What has Changed?
SeRA now manages central office and department administrator access through Authority Manager! This is our big enhancement for this release, but we have also made a number of other small enhancements.

Some additional highlights include:

- New enhancements to support research in our COVID environment
- A flag to denote projects getting funds through the CARES Act
- A few Central Office goodies

We hope you enjoy all of these new updates!

Contents

Proposals & Awards 2

- Integration with Authority Manager 2
- COVID Enhancements 2
- Small Enhancements & Bug Fixes 4

Central Office Enhancements 4

- Integration with Authority Manager 4
- COVID Enhancements 5
- Upgrades for Entity Management (Sara) 6
- Show Transaction Log before merge decision 7
- PTA Mgr: Show Oracle Organization in PTA Intake 7
- ARC Enhancements for Accounts Receivable 8
- Administration Functions 8
- Additional Small Enhancements & Bug Fixes 8
Proposals & Awards

Integration with Authority Manager
In the past, a user would submit a help ticket to request access to SeRA records owned by a department (owing organization). The SeRA support team, on behalf of the requestor, contacted the owning department/organization for their approval before granting access. The granting of SeRA access has now moved to Authority Manager so owning departments/organizations will maintain access to their SeRA records themselves! Each department/organization has identified grantor(s) and can now grant new SeRA access to others without submitting a help ticket. Users can receive access to a specific SeRA project (SPO); all SeRA projects (SPOs) under a department/organization code; and/or receive Notice of Award (NOA) email notifications for a department/organization.

COVID Enhancements
During this release, COVID became a big deal with lots of changes for research and researchers. To support this, a number of changes were made in the system. These include:

- For projects that are related to COVID, there is a new “COVID-19” option under Disease Related Research in the Research Focus Region on Project Questions page. This section is now displayed for all departments at Stanford so that this option can be selected. (Previously, Research Focus
For projects utilizing CARES Act funding or research related to COVID-19, there is a new flag “CARES Act Funding” and help info icon for new or submitted Proposals or Awards.

For projects which are negatively impacted due to COVID-19, department administrators can now notify OSR of sponsored project activities through a new Central Office Request type: “COVID-19 Sponsor Notification/Request”. This request type (as well as the “Other - Institutional Official request type) also include new instructional text with a link to a related form and a new “COVID-19 Request Form” attachment category for this form.
Small Enhancements & Bug Fixes

In this release, a number of small enhancements and bug fixes were completed. These included the following:

- Fixed issue around uploading large attachments from slow networks.
- Fixed issue where the left hand menu did not display for Other Agreement Logs so the attached agreement was not accessible.
- Updated Advanced Search to allow all departments/organizations (including non-research-orgs) to as search criteria for Basic Project, Transactions and Extended Projects searches.
- Corrected a number of instances where the field is marked “required” but validation was missing.
- Added Help Text for the main Project Location field
- Standardized a number of pop-up windows with consistent layout, alignment, action button options, showing required fields correctly, and updated instruction text.

Central Office Enhancements

Integration with Authority Manager

On the Central Office side, the granting function for the Central Office User role has been moved to Authority Manager. Central office roles are now separated clearly by the office they represent, and whether they have signing authority. Users can be granted OSR, RMG, ICO or Other designations. Granting of Central Office access remains with the support team.
COVID Enhancements

On the COVID front, there were also a few changes made for Central Office users. These include:

- In order to track the COVID-19 Sponsor Guidance, an additional attachment category and subcategory of “COVID-19 Sponsor Guidance” have been created in the Sponsor Maintenance App.
A new issue type has been added to the Award Transaction log called “COVID-19 related delay”.

**Transaction Log:**

<table>
<thead>
<tr>
<th>Issue Name *</th>
<th>COVID-19 Related Delay</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status *</td>
<td>Unresolved</td>
</tr>
</tbody>
</table>

**Upgrades for Entity Management**

This release added a few additional features for Entity Management where we manage sponsors in SeRA. The big upgrade is the new ability to track special conditions associated with a sponsor. The recording of an entity’s (sponsor) general sponsor terms and conditions are on a new page called “Terms & Conditions”. (Development of this page will continue to start capturing other sponsor level T&C attributes in the future.)

We have also fixed some issues with the high level “Updated On/By” fields for the sponsor which show in the upper right hand menu and on the primary report showing all sponsors. This field is now updating when any high level information is updated including all of the summary details, the comments, the program types, the related entities, and the financial standing.
A function has also been built to merge duplicate sponsors together to clean up some existing bad data in the system. This feature will update all existing projects that are connected with the merged sponsor so that these projects have the correct sponsor moving forward.

**Show Transaction Log before merge decision**
The Transaction Log is now displayed before the merge decision is made for award NCCs, Supplements, and Renewals. This allows you to track progress on the award even if you are still deciding if the money and terms need to be managed separately.

**PTA Manager: Show Oracle Organization in PTA Intake**
The post award intake now has an additional column that shows the Oracle Owning Organization listed in the award. This is pulled from the transaction so it should be available by the time the transaction shows up in the intake for almost all transactions.
ARC Enhancements for Sponsored Receivables Management (Accounts Receivable)

A few small, but exciting changes have been made to assist AR with their work. These include:

- Collection notes are now downloading in the .csv report from the AR Search!
- A new "Payment Not Posted" collection category was added to reflect when payment was not posted.
- A new "Payment Issue Due To Covid-19" collection category was added to reflect when there is a payment issue related to COVID-19.
- Some invoices were appearing in AR ARC that should not be there because of the billing terms. A fix was applied to remove those invoices from AR Collectors Dashboard and reporting.

Administration Functions

There were also some changes in our maintenance app for managing permissions. These include showing the permissions that come in from Authority Manager and updating the UI to be consistent with other areas in SeRA and removing some outdated privileges.

Additional Small Enhancements & Bug Fixes

A number of additional small enhancements and bug fixes for central office users were also completed during this release. These changes are described below:

- When PI Effort is supported by cost sharing the response to the cost share question is set to yes and cannot be changed. During award transaction processing, the PI effort question was not editable preventing users from changing cost sharing to “No” if terms had changed since the proposal. The PI Effort response and subquestions will now display on the Transaction Home of Award transactions so that it may be updated during Award processing.
A checkbox for “Description included in attachments” was not saving within IDC Waiver transactions. We have removed the checkbox and included help text explaining users should note in the text box when a description is included in the attachments.

Minor UI Changes were made on the Transaction Home of Subaward transactions. Date format and the names of columns were updated to be consistent with other areas of SeRA.