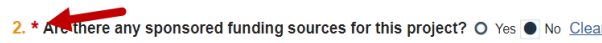
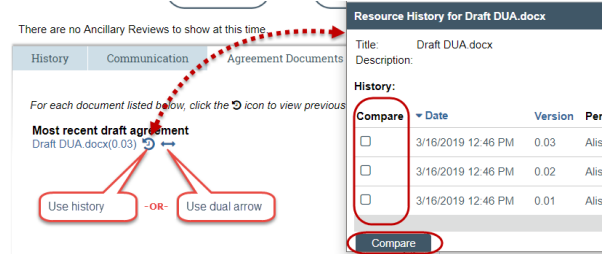
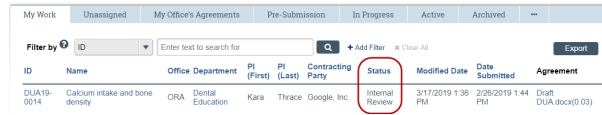
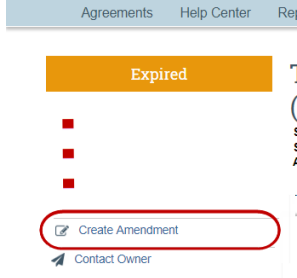
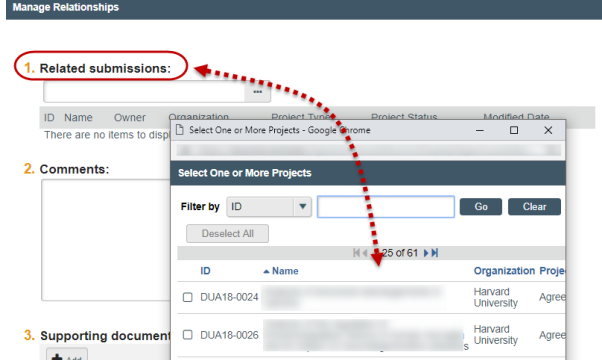


Agreements 1.24.0 Upgrade & Configuration Release Items: April 2019

This release includes the following minor vendor upgrade elements and Harvard updates.

What has changed...	What it means...	How it looks (as applicable)...
SmartForm Pages		
Agreement Information Sponsored funding question yes or no response is required	This question was often missed when initially completing the SmartForm, causing a request for clarifications to confirm funding either way.	
Workspaces		
Agreement 1. History view of document versions shows ability to compare document versions using Word document compare	1. If "upload revision" is used to replace a previous version, each iteration/version is stored so that when viewing the document history versions can be selected and compared. Compare creates a separate tracked document which highlights the differences between versions.	
All Agreements 2. My Work List (visible to negotiating office only) able to be sorted by submission state	2. The work list is updated to include columns that can be sorted for easier viewing/filtering. Any column with a blue text heading can be clicked to sort.	
3. Search and filter (on lists and in forms) allow for "or" and "and" operators, rather than only "and"	3. Use Boolean Operators for Complex Searches valid Operators: -or, -and to find any of several text values, such as filtering a department column with Center -OR Ctr. Also, find everything between two numbers, such as filtering a numeric column with > 10000 -and <= 50,000.	

What has changed...	What it means...	How it looks (as applicable)...
Activities		
1. Allow for amendment on expired agreement (to change or extend the previously active agreement)	1. From newly created Site workspaces, study teams can add site-specific details and following approval, report renewal information and create site modifications (beginning “SM”).	1.  2. 
2. Manage Relationships limited to association with main agreement records only (list for relationships excludes amendments)	2. The links between agreements can be created and shown on the main agreement only, reducing confusion regarding the relationships between the two records.	
Reviewer Activities		
3. Track Agreement Elements activity allows for the inclusion of a public comment	3. To include some context on completion of the activity, a text space is provided and will show on the agreement history tab.	3. 
4. Assign Owner list sorts by last name	4. The list of owner/reviewers that displays on the activity pop up is now in alphabetical order by last name.	
5. Finalize/convert to pdf activity converts to pdf/a	5. Converting to pdf/a allows for encapsulated document file storage (and possible archiving)	

What has changed...	What it means...	How it looks (as applicable)...
Notifications		
1. Add notice to owner when an item is assigned for review	1. A notice is sent to the assigned owner/reviewer when an item is assigned.	
2. All notification content was reviewed to make minor clarifications in subject, title, text, recipients, or content	2. Some inconsistencies remained across notifications. These were reviewed and corrected.	
3. Fix header and footer in pre submission reminder	3. The pre-submission reminder was missing elements that indicated the notice origin. These have been added.	
4. Change origin of clarifications requested notice to system (rather than owner/reviewer)	4. The clarifications requested notice appears to be from the owner/reviewer making the request rather than from the system. This has been updated to show the system as the from address and the reply to address.	
Other		
Corrections to school and university-wide level view access	The school and university-wide view permissions were limited due to a bug. This is corrected so that assignment as a viewer allows for the expected view of all submissions associated with that group (department, school, or university-wide).	