What has Changed?
This release was a very short release, but is still chock full of fun improvements. Some highlights include:

- The ability for departments to reassign transactions
- Replacements for EDW reports
- New T&C requirements
- Updated export control approvals
- More Entity Management changes

We hope you enjoy all of these new updates!

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Proposals & Awards

**Ability to Reassign Transactions**
From the transaction history page, now all users with access to a SPO or transaction can reassign a task to another user in order to manage workload. This is available on all transaction types.

**Replacement for EDW Reports**
Three new reports are available in SeRA on the “Reports” page. These reports return project data, proposal data, or award data based on the selected search criteria. Results in these reports are limited to projects where the Owning Org / Administrating Org for the project falls within a department for which you are listed as a SeRA department administrator. (i.e. Projects where you have been granted project level access, but are managed by a department outside of your purview are not returned in the results.)
Small Enhancements & Bug Fixes

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

- Updated the proposal approver pages to show important and consistent information in the summary section. This includes more detailed information about cost sharing.
- Fixed issue with Central Office Requests taking a very long time to start.
- Corrected attachment links in the AAN/NOA PDF.
- Help text information about COVID related research requirements will conditionally display when COVID-19 research focus is selected.
- For all transaction types store sponsor name and sponsor code, which allows for proper report sorting on sponsor.
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- Updated the validation on Project Personnel Effect dates to also include current active transactions.
- In order to prevent some scenarios where duplicate tasks are created, intake queues, reassignment and sponsor maintenance pages, will now check the system for an existing task prior to creating a new task.
● The issue where the Other Support Report occasionally doubled the awarded amount has been fixed.

Central Office Enhancements

New T&C Requirements

Two new requirements have been added to the Terms & Conditions page to track two new federal clauses that can be included in agreements. These are:

● DOE Order 142.3A: Unclassified Foreign Visits and Assignments Program
  This new question is required for all agreement types with a federal sponsor (or prime). It is also an optional question for all Other Agreement Logs.

● DOE Order 486.1: Foreign Government Talent Recruitment Programs
  This new question is required for contracts & subcontracts with a federal sponsor (or prime). It is also an optional question for all Other Agreement Logs.
Upgrades for Entity Management

More changes came for Entity Management this release. One change was a new “Country of Parent Entity” field to store the country where the parent entity resides (and whose laws need to be followed). This can be found in the Entity region which has a slightly new look to make it easier to read.

Additionally, the phone, email, and address regions were combined into one “Contact Information” region so that all of this information can be seen and edited in one location. For this information, contact names have been removed and individual contact information has been moved into the Personnel region (which is now collapsed by default).

While working on these changes, we also made a few other small changes and improvements:

- Show bi-directional links for related entities. If an entity A is linked to entity B, then that relationship should be seen from both entity information pages.
- Allow non-US sponsor contact address information to be entered from within a project or from Entity Management application.
- Add a check for duplicate entity names while editing a sponsor.
- A number of minor UI updates
**Updated Export Control approvals**

With input from Steve Eisner, the export control approval page was updated and simplified.

- The export control approver can now specify when a High Risk Cover Letter is required as part of the proposal.
- The Project Questions page has been updated to more easily & clearly show the information entered by the export control approver.

![Export Control Review](image)

- Visibility for export approver comments has also been improved by adding the export control comments in the transaction history region on the Transaction Home page.

![Transaction History](image)

- NOA notifications will now be sent to the export control mailing list instead of the specific user who completed the export control review.
- Export Approval pages will no longer have the “Send Email Alert to PI” and related subfield for sending a copy of email to others. Also, sub-selections for the “Conditionally Approved” status have been removed.
- The export control approval page is simplified with combined regions and easier data entry as well as easier entry for comments.
**PTA Mgr: Limit values in “award purpose“ selection**  
Recent changes in Oracle were made to restrict values available in the “award purpose” field of a sponsored award. Changes were made in PTA Manager to only show these same values.

![Image showing the list of award purpose values in PTA Manager.](image)

**ARC Enhancements for Accounts Receivable**  
A new invoice status called “Due Upon Execution” was added to the selection list.

![Image showing the added invoice status.](image)

Also, a bug was fixed around issues filtering for Collection Statuses or Collection Categories with no value. Previously, the filters in the interactive reports in the AR Search, My Arc, and Invoices region were not showing results accurately. This has been resolved so finding invoices where status or category has not been entered can be done easily.
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:

- In order to support the GBS Salesforce implementation, we updated the SeRA country values to match the Salesforce country values. This included updates to the EDW and reporting tables.
- The OPACS COI utility has been updated to push data to SeRA if the COI answer is changed through a data fix to OPACS.
- Corrected issue where Grant PPG resubmission was not creating a PPG budget in the PDRF in some scenarios.
- Fixed issue with auto-fill for dates on the Budget Details page.
- Updated the NOA Notifications page in app 800 for easier management of NOA distribution lists.