# SETRIS User Guide

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SETRIS OVERVIEW

SETRIS - Subcontractor Electronic Time Recording & Invoice System. This is a solution for a timelier invoicing of subcontractor hours and related cost. General Dynamics IT has developed a system whereby our subcontractors can electronically record their time to generate electronic weekly invoices. Based on the electronically recorded time, the system generates a Subcontractor Electronic Invoice for payment after the time has been reviewed and approved by the subcontractor, and reviewed by GDIT. The intent of SETRIS is to maximize GDIT’s operational efficiencies by streamlining the processing of subcontractor timesheets and invoices to achieve timely project results. The resultant benefit for our subcontractors will be the generation of weekly invoices for which payments will be processed in a more efficient manner. The basis for a subcontractor P.O. to be set up in SETRIS is a purchase order that meets the following criteria:

- The P.O. line UOM = **Hour**
- Quantity = number of hours
- The P.O. line must be in an **open** status in AP
- The P.O. line Expenditure Type must be one of the following: SUBK PLC, SUBK PLCNL, SUBK LBRHR, SUBK LABOR
- The P.O. unit price line rate must be **1**, or **greater**
- The P.O. must begin with **07ESM** or **08ESM**
- The subcontract type must be **T&M**, or an **FFP**
- Description = Examples are labor category, project name, etc. If the line is for overtime, please start line with **OT** or some other identifier. The P.O. line description is what the **SUBK Contributor** sees on their timecard.

P.O.’s that match this criteria will be set up in **SETRIS** and available to be assigned.
GDIT User Roles:

- GDIT Administrator (required for each P.O. – may administer multiple P.O.’s)
- GDIT Primary Reviewer (required for each P.O. – may be assigned to multiple P.O.’s)
- GDIT Secondary Reviewer (assigned to a GDIT primary reviewer)

An e-mail is sent to new users when they have been provisioned a SETRIS User Role.

Example: Dear Employee,

Welcome to the General Dynamics Subcontractor Electronic Time Card & Invoice System (SETRIS): General Dynamic’s employees may access SETRIS via a single sign-on link located under the Enterprise Applications menu on the GDIT TeamWorks Home Page (https://teamworksportal.gdit.com/Pages/default.aspx).

Click on Program Management under Conducting Business, then SETRIS under Services and Applications.

Please do not reply to this email. This address is not monitored. For additional assistance, please contact your SETRIS GDIT Administrator.

- SETRIS requires submission of weekly timecards by a SUBK Contributor on Friday that are approved by the subcontractor and accepted by GDIT. This will result in an invoice created by GDIT that is available for Accounts Payable processing each Monday.
- The GDIT SETRIS SUBK time and invoice system provides both GDIT personnel and SUBK personnel a quick and efficient process of setting up P.O.’s and provisioning personnel in the system upon the placement of a P.O. by GDIT.
- SETRIS Roles
  - General Dynamics
    - GDIT Administrator
    - GDIT Primary Reviewer
- GDIT Secondary Reviewer
  - Subcontractors
    - SUBK Administrator
    - SUBK Contributor
    - SUBK Primary Approver
    - SUBK Secondary Approver
- Special Privileges – SETRIS Roles identified above include specific and limited functionality. For instance, a SUBK Primary Approver is not eligible to complete a timecard. Recognizing that this may be a requirement for some subcontractors, a special privilege may be assigned by the GDIT SUBK Administrator that enables a SUBK Approver to also be eligible to complete a timecard. Special privileges can be assigned to all SETRIS Roles, including GD personnel.
- Processes required to set up a P.O. and provision both GD and SUBK personnel in SETRIS.
  - GDIT Administrator requests to be provisioned – manager approval required
    - Assigns P.O. and P.O. lines in SETRIS as eligible for charging
    - Provision a SUBK Administrator (by supplier name)
    - Provision a GD Primary Reviewer and assign to a P.O.
    - Provision a GD Secondary Reviewer and assign to a Primary Reviewer, or
    - The GD Primary Reviewer may assign the Secondary Reviewer also
  - SUBK Administrator
    - Provision SUBK Contributors and assign to P.O. line(s)
    - Provision a SUBK Primary Approver and assign to a P.O.
    - Provision a SUBK Secondary Approver and assign to a Primary Approver, or
    - The SUBK Primary Approver may assign the Secondary Approver also
- All personnel provisioned in SETRIS will receive e-mails indicating they have been provisioned.
  - GD Personnel
    - E-mail will indicate the role they have been provisioned to
    - GD personnel will access SETRIS via SSO after having successfully logged into the GDIT domain
    - SETRIS screen displays will be based on the role they been provisioned and the P.O.(s) they have been assigned to
  - SUBK Personnel
    - E-mail will indicate the role they have been provisioned to and their login ID
• E-mail will indicate a temporary password to establish a permanent password

• Subcontractor personnel must establish a permanent password timely and answer security questions to be used for self-service password re-sets

• SETRIS screen displays will be based on the role they have been provisioned and the P.O.(s) and P.O. line(s) they have been assigned to

  • All personnel provisioned in SETRIS must have a start date, end dates are optional.
  • All P.O. lines assigned in SETRIS will have start and end dates.
  • All personnel provisioned in SETRIS with the exception of the SUBK Contributors will have access to a reporting tool with data extract functionality.
Logging into SETRIS

The SETRIS application is single sign on. To sign on, click the URL: https://setrisint.gdit.com, or you may access SETRIS from the SETRIS located under the Enterprise Applications menu on the GDIT TeamWorks Home Page. The users name is linked with their Active Directory account, similar to other applications such as ETS & BPM.

The single sign on will display the Main Page. The Main Page will display options based on your SETRIS User Role and Special Privileges.
GDIT Administrator

Access Request and Role

The GDIT Administrator role is assigned by the FS System Administrator, via a BPM request, that must be approved by the requestor’s supervisor. This access request only needs to be completed one time. To complete an access request, please click on the link: https://bpm.gdit.com/suite/tempo/actions/view/all

The GDIT Administrator role has the ability to:

- **Provision and Maintain GDIT and Subcontractor User Type Roles**
  - GDIT Primary and Secondary Reviewers
  - SUBK Administrator
  - All Other SUBK Roles - Special Privileges (Only as Required)

- **Create and Maintain Subcontracts**
  - Create the SUBK and P.O. Association
  - Assign the Appropriate P.O. Lines for SUBK Time Charging

- **Run a Data Extract Report**
Creating a Subcontract in SETRIS

1. On the **Main Page**, click the **Maintain Subcontractors** option.
The Maintain Subcontracts option is now displayed.

2. Click the Create & Maintain Subcontracts option.  
   A Subcontract Maintenance window is displayed.

3. Click the dropdown arrow to display the list of Search by options. 
   
   **Note:** You may also click in the Search by field to display the list of options.

![Setris User Interface](image)

**The Search by Options:**

**Search by P.O. NUMBER**
This option allows you to search by the P.O. NUMBER. The P.O. NUMBER must be set up in SETRIS. This will occur the morning after the P.O. has been processed in ESM/IFS.
The criteria for a P.O. to be eligible in SETRIS are:

- The P.O. line UOM = Hour
- Quantity = number of hours
- The P.O. line must be in an open status in AP
- The P.O. line Expenditure Type must be one of the following: SUBK PLC, SUBK PLCNL, SUBK LBRHR, SUBK LABOR
- The P.O. unit price line rate must be 1, or greater
- The P.O. must begin with 07ESM or 08ESM
- The subcontract type must be T&M, or an FFP
- Description = Examples are labor category, project name, etc. If the line is for overtime, please start line with OT or some other identifier. The P.O. line description is what the SUBK Contributor sees on their timecard.

**Search by Supplier Name**
This option allows you to search for a Supplier/Subcontract name. If you enter the complete Supplier Name, it must be entered exactly how it is set up in the system. If you enter a partial Supplier Name, you may receive numerous Supplier Names and P.O.’s. **The recommended option is to search by the P.O. NUMBER.**

4. Click the **Search by P.O. NUMBER** option.
5. Click the **Search** field, and type the appropriate **P.O. NUMBER**.
   **Note:** The **Search** field is not case sensitive.

6. Click the **Search** icon.
   The **P.O. Number**, **Supplier Name** and **Assignment Status** will be displayed.
Note: You may click on the Expand/Collapse icon, located on the header of every screen, to hide the menu options.

7. In the Subcontract Maintenance window, click the appropriate P.O. NUMBER. The P.O. Lines will be displayed.

8. In the Select to column, click the Checkbox(es) of the appropriate chargeable P.O. Lines. 
   Note: To select all P.O. Lines, click the checkbox below the Select to column name.
The selected and assigned P.O. Lines must have a **Start** and **End Date**. This is required when assigning a P.O. Line. The **Start Date** will default to the current day unless specified otherwise.

9. On the assigned P.O. Line, click the **End Date** field.
   A *calendar* will display.

10. On the calendar, click the appropriate **End Date**.
11. Once the **End Date** is selected and displayed, click the **Save** button.

A message will display that the *Process completed successfully*! The **P.O. Lines** have been assigned with a Start and End Date.

12. Click the **OK** button.
If only the menu option icons are displayed, hover over the icon and the menu option name will display.

13. To exit the application, click the **Log Off** option.
Provision a SUBK Administrator
(A SUBK Administrator only has to be provisioned one time)

1. On the **Main Page**, click the **Maintain Application Users** option.
The *Maintain Application Users* options are now displayed.

2. Click the **Provision and Maintain Users** option.
   A *User Search* window is displayed.

3. Click the dropdown arrow to display the list of **Search by** options.
   **Note:** You may also click in the **Search by** field to display the list of options.

4. To provision a *SUBK Administrator* **SETRIS** user role, click the **NEW Non-Employee User by SUPPLIER NAME** option.
The **Search by Option:**

**NEW Non-Employee User by SUPPLIER NAME**
This option allows you to search for the Subcontract/Supplier name, and provision a **SUBK SETRIS** role.

5. Click the **Search** field, and type the appropriate **Subcontract/Supplier** name .
   **Note:** A partial name may be entered. The **Search** field is not case sensitive.

6. Click the **Search** icon.
   The **Supplier Name** and **Active PO Count** will be displayed.
7. In the *User Search* window, click the appropriate **Supplier Name**. There will be columns and fields displayed, where the **SUBK User** profile information must be entered, to provision a SETRIS User Role.
8. Enter the appropriate User ID (Email Address).

9. Enter the First and Last Name of the SUBK Administrator.

10. Double click the Role ID field, or click the dropdown arrow, to display the Role ID options.

11. Click the SUBK Administrator Role.

12. Once the Role ID is selected, click the Save button.
A message will display that the *Process completed successfully!* The User has been provisioned a **SUBK Administrator** role.

13. Click the **OK** button.

The **SUBK Administrator** will receive **two** Emails when they have been provisioned by a GDIT Administrator.

The **first** email includes the SUBK’s USER ID (Email Address) and the provisioned SETRIS User role. This email will also include an attachment. The **second** email includes the SUBK User’s temporary password. This **temporary** password is time sensitive and should be executed as soon as possible. The SUBK User **must** log in with the provided temporary password, and create a new password.
Assign Special User Privileges to SUBK User Types

In addition to a provisioned SUBK role, the GDIT Administrator may assign a SUBK User Special Privileges. For example, the role of a SUBK Administrator may need to perform Time Entry and would need to be assigned the Time Entry privilege.

1. On the Main Page, click the Maintain Application Users option.
The *Maintain Application Users* options are now available.

2. Click the **Assign Special User Privileges** option.  
   A *User Search* window is displayed.

3. Click the dropdown **arrow** to display the list of **Search by** options.  
   **Note:** There is only one *Search by* option when assigning special privileges.

4. Click the **Assign Special Privileges by NAME** option.
5. Click the **Search** field, and type the appropriate users **Last Name**.
   **Note:** The Search field is not case sensitive.

6. Click the **Search** icon. A list of available user(s) with their **SETRIS Role** will be displayed.
7. In the *User Search* window, click the appropriate **User ID**. The *User’s Privilege Categories* and *Privilege Assigned* columns will display.

8. Click the *Privilege Assigned Checkbox(es)* for the appropriate *Privilege Category*. 

![User Search Window](image)
9. Click the **Save** button.

A message will display that the *Process completed successfully!*
A **Privilege Category** has been assigned to the SUBK Administrator.

10. Click the **OK** button.
Maintain Subcontracts

1. On the **Main Page**, click the **Maintain Subcontractors** option.
The *Maintain Subcontracts* option is now available.

2. Click the **Create & Maintain Subcontracts** option.
   
   A *Subcontract Maintenance* window is displayed.

3. Click the dropdown arrow to display the list of *Search by* options.
   
   **Note:** You may also click in the *Search by* field to display the list of options.

4. Click the **Search by P.O. NUMBER** option.
The Search by Options:

Search by P.O. NUMBER
This option allows you to search by P.O. NUMBER. The P.O. must be set up in SETRIS.

Search by SUPPLIER NAME
This option allows you to search for a Supplier/Subcontract name. If you enter the complete Supplier Name, it must be entered exactly how it is set up in the system. If you enter a partial Supplier Name, you may receive numerous Supplier Names and P.O.’s. The recommended option is to search by P.O. NUMBER.

5. Click the Search field, and type the appropriate P.O. NUMBER.
   Note: The Search field is not case sensitive.

6. Click on the Search icon.
   The PO Number, Supplier Name and Assignment Status will be displayed.
7. In the Subcontract Maintenance window, click the appropriate **P.O. NUMBER**. All **P.O. Lines** will be displayed.

Some examples of updates/changes:
- Start and End Dates
- Assign P.O. Lines
8. In this example, click a P.O. Line **End Date** field. A calendar will display.

9. On the calendar, click the appropriate **End Date**.
10. Once the **End Date** is selected, click the **Save** button. A message will display that the *Process completed successfully*!

11. Click the **OK** button.
If only the menu option icons are displayed, hover over the icon and the menu option name will display.

12. To exit the application, click the **Log Off** option.
Provision a GDIT Internal User

1. On the **Main Page**, click the **Maintain Application Users** option.
The *Maintain Application Users* options are now displayed.

2. Click the **Provision and Maintain Users** option.  
   A *User Search* window is displayed.

3. Click the dropdown arrow to display the list of *Search by* options.  
   **Note:** You may also click in the *Search by* field to display the list of options.
The *Search by Options*:

**NEW Employee User by NAME**  
This option allows you to search for the GDIT User’s name to provision a **SETRIS** role. The users name is linked with their Active Directory account.

**MAINTAIN Users by NAME**  
This option allows you to search for a provisioned GDIT User’s name. The GDIT User’s *status/profile* and *roles* may be changed or updated.

4. To provision a **GDIT User**, click the **NEW Employee User by NAME** option.

5. Click the **Search** field, and type the users **Last Name**.  
   **Note:** A partial last name may be entered. The **Search** field is not case sensitive.

6. Click the **Search** icon.  
   A list of available user(s) will be displayed including their *Organization Unit* and *Department*.
7. In the *User Search* window, click the appropriate *User Name*. The GDIT *User profile/status* information will be displayed.
For the **NEW Employee User by NAME** option, the **GDIT Administrator** can only provision roles for *GDIT Primary Reviewers* and *GDIT Secondary Reviewers*.

8. Double click the **Role ID** field, or click the dropdown arrow ▼, to display the **Role ID** options.

9. Click the appropriate **SETRIS User Role**.

![Role ID dropdown](image)
10. Once the Role ID is selected, click the Save button.

A message will display that the Process completed successfully! The GDIT User has been provisioned to a specific role. An E-mail is sent to a new user when they have been provisioned a SETRIS User Role.

11. Click the OK button.
Maintain a GDIT Internal User

A GDIT User’s profile and roles can be changed or updated.

1. On the Main Page, click the Maintain Application Users option.
The *Maintain Application Users* options are now available.

2. Click the **Provision and Maintain Users** option.
   A *User Search* window is displayed.

3. Click the dropdown arrow to display the list of *Search by* options.
   **Note:** You may also click in the *Search by* field to display the list of options.

4. To maintain a **GDIT User**, click the **MAINTAIN User by NAME** option.
MAINTAIN Users by NAME
This option allows you to search for a provisioned GDIT User’s name. The GDIT User’s status/profile and roles may be changed or updated.

5. Click the Search field, and type the Users Last Name.  
   Note: A partial last name may be entered. The Search field is not case sensitive.

6. Click the Search icon.
   A list of available user(s) will be displayed including theire User ID, Full Name, SETRIS Role and SETRIS Status.
7. In the *User Search* window, click the appropriate User ID/Name. The *GDIT User’s* information will be displayed where you may update/change the profile status.

Some examples of updates/changes:
- **Start** and **End Dates**
- Changing the **Status** of the user from *Active* to *Inactive*. 
8. Click the appropriate field to update.
9. Click the **Save** button.

A message will display the *Process completed successfully!*

10. Click the **OK** button.
Assign a GDIT Primary Reviewer to a Subcontract/PO

1. On the **Main Page**, click the **Maintain Application Users** option.
The *Maintain Application Users* options are now available.

2. Click the **Primary Approver/Review Assignments** option. 
   A *Maintain Primary Assignments* window is displayed.

3. Click the dropdown *arrow* to display a list of *Search by* options.  
   **Note:** You may also click in the *Search by* field to display a list of options.

4. Click the **Primary Reviewer by User Name** option.
The Search by Options:

**Primary Reviewer by User Name:**
This option allows you to search for a user name that has been provisioned the SETRIS role of *GDIT Primary Reviewer*.

**Primary Reviewer by P.O. Number:**
This option allows you to search for the *GDIT Primary Reviewer* by the Purchase Order Number. The *GDIT Primary Reviewer* must be assigned to a PO/Subcontract if this option is selected.

5. Click the **Search** field, and type the user's **Last Name**.
   **Note:** A partial last name can be entered. The **Search** field is not case sensitive.

6. Click on the **Search** icon.
   A list of available *GDIT Primary Reviewer(s)* will be displayed.

![Screenshot of SETRIS interface showing search results for GDIT Primary Reviewer]
7. In the Maintain Primary Assignments window, click the appropriate **GDIT Primary Reviewer** name. A list of available **PO Numbers/Supplier Names** will display, for which a **GDIT Primary Reviewer**, has yet to be assigned.

8. Click the **Checkbox(es)** of the appropriate PO’s to be assigned to the **GTE Primary Reviewer**.

9. Click the **Save** button.
A message will display that the *Process completed successfully!* The **GDIT Primary Reviewer** has been assigned to a P.O./Subcontract.

10. Click the **OK** button.
Assign a GDIT Secondary Reviewer

To assign a GDIT Secondary Reviewer, the GDIT User must be provisioned this role in SETRIS. (See Instructions - Provision a GDIT User).

1. On the Main Page, click the Maintain Application Users option.
The *Maintain Application Users* options are now available.

2. Click the **Assign Secondary Approver/Reviewer** option.  
   A *Maintain Secondary Assignments* window is displayed.

3. Click the dropdown **arrow** to display the **Search by** options.  
   **Note:** There is only one *Search by* option when assigning a *GDIT Secondary Reviewer*.

4. Click the **Select Primary Reviewer by Name** option.
Select Primary Reviewer by Name
This option allows you to search for the GDIT Primary Reviewer by name. The GDIT Primary Reviewer must be provisioned this role in SETRIS.

5. Click the Search field, and type the user's Last Name.  
   Note: A partial last name can be entered. The Search field is not case sensitive.

6. Click the Search icon.

7. A list of GDIT Primary Reviewer(s) will be displayed.
8. In the *Maintain Secondary Assignments* window, click the appropriate **GDIT Primary Reviewer** name. A list of available **GDIT Primary Reviewer** and **GDIT Secondary Reviewer** names will be displayed.

9. Click the **Checkbox(s)** of the appropriate **GDIT Secondary Reviewer** to be assigned to the **GDIT Primary Reviewer**. **Note:** The **GDIT Primary Reviewer** has already been assigned to a P.O./Subcontract.

10. Click the **Save** button.
A message will display that the *Process completed successfully!* The **GDIT Secondary Reviewer** has been assigned to a **GDIT Primary Reviewer**.

11. Click the **OK** button.