

Release Notes

Schedule

Over the weekend from **Friday, October 1st 6PM AZ Time** through **Monday, October 4th 6AM AZ Time** these release items will be patched to ERA Production.

Details

Portal 10 Phase 1 (Master, IBC, Grants)

Project Workspaces (e.g. Proposal, Award)

- **Breadcrumbs**, path to current page, always visible below navigation bar
- Hyperlinks to parent pages for the project allow one-click navigation

Reports

- **ASU Reports** initially open as a Slide-In over the current window instead of a pop-up
- **Export** and Change Parameters are included in the **Actions** menu

SmartForms

- SmartForm controls to **Exit**, **Save**, and **Continue** are now always visible in the bottom right of the page, and clicking Continue conveniently saves and opens the next SmartForm
- The left menu navigation can be collapsed and expanded to increase screen real estate or jump between SmartForms
- New SmartForm UI has skip and **keyboard navigation** for improved accessibility

Documents

- When attaching documents, the **document title** can be modified in the popup window
- **Download Copy**, **Upload Revision**, and **Delete** are included in the three dots (ellipsis) menu to the right of any uploaded document

Agreements

None

COI

None

Grants

- See **Portal 10 Phase 1**
- **SF424** includes Phase II State and Country Form Updates (8 forms), Phase I UEI Form Updates (9 forms) to support the transition from **DUNS to UEI**, redesigned Budget and Subaward Budget Views, download Subaward link available on the FOA Workspace, and corrected bugs.
- AutoMap supports Portal 10, the **HUD-52651** form, and addresses two minor severity bugs.

IBC

- See **Portal 10 Phase 1**
- Moved Recombinant or Synthetic Nucleic Acids Usage **Section III-F-8** appendices to Q1.
- Ability to correct or modify dates for **Safety submissions** in Post-Review and Approved. With this release, Safety Specialist can re-execute the Approve Submission (Admin) activity when the protocol is

in a state of Post-Review and Approved for all submission types. Safety Administrators can also execute the Edit Approval Period in Approved state for all submission types.

- **Request Clarifications** by Member notification is sent to the PI instead of the Assigned Specialist.
- Unable to select **Safety Setting**. If the ancillary review is required is yes in safety settings then the last workflow stoppage is also required, otherwise it is not required.
- The default **Last Approval** date on an amendment is fixed. When there is an annual review and amendment created on a submission and the annual review gets approved first, then the new Last Approval date will show up when the user goes to submit the review or administratively approve the amendment.
- Added the ability to create an **Amendment** or **Amendment/CR** for protocols in the Lapsed and Suspended states.
- **Manage Ancillary Review**, notification of ancillary review is fixed. When Ancillary Reviewers are added to a submission in Pre-Submission state, no notifications will be sent. When Ancillary Reviewers are added (with Response Required set to true) to a submission other than in Pre-Submission state, Notification of Ancillary Review will be sent to all the newly added reviewers.
- The **organization ancillary reviewers** have access to all appropriate SmartForm views on an amendment.
- The **Prepare Letter** activity is now available to all specialists, and the **Assign Specialist** activity is available in all states.
- Resolved an issue that prevented risk group selections from showing in the **Submit Biosafety Risk Assessment** activity on follow-on submissions.
- Fixed an issue that caused the display of **Recombinant Usage** selections to be incorrect in the printer version of the protocol.

IRB

None

Master Store

- See **Portal 10 Phase 1**

Workday

None

Development

None

Completed Features

None

Projects

- **ERA Portal 10 Upgrade – Training** site is being updated to Portal 10 to match Production.

Upcoming Sprints/Upgrades

- November 1st (New York City sprint)
- November 29th (Oaxaca sprint)