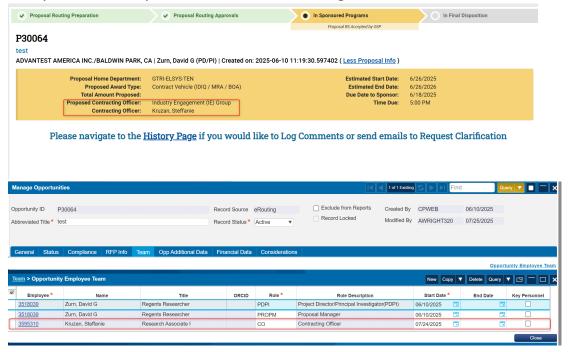# ERCM MINI RELEASE NOTES

## eRouting

> (ER-4505) In eRouting, the **Contracting Officer** field in the Header will update to match the Contracting Officer that is assigned on the **Manage Opportunities --> Team** tab in CM. The **Proposed Contracting Officer** field was added to show the CO that was selected in eRouting. Note: If the CO is changed in CM, it does not update immediately in eRouting. A job runs every 2 hours to update the field in eRouting.
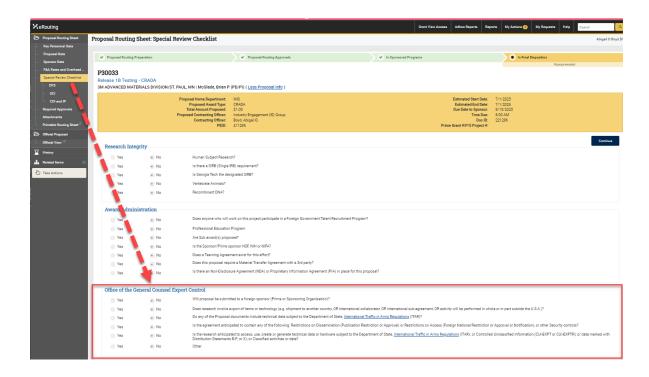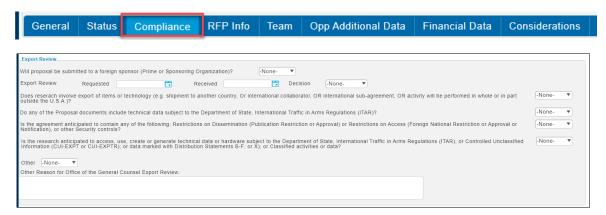


## eRouting and Contract Management

> (ERCM-32)/(ERCM-41)

In **eRouting**--> **Proposal Routing Sheet** --> **Special Review Checklist**-->**Office of the General Counsel Export Control** _all_ export questions and answers will be passed to CM.
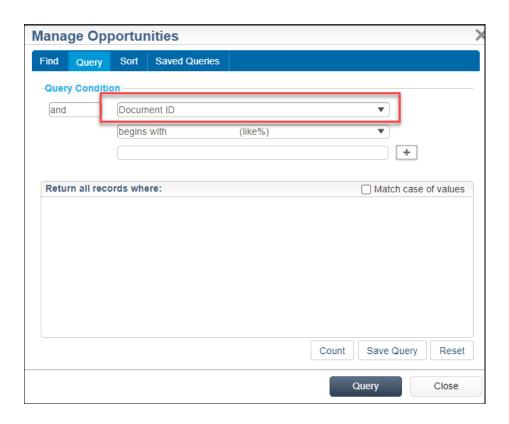
# ERCM MINI RELEASE NOTES



In **Opportunities**-->**Compliance** tab, a new section has been created to capture *all* questions and responses related to Export Control from the Special Review Checklist in eRouting. These values will be passed from eRouting to CM.



## Contract Management

➢ (CMS-4425) In **Opportunities** and **Contracts**--> **Query** Search by **Document ID** has been optimized to deliver accurate results.

# ERCM MINI RELEASE NOTES
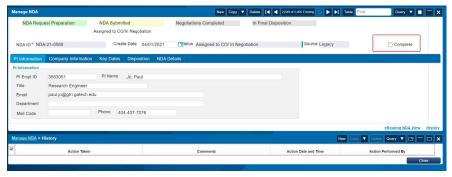
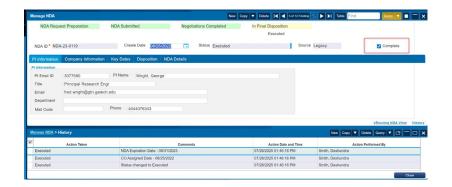# EXCHANGE AGREEMENT RELEASE NOTES

## Exchange Agreement Enhancements

- ➢ (CMS-4363) (CMS-4224) (CMS-4372) (CMS-4362) Legacy data from 2018 onward was loaded into Contract Management for NDA, DUA, and MTA.

- ➢ (CMS-4204) In CM, a **Source** field was added to the header for the Manage NDA, Manage DUA, and Manage MTA pages. The **Source** indicates whether the record was initiated in eRouting or was a Legacy record uploaded into CM. The field displays **eRouting** or **Legacy**.
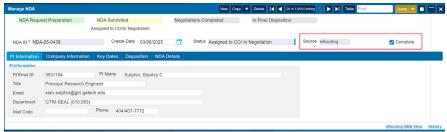




- ➢ (CMS-4172) (CMS-4374) (CMS-4378) (CMS-4205) (CMS-4207) In CM, a **Complete** checkbox was added to the header of the Manage NDA, Manage DUA, and Manage MTA pages. **Note:** Event email notifications (CO assigned emails and expiration emails) will only go out if the Complete checkbox is checked.
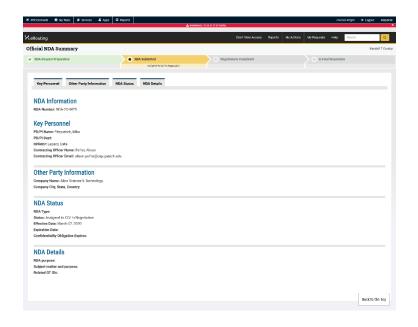    - Unchecked **Complete** indicates a Legacy record that needs additional information.



    - Once all required information is completed on Legacy records, the user will check the **Complete** checkbox and save the record.
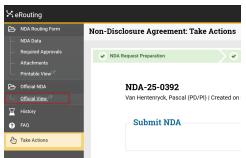
# EXCHANGE AGREEMENT RELEASE NOTES



- For Exchange Agreements (NDA, DUA, and MTA) initiated in eRouting and sent to CM, the **Source** field will display **eRouting** and the **Complete** checkbox will be checked.



- ➢ (CMS-4382) (CMS-4180) (CMS-4383) (CMS-4390) In eRouting, **Summary** pages were created for all Exchange Agreements (NDA, DUA, and MTA) Users can view current eRouting and Legacy Exchange Agreements inside eRouting. Note: The **Summary** page is only visible once the record is in CM.
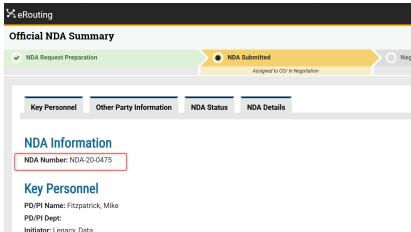
# EXCHANGE AGREEMENT RELEASE NOTES

For eRouting initiated Exchange Agreements, the Summary page can be accessed via the **Official NDA → Official View** link.



➢ (CMS-4455) In eRouting, when viewing a **Summary** page for DUA, NDA, or MTA, the ID for eRouting initiated EAs is a hyperlink back to the form in eRouting.



**Note:** Legacy records do not have this hyperlink since they are not initiated in eRouting and have no form in eRouting.

# EXCHANGE AGREEMENT RELEASE NOTES

➢ (CMS-4389) (CMS-4484) Exchange Agreement COs can search for Legacy records in eRouting by checking the **Legacy** checkbox on the **Search All** pages for NDA, DUA, and MTA.