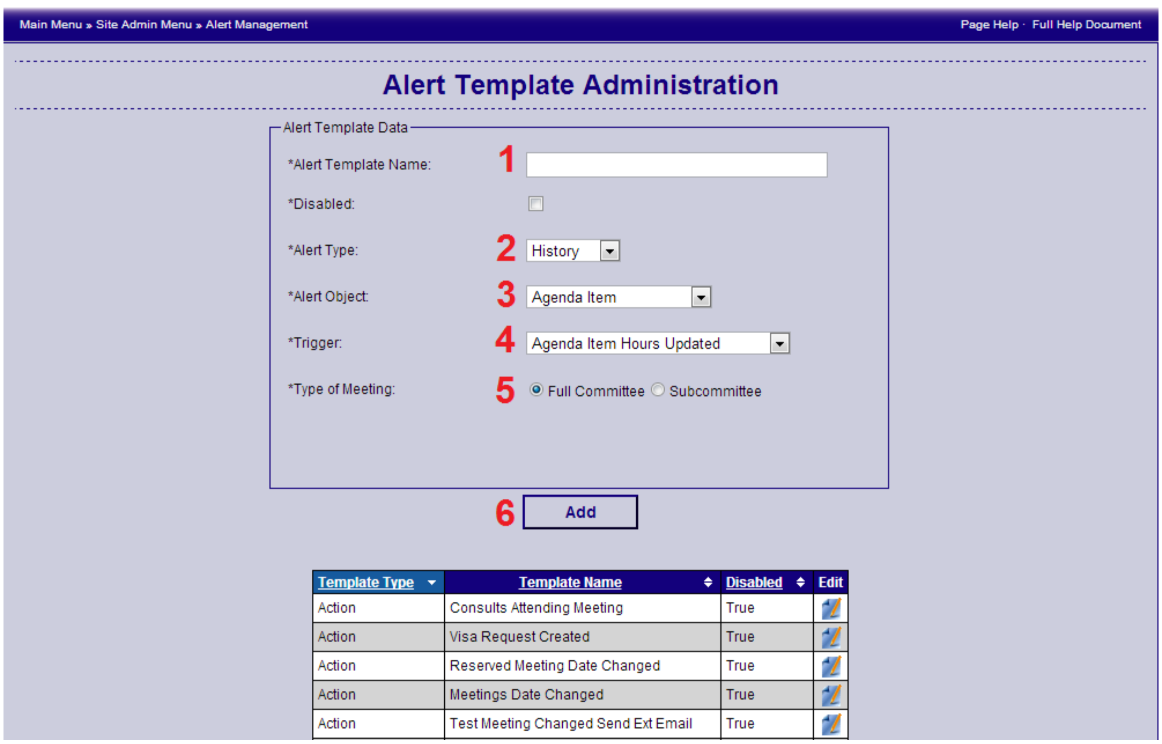
1. Click the edit icon next to the appropriate template.
2. Change the data as needed.
3. Click the “Save” or “Delete” button.



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	

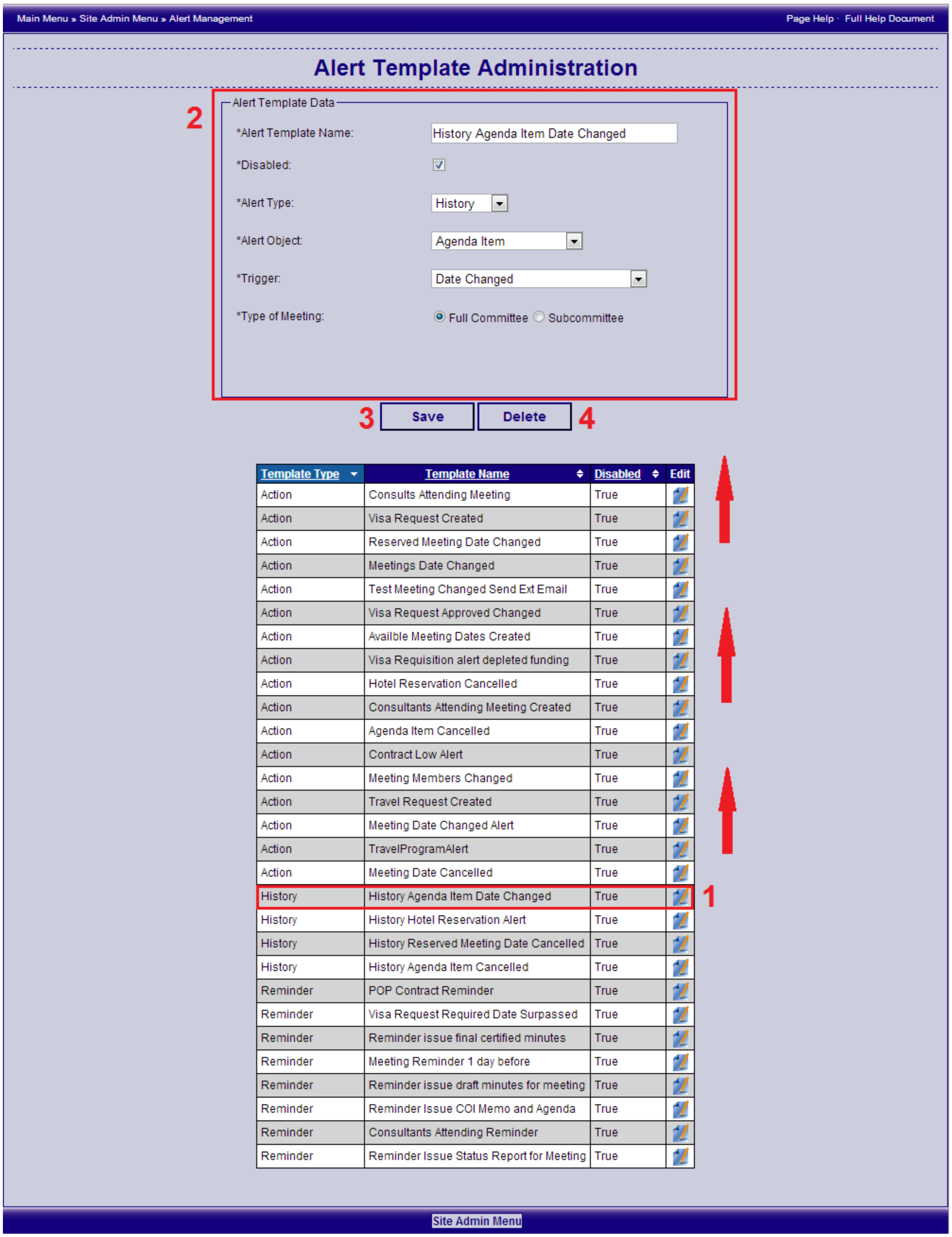
History Alert Template:
To add a new History Alert Template:

1. Enter an alert template name.
2. Choose “History” as the alert type.
3. Choose the object the alert will act upon: Agenda Item, Reserved Meeting Date, or Hotel Reservation.
4. Choose the trigger the alert will be sent upon. Each object has trigger fields specific to it. For example, Agenda Item has “Agenda Item Hours Updated” and “Lead Engineer Changed”.
5. Choose the type of meeting the object applies to: Full Committee or Subcommittee. This will update the names of trigger fields, as different types of meetings may carry different names for their data fields.
   When choosing certain triggers, such as date related triggers, the “Trigger Field” control will become visible. If it is visible, choose a trigger field, such as “Agenda Item Date” or “Reserved Meeting Date”. This will indicate which time-dependent field the alert is to be triggered from.
6. Click the “Add” button.



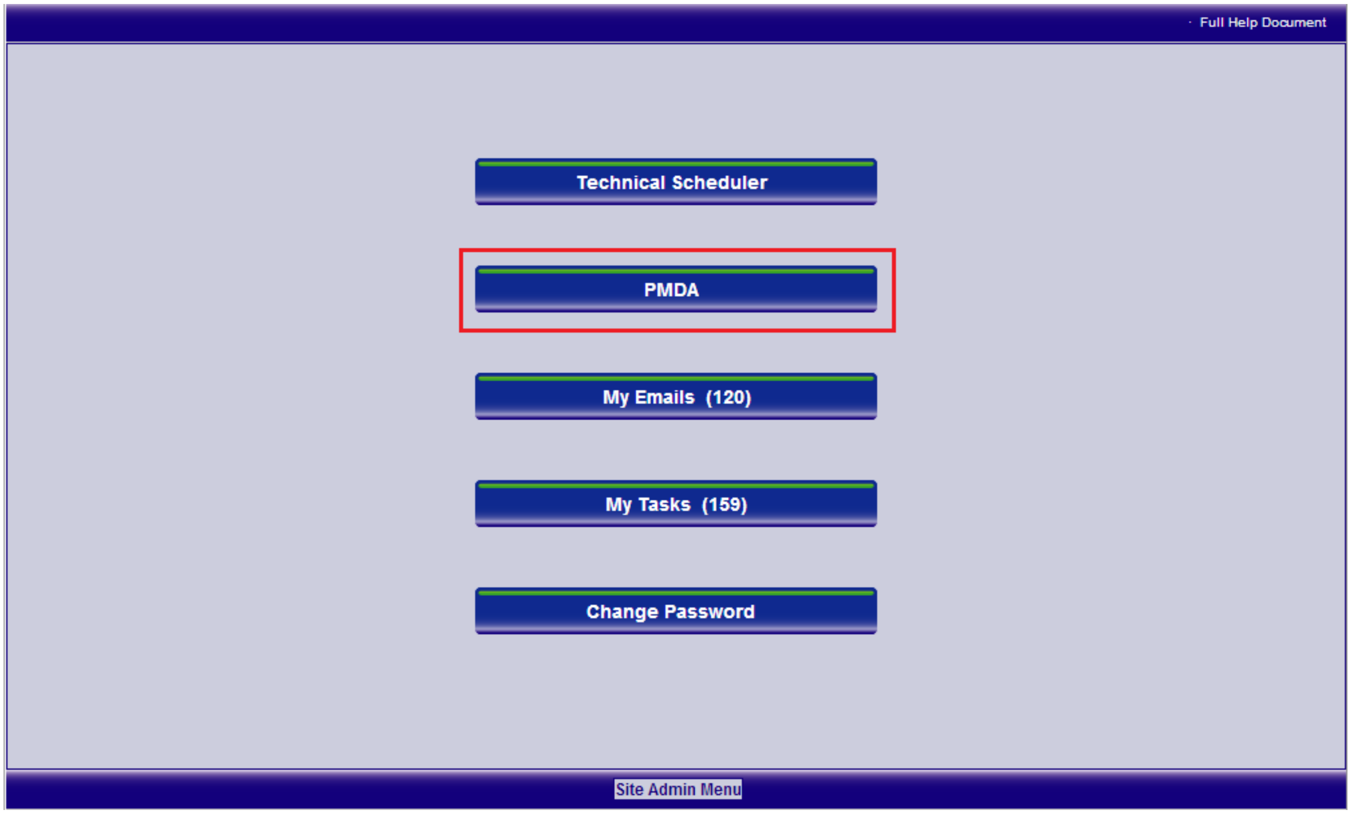
To edit or delete an existing History Alert Template:

1. Click the edit icon next to the appropriate template.
2. Change the data as needed.
3. Click the “Save” or “Delete” button.



WebACTs PMDA Module

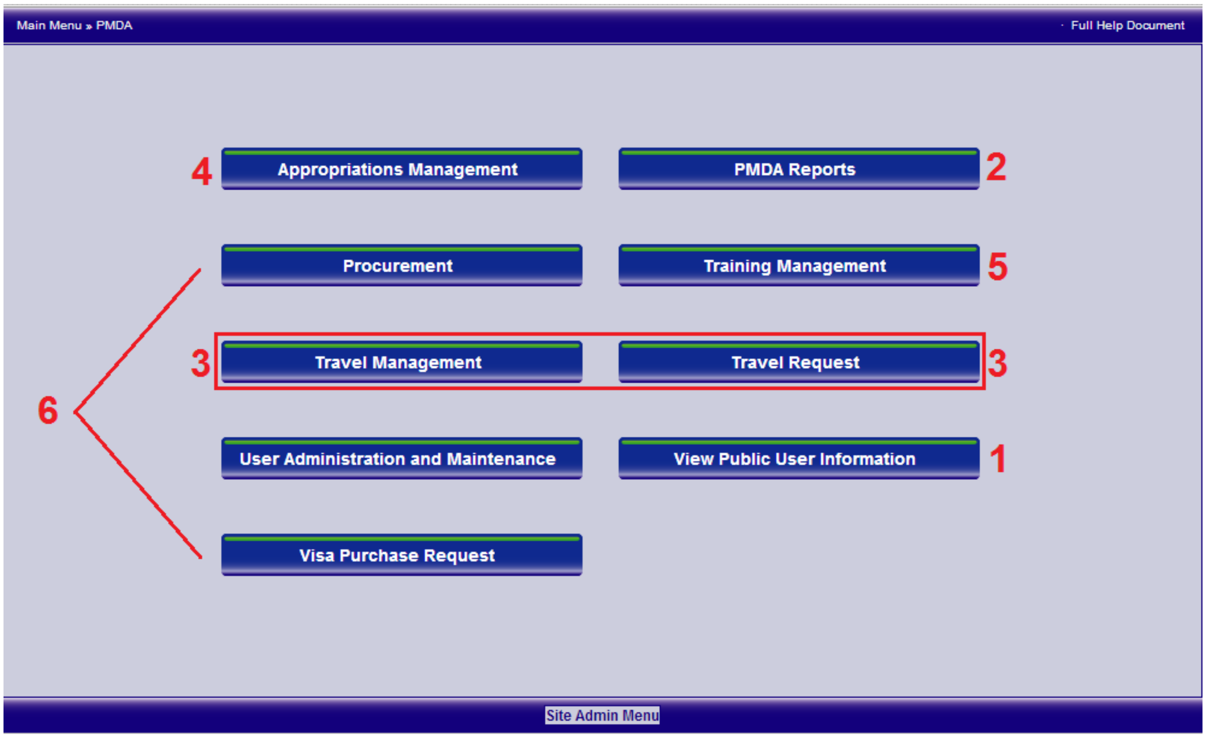
The PMDA section of WebACTs is reached via the PMDA button on the home menu.



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

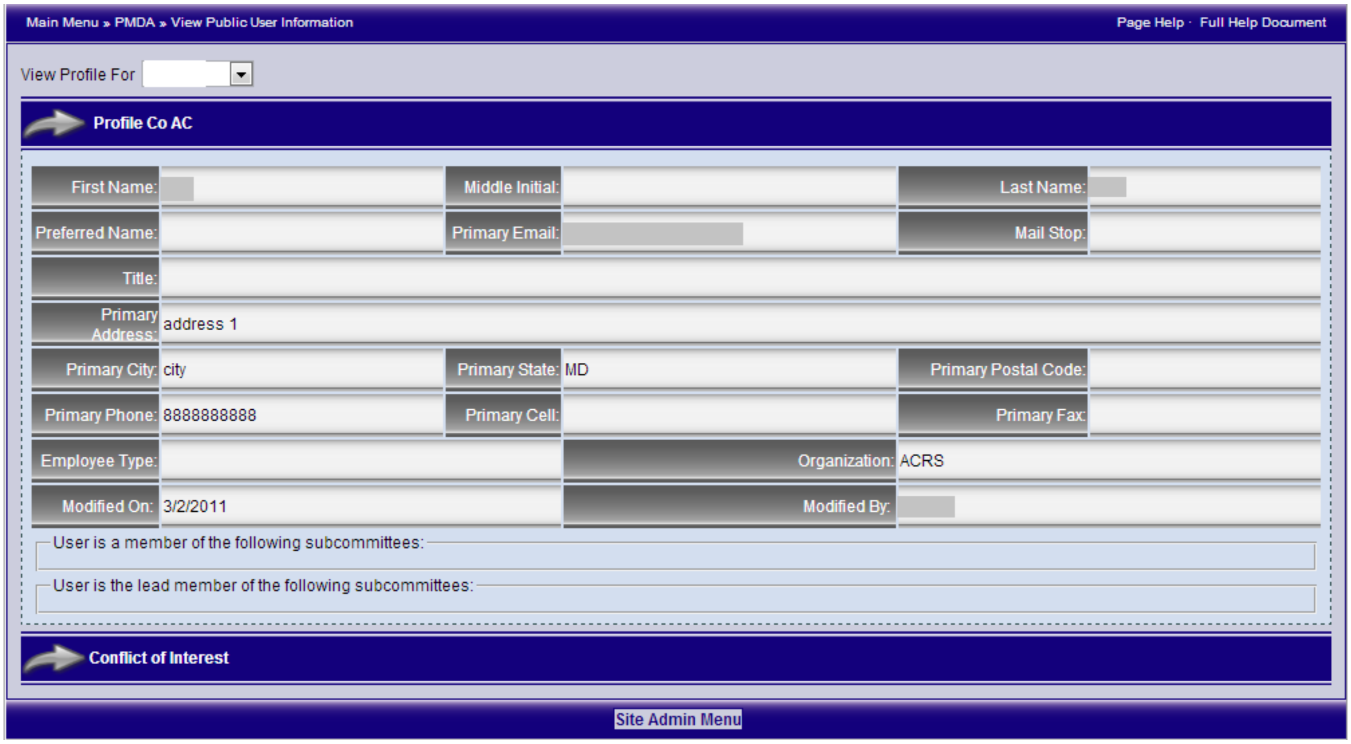
1) Public user data
2) Reports
3) Travel Management, including:
    a. Hotels and Hotel Reservations
    b. Travel Requests
    c. Travel Records
    d. Travel Reservation Meeting List
4) Appropriations Management
5) Training Management
6) Procurement Management, including:
    e. Contracts
    f. Visa requests and requisitions

Here is the main PMDA menu:

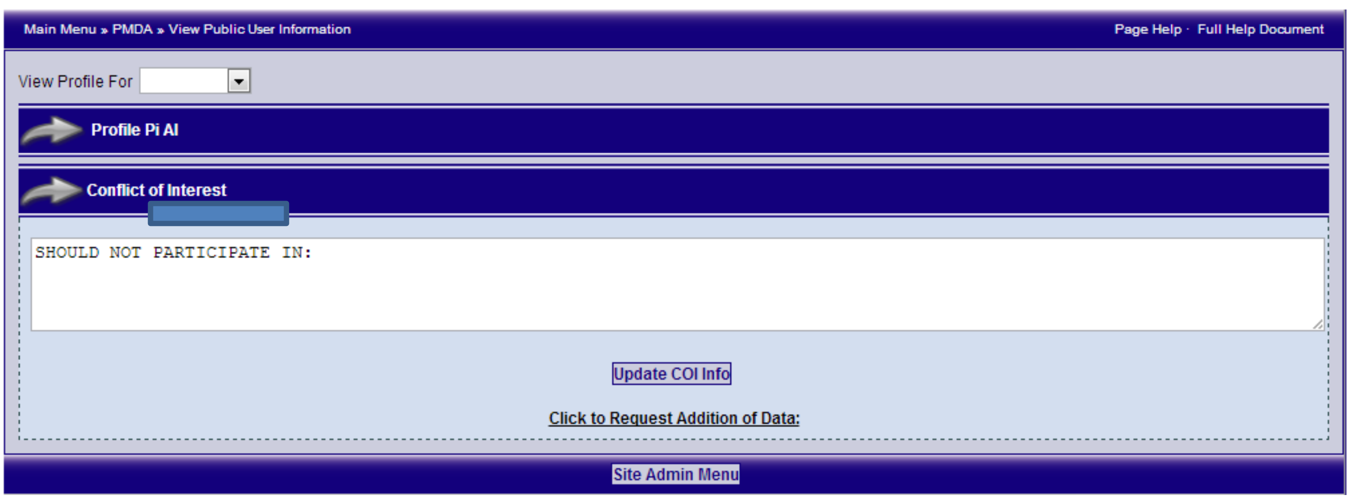


View Public User Information

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



A person's conflict of interest data is also included on this screen, as well as a link to request additions/corrections to be made.



To request additions/corrections:

1) Click on "Click to Request Addition of Data".
2) Select who the request is to be sent to.
3) Fill in the request.
4) Click "Send Request".

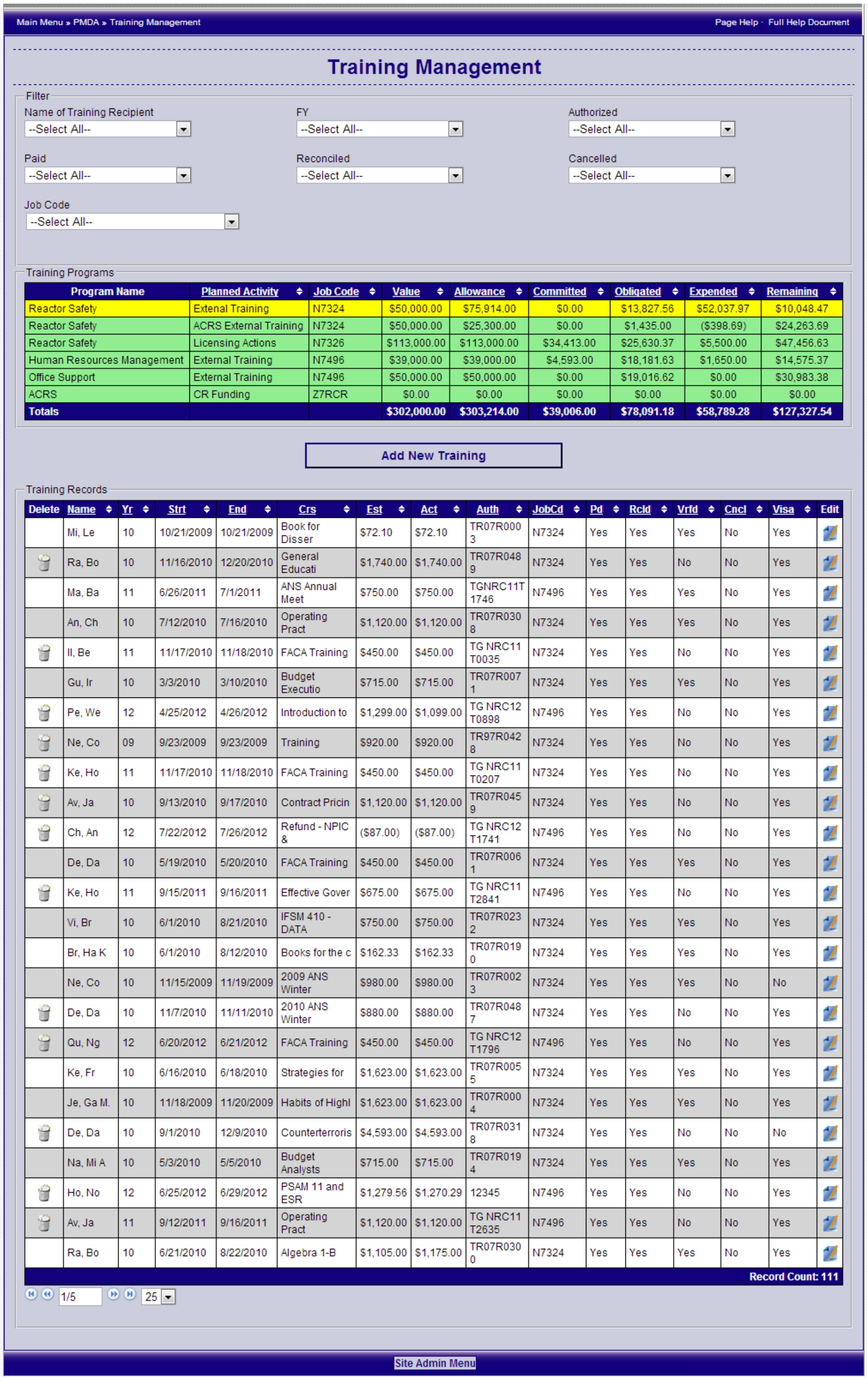
If your permissions allow, the "Update COI Info" option will be available, allowing you to edit the COI Information without sending a request.

PMDA Reports

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

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.



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
Totals			**$302,000.00**	**$303,214.00**	**$39,006.00**	**$78,091.18**	**$58,789.28**	**$127,327.54**

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	
	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 NRC11 T0035	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 NRC12 T0898	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 NRC11 T0207	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 NRC12 T1741	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 NRC11 T2841	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 NRC12 T1796	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 NRC11 T2635	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	

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--

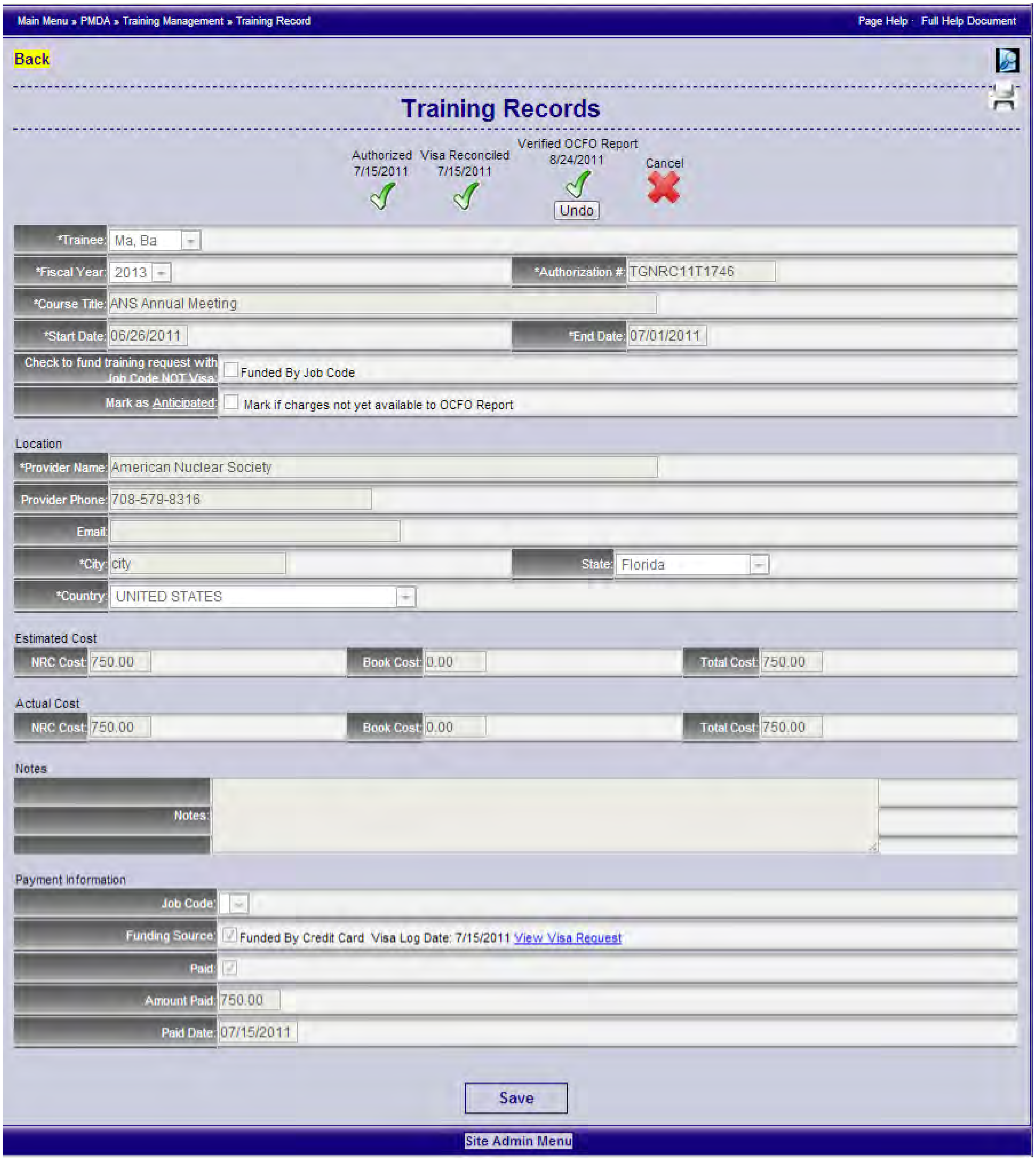
Training Programs

Program Name	Planned Activity	Job Code	Value	Allowance	Committed	Obligated	Expended	Remaining
Reactor Safety	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
Totals			**$302,000.00**	**$303,214.00**	**$39,006.00**	**$78,091.18**	**$58,789.28**	**$127,327.54**

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		
	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	


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

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 Job Code NOT Visa:	Funded By Job Code		
Mark as Anticipated:	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:	Funded By Credit Card Visa Log Date: 7/15/2011 View Visa Request
Paid:	
Amount Paid:	750.00
Paid Date:	07/15/2011

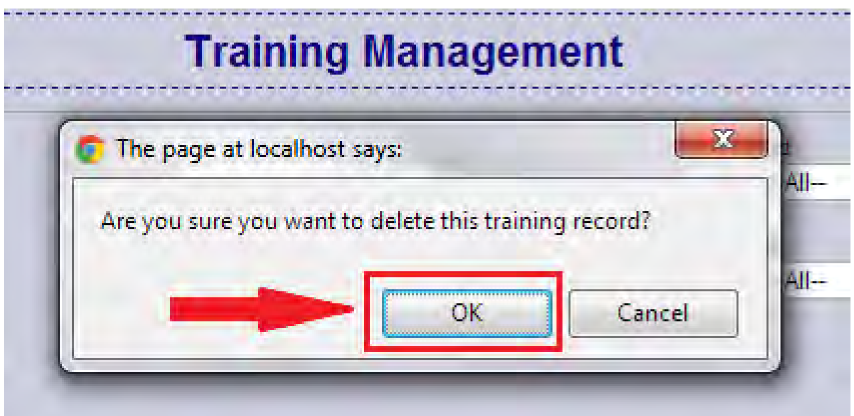
Save

Site Admin Menu

3) To delete the training record, click on the trash icon to the left (this icon will only display if the record is able to be deleted).

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
Totals			$302,000.00	$303,214.00	$39,006.00	$78,091.18	$58,789.28	$127,327.54

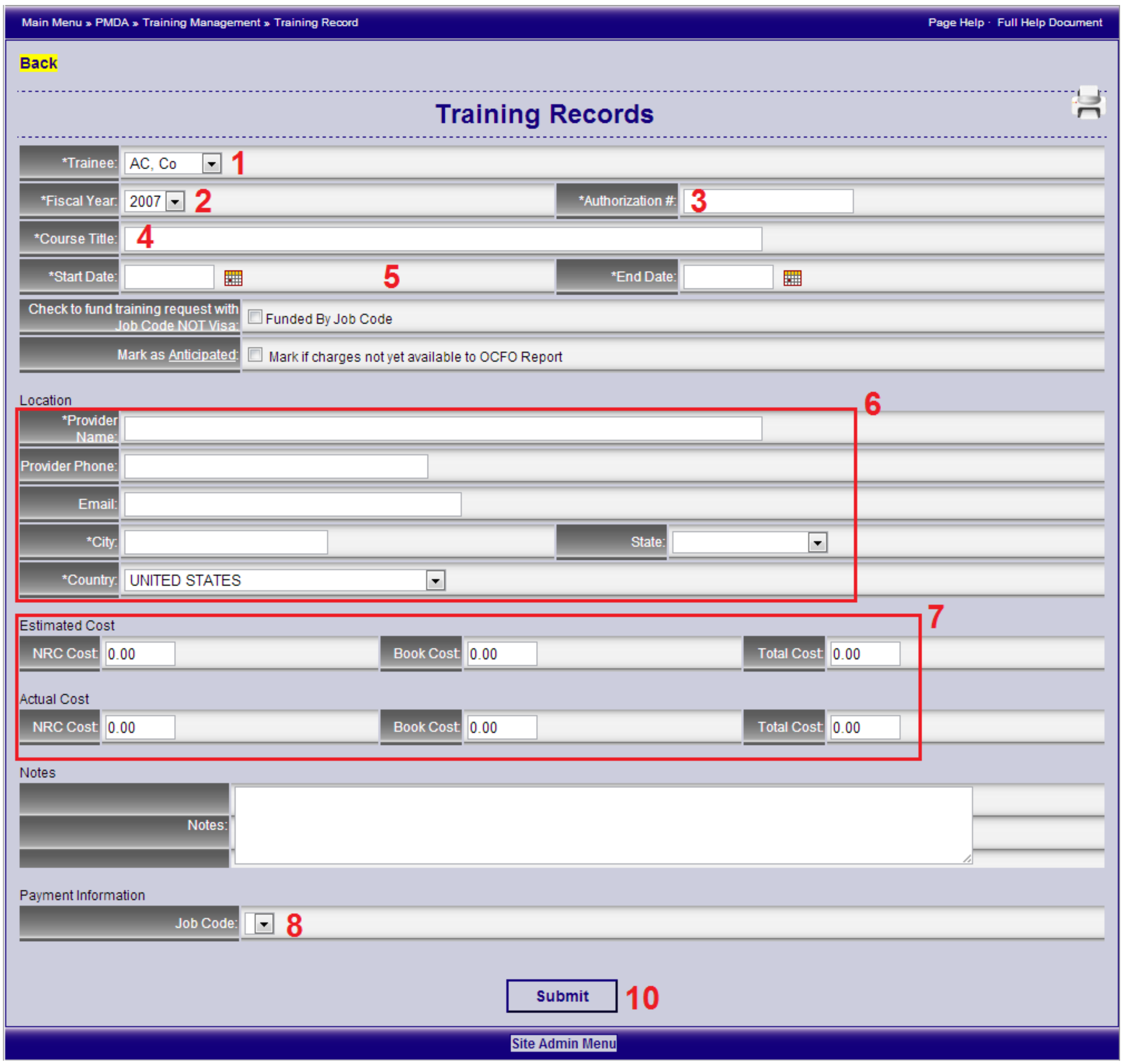
Delete	Name	Yr	Strt	End	Crs	Est	Act	Auth	JobCd	Pd	Rcld	Vrfd	Cncl	Visa	Edit
	Mi, Le	10	10/21/2009	10/21/2009	Book for Disser	$72.10	$72.10	TR07R0003	N7324	Yes	Yes	Yes	No	Yes	
		10	11/16/2010	12/20/2010	General Educati	$1,740.00	$1,740.00	TR07R0489	N7324	Yes	Yes	No	No	Yes	
	Ma, Ba	11	6/26/2011	7/1/2011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



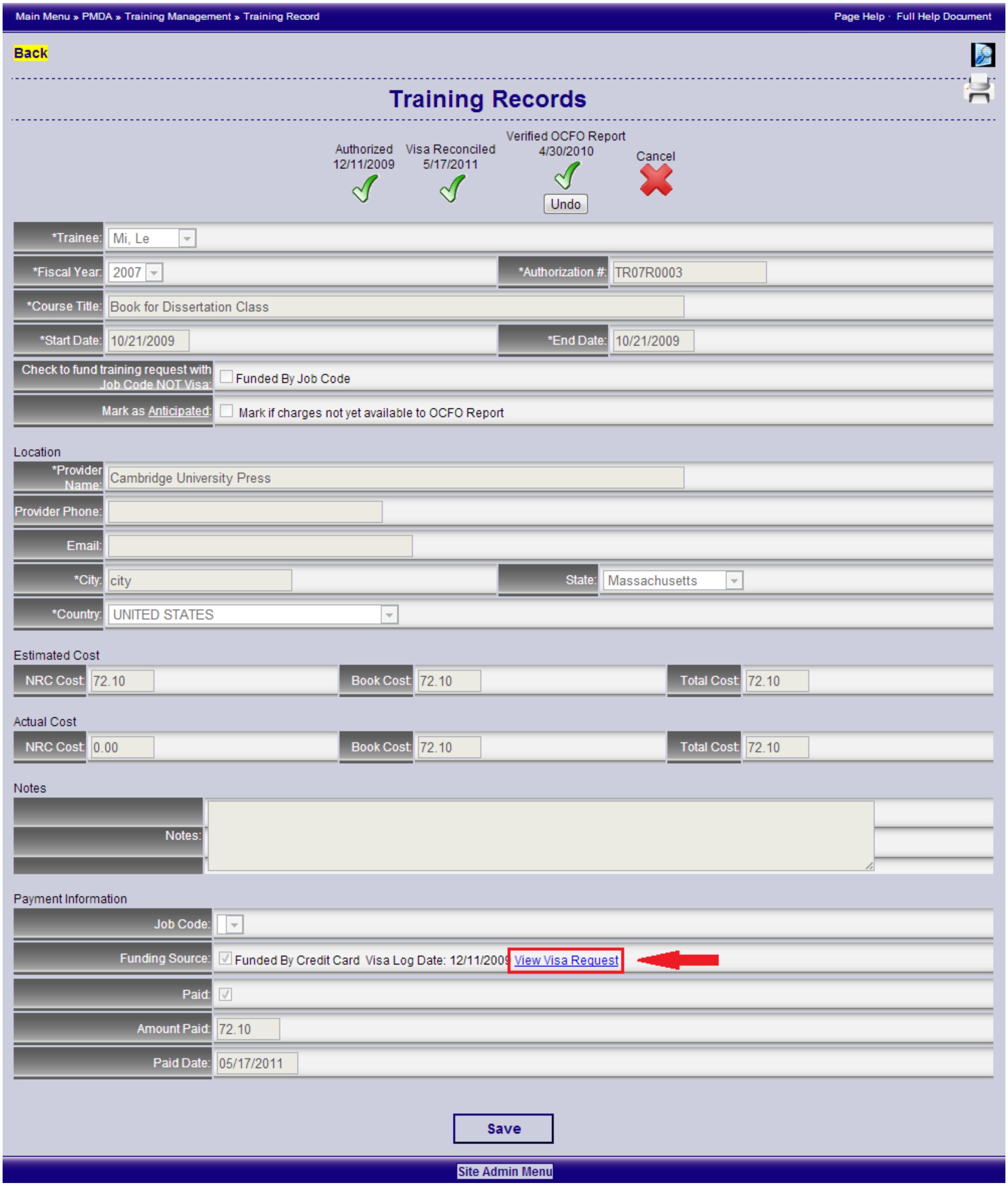
Adding a New Training Record

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".



Depending on the cost of the training record, it may automatically be authorized and reconciled, thus pulling its expenses directly from the Job Code budget, or it might need to go through the Visa Request approval process. To view the associated Visa Request created, click on the “View Visa Request” link on the Training Screen.



As the applicable steps of the Visa Request process are completed, the appropriate step in the training record should be marked as complete in the sequence steps at the top of the page.

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

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

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

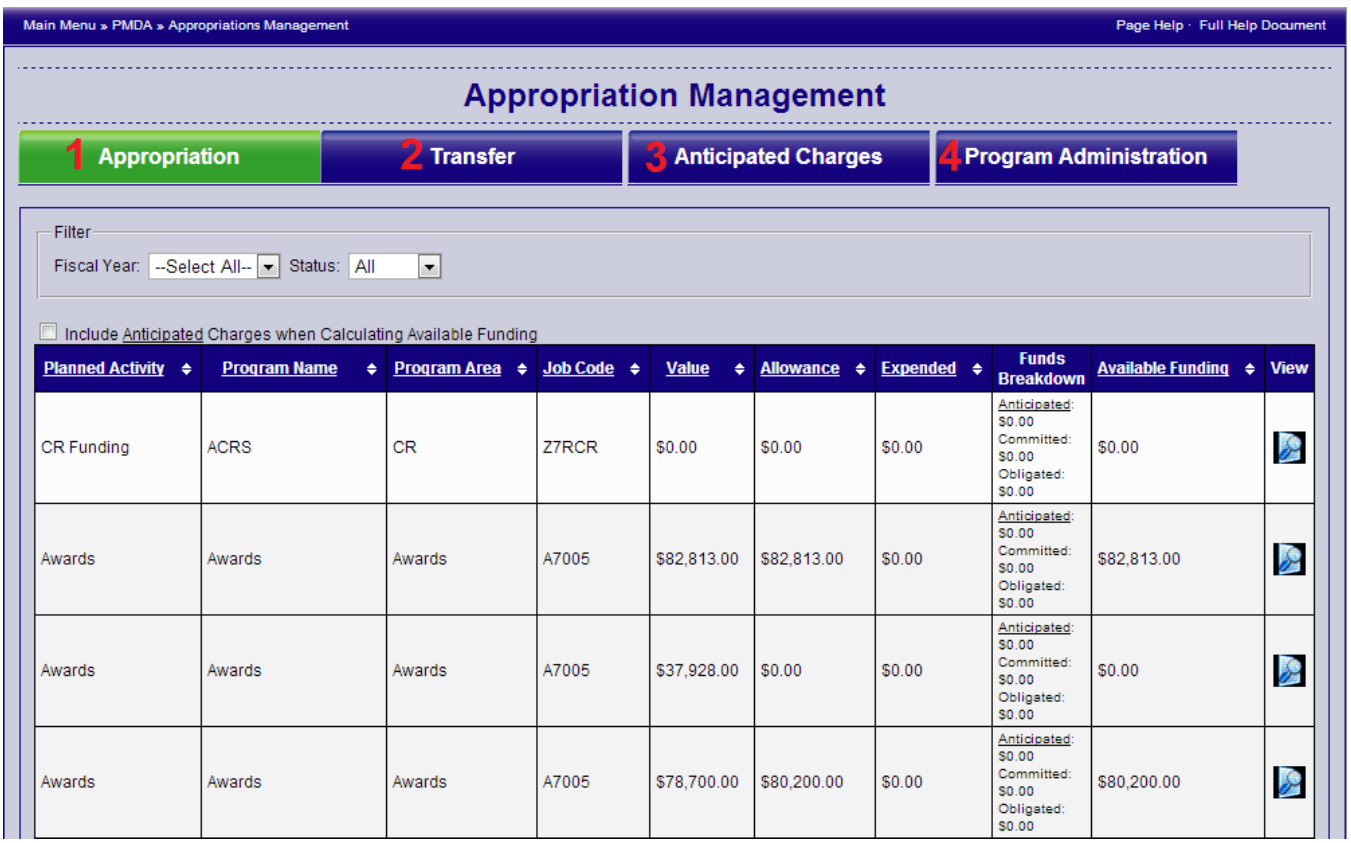
Cancelling a training record will return the record's expenses to the associated job code.

Appropriation Management

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

Managing appropriations allows one to:

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



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	

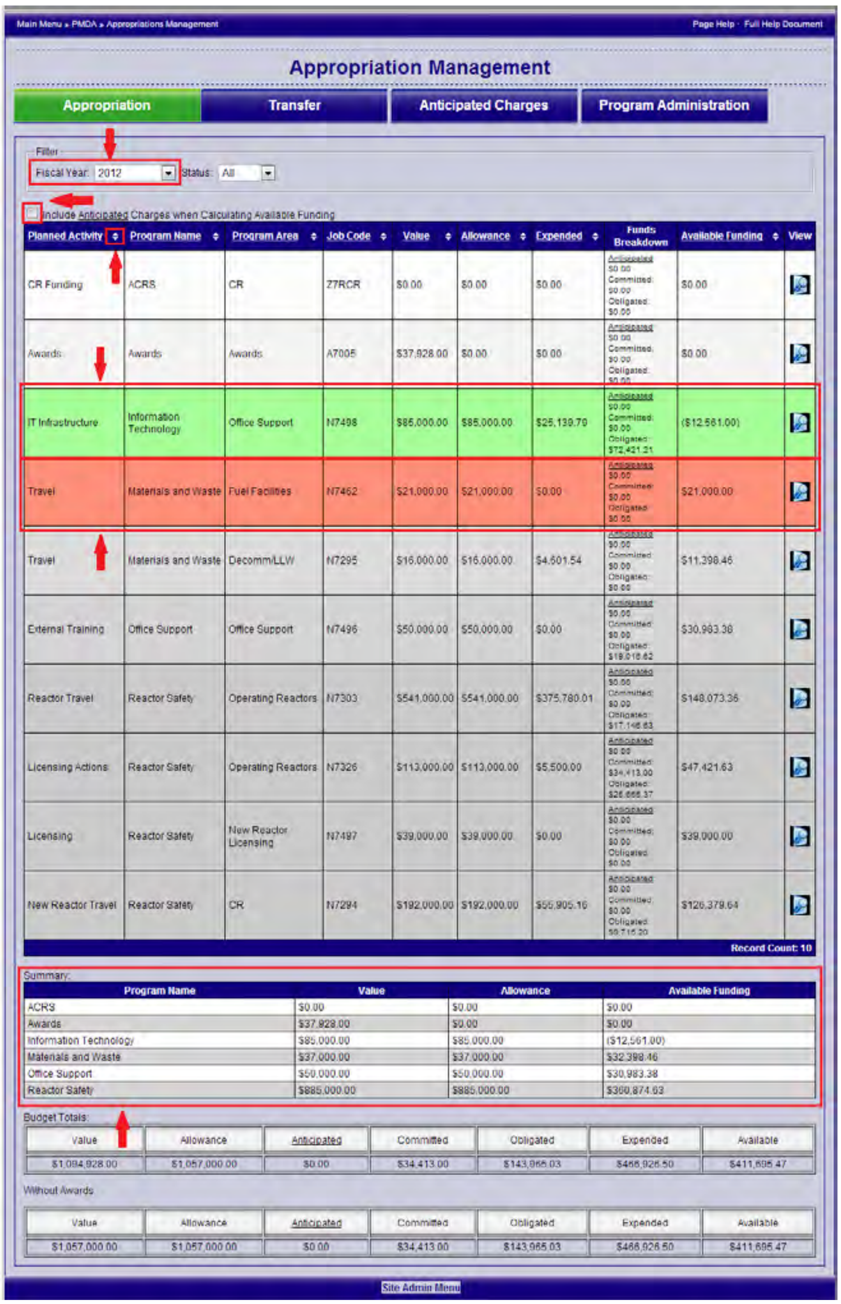
Overview

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

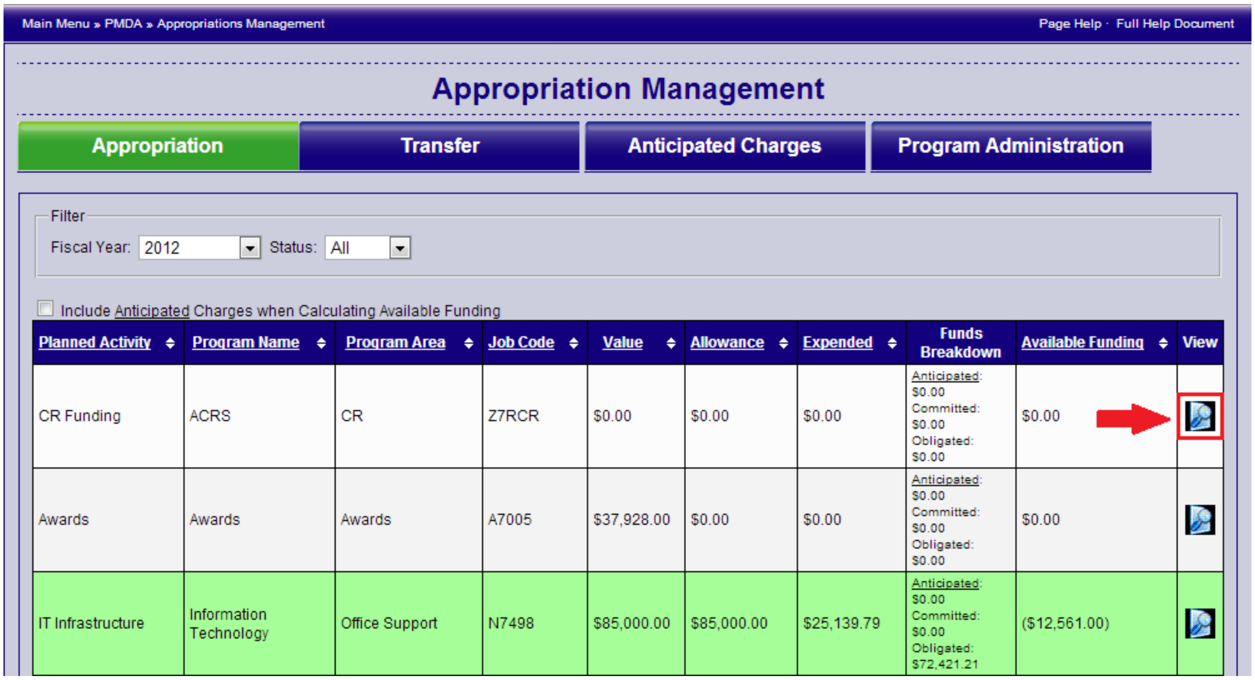
The grid may be sorted by any column, and totals for each column may be viewed toward the bottom of the screen.

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

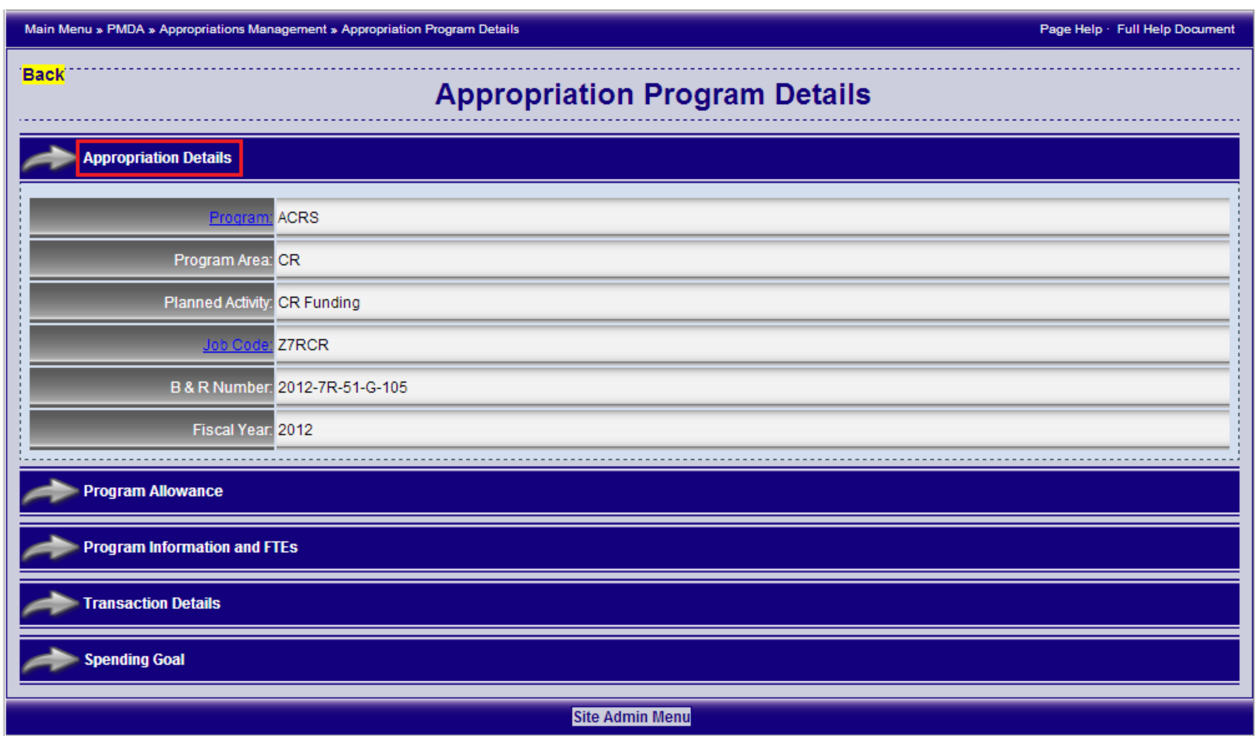
Each program name is uniquely colored for identification. Green indicates a program has met its spending goals. Red indicates a program has failed to meet its spending goals.

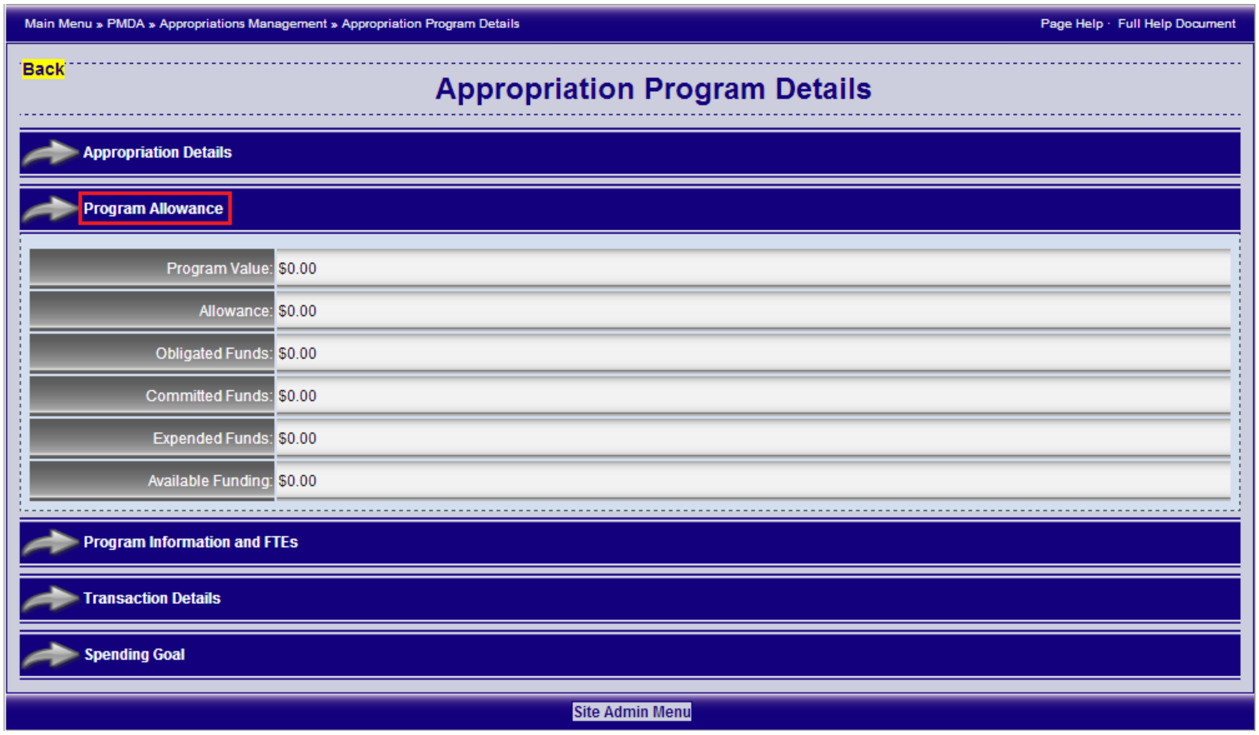


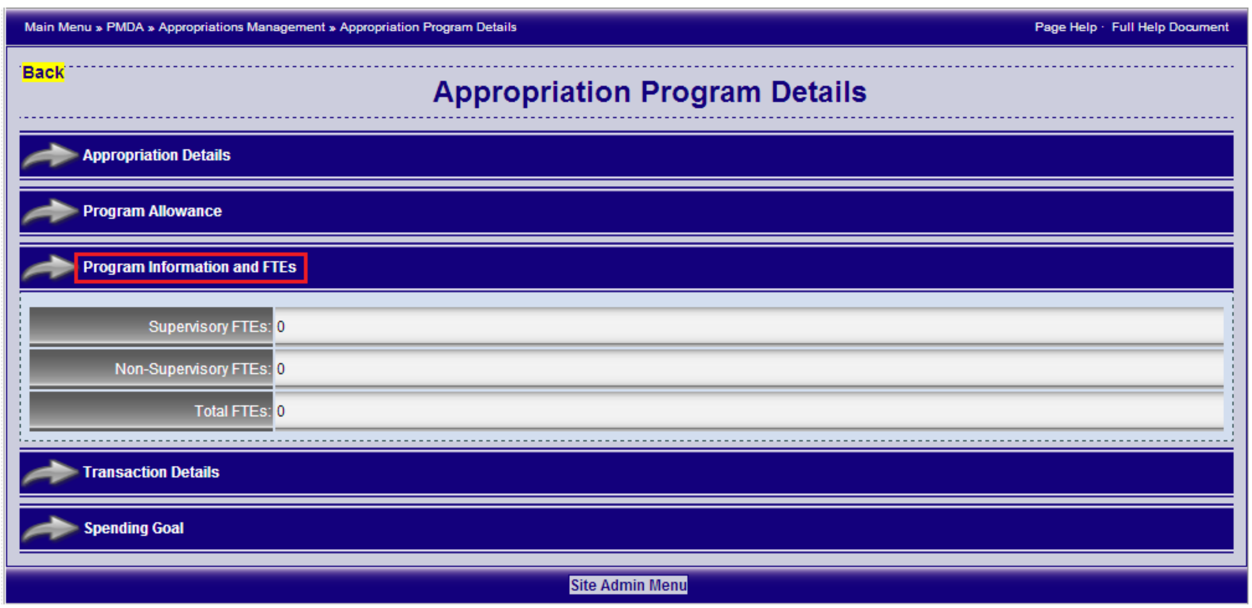
To access the details of a particular program, click the “View” button to the right side of the program grid.

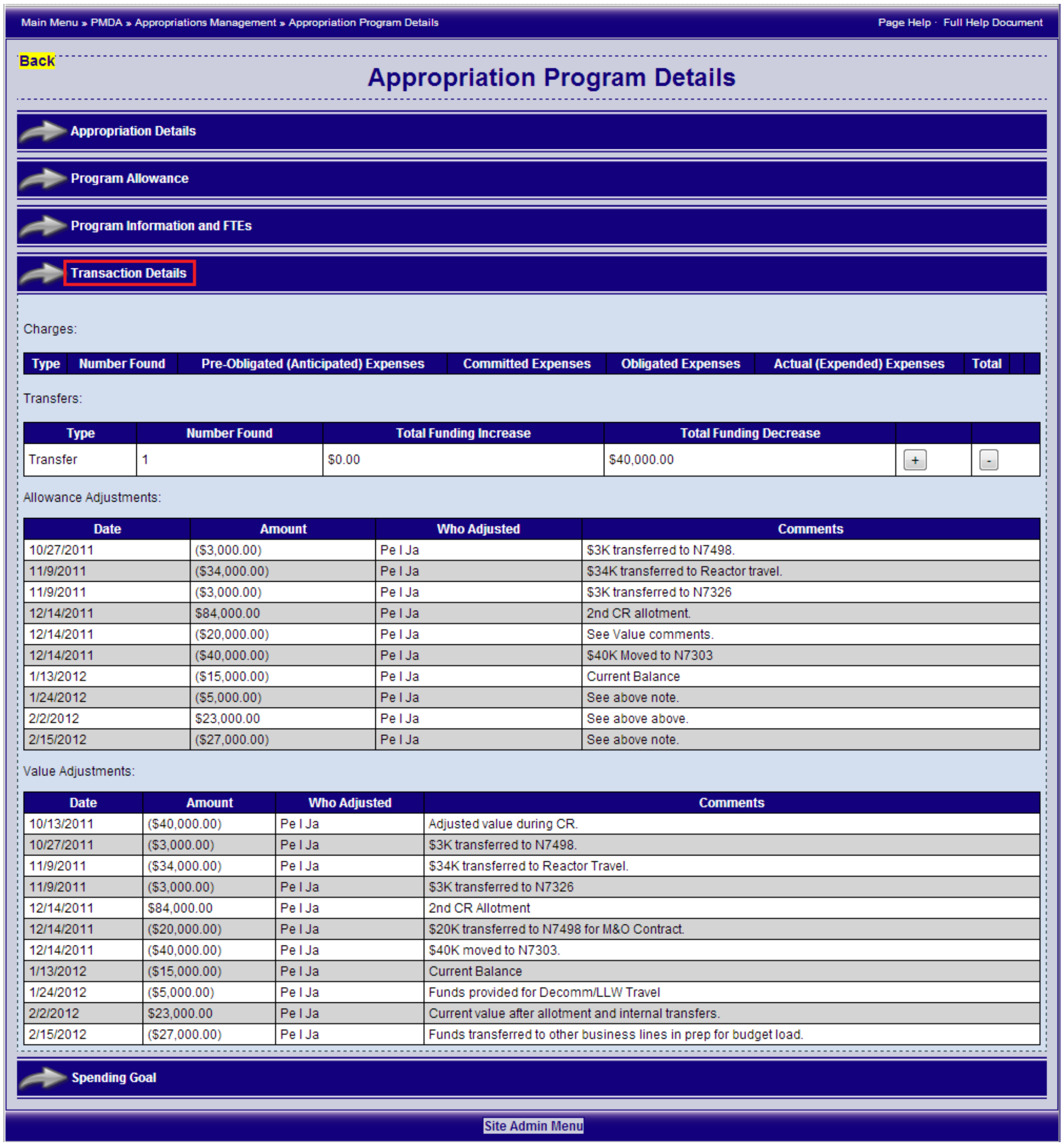


Details include the Job Code and Program Area, as well as budget specifics including Allowance, Full Time Employee (FTE) information, Transaction Details showing charges and transfers against the program, and spending goals which can be specified.




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:

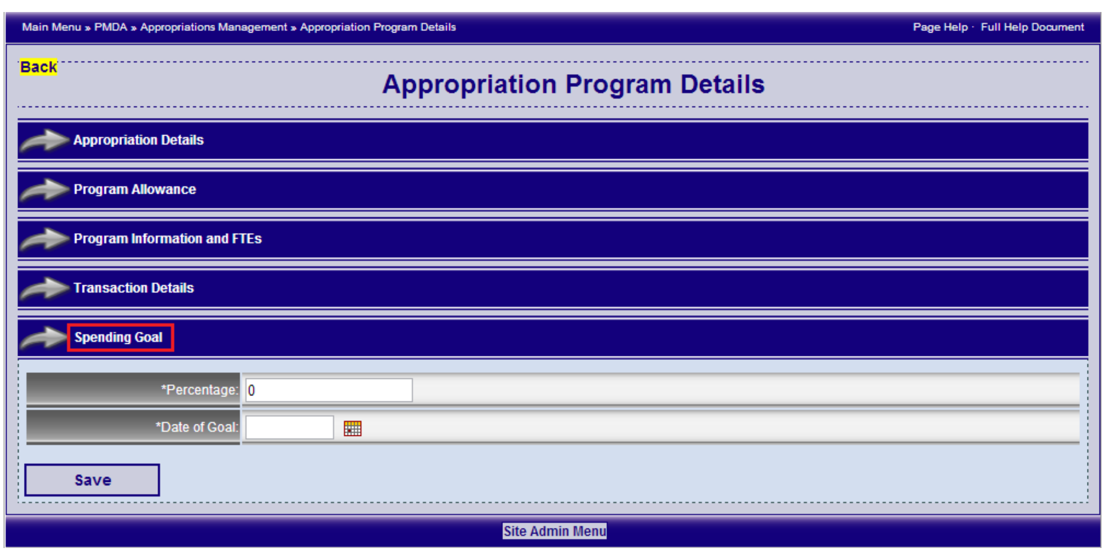
Date	Amount	Who Adjusted	Comments
10/27/2011	($3,000.00)	Pe I Ja	$3K transferred to N7498.
11/9/2011	($34,000.00)	Pe I Ja	$34K transferred to Reactor travel.
11/9/2011	($3,000.00)	Pe I Ja	$3K transferred to N7326
12/14/2011	$84,000.00	Pe I Ja	2nd CR allotment.
12/14/2011	($20,000.00)	Pe I Ja	See Value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

Value Adjustments:

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

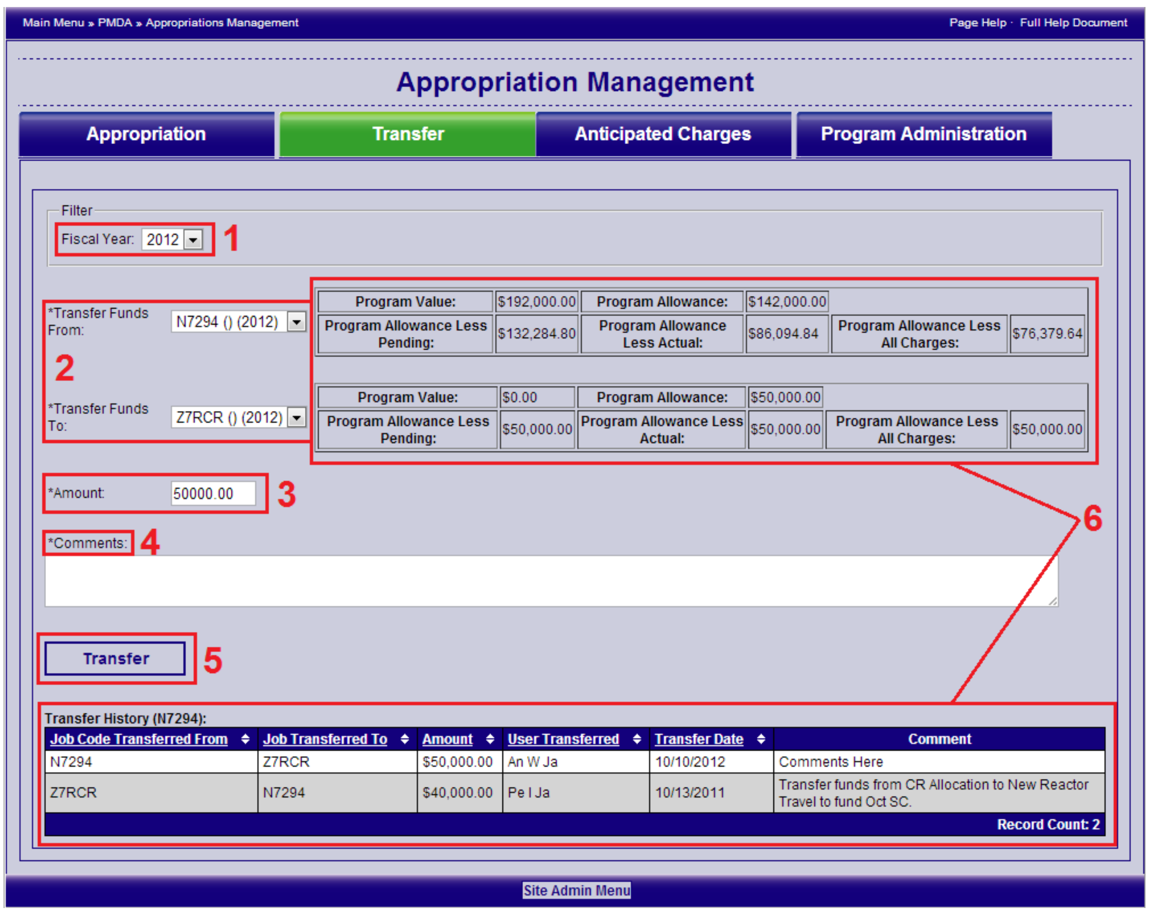
The spending goal for a program, which is the percentage that must have been spent by the date specified, may also be set through this area. Spending goal targets may be viewed through the appropriations management program grid on the main appropriations management page.

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.

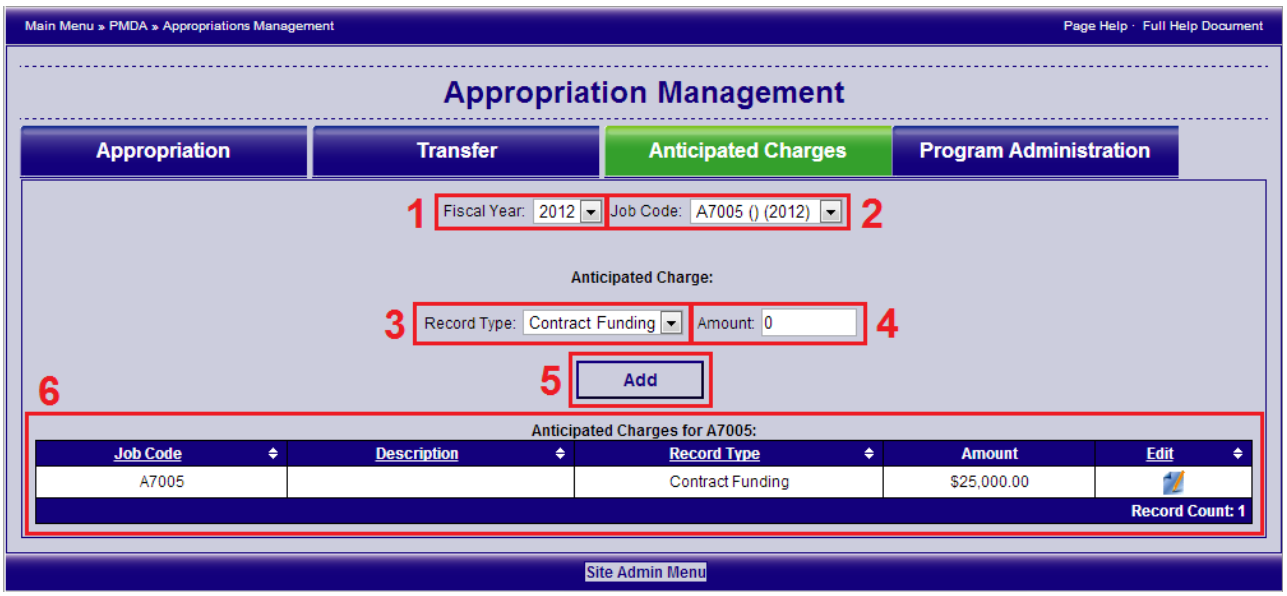


Anticipated Charges

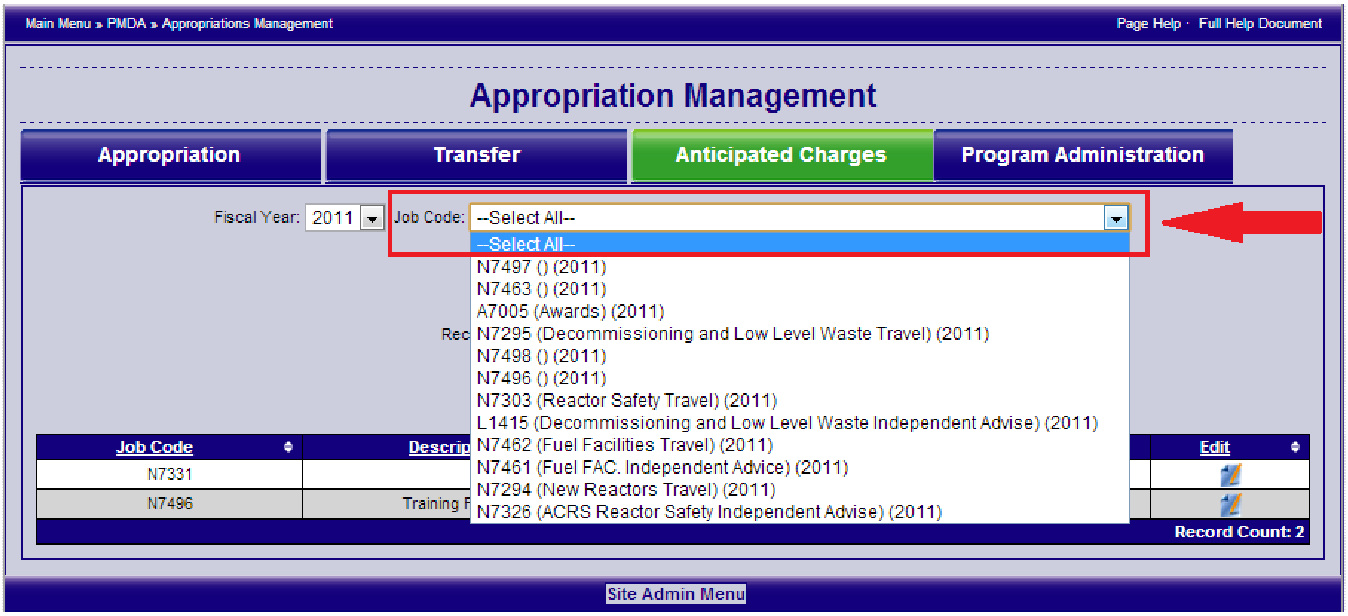
Anticipated charges are created for programs as a forecasting mechanism. They allow the Appropriations Administrator to enter anticipated increases or decreases.

To enter an anticipated charge:

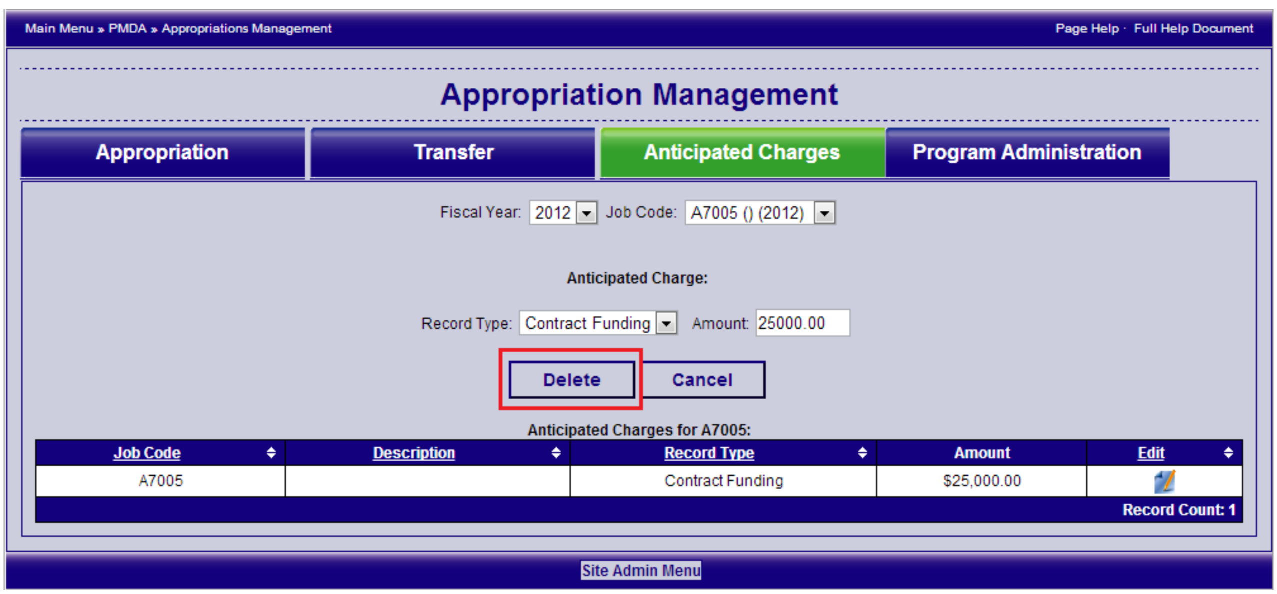
- Select the fiscal year to display associated job codes.
- Select a job code.
- Select the record type for the anticipated charge.
- Enter an amount (use a positive number for anticipated charges and a negative number for anticipated funding).
- Click “Add”.
- A grid showing the anticipated charges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



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



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



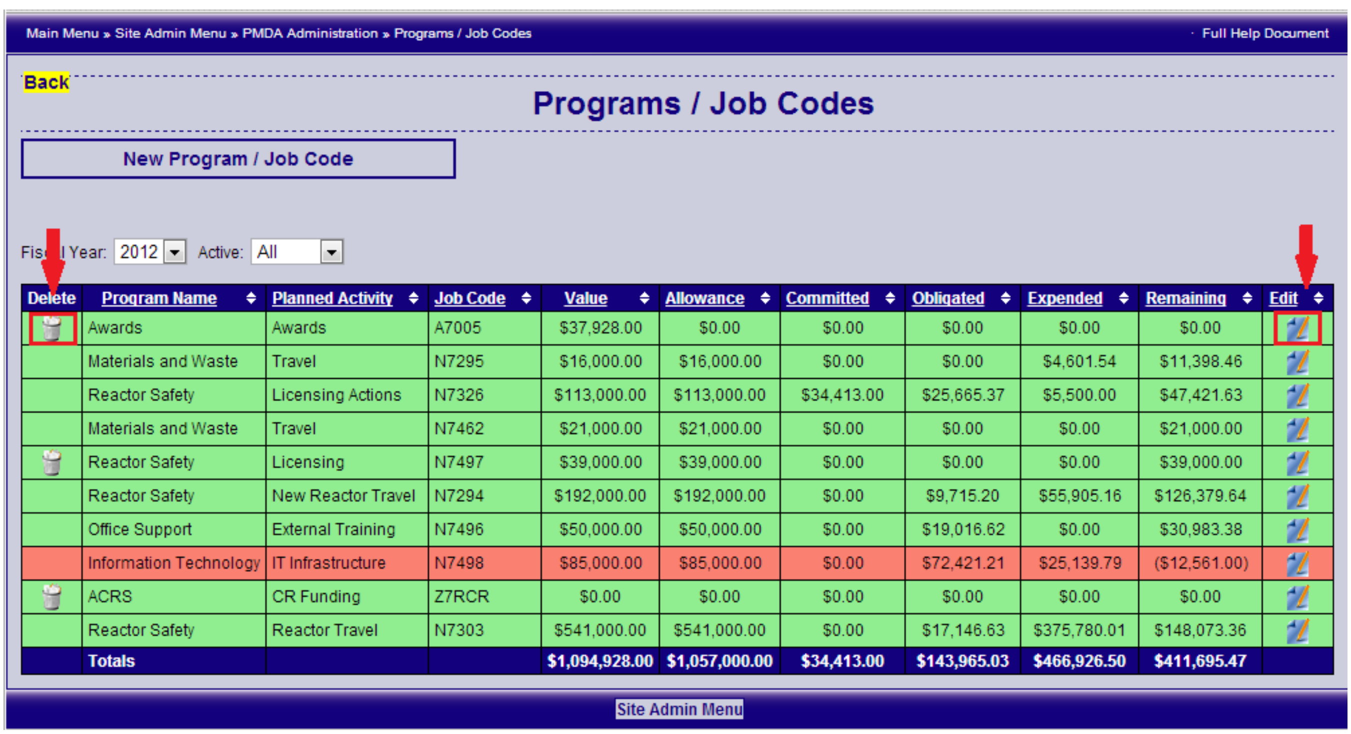
Program Administration

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

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

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

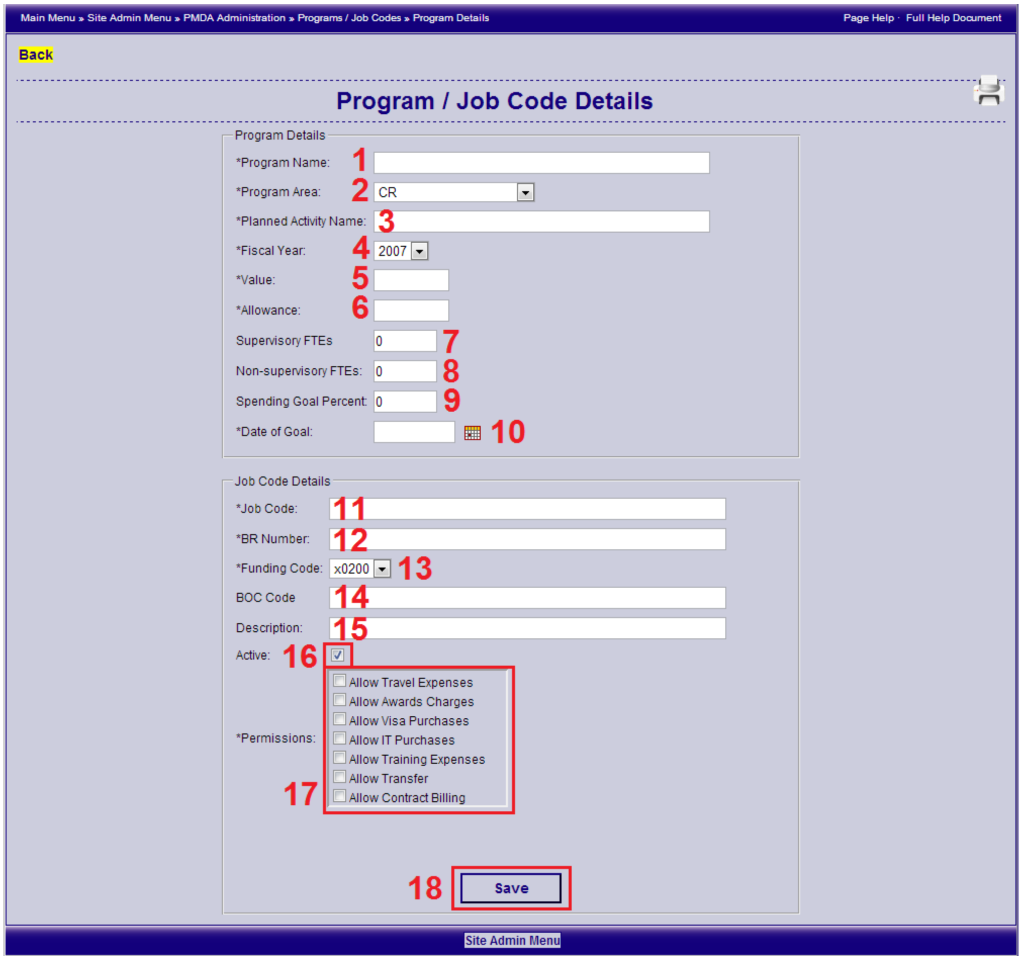
Note: Program/Job Codes without charges against them may be deleted by an administrator.



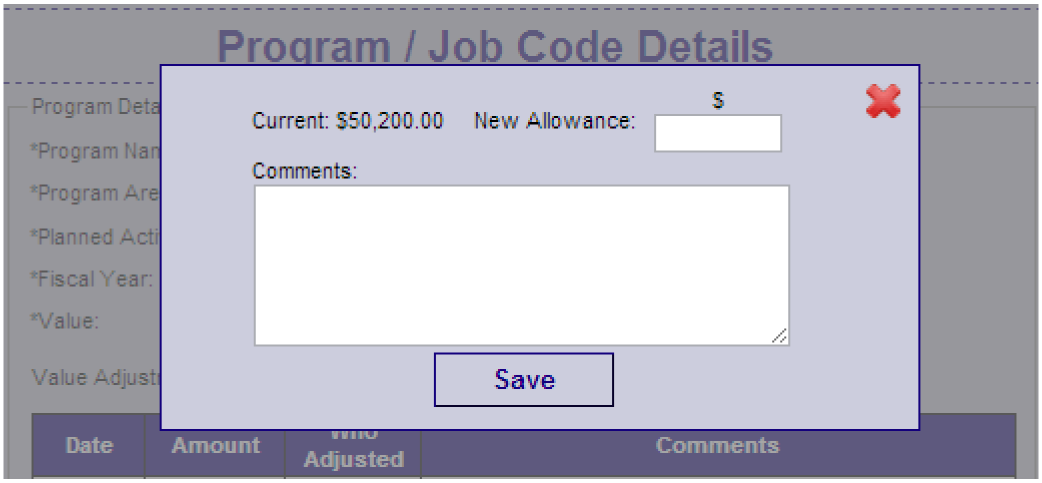
Delete	Program Name	Planned Activity	Job Code	Value	Allowance	Committed	Obligated	Expended	Remaining	Edit
	Awards	Awards	A7005	$37,928.00	$0.00	$0.00	$0.00	$0.00	$0.00	
	Materials and Waste	Travel	N7295	$16,000.00	$16,000.00	$0.00	$0.00	$4,601.54	$11,398.46	
	Reactor Safety	Licensing Actions	N7326	$113,000.00	$113,000.00	$34,413.00	$25,665.37	$5,500.00	$47,421.63	
	Materials and Waste	Travel	N7462	$21,000.00	$21,000.00	$0.00	$0.00	$0.00	$21,000.00	
	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	$192,000.00	$0.00	$9,715.20	$55,905.16	$126,379.64	
	Office Support	External Training	N7496	$50,000.00	$50,000.00	$0.00	$19,016.62	$0.00	$30,983.38	
	Information Technology	IT Infrastructure	N7498	$85,000.00	$85,000.00	$0.00	$72,421.21	$25,139.79	($12,561.00)	
	ACRS	CR Funding	Z7RCR	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
	Reactor Safety	Reactor Travel	N7303	$541,000.00	$541,000.00	$0.00	$17,146.63	$375,780.01	$148,073.36	
	Totals			**$1,094,928.00**	**$1,057,000.00**	**$34,413.00**	**$143,965.03**	**$466,926.50**	**$411,695.47**	

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".



All options will remain the same when editing the Program/Job Code, however, when adjusting the program's value or allowance, comments will be required and a transaction will be recorded in the system for the adjustment.



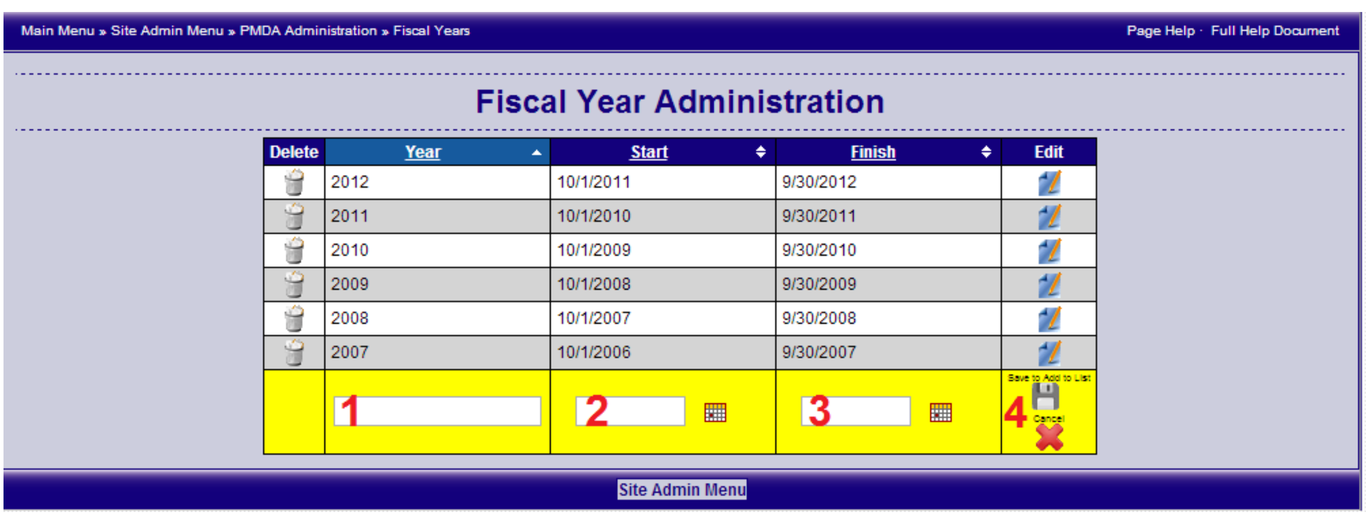
Fiscal Years

Fiscal Years are used throughout the system.

To add or edit a fiscal year:

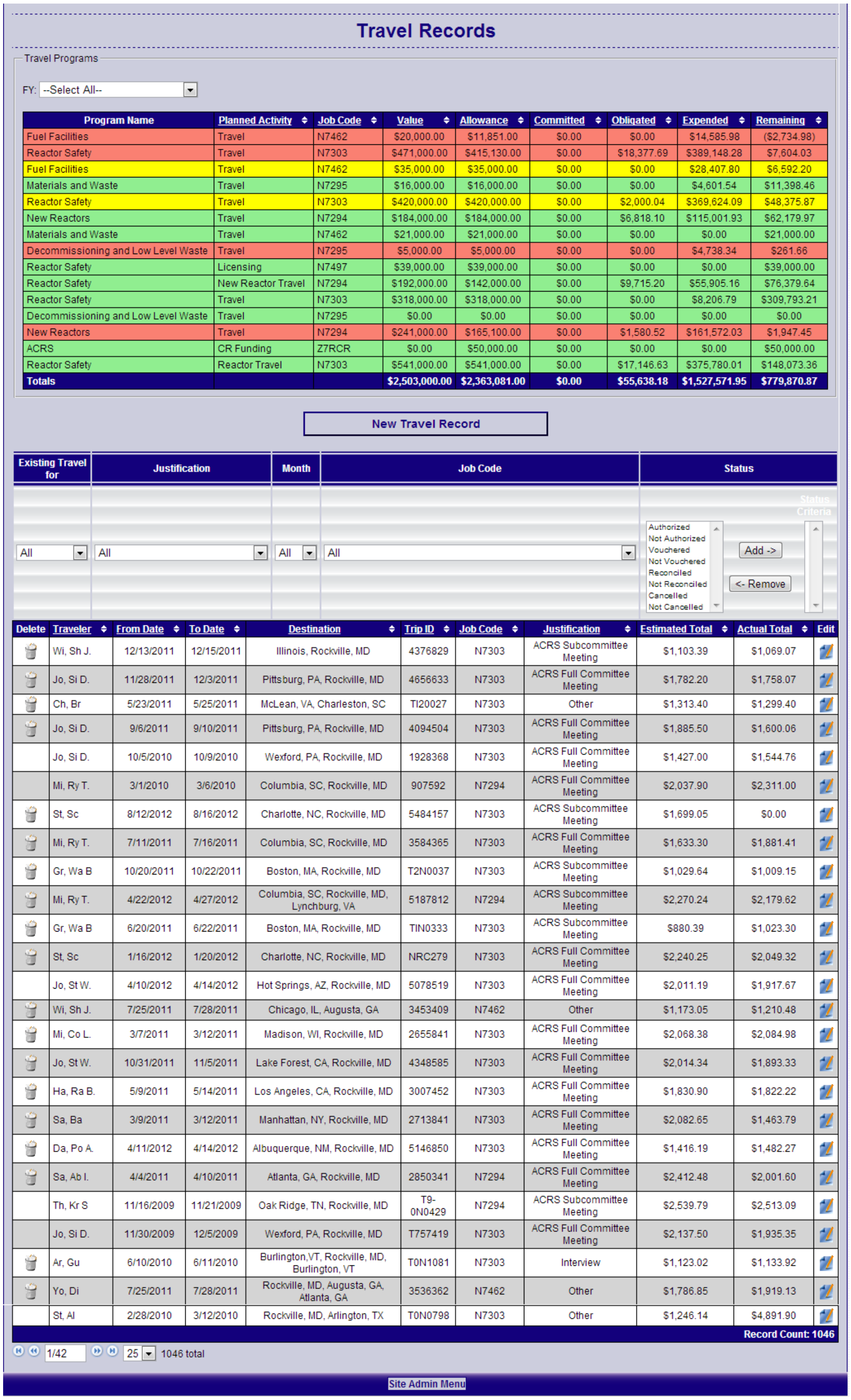
1) Enter the text of the year. (e.g. 2011, 2012, etc.)
2) Enter a start date for the fiscal year.
3) Enter a finish date for the fiscal year.
4) Click the “Save” button.

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



Travel Records

The Travel Records screen provides an overview of travel records in the system. It has a list of the programs related to travel, fiscal status, and a filtered list of travel records.



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
Totals			$2,503,000.00	$2,363,081.00	$0.00	$55,638.18	$1,527,571.95	$779,870.87

New Travel Record

Existing Travel for	Justification	Month	Job Code	Status
All	All	All	All	Authorized Not Authorized Vouchered Not Vouchered Reconciled Not Reconciled Cancelled Not Cancelled Add -> <- Remove

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	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	
	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	

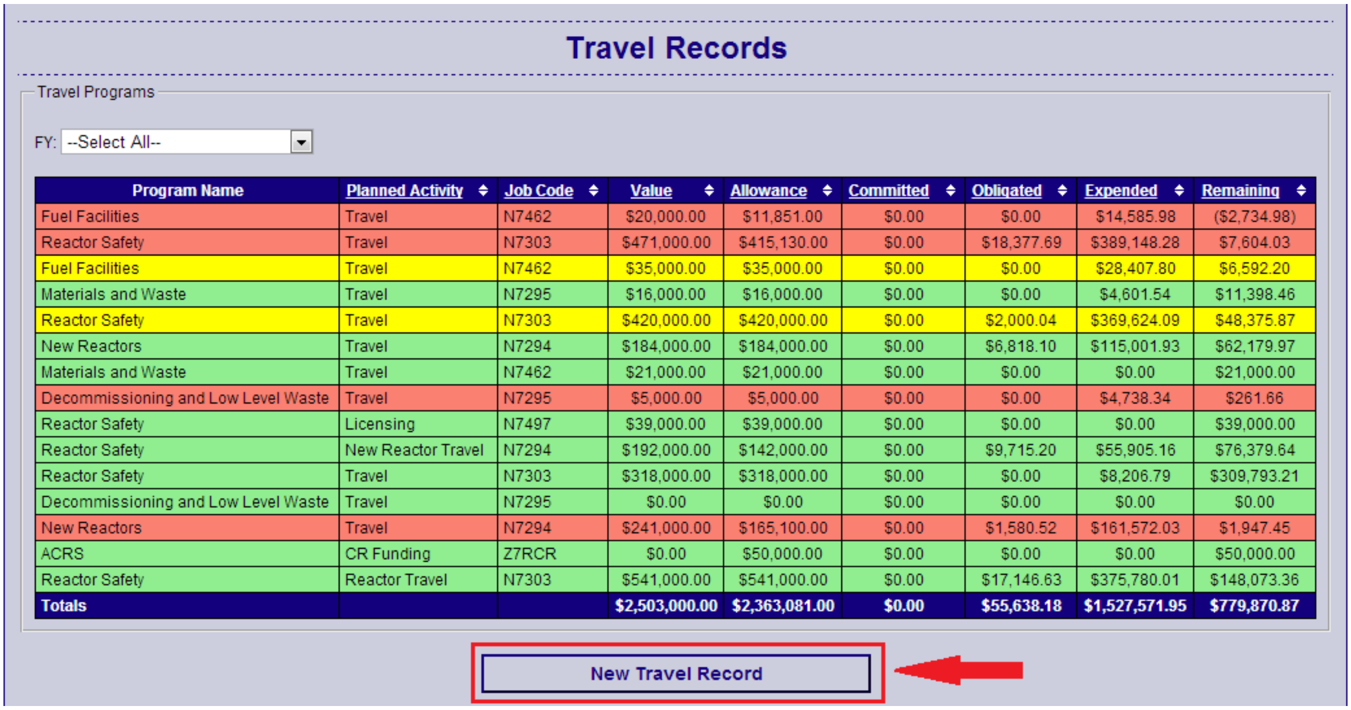
Record Count: 1046

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
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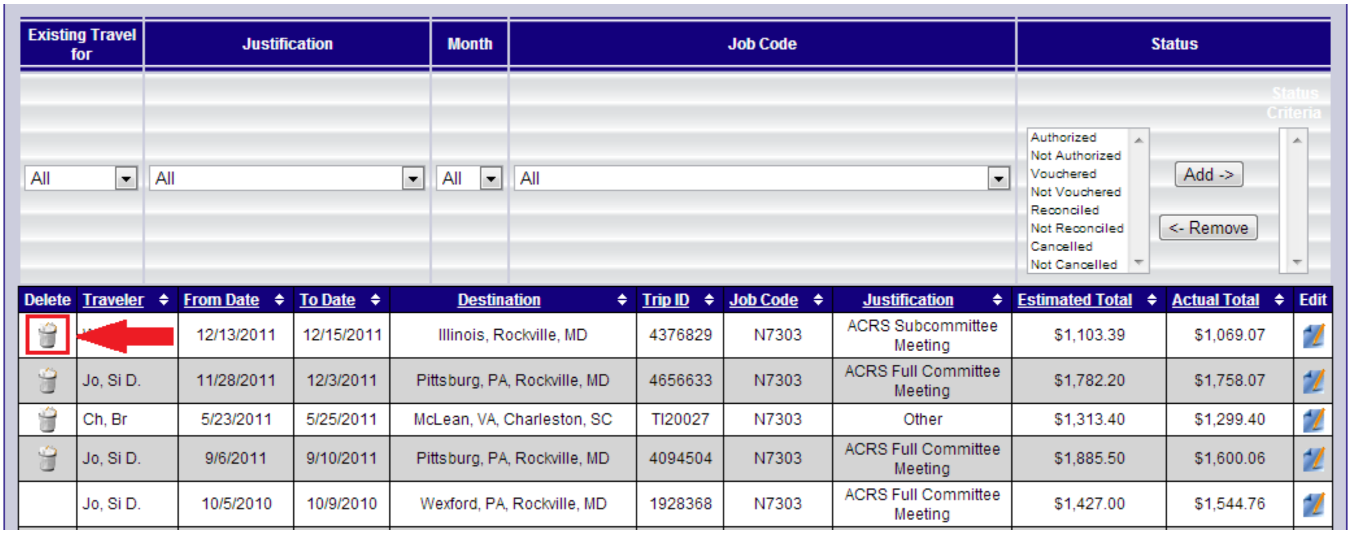
Reactor Safety	Reactor Travel	N7303	$541,000.00	$541,000.00	$0.00	$17,146.63	$375,780.01	$148,073.36
Totals			**$2,503,000.00**	**$2,363,081.00**	**$0.00**	**$55,638.18**	**$1,527,571.95**	**$779,870.87**

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.



Delete	Traveler	From Date	To Date	Destination	Trip ID	Job Code	Justification	Estimated Total	Actual Total	Edit
		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.

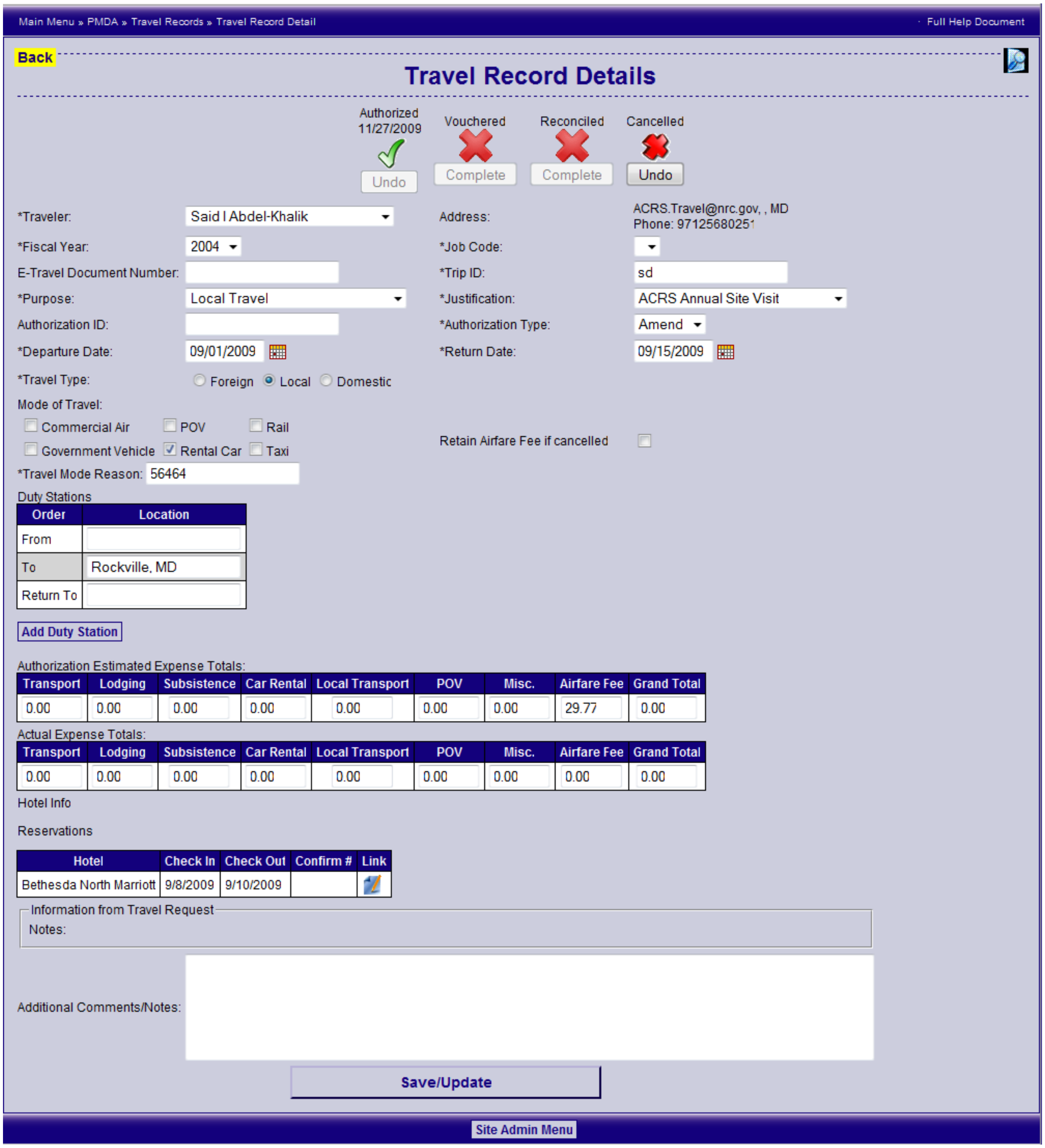
You may move a travel record along the approval sequence as each step is completed. For example, you may mark it as Authorized, Vouchered and Reconciled.

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.

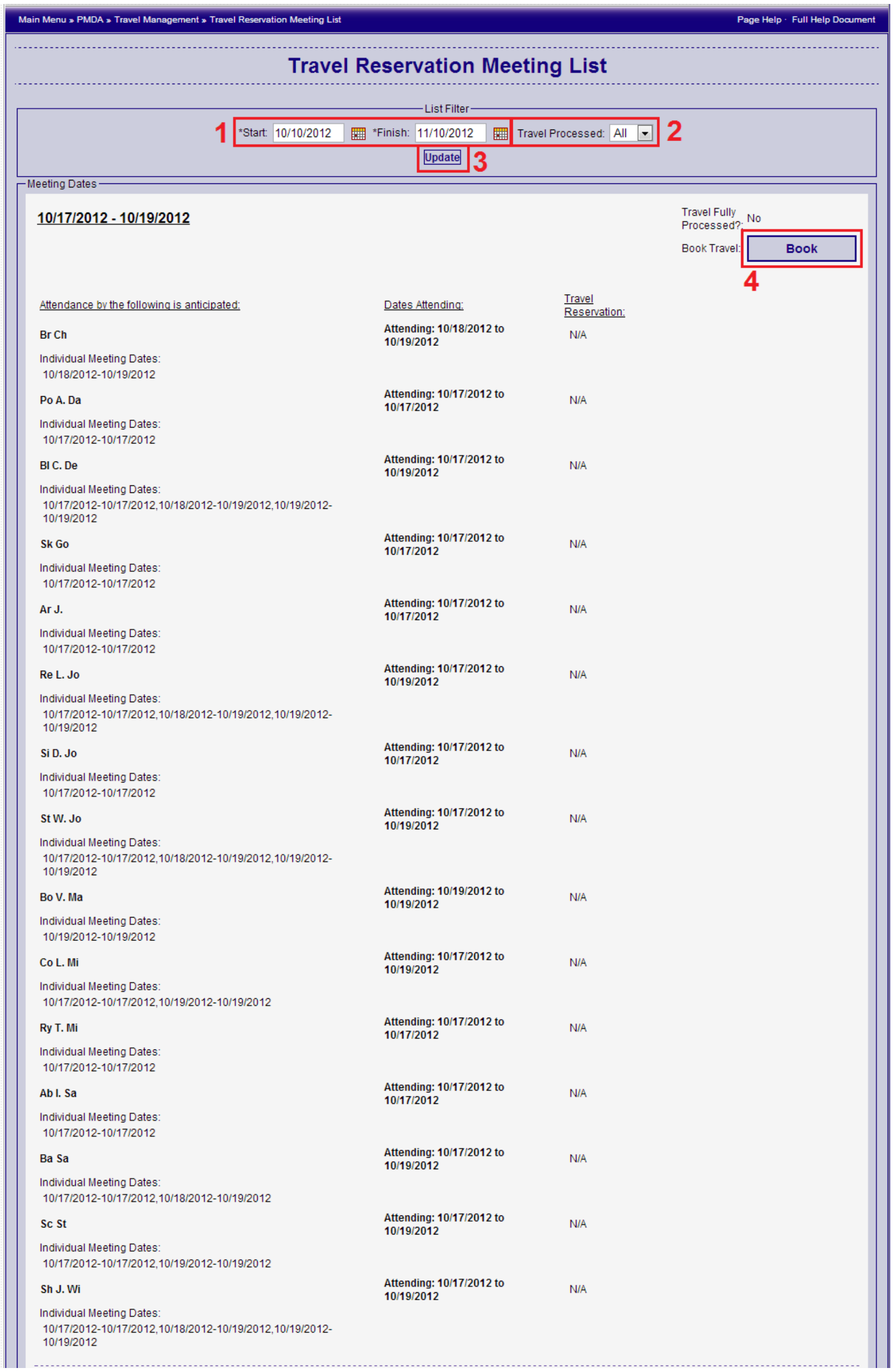


Bulk Travel Record Entry

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.

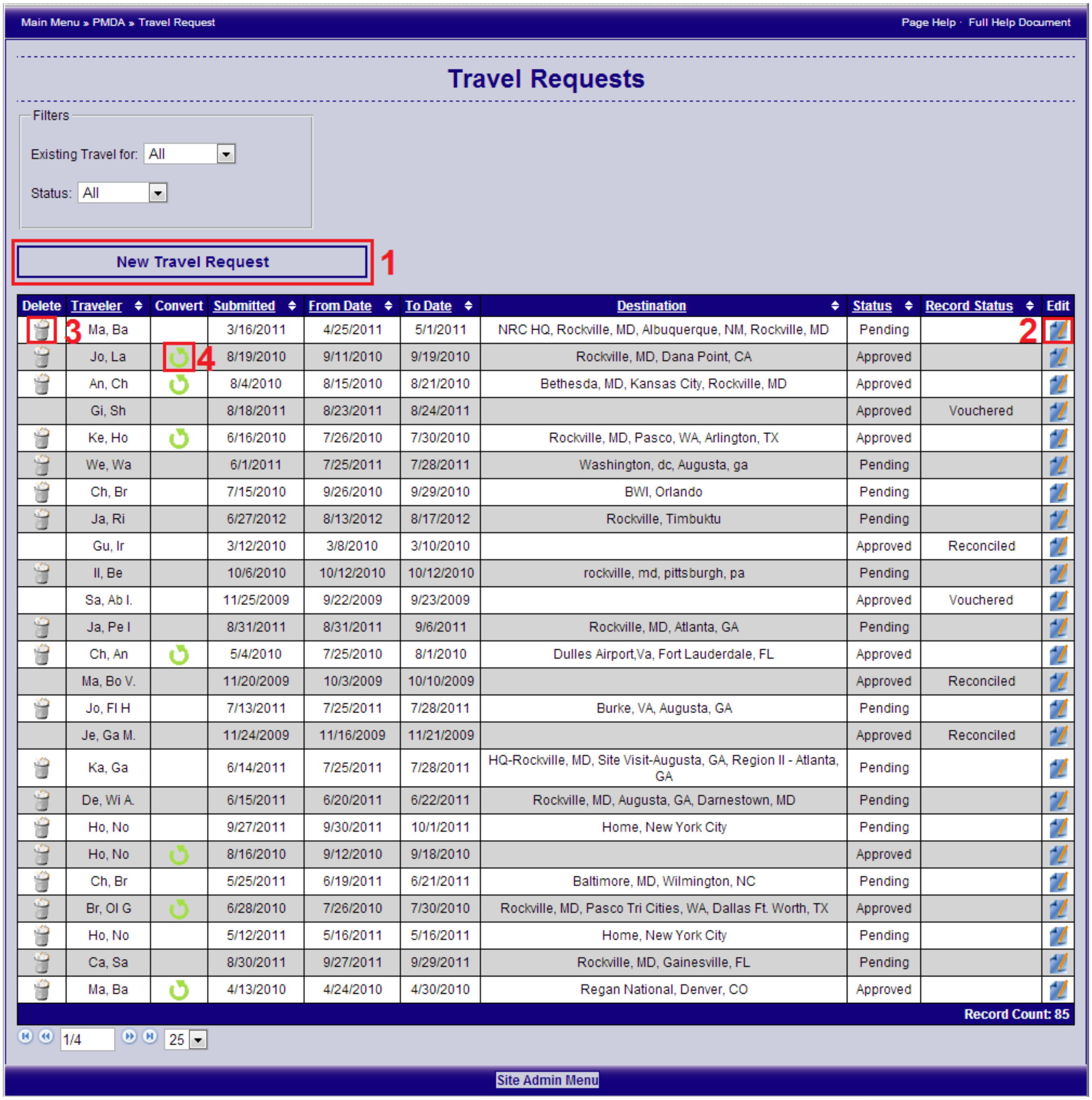


You may now edit/enter the travel records in bulk by entering the departure and return dates for each member. Each individual travel record can still be edited manually using the Travel Records screen if it requires distinct data from the rest.

After entering the travel record, click “Save”. You will be returned to the prior screen where you may book travel reservations for other attendees of the selected meeting.

Travel Requests

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

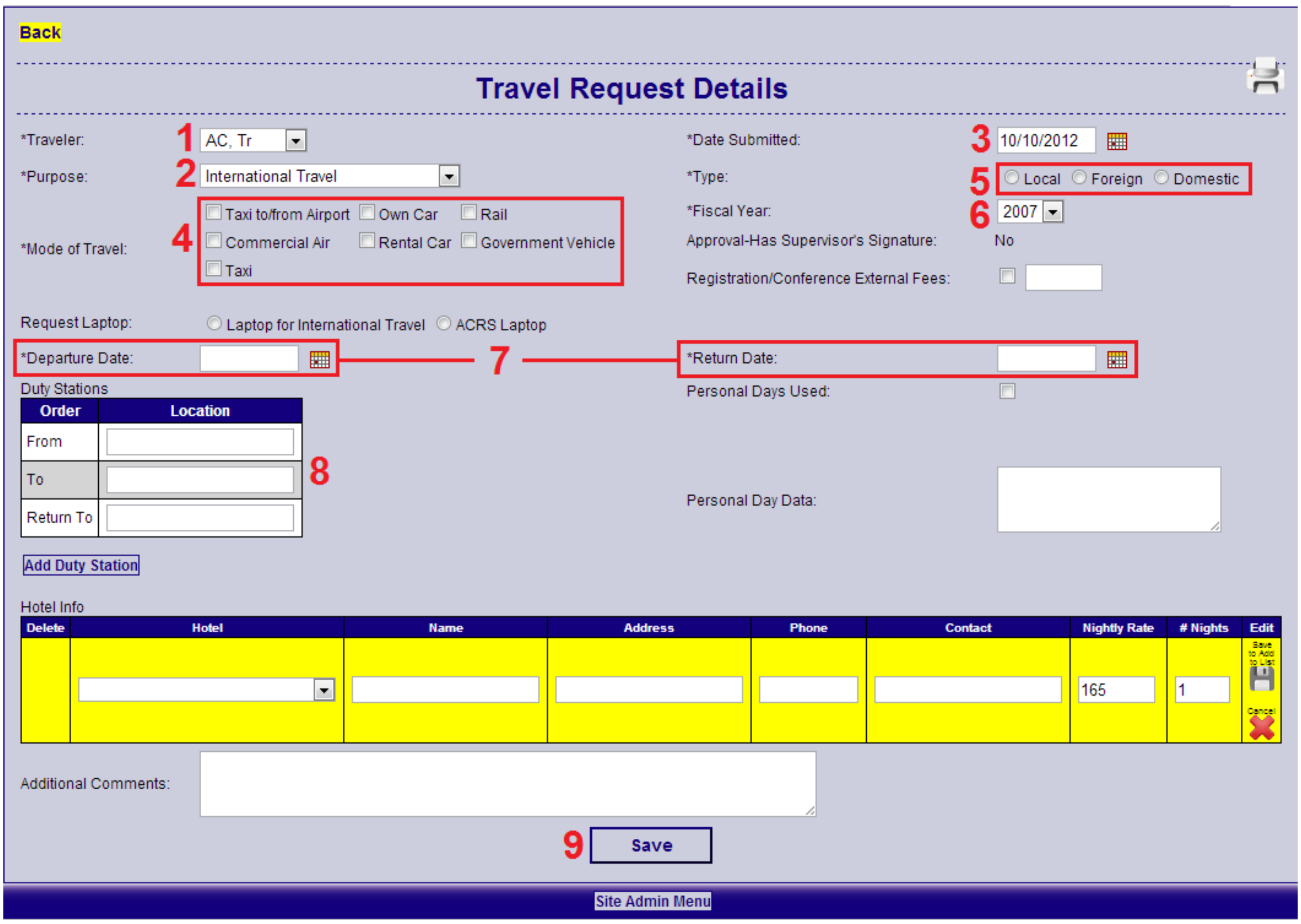


Delete	Traveler	Convert	Submitted	From Date	To Date	Destination	Status	Record Status	Edit
	Ma, Ba		3/16/2011	4/25/2011	5/1/2011	NRC HQ, Rockville, MD, Albuquerque, NM, Rockville, MD	Pending		
	Jo, La		8/19/2010	9/11/2010	9/19/2010	Rockville, MD, Dana Point, CA	Approved		
	An, Ch		8/4/2010	8/15/2010	8/21/2010	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		

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.

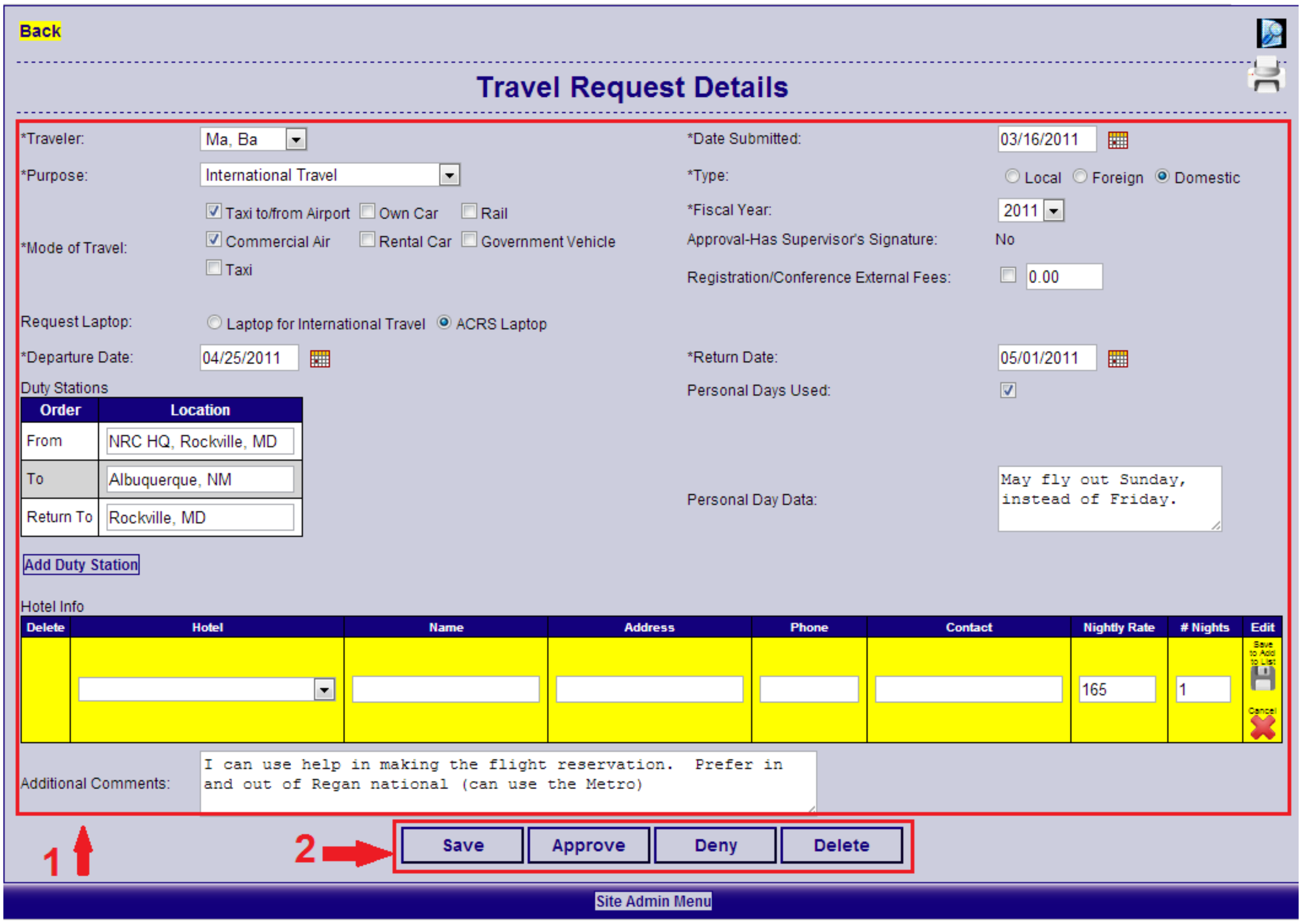
To enter a Travel Request:

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”.



To edit a Travel Request:

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



Procurement

Procurement consists of the Visa module and the Contracts module.

The Visa module allows:

Visa Request Management
Visa Request Approval
Visa Invoice Processing
Visa Requisitions

The Contracts module allows entry of Contracts and Contract Invoices:

Visa

The Visa module includes:

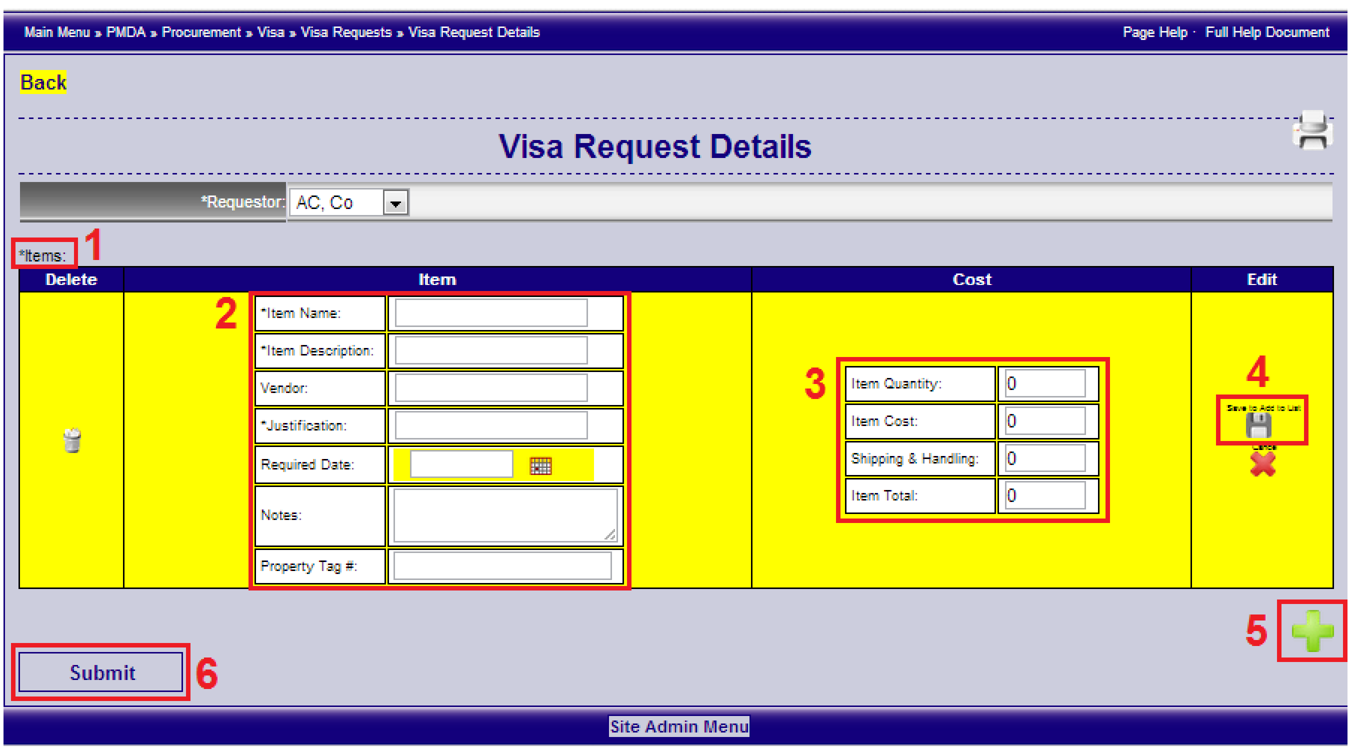
a) Visa Request Management
   i) Allows entry and edit of visa requests.
b) Visa Request Approval
   i) Allows approval of visa requests by dedicated roles.
c) Visa Invoice Processing
   i) Allows Visa Requests to be reconciled by a Visa Administrator.
d) Visa Requisitions

Visa Request Management

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

To create a new Visa Request:

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



Updated: November 2012

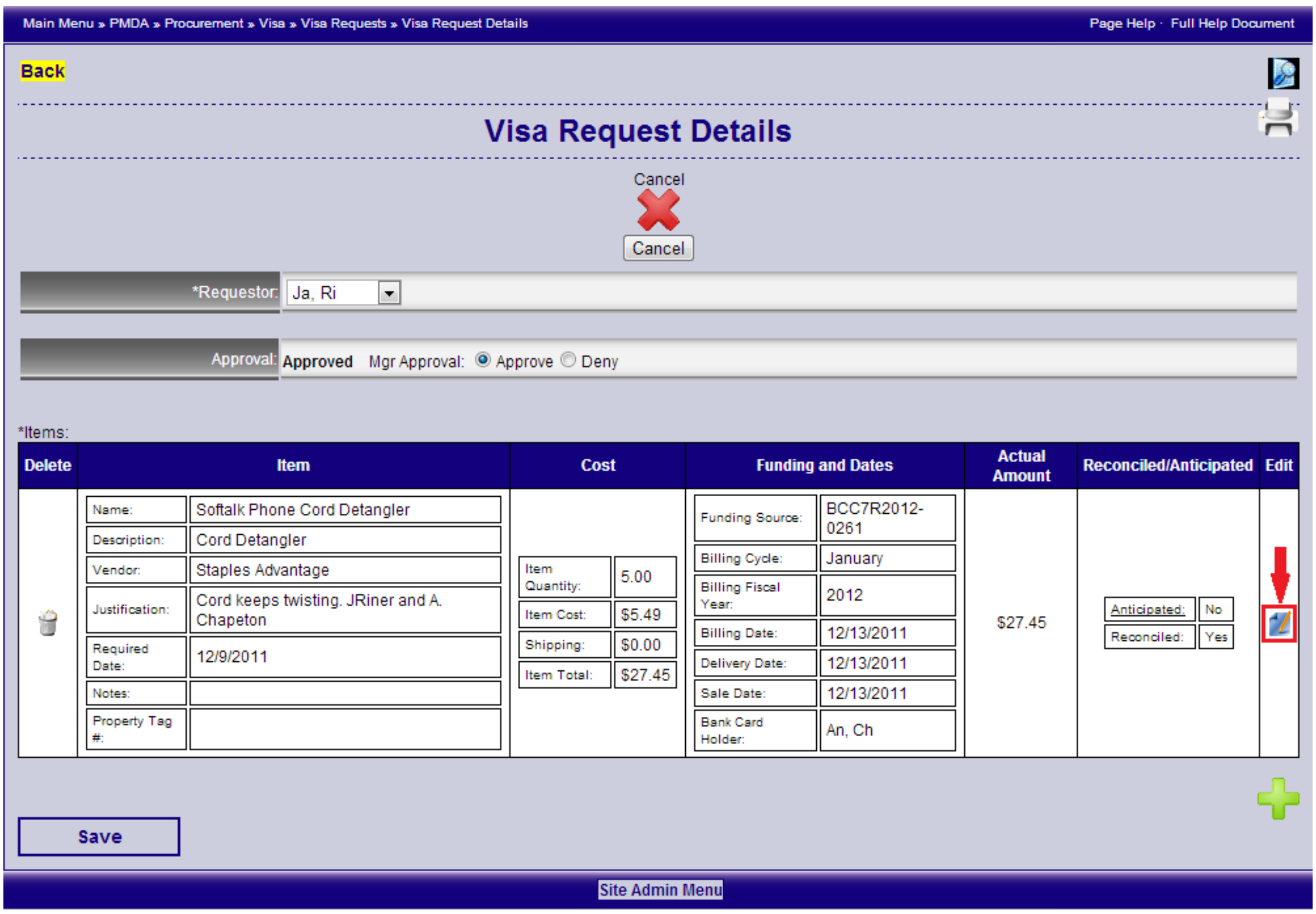
Processing Visa Requests (assigning a funding source)

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

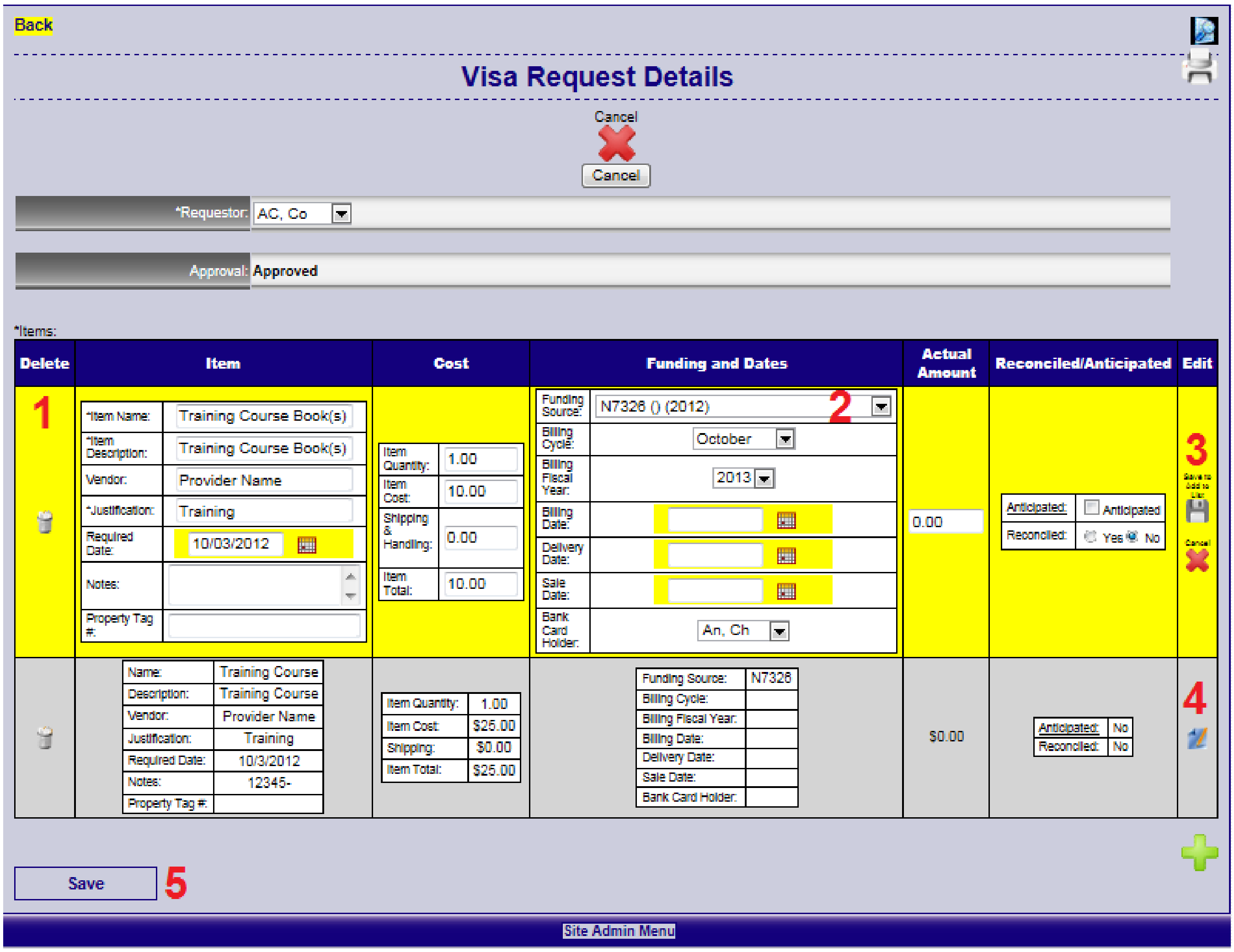
To assign the funding source to the visa request, select the visa request from the Visa Request Management screen by clicking the edit button next to the request in the grid. You will be taken to the Visa Request Details screen where you may edit the line items, assigning a funding source to each.

To assign a funding source:

1. Click "Edit" button next the line item in the "Items" section of the visa request.



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



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

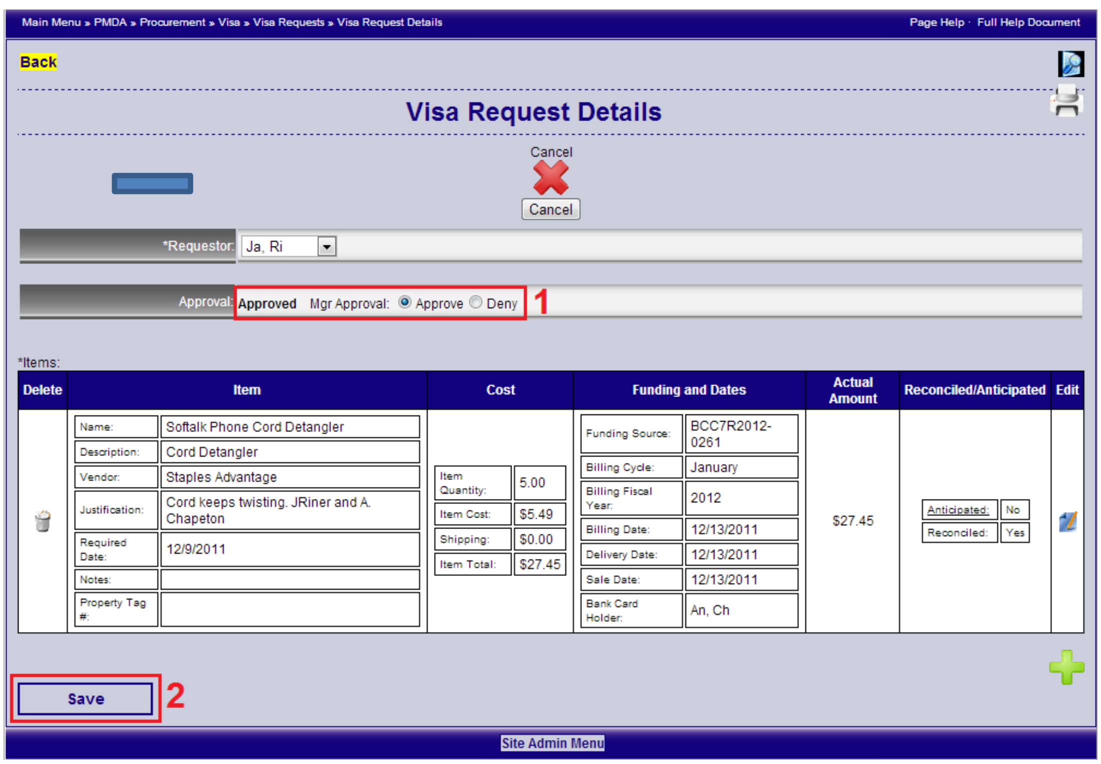
Approving Visa Requests

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

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

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

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



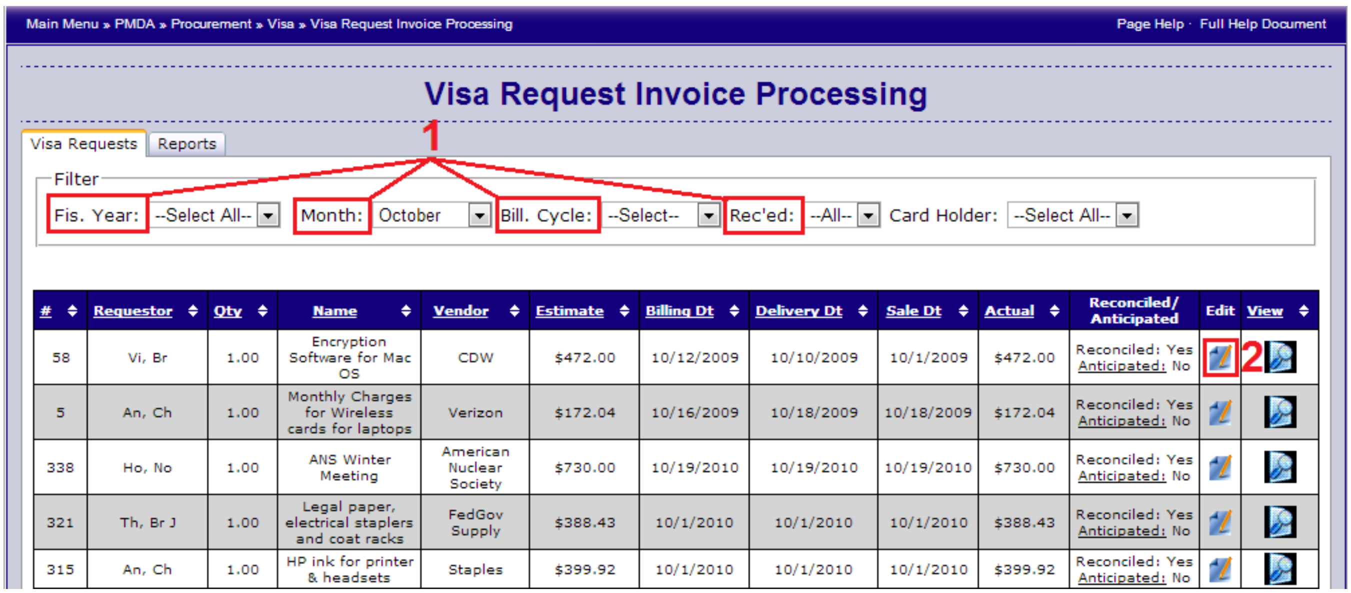
Updated: November 2012

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.

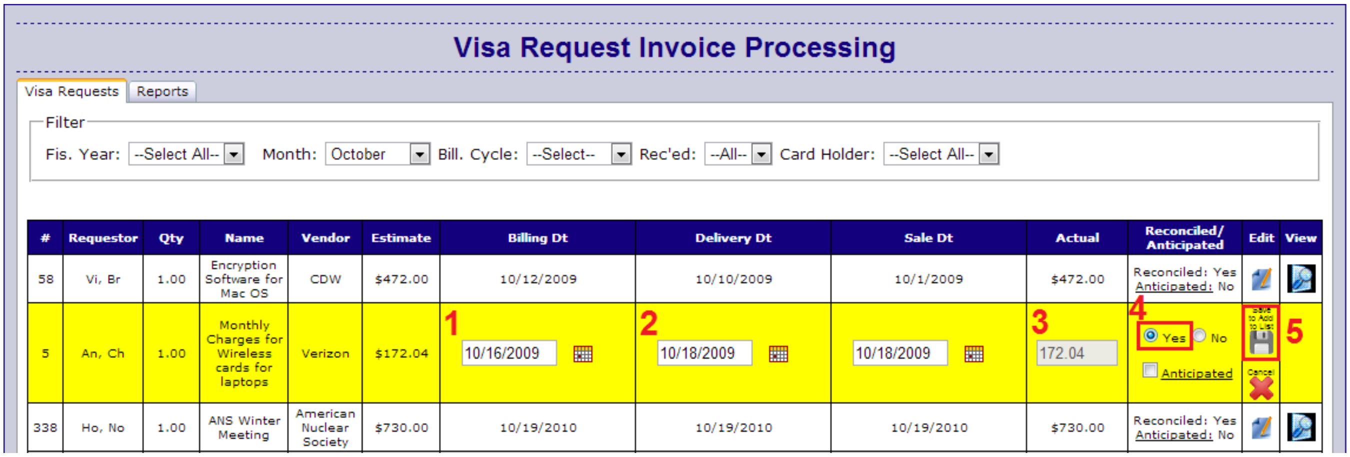
To reconcile visa invoices through the Invoice Processing Grid:

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.



#	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	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		

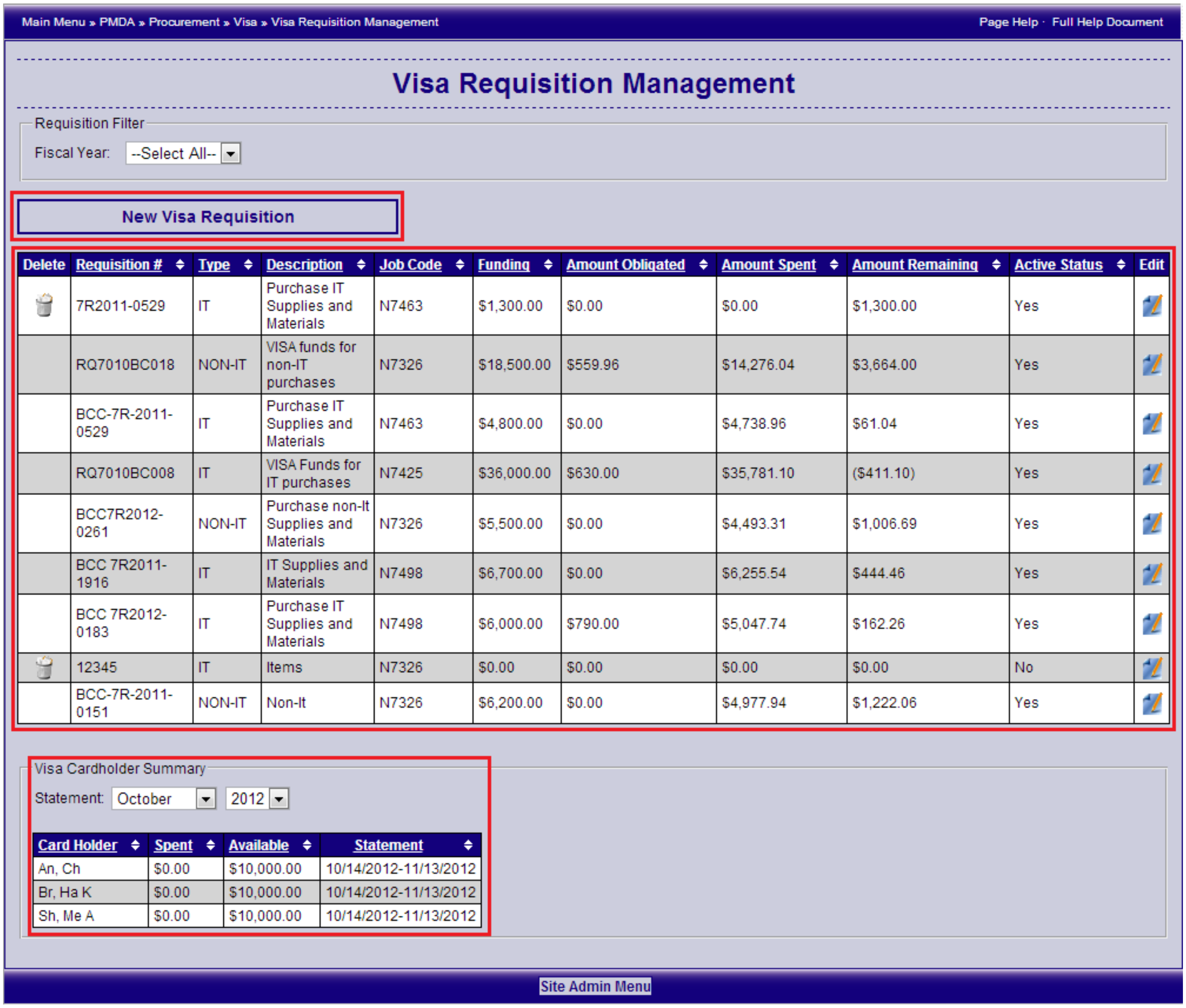
1. Enter the Billing Date (if not present).
2. Enter the Delivery Date (if not present).
3. Enter the Actual Amount of the request.
4. Click the “Yes” radio button in the “Reconciled” column to indicate that this request is reconciled.
5. Click the “Save” button to the right of the item. The request 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 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

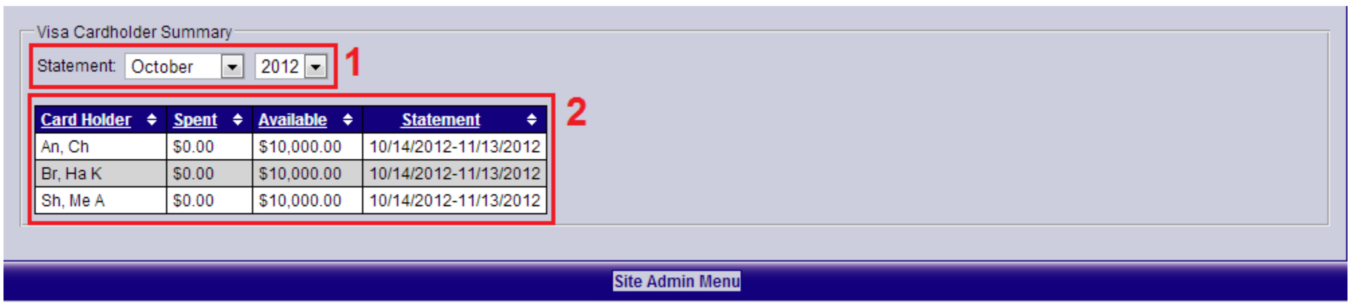
Site Admin Menu

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.

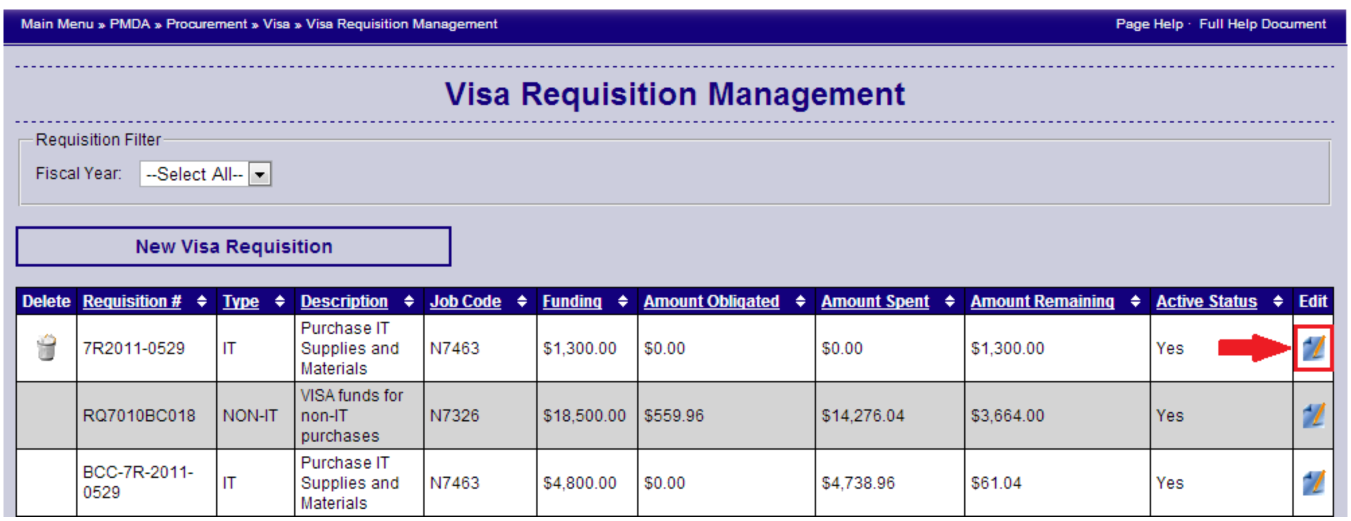
To view the amount expended and obligated for a visa card held by a particular cardholder per billing cycle:

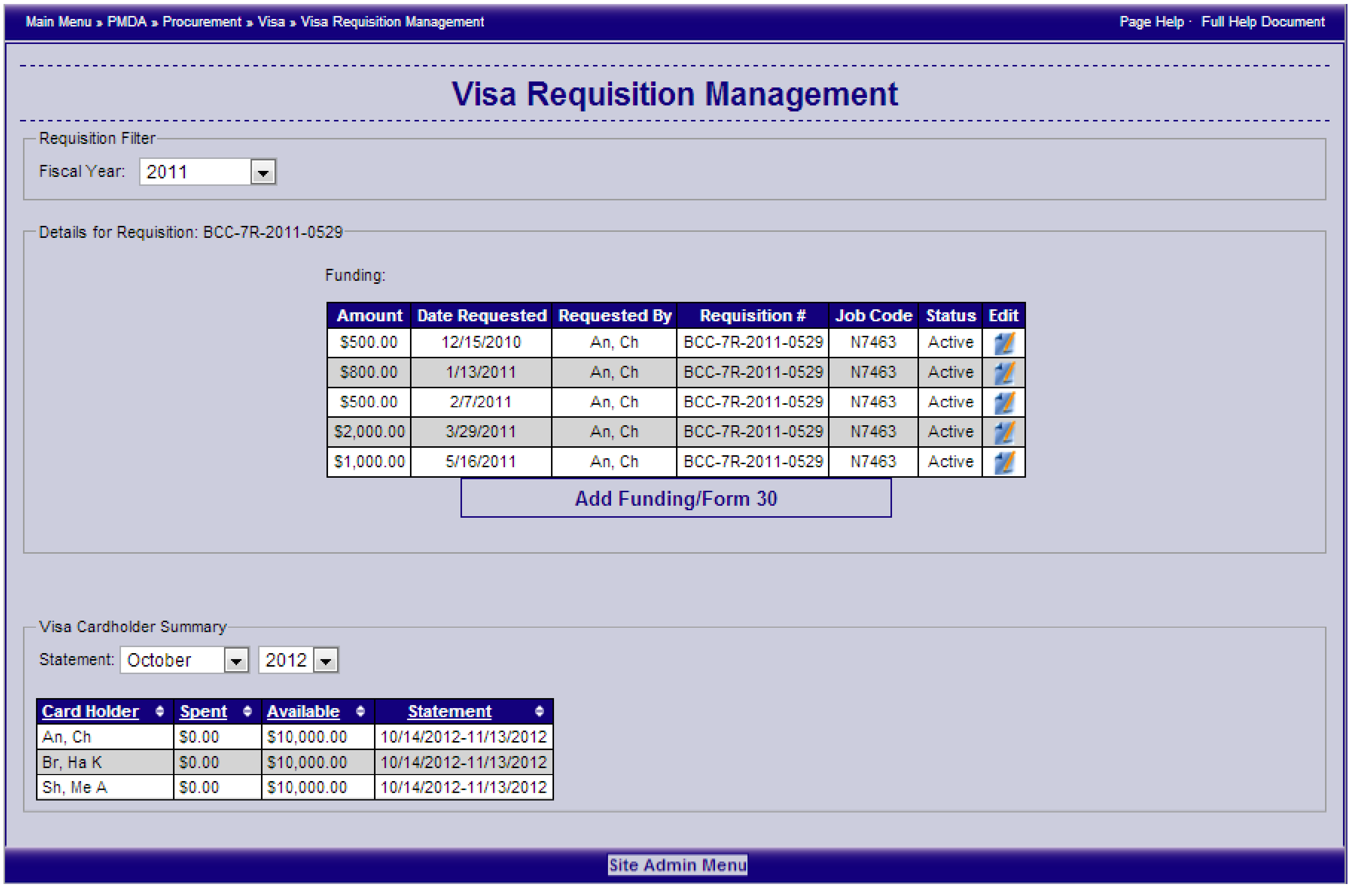
1) Select the Cycle and Fiscal Year from the dropdown lists in the Visa Cardholder Summary section of the screen.
2) The associated grid will be updated to show the cardholder and amount expended and obligated for the cycle which is indicated in the cycle column.



To view and edit an existing requisition:

1) Select the requisition from the grid using the “Edit” button next to the requisition.
2) A view of the funding records for that visa requisition will be shown.



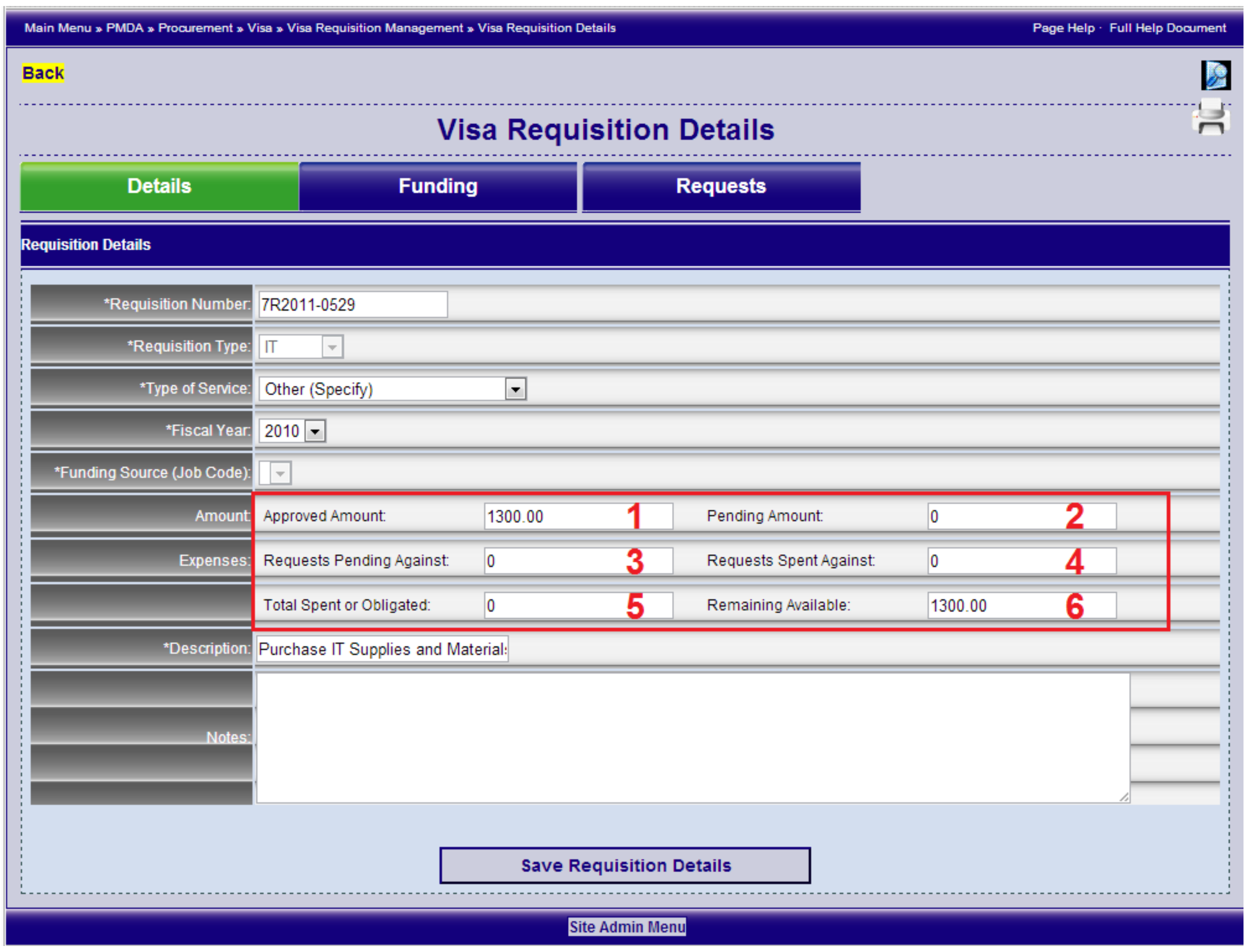


Select an edit button next to any of the funding records shown to be directed to the Visa Requisition Details screen for that requisition.

The Visa Requisition Details screen shows a detailed view of the requisition, including a section for details, funding for the requisition, and visa requests against the requisition.

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

1) Approved active funding.
2) Pending funding.
3) Pending visa requests against the requisition.
4) Expended (reconciled) visa requests against the requisition.
5) Total spent and obligated.
6) Remaining funding available.



The funding section shows a grid of all the funding records associated with the visa requisition and their status. A pending funding record has not yet been approved to be active and spendable, while an active funding record may incur expenses from visa requests. To access a funding record, click the “Edit” button next to it. Funding records which have no visa requests against them may be safely deleted if necessary.

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	

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

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.

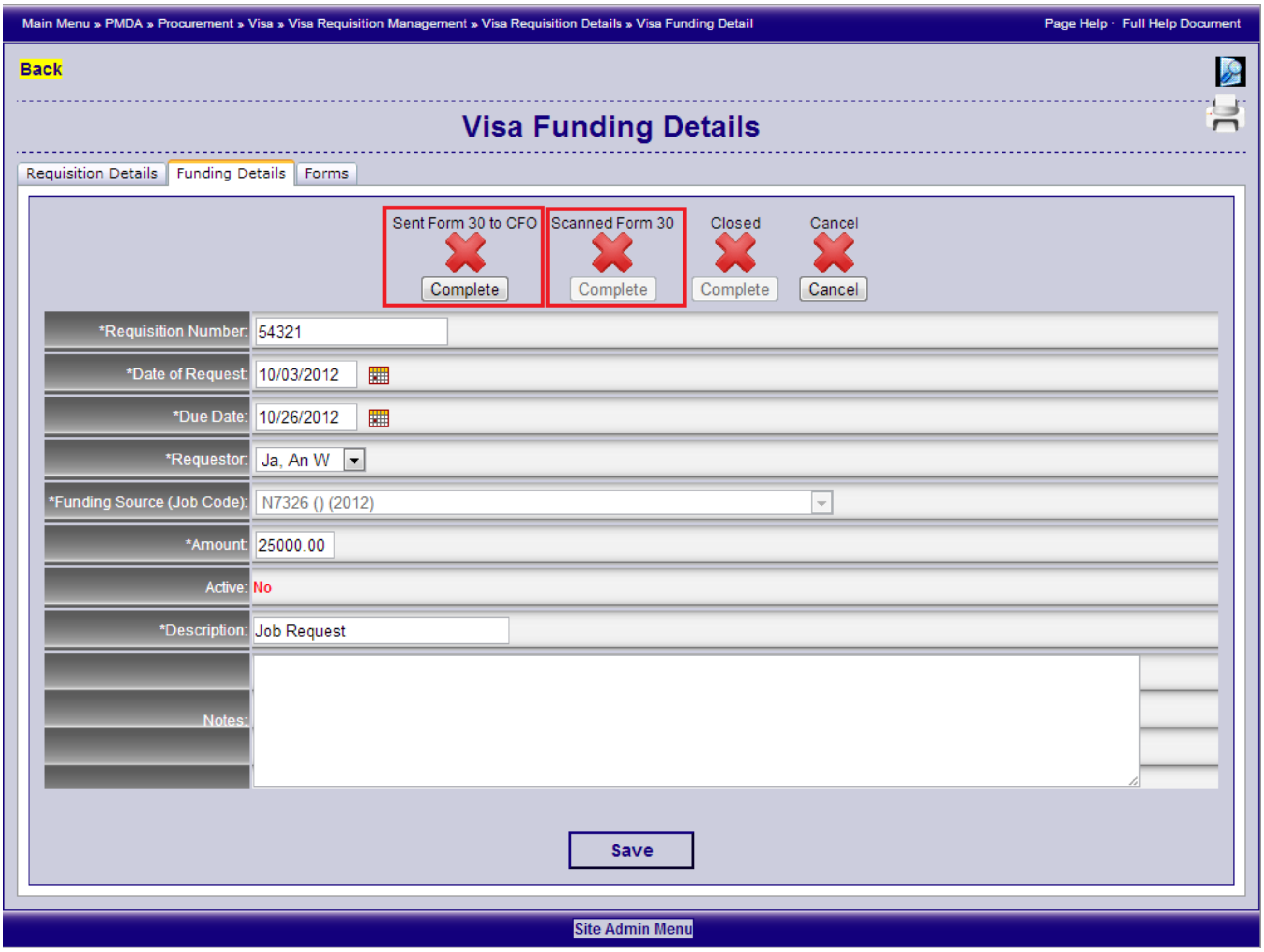
Delete	Requisition #	Type	Description	Job Code	Funding	Amount Obligated	Amount Spent	Amount Remaining	Active Status	Edit
	7R2011-0529	IT	Purchase IT Supplies and Materials	N7463	$1,300.00	$0.00	$0.00	$1,300.00	Yes	
	RQ7010BC018	NON-IT	VISA funds for non-IT purchases	N7326	$18,500.00	$559.96	$14,276.04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

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

Visa Funding

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



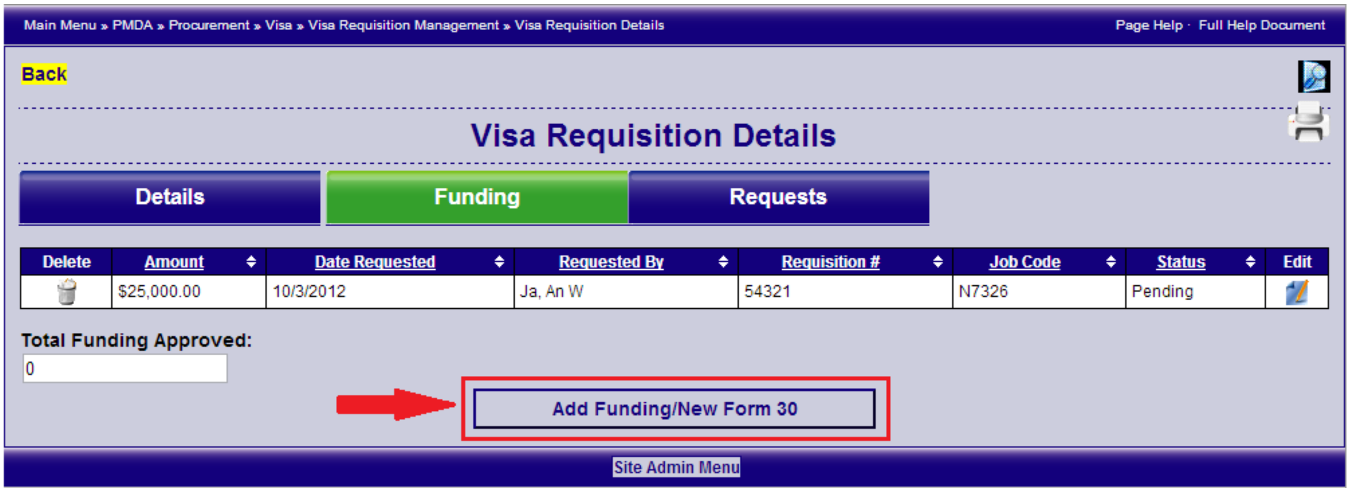
The "Form 30" associated with the funding record may be accessed and printed by selecting the "Forms" tab and clicking the Form 30 link to generate the form report, or clicking the "Print" icon at the top right of the screen.

Additional funding may be added to an existing Visa Requisition.

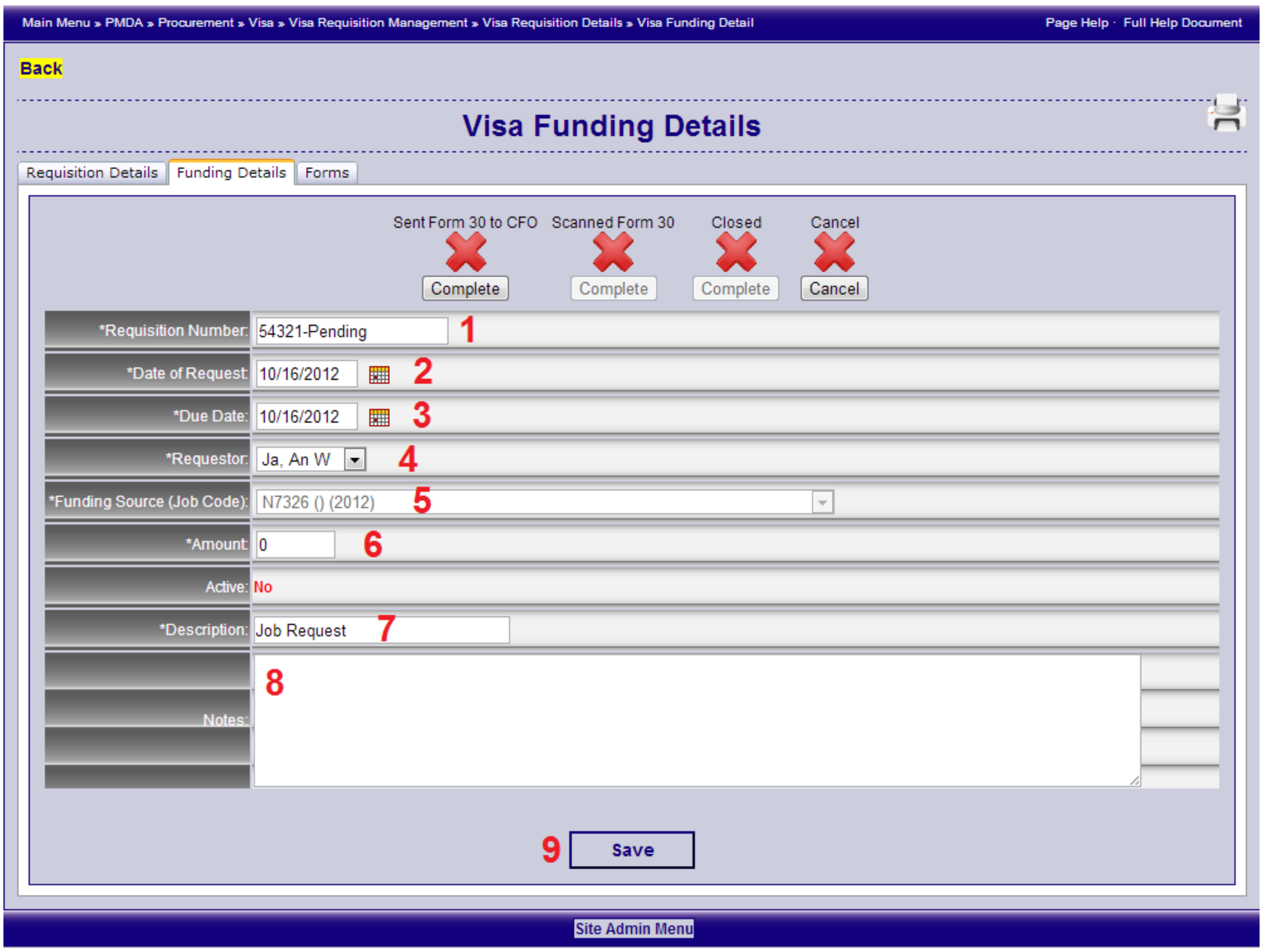
To add funding to a Visa Requisition:

From the “Funding” tab of the Visa Requisition:

1. Click the “Add Funding/New Form 30” button.



1. Enter the requisition number.
2. Enter the date of the request.
3. End 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”.



Contracts

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

Status: All Starting Year: All Filter Contract Totals for RFPAs with Fiscal Year: 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 RFPAs, add/edit invoices, mark invoices as paid, etc.), click the edit icon.

If a contract can be deleted, click the appropriate trash can icon. The icon will only appear if the contract is allowed to be deleted by business rules.

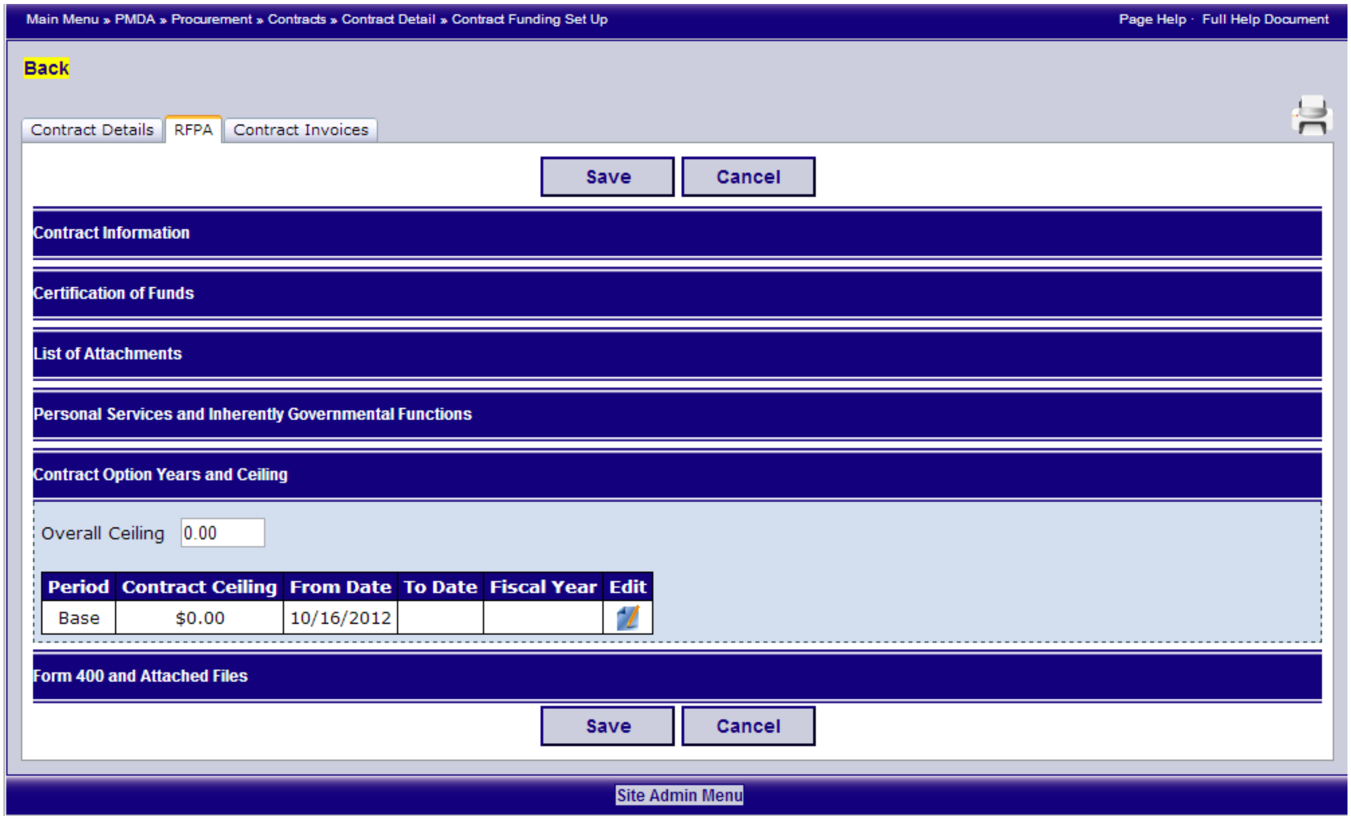
Status: All Starting Year: All Filter Contract Totals for RFPAs with Fiscal Year: All

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”.



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

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			

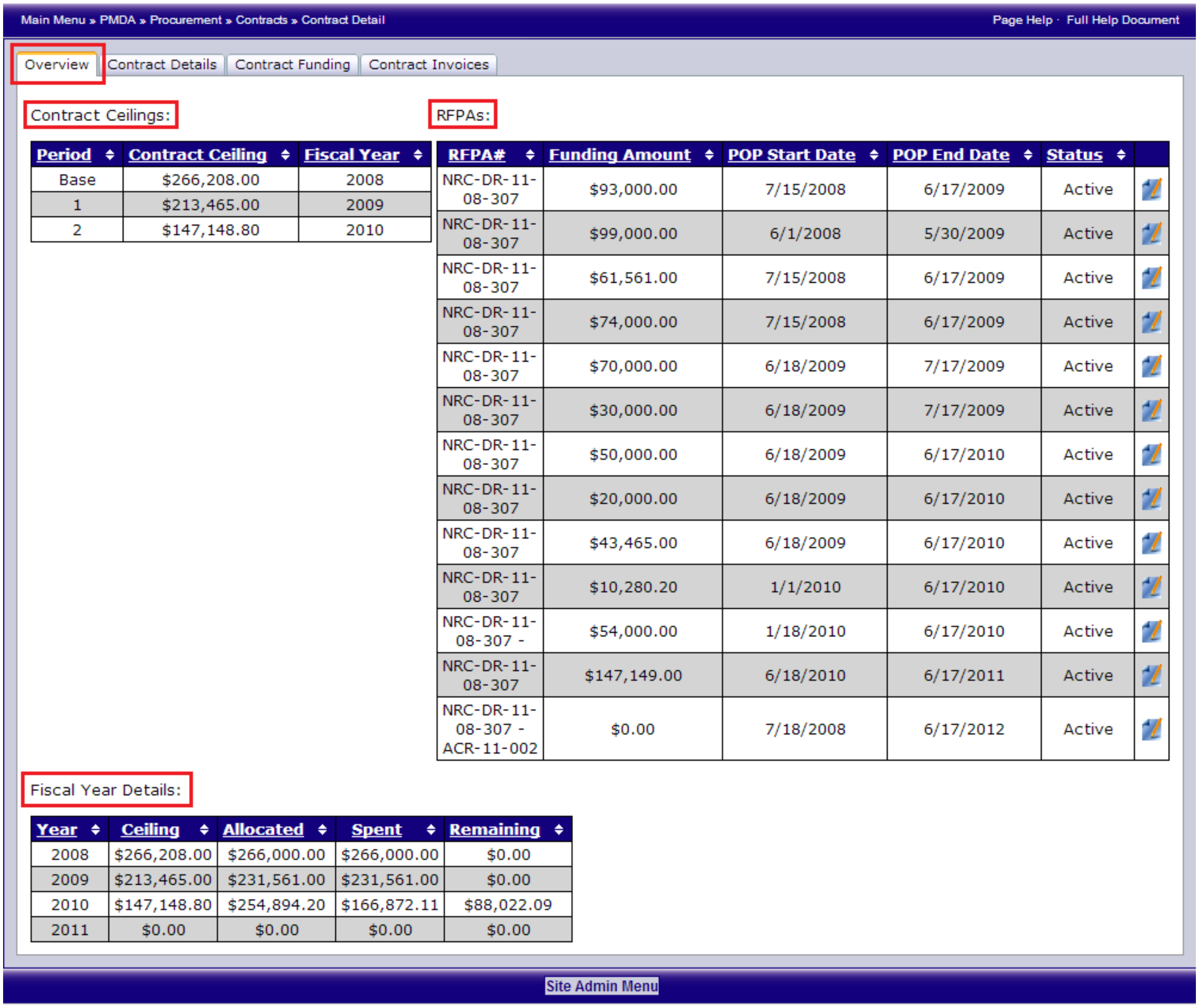
Form 400 and Attached Files

Save Cancel

Site Admin Menu

The Contract Details page includes four tabs.

The overview tab gives summary data about the ceilings, RFPA 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:

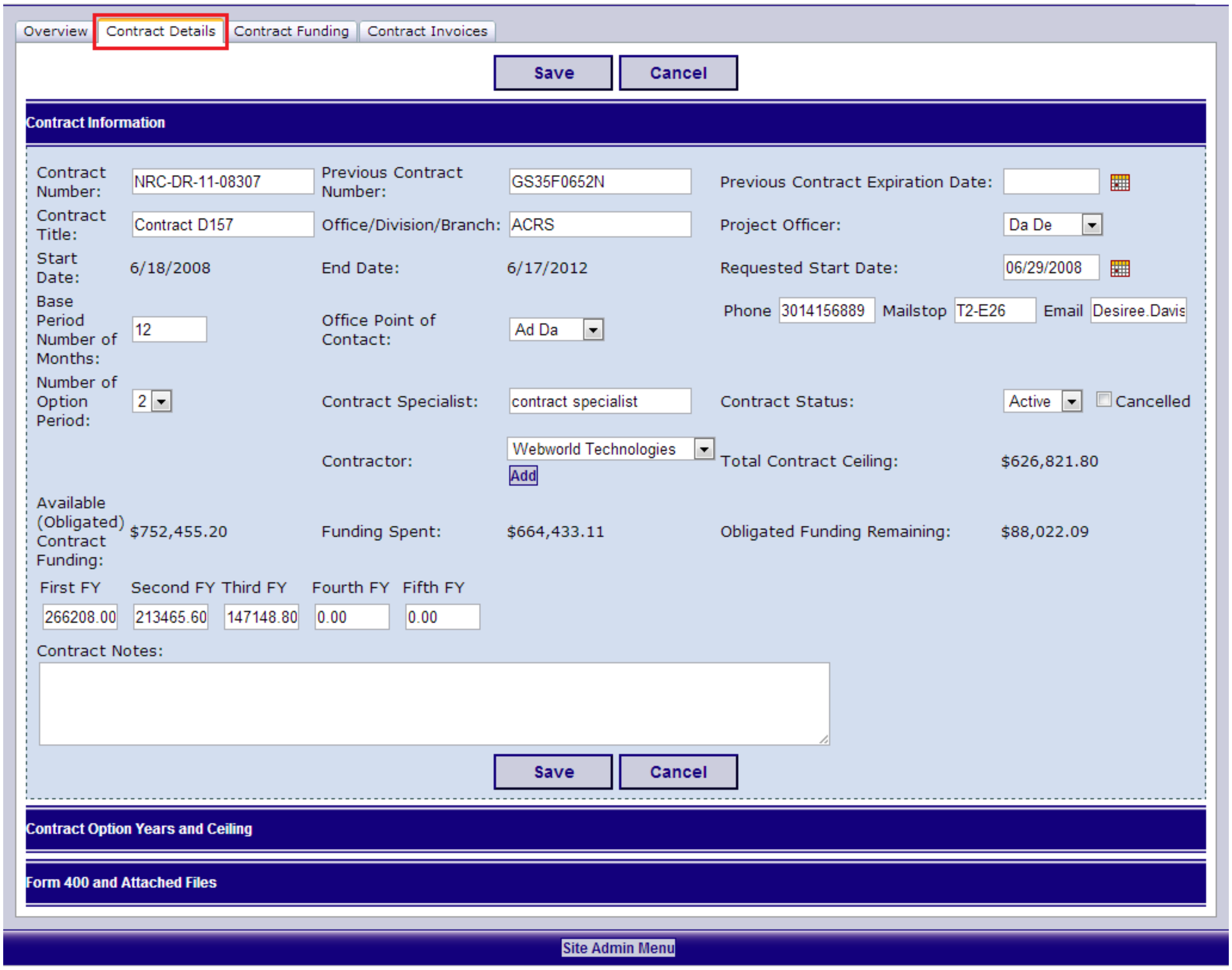
RFPA#	Funding Amount	POP Start Date	POP End Date	Status
NRC-DR-11-08-307	$93,000.00	7/15/2008	6/17/2009	Active
NRC-DR-11-08-307	$99,000.00	6/1/2008	5/30/2009	Active
NRC-DR-11-08-307	$61,561.00	7/15/2008	6/17/2009	Active
NRC-DR-11-08-307	$74,000.00	7/15/2008	6/17/2009	Active
NRC-DR-11-08-307	$70,000.00	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

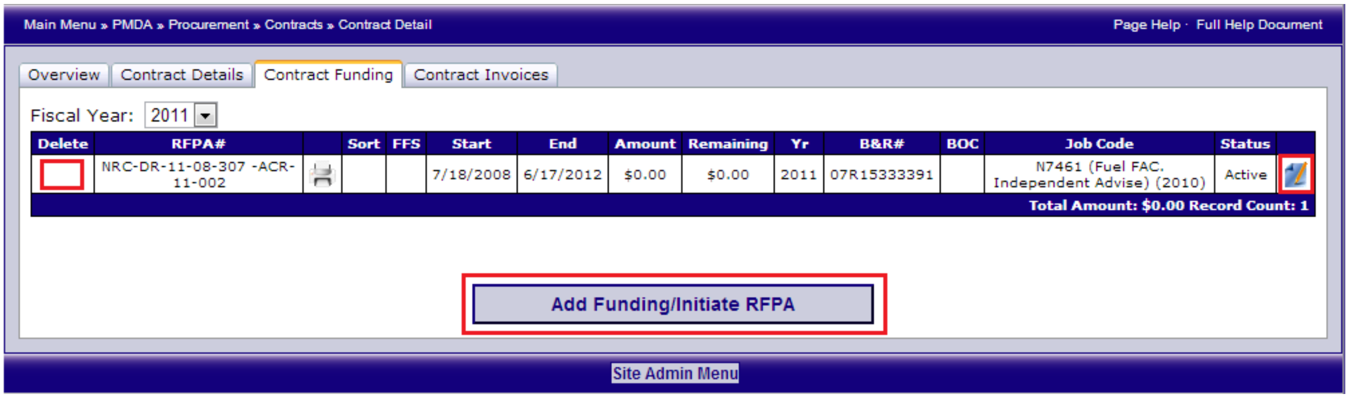
The Contract Details tab contains the details that apply to all RFPAs for the contract. These can be updated as necessary by changing the data and clicking “Save”.



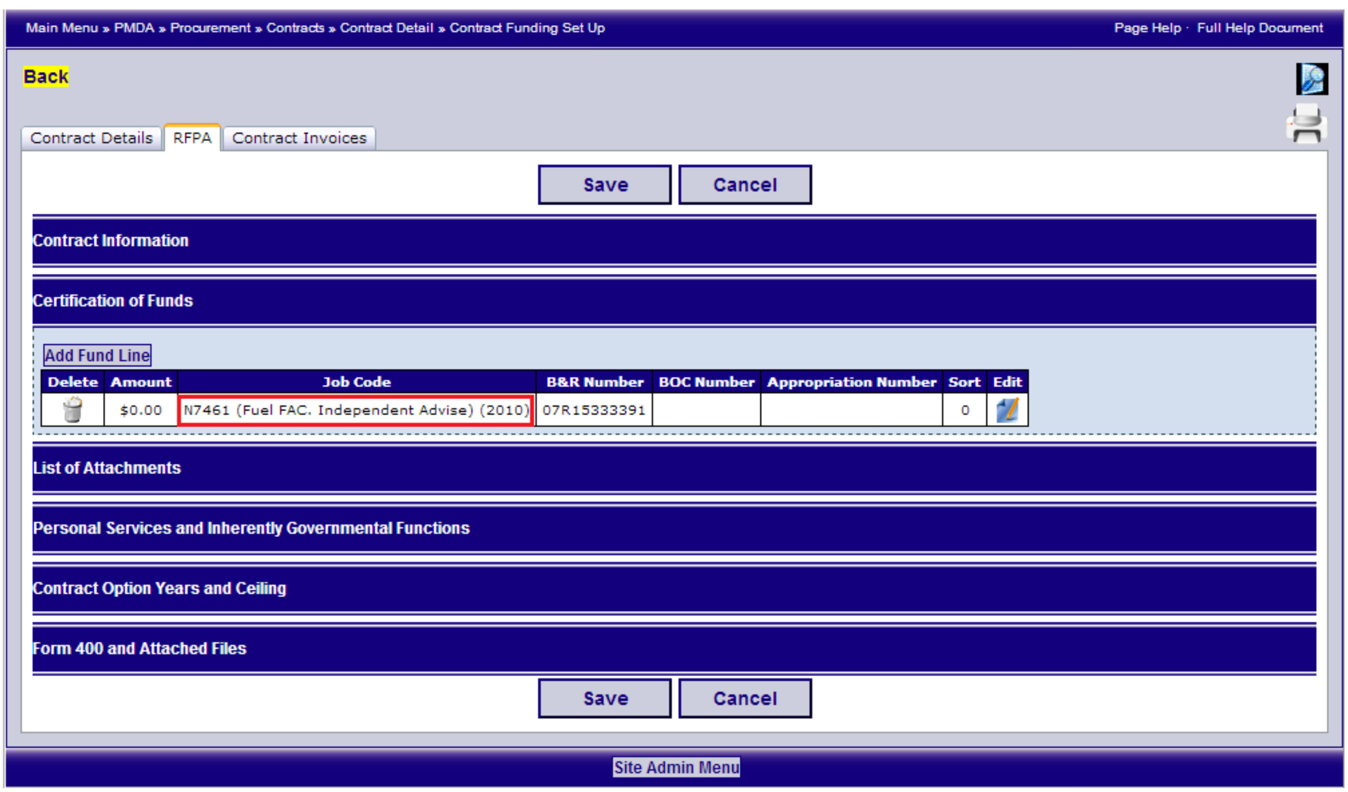
The Contract Funding tab contains a list of all RFPAs for the contract. A new RFPA can be started from here by clicking the “Add Funding/Initiate RFPA” button.

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

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



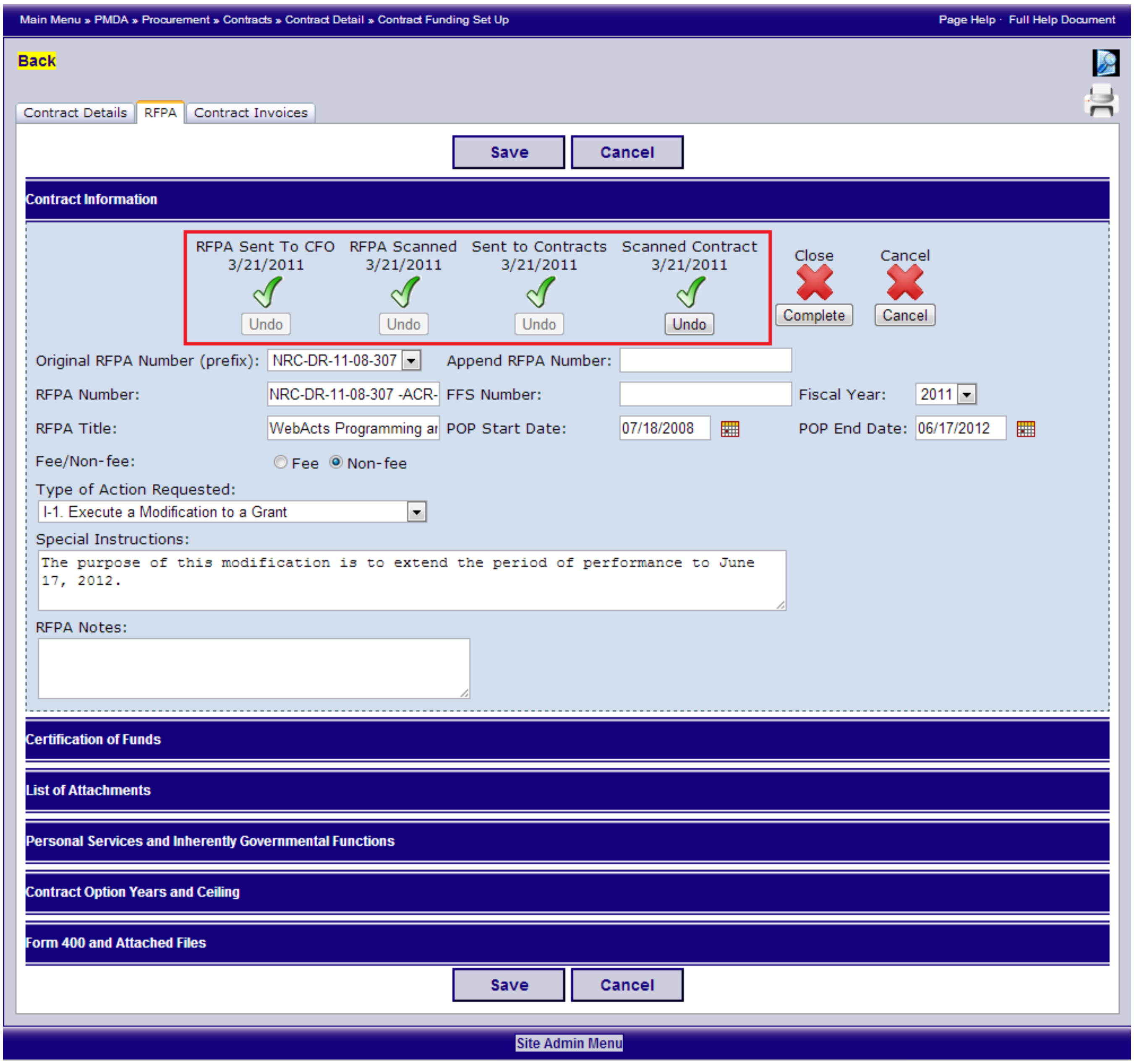
The funding associated with an RFPA is listed in the fund lines shown in the “Certification of Funds” section. Each fund line is associated with a job code so the funding may be drawn from a budget related Job Code/Program.



Completing the sequence items for an RFPA certifies (makes active and available) an RFPA's funds.

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

When an RFPA has been marked "RFPA Sent to CFO", "RFPA Scanned", "Sent to Contracts" and "Scanned Contract", its funds are considered "Certified" or "Active" and the funds are obligated from the RFPA's associated job code. Obligated funds may have invoices paid against them.

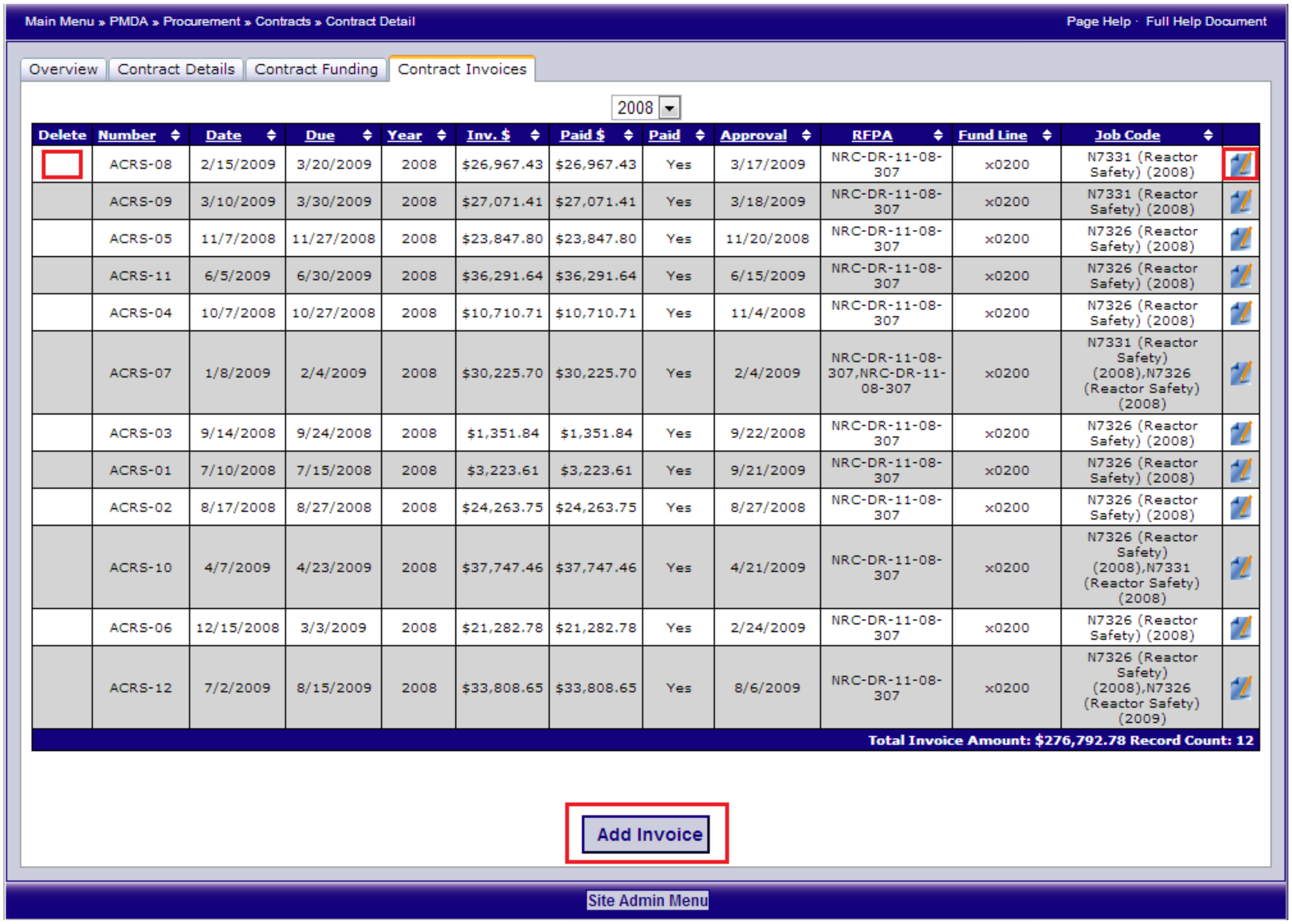


The Contract Invoices tab contains a list of all invoices related to the contract.

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

To edit an existing Invoice, click the edit icon.

To delete an invoice, click the trash can icon.



Delete	Number	Date	Due	Year	Inv. $	Paid $	Paid	Approval	RFPA	Fund Line	Job Code	
	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

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”.