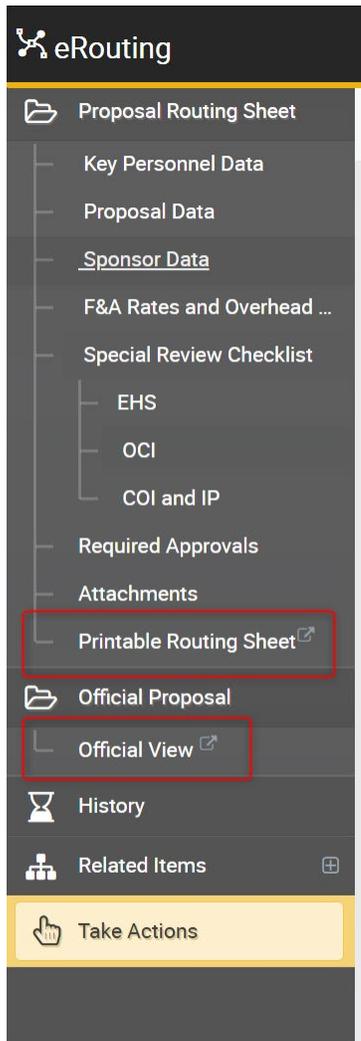


# RELEASE NOTES – 1A 2025

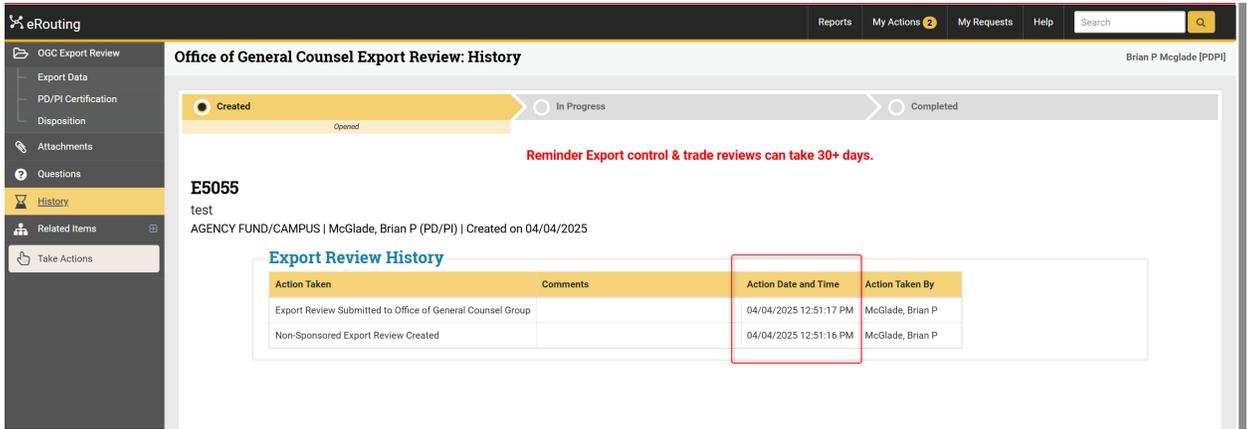
## eRouting

- (ER-4309) For RI and GTRI, the two Printable Views on the left menu bar in eRouting have been relabeled to “Printable Routing Sheet” and “Official View”.



- (ER-4163) In the Export Control module, the Export Review History now shows AM or PM in the Action Date and Time column.

# RELEASE NOTES – 1A 2025



- (ER-4430) In the Export Control module, on the Export Control Certification>Certification Data page, the next to last question was updated to say **“Will a non-US person (foreign person) at Georgia Tech HAVE ACCESS to a proprietary manual with sufficient technical information to enable that person to install, operate, maintain, repair, overhaul AND refurbish any equipment or materials used in this project, even if none of these listed activities are actually performed by the person? If yes, please provide the type of equipment or material and the name of the manufacturer.”**

If new technology is developed, will the results be published?

Yes

No

Indicate your determination with regard to whether this project is subject to the ITAR or EAR.

The project/technology is covered by EAR CCL ECCN category

The project/technology is covered by ITAR USML category

Unknown/unsure

Describe any specialized equipment that will be used by a foreign person in the course of performing the research:

Describe any specialized equipment that will be used by a foreign person in the course of performing the research:

**Will a non-US person (foreign person) at Georgia Tech HAVE ACCESS to a proprietary manual with sufficient technical information to enable that person to install, operate, maintain, repair, overhaul AND refurbish any equipment or materials used in this project, even if none of these listed activities are actually performed by the person? If yes, please provide the type of equipment or material and the name of the manufacturer.**

Describe any specialized equipment that will be used by a foreign person in the course of performing the research:

Will anything (including equipment, encrypted software, data or other materials) be sent out of the U.S. in the course of this project?

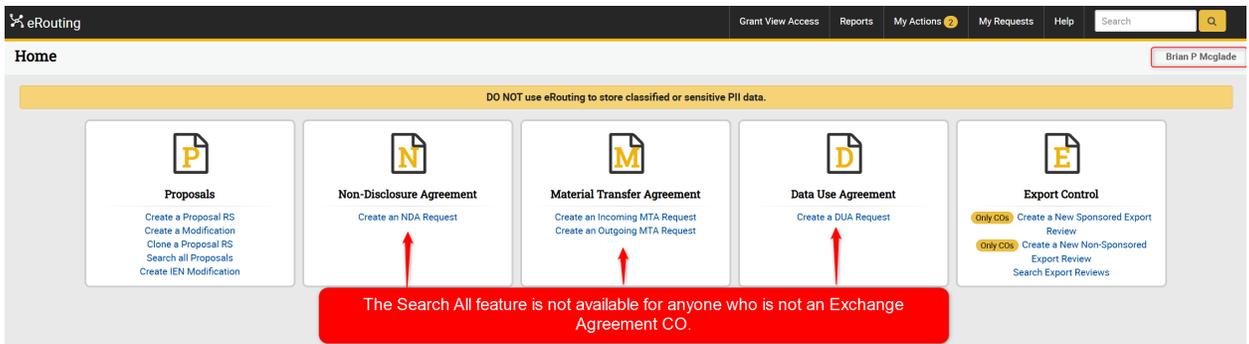
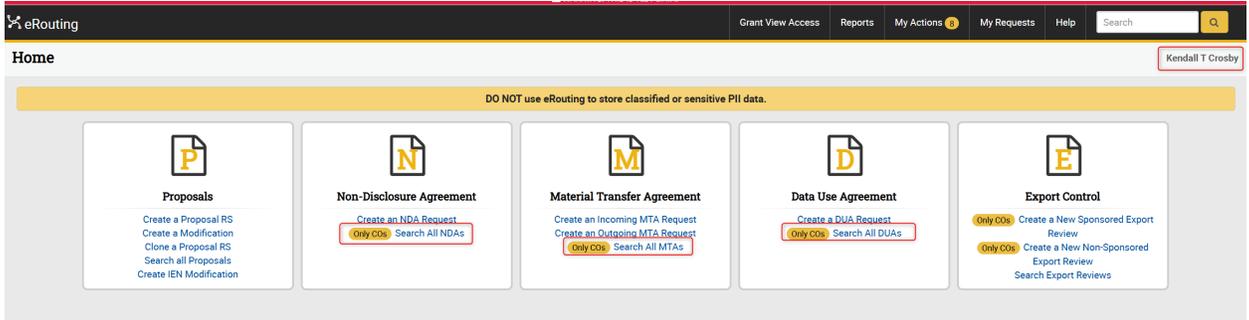
Yes

No

Continue

# RELEASE NOTES – 1A 2025

- (ER-4407)/(ER-4515) For all Exchange Agreement modules (NDA, MTA, DUA), the **Search All** feature is only available to Exchange Agreement Contracting Officers.



## eRouting and Contract Management

- (ER-4395)/(CMS-3917) Responses for **sIRB Requested** and **GT sIRB of Review** are now pushed from eRouting to CM.

The screenshot shows the 'Research Integrity' form in eRouting. The form contains several questions with radio button options. The questions 'Has single IRB (sIRB) been requested?' and 'Is Georgia Tech the single IRB (sIRB) of review?' are highlighted with a red box. The other questions are: 'Human Subject Research?', 'Is this a clinical trial under NIH, OHRP or FADAA/FDA that will need to be registered on clinicaltrials.gov?', 'Is there a SIRB (Single IRB) requirement?', 'Is Georgia Tech the designated SIRB?', 'Vertebrate Animals?', and 'Recombinant DNA?'.

# RELEASE NOTES – 1A 2025

The screenshot shows a software interface with a blue header bar containing tabs: General, Status, Compliance, RFP Info, Team, Opp Additional Data, Financial Data, and Considerations. The 'Considerations' tab is selected. Below the header, there are several sections of form fields, each with a dropdown menu set to '-None-'. The fields are arranged in a grid. A red rectangular box highlights the 'siRB Requested?' field in the bottom right section, which also includes 'siRB Opportunity Protocol', 'GT siRB of Review?', and 'GT siRB Opportunity Protocol'.

## Contract Management

- (CMS-4174)/(CMS-4152) In Opportunities and Contracts, the Project Type list of values now contains External Consortium Membership (ECM).

The screenshot shows a 'Lookup' dialog box with a table of Project Type values. The table has two columns: 'Code' and 'Description'. The 'ECM' row is highlighted with a red box. Below the table, there are 'Select' and 'Cancel' buttons. In the background, the 'Project Type\*' field in the main form is highlighted with a red box.

Code	Description
AS	Academic Support
CM	GT Center Membership
COMP	Computer
ECM	External Consortium Membership
INST	Instruction
OSA	Other Sponsored Activity
RES	Research
RT	Research Training
RUCAP	Research Uncapped
SF	Scholarship/Fellowship
SS	Student Support

- (CMS-4256)/(CMS-4118) In Opportunities and Contracts, the following new subjects have been added to the Activities subtask. This enhancement will allow COs to capture comments/notes about compliance reviews that originate in CM. These activities will be logged in the history log\*.
  - Proposal sent to EVPR for OCI review
  - Proposal sent to COI for review
  - Proposal sent to Export Control for review
  - Proposal sent to OIT Cyber Security for review

# RELEASE NOTES – 1A 2025

Manage Contracts > History Log			
	Action Taken	Comments	Action Date and Time
<input type="checkbox"/>	Activity Logged	Proposal sent to OIT Cyber Security for review: Test Note Activity for #101	04/09/2025 03:09:11 PM
<input type="checkbox"/>	Activity Logged	Proposal sent to Export Control for review: Test Note for Activity for #100	04/09/2025 03:08:38 PM
<input type="checkbox"/>	Activity Logged	Proposal sent to COI for review: Test Note Activity for #99	04/09/2025 03:07:34 PM
<input type="checkbox"/>	Activity Logged	Proposal sent to EVPR for OCI review: Test Notes for Activity #98	04/09/2025 03:06:24 PM

\*Note: There are no emails or other communications associated with these new activities.

- For Opportunities, the History log will be viewable in eRouting.
- For Contracts, the History Log is viewable in **CM only**.

- (CMS-4000) George Burdell's name will no longer appear in the History Log for Opportunities or Contracts. George Burdell has been replaced with the user or system completing the action.

Manage Contracts > History Log				
	Action Taken	Comments	Action Date and Time	Action Performer
<input type="checkbox"/>	Workday Modification	MOD sent to Workday for Revision # 002	01/09/2025 05:18:02 PM	CM System
<input type="checkbox"/>	CO Add PD/PI	CO Add PD/PI: (DiSalvo, Carl F)	11/19/2024 03:57:03 PM	Lowe, James
<input type="checkbox"/>	CO Remove PD/PI	CO Remove PD/PI: (DiSalvo, Carl F)	11/19/2024 01:43:51 PM	Teal, John
<input type="checkbox"/>	CO Remove PD/PI	CO Remove PD/PI: (Le Dantec, Christopher A)	11/19/2024 01:42:34 PM	Teal, John
<input type="checkbox"/>	Workday Modification	MOD sent to Workday for Revision # 001	11/19/2024 01:34:54 PM	CM System
<input type="checkbox"/>	Workday New Award	New Award sent to Workday	09/19/2023 11:45:10 AM	CM System
<input type="checkbox"/>	CO Assigned	Assigned to CO (Teal, John)	09/13/2023 08:24:39 AM	Teal, John
<input type="checkbox"/>	CO Add PD/PI	CO Add PD/PI: (Le Dantec, Christopher A)	09/13/2023 08:23:31 AM	Teal, John
<input type="checkbox"/>	Active	Status Changed to Active	09/13/2023 08:23:31 AM	Teal, John

- (CMS-4192) Upon Awarding an opportunity, **BOA DOCH ID** is a required field when Proposed Award Type is Delivery Order (DO) or Task Order (TO).

General | Status | Compliance | RFP Info | Team | Opp Additional Data | Financial Data | Considerations

**Opportunity Info**

Number \* P22163

Full Title \* Porous Polymer Supported Amine Sorbents for DAC: Oxidative Degradation a...

Special Programs  New Special Program

Proposal/Award Classification NEW New

STTR/SBIR or PIA Proposal? -None- SBIR Proposal [No] STTR Proposal [No] PIA Proposal [No]

**Opportunity Roles**

Our Role/Responsibility PRIME Prime Contractor

Sponsor Account \* 41088 SHELL GLOBAL SOLUTIONS INC/HOUSTON, TX Type Customer

Contract Type \* FP Fixed Price

**Contract Information**

Proposed Award Type \* DO Delivery Order

Sponsor Contract No \* WE6712-H2 Name

CFDA No

Prime Sponsor Contract No

Project Type RES Research

Fund/Award Number

Main Opportunity ID  BOA DOCH ID \*

Contract Vehicle/BOA

Campus/Lab Address

Task Order No

Primary Work Location

Primary Home Dept \* 190 Chemical and Biomolecular(190)

**Prospect**

**Message(s)**

**Error(s)**

The following field is required: BOA DOCH ID.

# RELEASE NOTES – 1A 2025

- (CMS-4219) Any and all changes to the Stage field are now recorded in the History Log.

The screenshot shows the 'Opportunity Status' form with the 'Status' tab selected. The 'Stage' dropdown is set to 'P' and displays 'Pending (Submitted to Sponsor)'. Below the form is a 'History Log' table with the following data:

Action Taken	Comments	Action Date and Time	Action Performed By
Proposal Routing Sheet Returned		04/04/2025 12:55:13 PM	Walker, David
CO Returns Proposal	CO Returns Proposal. Test of history log update	04/04/2025 09:43:20 AM	Boyd, Abigail
Proposal Awarded	Proposal Package Awarded	04/04/2025 09:42:20 AM	Boyd, Abigail
Proposal Withdrawn	Proposal Withdrawn	04/04/2025 09:41:32 AM	Boyd, Abigail
Proposal Pending	Proposal Package Submitted to Sponsor	04/04/2025 09:40:50 AM	Boyd, Abigail
Proposal Accepted	Proposal Stage Changed to Accepted	04/04/2025 09:40:32 AM	Boyd, Abigail
Proposal Ready for Review	Proposal Stage Changed to Ready for Review	04/04/2025 09:40:09 AM	Boyd, Abigail
Proposal Notice of Award	Proposal Notice of Award	04/04/2025 09:38:50 AM	Boyd, Abigail
Proposal In-Progress	Proposal Stage Changed to In-Progress	04/04/2025 09:38:28 AM	Boyd, Abigail
Proposal Submitted to GTRC	Proposal Submitted to GTRC NA	04/04/2025 09:37:14 AM	Boyd, Abigail
Proposal Declined	Proposal Declined. NA	04/04/2025 09:36:41 AM	Boyd, Abigail
Proposal Archived	Proposal Stage Changed to Archived	04/04/2025 09:36:18 AM	Boyd, Abigail

- (CMS-4211) Contracts> Query Search by Employee Name has been optimized to deliver accurate results.

The screenshot shows the 'Manage Contracts - Saved Query: Blank' form. The 'Search Criteria' section includes the following fields:

- Contract ID: begins with [ ]
- Contract Name: begins with [ ]
- Main Opportunity ID: begins with [ z ]
- Main Opportunity Name: begins with [ ]
- Sponsor Contract No: begins with [ ]
- Sponsor Account: begins with [ ]
- Prime Sponsor Contract No: begins with [ ]
- Employee Name (Teams): begins with [ ]
- Employee ID (Teams): begins with [ ]

Buttons at the bottom include 'Count', 'Save Query', 'Reset', 'Find', and 'Close'.

# RELEASE NOTES – 1A 2025

- (CMS-4163) Contracts> General tab, Key Personnel Change now captures both Approval and Notification Requirements. Users can now indicate if Key Personnel and/or Notification is required.

The screenshot shows the 'General' tab of a contract record. The 'Key Personnel Change: Prior Sponsor Approval Required' dropdown is set to '-None-' and the 'Notification Required' dropdown is also set to '-None-'. Both dropdowns are highlighted with a red box.

- (CMS-4220) In Contracts, the History Log is updated when the Contract Name field is changed. This enhancement will help track when SPS has assigned the D# and when other updates occur to the Contract Name field.

The screenshot shows the 'Manage Contracts' interface. The contract record is displayed with the following details:

- Contract ID: CNTR-00000000012607
- Main Opportunity ID: P17707
- Sponsor Contract No: efgsgsf
- Costpoint Opportunity:
- Exclude from Reports:
- Name: Butter
- Document ID: 221142
- Record Status: Active
- Created By: AM4
- Modified By: AM4

The History Log shows the following entries:

Action Taken	Comments	Action Date
Contract Name Updated	Contract Name Changed From AWD-006916 To Butter	04/22/2025 11:14:11 A
Award Actions Edited	Record updated in Award Actions - MOD ID: 000	04/22/2025 11:13:06 A
Workday New Award	New Award sent to Workday	04/22/2025 11:13:06 A
Award Actions Edited	Record updated in Award Actions - MOD ID: 000	04/22/2025 11:12:23 A
Award Actions Created	Record added to Award Actions - MOD ID:000	04/22/2025 11:10:59 A
Active	Status Changed to Active	04/22/2025 10:28:36 A
CO Assigned	Assigned to CO (Haase, Yathurshi)	04/22/2025 10:28:36 A
Contract Name Updated	Contract Name Changed From To P17707	04/22/2025 10:28:36 A

# RELEASE NOTES – 1A 2025

- (CMS-4246) For Deliverables, the Sponsor Due Date becomes required when Reoccurring Template is checked.

The screenshot shows the 'Contract Deliverables' form. The 'Reoccurring Template' checkbox is checked and highlighted with a red box. A red arrow points from this checkbox to the 'Sponsor Due Dt' field, which is also highlighted with a red box. Other fields include 'Number', 'Type', 'Description', 'Full Description', 'Award Action Revision #', 'Contract Start Date', 'Contract End Date', 'Report End Date', 'Original Due Date?', 'Delivered', 'Satisfied', 'Frequency', 'Begin Date', and 'End Date'.

- (CMS-3887) Contracts> Award Actions tab> Action Type, the label for "Administrative Mod" has been updated to "Administrative Mod (OSP Internal Only)". This is a label change only and does not impact the workflow or required data.

The screenshot shows the 'Award Actions > Identification' form. The 'Action Type' dropdown menu is open, showing the updated label 'Administrative Mod (OSP Internal Only)'. A red arrow points to this option. Other fields include 'Contract Mod ID', 'Revision Number', 'Description', 'Project Mod ID', 'Award Dates', 'Award Value', 'Award Fundin', and various checkboxes for 'Initiation', 'Modification', and 'Document Load'.

- (CMS-4164) Contracts> Award Actions tab> Administrative Notes is the only comment field required when completing an initiation and modifications. The Notes field is no longer required. However, historical notes will still be viewable, but not editable.

# RELEASE NOTES – 1A 2025

**Award Dates**

Start Date: 06/01/2021 | Award Date: 04/09/2025 | Award Project Type: MAIN  
 End Date: 12/30/2021 | Federal Award Date: | Opportunity ID: P12538  
 Effective Date\*: 04/09/2025 | Fund Types: | Funding Sponsor: DOD/DARPA/DEFENSE SCIENCES OFFICE

**Award Value**

Value: 0.00 | Fee%: 0.00% | Cost: 0.00 | Fee: 0.00 | Cost Share Amount: |

**Award Funding**

Value: 0.00 | Fee %: 0.00% | Cost: 0.00 | Fee: 0.00 | Cost Share Amount: |

Initiation | Initiation End Date: |  
 Send to Workday OR Send Notification  
 Modification | Modification Date: |  
 Document Load | Document Load Date: |  
 Create New Project Modifications

Workday Response Message

Administrative Notes (Feed to CIS)\* 

<<Required for initiation and modifications>>

Notes

**Message(s)**

**Error(s)**  
 The following field is required: Administrative Notes (Feed to CIS).

- (CMS-4209) An entry will be added to the History Log when an Award Action is created, edited or deleted. The log will display the action performed, modification affected and who performed the action.

Manage Contracts > History Log Query ▼ [icon]

Action Taken	Comments	Action Date and Time	Action Performed By
Award Actions Edited 	Record updated in Award Actions - MOD ID: 000	04/08/2025 08:31:18 AM	Boyd, Abigail 
Workday New Award	New Award sent to Workday	04/08/2025 08:31:17 AM	CM System
Award Actions Deleted 	Record deleted from Award Actions - MOD ID: 001	04/08/2025 08:30:56 AM	Boyd, Abigail 
Award Actions Created	Record added to Award Actions - MOD ID:001	04/08/2025 08:30:31 AM	Boyd, Abigail
Award Actions Created 	Record added to Award Actions - MOD ID:000	04/08/2025 08:29:10 AM	Boyd, Abigail 