What has changed?
A new version of SeRA was released on February 15th 2018. The focus of the release was to implement SeRA Module 10: Accounts Receivable Tracking! This is a new module tracking the workload for the Accounts Receivable team. It is also the first step to eventually displaying invoice information within SeRA projects. Additionally, we are rolling out new functionality that will allow people to view who has access to their projects as well as add and revoke project level access! Our final big enhancement was the redesign of the PTA Manager approval workflow to resolve some existing quirks in this process. In addition, a number of smaller enhancements and bug fixes were implemented in this release.

NOTE: Following each SeRA release it’s necessary to clear your internet browser cache and cookies. The following simultaneous key strokes will clear the respective browsers. Once the browser is cleared, close and re-open the browser then open a new SeRA session.

- Mozilla Firefox  – Ctrl + Shift + Delete
- Chrome  – Ctrl + Shift + Delete
- Internet Explorer  – Ctrl + Shift + Delete
- Safari iOS  – Ctrl + Alt + e

Contents
Proposals & Awards ...................................................................................................................................... 2
  Manage SPO level authority .......................................................................................................................... 2
  Manage Project Contacts ............................................................................................................................... 2
  Small Enhancements & Bug Fixes .................................................................................................................. 3
Redesigned PTA Manager Workflow ............................................................................................................ 4
  Allow approvers to be removed and added mid-way through routing.......................................................... 4
  Updated "Return to Initiator" workflow ........................................................................................................ 5
  Bug fixes ....................................................................................................................................................... 5
Module 10: Accounts Receivable Tracking ................................................................................................... 5
  Dashboard for Billers & Collectors ................................................................................................................. 5
  Award Page Changes in ARC ......................................................................................................................... 11
  AR Search .................................................................................................................................................... 14
Central Office Small Enhancements & Bug Fixes ....................................................................................... 14
Proposals & Awards

**Manage SPO level authority**

It is now easy to view, grant, and revoke Project level authority on any project! Any user that has access to a SPO can now view all the people with authority to the SPO. This is done from the authority tab within the people page of the project. From here, additional people can be granted access to the project. Access can also be revoked for people who no longer need access to the project. Finally, project level access can be viewed and managed! For more information view the [SPO Level Access Guide](#) for details.

![Project Specific Authority](image)

**Manage Project Contacts**

A new region to manage the Stanford contacts associated with a project is now available within the contacts tab of the people page within a project. In this section, department administrators, financial admins, and study coordinators are automatically pulled in from transactions and displayed in this region. These roles can then be managed along with other roles in order to have easy access to project contacts.
This is phase 1 of this functionality. Phase 2 will include more integration with transactions to assist in keeping these contacts up to date.

![Project People](image)

**Small Enhancements & Bug Fixes**

We also added a few small enhancements and bug fixes:

- Fixed the issue where the agreement type for some old transactions was showing as “22” instead of “Other”.
- The Proposal ID associated to the proposal is now displayed in parenthesis next to the proposal type in the Award tab of the Project Summary page.
- Added validation to the “Add FYI” pop-up in PTA Manager.
- Updated the display and sort capability of Segments on the Project Summary page.
- The updated date and updated by fields for attachments are now properly saving in all scenarios.

**Redesigned PTA Manager Workflow**

The PTA Manager approval workflow was previously operating erratically in various scenarios. In order to fix these issues, the entire workflow was redesigned and upgraded. This changed the look of the approver region as well as the functionality of the approval process. Now it should be easy to add approvers and know the order in which the approvals will occur. The approval workflow is also much more flexible and allows approvers to be added or removed at any stage of the workflow.

*Allow approvers to be removed and added mid-way through routing*

Approvers for a PTA transaction can now be added or removed throughout the routing process. The current department assignee can navigate to the "Approvals" page and click the trash can icon to remove or click "Add Approver" button to add additional approvers. Note: system generated approvals are not editable (e.g. PI, SoM Fiscal Affairs Office).
Updated "Return to Initiator" workflow
When PTA transactions were returned to the initiator, they sometimes needed to go back through some (but not all) approvers based on where they were in the workflow. This has been updated so that after the "return to initiator" process is complete, the transaction will return to the approver that returned it. This means that no approvals need to be obtained again. If a user wants an approver to re-approve the transaction, they can add the approver in again in the approvers region before routing.

Bug fixes
A few small bug fixes related to PTA approvals were also fixed. These were:

- When an approval task is reassigned the newly assigned approver will now display as the designated approver for the reassigned task.
- Task approvals and reassignments were being listed in an incorrect order in the transaction history region for some PTA transactions. This has been resolved.

Module 10: Accounts Receivable Tracking
The main change in this release is the new SeRA Module 10: Accounts Receivable Tracking! This module was built for the Accounts Receivable group for better management of their invoices and collections activities. This module is built within the current ARC infrastructure and can be found by navigating to the ARC module in SeRA.

Dashboard for Billers & Collectors
My ARC dashboard will now include an Action Items region for Collectors as well as Billers dependent on a user’s Oracle authority. If a user has the SU GA Billing & Reporting authority, the user will see the
Billers Action Items region on their My ARC dashboard. If a user has the SU AR Collector authority, the user will see the Collectors Action Items region on their My ARC Dashboard.

Billers Dashboard
SeRA will run a daily job to pull in all invoices generated after running the streamline billing job. Billers and Collectors will be able to view invoices in their Action Items region only if they have been assigned either the SRM Biller or SRM Collector role on the Oracle award (in the personnel tab).

Billers will be able to take action on the invoices directly from their dashboard by selecting the appropriate Biller Status and Invoice Completion Date. Clicking on the Invoice Number hyperlink will open the Invoice pop-up window which will also allow Billers the ability to update this same information as well as add comments pertaining to that invoice. SRM Billing Notes can be viewed by clicking on the notes icon shown on the SRM Billing Notes column.
Invoice Pop-up Window

Invoice pop-up window allows a user to update Invoice Status, Invoice Completed Date and enter Comments.
Collectors can take action on the invoices by clicking on the Invoice Number hyperlink. This will open up the Invoice pop-up window and Collectors can select a Collection Status, Collection Category, Hold Back as well as add comments pertaining to that invoice. Comments History can be viewed by clicking on the comments icon shown on the Comments column.
Clicking on the Invoice hyperlink will open up the Invoice pop-up window where Collector can select a Collection Status, Collection Category, Hold Back as well as add comments pertaining to that invoice.
To see more information about the award or invoice, a user can click on the award number hyperlink. This will open up the existing Award page which Closeout Accountants use to do their closeouts.

**Award Page Changes in ARC**

The Award page in ARC has been updated to bring in additional invoice & collection data as well as starting to make the page more consistent with other SeRA pages. These changes are available when viewing the award for invoice & collection information as well as closeout information.

The award page now displays a header region similar to what is seen in other SeRA pages which contains the SPO level information.
Additional award information is now available in the award region. The new fields include the following:

- SPO Start Date
- SPO Funded To Date
- SPO End Date
- # Days Final Invoice
- # Days Final Report Due
- Funding Source Name

The SRM Collector and SRM Biller have been added to the Personnel region.

SRM Billing notes region has been added to give Billers a field to enter billing notes. This field is editable by Billers and Administrators only. All others have view only access.

A new invoices region has been added to show all invoices pertaining to the award dated back three years from go-live. This region is mainly for Billers and Collectors but Closeout Accountants can also view this data.
Billers and Collectors have view only access to the Closeout Awards tab and the Comments tab.

A Reminders tab has been added to make it easier for all to see reminders pertaining to the award. Users can also create reminders from here by clicking on the Create Reminders button.

Attachments is now a new page that can be accessed by clicking on the Attachments link in the left hand navigation.
**AR Search**

The AR Search page is an invoice level search. This means that a user can search for an Award Number and the search results will return all invoices related to the award. No data will be initially displayed. Users will have to do an active search in order for data to display.

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**Central Office Small Enhancements & Bug Fixes**

We also added a few small enhancements and bug fixes that help central office users:
• In PTA Manager, when an EFP interest task is either system generated or created manually, the system will now default the owning organization code of the task to ZZUU (instead of BZNB).
• In PTA Manager, we are now defaulting the budget version name for award renewals.
• We are now properly storing the last updated date for ACR email templates.
• Budget Managed by CCTO and Budget Amendment fee in Award Transaction Logs are now hidden for parallel transactions, until the Proposal merge is complete. The data in these fields entered during the proposal is then seen in the Award Transaction Log once the Proposal merge completes.