

MEMORANDUM

Subject: Contract Manager Enhancements**Date:** January 15, 2021

The Research Foundation's Contract Manager System has been upgraded to make it faster, more responsive, and to include new features and enhancements which provide users with more robust information and create a better user experience. There have been no changes to the system's business rules. A detailed description of the enhancements is provided below.

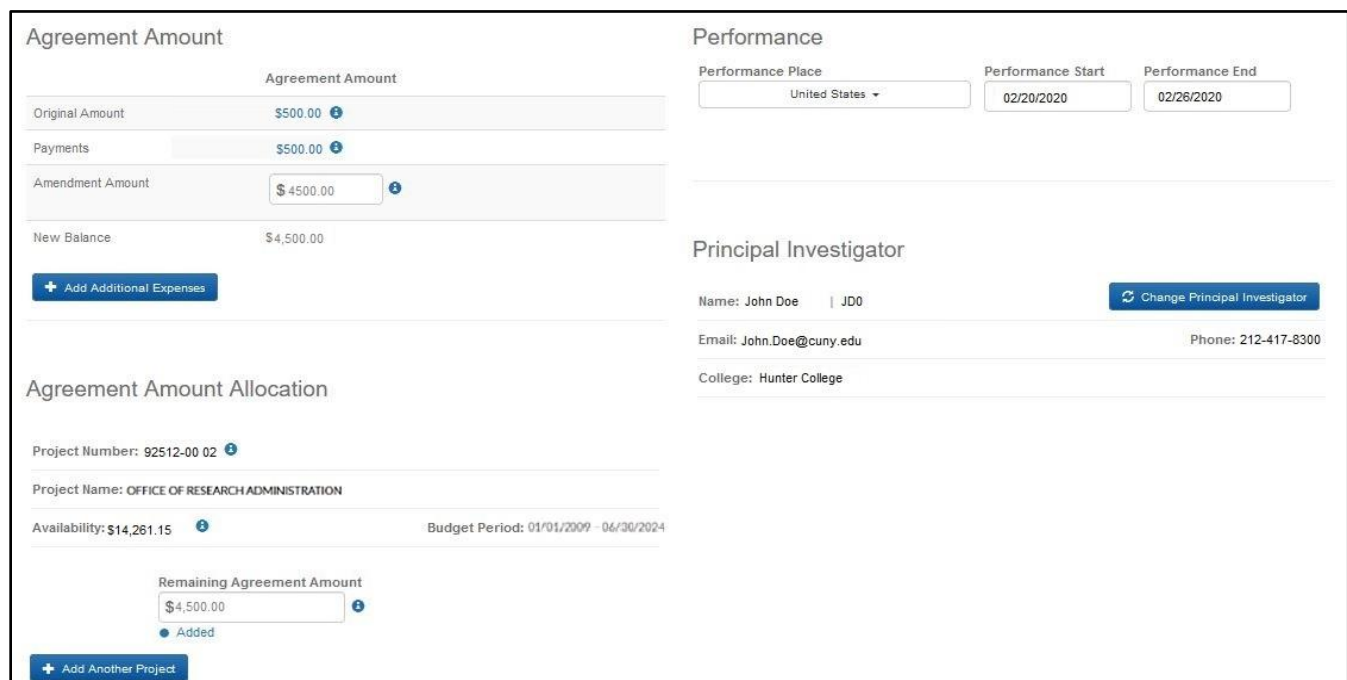
I. Data Entry Improvements for Amendments

The Agreement Details section has been completely redesigned to make it easier for users to amend MOUs, ICAs and Subawards. Figure 1a below shows the former Agreement Details screen, and Figure 1b shows the new Agreement Details screen.

The Agreement Amount section has been removed so users no longer need to enter the Amendment Amount twice. Instead, the new Agreement Details screen for amendments includes an Amount Allocation section, where users enter the amount they wish to encumber or disencumber on each individual PRSY, simplifying the process of allocating funding among multiple PRSY's.

New filters have been added to make it easier for users to view the details of each iteration of the MOU, ICA or Subaward.

Encumbrance changes made on amendments will now be captured and displayed in the audit trail for the amendment (see Section II for more information).



The screenshot displays the 'Former Agreement Details Screen' with two main sections: 'Agreement Amount' and 'Performance'.

Agreement Amount Section:

- Agreement Amount:** A table showing 'Original Amount' as \$500.00, 'Payments' as \$500.00, and 'Amendment Amount' as \$4,500.00. The 'New Balance' is calculated as \$4,500.00.
- Buttons:** '+ Add Additional Expenses'.
- Agreement Amount Allocation:** Includes 'Project Number: 92512-00 02', 'Project Name: OFFICE OF RESEARCH ADMINISTRATION', 'Availability: \$14,261.15', and 'Budget Period: 01/01/2009 - 06/30/2024'.
- Remaining Agreement Amount:** A field showing \$4,500.00 with an 'Added' status.
- Buttons:** '+ Add Another Project'.

Performance Section:

- Performance Place:** A dropdown menu set to 'United States'.
- Performance Start:** A date field set to '02/20/2020'.
- Performance End:** A date field set to '02/26/2020'.

Principal Investigator Section:

- Name:** John Doe | JD0
- Email:** John.Doe@cuny.edu
- Phone:** 212-417-8300
- College:** Hunter College
- Buttons:** 'Change Principal Investigator'.

Figure 1a: Former Agreement Details Screen

Amount Allocation

[Previous Contracts](#)

Project: 92512-00 02

OFFICE OF RESEARCH ADMINISTRATION

Availability: \$14,261.15

Budget Period: 01/01/2009 – 06/30/2024

Starting Agreement Balance :

\$500.00

Amendment (+/-) :

\$ 4500.00

Subtotal :

\$500.00

New Agreement Balance :

\$ 4500.00

FAIN Number :

e.g. K22NS091312

[+ Add Project](#)

Performance

Performance Place

United States

Performance Start

02/20/2020

Performance End

02/26/2020

Principal Investigator

[Change Principal Investigator](#)

Name John Doe

Email: John.Doe@cuny.edu

Phone: 212-417-8300

College: HUNTER COLLEGE

Figure 1b: New Amendment Agreement Details Screen

II. Improved Audit Trail and Encumbrance Details

These new enhancements have enabled the Research Foundation to improve the audit trail to include more significant details of the agreement amounts and PRSYs associated with each transaction (see *Figure 2*). This will allow users to see not only “who” made changes and “when” they were made, but also “what” was changed.

Additionally, changes will now continue to be documented in the audit trail after transactions are fully executed. This allows users to easily access encumbrance details, payments, adjustments, and other actions that impact the total value and remaining balance of the MOU, ICA or Subaward right from the audit trail. Users can access the audit trail by clicking the following icon in Contract Manager:



The enhanced audit trail provides users with a much clearer breakdown of the expenditures for each transaction and allows users to understand more easily how a transaction came to be in a specific state. It also has the added benefit of giving users access to this greater level of detail all within Contract Manager, without the need to seek information from other RF systems, such as Kualii, Web Reports or the Payment Request system.

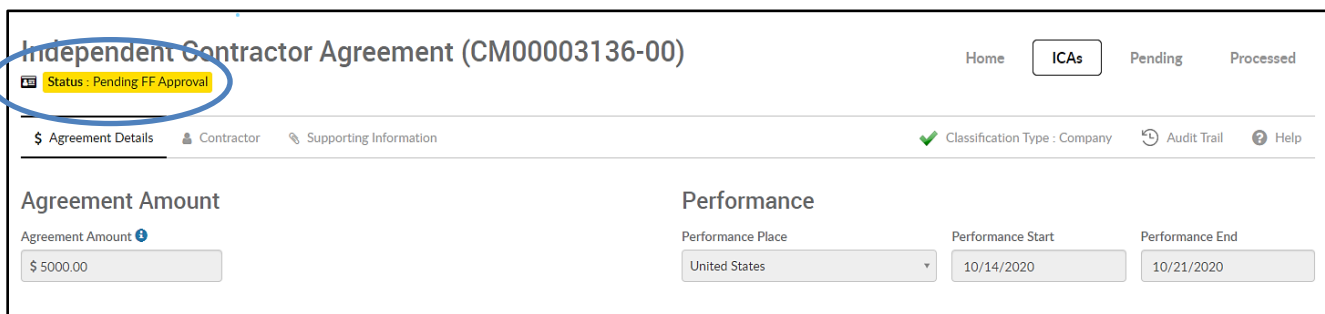
Audit Trail for MOU CM00002898-00	
▶ Jane Doe : (Role: GO, UserId: JDO) created this transaction of \$400.00 on 05/14/2020 at 12:29 PM	
▼ Jane Doe : (Role: GO, UserId: JDO) Updated Distribution on 05/14/2020 at 12:29 PM	
Updated Agreement Amount from \$400.00 to \$500.00 on 92512-00 02	
▶ Jane Doe: (Role: GO, UserId: JDO) Updated Distribution on 05/14/2020 at 12:30 PM	

Figure 2: Improved Transaction Audit Trail

III. Improved Status Message and Contact Information Details

To provide users with a greater ability to track requests and obtain status updates, the Research Foundation has made the status message visible within each transaction and has added a contact information card for whom to contact for status updates (see *Figures 3 & 4*). The revised status message informs users where the transaction currently resides in the Contract Manager Workflow and provides the appropriate contact information for the RF staff/department who can provide a status update. Figure 4 below shows an illustration with the contact information being an email address for the Finance Department.

For other requests that are pending, such as those awaiting Project Administrator (“PA”) approval or Legal Review, the system will now provide users with the email address and telephone number of the PA or for the assigned Legal Affairs staff member. This ensures that users contact the appropriate RF staff/department where the transaction currently resides for approval without having to seek out contact information separately or misdirecting their requests to other RF staff/departments.



Independent Contractor Agreement (CM00003136-00)

Home ICA's Pending Processed

Status: Pending FF Approval

Agreement Details Contractor Supporting Information

Classification Type: Company Audit Trail Help

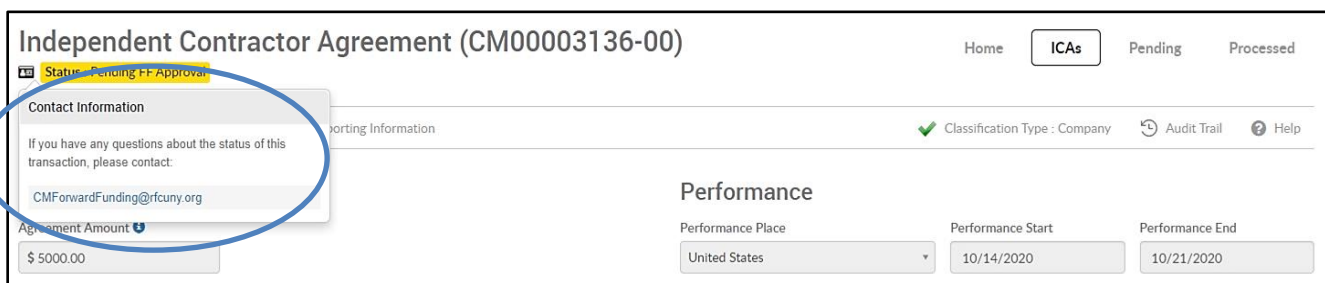
Agreement Amount

Agreement Amount \$ 5000.00

Performance

Performance Place United States Performance Start 10/14/2020 Performance End 10/21/2020

Figure 3: Status Message



Independent Contractor Agreement (CM00003136-00)

Home ICA's Pending Processed

Status: Pending FF Approval

Contact Information

If you have any questions about the status of this transaction, please contact:

CMForwardFunding@rfcuny.org

Agreement Amount \$ 5000.00

Performance

Performance Place United States Performance Start 10/14/2020 Performance End 10/21/2020

Figure 4: Contact Information for Status Update Requests

Please email legalaffairs@rfcuny.org with any questions related to the enhancements detailed in this memorandum.