

SERA IRONWOOD RELEASE: MAY 21ST, 2020

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.

SPO #170482
Benjamin Inbeh Chung
Urology - Divisions (XZKU) Sponsor: Intuitive Surgical

Agreement type: Grant

Show All [Proposal Summary](#) [Proposal Details](#) [Transaction History](#)

Transaction History

	Task	Status	Assignee	Assigned	Completed	Comment	Reassign
PI - Benjamin Inbeh Chung	Prepare PDRF	Completed	Derrick P. Lin	02/21/2020 10:08 AM	02/21/2020 10:25 AM		
	Approve PDRF (PI)	In Progress	Benjamin Inbeh Chung	02/21/2020 10:25 AM			Reassign
OSF - Anne Lynn S. Chang	Prepare OSF form	In Progress	Anne Lynn S. Chang	02/21/2020 10:25 AM			
Export Control Review	Export Control	Reassigned	Export Control Queue	02/21/2020 10:25 AM	05/19/2020 01:06 PM		
		Completed	Steve Eisner	05/19/2020 01:06 PM	05/19/2020 07:49 PM		

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.)

EDW Projects Report

This report returns all **projects** which satisfy the selected search criteria **and** where you have department administrator authority. SPOs managed by other departments are not returned in the results (even if you have access to those SPOs).

Additional Notes: Results are updated overnight. Only completed transactions are included in these results.

Search

SPO:

PI:

Project School:

Project Owning Org:

Direct Sponsor:

Prime Sponsor:

Agreement Types:

Project Status:

Total Estimated Cost >=

Start Date: On / After:

On / Before:

End Date: On / After:

On / Before:

Projects Report

Q

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SPO	PI	School	Department	Owning Org	Direct Sponsor	Direct Sponsor Type	Prime Sponsor	Prime Sponsor Type	Direct Sponsor Agreement #	Agreement Type	Title
171350	Christina Ren	School of Humanities and Sciences	H&S Departments and Programs	Biology	National Institutes of Health	US Federal Government	-	-	-	Fellowship	Testing Other Sponsored Act

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.

Select all that apply *

Terms & Conditions (Award - Amendment)

SPO #118147 (Segment 1)
Sally M Benson
Global Climate and Energy Project (NKNL)

Agreement Number: 118147
Agreement type: Contract

Sponsor: Lawrence Berkeley Laboratories, U

Requirements

52.219-9: Small Business Subcontracting Plan *	Yes	No
52.232-20: Limitation of Costs or equivalent *	Yes	No
52.232-22: Limitation of Funds or equivalent *	Yes	No
252.204-7000: Disclosure of Information or equivalent *	Yes	No
DOE Order 142.3A: Unclassified Foreign Visits and Assignments Program *	Yes	No
DOE Order 486.1: Foreign Government Talent Recruitment Programs *	Yes	No
52.204-21: Basic Safeguarding of Covered Contractor Information Systems *	Yes	No
252.204-7012: Safeguarding Covered Defense Information and Cyber Incident Reporting *	Yes	No
NIST SP 800-171: Protecting Controlled Unclassified Info (CUI) in Non-fed Systems and Organizations *	Yes	No
52.222-41: Service Contract Labor Standards *	Yes	No
52.222-54: Employment Eligibility Verification (E-Verify) *	Yes	No
52.222-62: Paid Sick Leave Under Executive Order 13706 *	Yes	No

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.

23andMe (23ANDME)

Show All Entity Contact Information Personnel Financial Standing Related Entities Comments

Entity Edit

Legal Name 23andMe ?
 Code 23ANDME ? EIN ?
 Type US Corporation ? DUNS ?
 Status Active UEI ?
 URL

PHS No
 Export Control No
 DOD F&A Cap No
 DOD Sub-Agency No
 Restricted Foundation No

Country of Parent Entity United States
 Special Conditions No

Updated: Sara Woodworth (05/26/2020 03:01PM)

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).

Contact Information Add

Type	Address	Email Address	Phone	Fax	Notes	Edit	Delete	Added	Updated
Primary	1234 Some St Anywhere, California 90000 United States	pre@entity.com	123- 456- 7890	-	This information is for the preaward office at this entity.			Sara Woodworth (05/26/2020 03:08PM)	Sara Woodworth (05/26/2020 03:15PM)

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

Award Approval	NOA Recipient	High Risk Letter
Required	Yes	Yes

Approval Type	Status	Completed	Completed By	Comment
Proposal	Approved	05/18/20200	Steve Eisner	Call me if you need help with the High Risk EC Cover Letter.

- 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.

SPO #170482
Benjamin Inbeh Chung
Urology - Divisions (XZKU)

Transaction History

Agreement type: Grant

Sponsor: Intuitive Surgical

Transaction History

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Actions

Quick Links

- [View PDRF](#)
- [Add Project Comme](#)
- [View Project Comm](#)
- [Add Attachments](#)
- [View Project Attach](#)
- [View Segment Data](#)

Actions

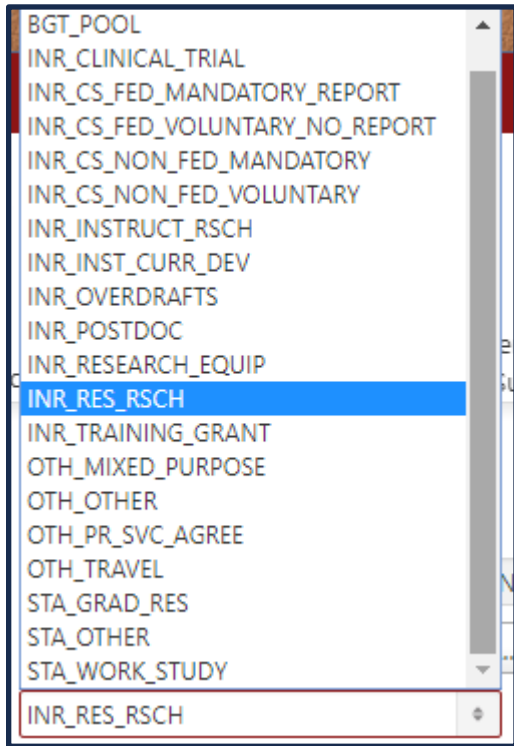
Comment: More time is needed to complete a full review.

Added by: Steve Eisner

- 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.

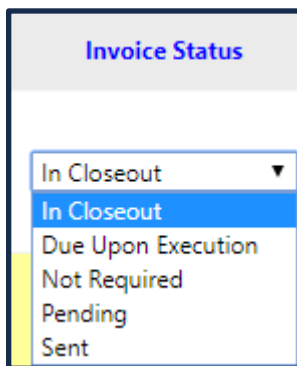
PTA Mgr: Limit values in "award purpose" selection

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.



ARC Enhancements for Accounts Receivable

A new invoice status called "Due Upon Execution" was added to the selection list.



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.