SAM Release Notes
Build 2015-10-31

October 31, 2015

Change Log

Version #	Date of Change	Section	Description of Change	Changed By
1	10/20/2015	All	Initial draft	IBM
2	10/26/2015	Release Notes	Incorporated GSA Comments	IBM
3	10/30/2015	Release Notes	Updated Item 16056	IBM

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Overview

With each software release, we work to improve the System for Award Management (SAM) user experience, improve the quality of information available from SAM, and reduce the burden for those wishing to do business with the U.S. Federal government. We do this through a combination of minor enhancements and fixing known issues. This document summarizes the customer-facing changes that were made to the SAM application and database in the development window culminating in the build to production on October 31, 2015.

Release Notes

Description	Reference IDs
Enhancements	
Added the National Provider Identifier (NPI) to the SAM Exclusion extract to provide awarding officials with a more complete public extract.	7119
Created simplified mapping documents for the SAM Entity Management extracts to provide users of SAM data a quick reference for the data layout and formatting.	13495
Updated the "sort by" and "order by" logic on the Search D&B Records page and Cross Reference page to allow users to sort Ascending and Descending for each column in the results returned display boxes increasing usability for managing exclusions.	14026
Added functionality to allow federal hierarchy maintainer users to choose to view only Active levels of their federal hierarchy, or Active and Inactive levels of their federal hierarchy, increasing usability.	14444
Created an email notification to alert users when their entity is flagged as having Delinquent Federal Debt (DFD) subject to the Treasury Offset Program, what the DFD indicator means, and what action to take. Created another notification to inform users when the debt flag is removed. Both messages are designed to reduce user confusion.	15269
Added a notification the Data Access Request page to inform users which data access roles they currently have, and when they expire, improving the data access request process.	15601 / 15604
Added a notification the GSA Data Approval page to inform approvers which data access roles the user currently has, and when they expire, improving the data access approval process.	15602

Added functionality to display the HUBZone Certification Entrance and Exit Date in the Core Data section of an entity registration under "SBA Certified" allowing awarding officials to make a more informed decision.	16543
Added "Read Only" Provisions FAR 52.222-50 and FAR 52.222-56 to the application to increase regulatory compliance.	16548
Added a Confirmation Page when users select cancel while creating or updating an exclusion record allowing users to either return to the exclusion or to proceed with cancelling, improving the exclusion management process.	17428
Added a Location accordion to the Disaster Response Registry Search page. Users will be able to search for entities able to provide disaster relief by entities' physical address, in addition to the other available search criteria, increasing the relevance of search results.	17888
Updated page headers, field labels, and page description text throughout the exclusion process pages to improve users' experience.	17889
Improved the confirmation page users see when they Delete or Deactivate an exclusion record. The page now lists the Organization Name, DUNS Number, CAGE Code, Classification Type, Active Data and Termination Date. This provides relevant information to the user in case they want to retain the confirmation page for their records.	17920
Added additional data elements to the SAM Exclusion Search results page -- SSN (if the user has FOUO access), Excluding Agency, Exclusion Type, and Termination Date – to provide more information to the user sooner in the search process.	17921
Updated the SAM Entity Management daily extract file to include the Purpose of Registration code in the subset of information sent for Deleted/Deactivated and Expired records.	17923
Added a DUNS Number column to My Exclusions and My Agency's Exclusions pages to allow officials to more quickly distinguish the correct location from among the exclusion records displayed.	18565
Accessibility Enhancements	
Added a horizontal scroll bar throughout the application when the view is zoomed in (up to 200%) increasing accessibility for users with low-vision.	17451
Updated text to replace on-page “directional” instructions with more detailed navigation descriptions providing better guidance for blind or low-vision users who rely on assistive technology.	17452

Grouped related control groups into FieldSet elements with clear legends to help distinguish what fields are associated with each other increasing usability for blind or low-vision users who rely on assistive technology.	17453
Updated descriptive text on pages informing users that mandatory fields are marked with asterisks increasing usability for blind or low-vision users who rely on assistive technology.	17454
Fixed the Skip Navigation link to direct a user to the main content of the page when activated increasing usability for blind or low-vision users who rely on assistive technology.	17487
Exclusions Management	
Implemented an email notification to be sent to the Agency Administrator - Exclusions and Exclusions Representative for when D&B detects a change to specific monitored fields, e.g. legal business name and physical address, for Firm exclusion records.	9660
Included the Hour/Minute/Second Timestamps for Historical Exclusion Records allowing users to distinguish different updates done within the same day.	10973
Added Firm exclusion records, as well as entity registration records, to the D&B Monitoring process. If a DUNS Number associated with an exclusion record is flagged by D&B as having a change to its Legal Business Name or Physical Address, SAM will send the appropriate users an email notification (see Item 9660) inviting them to review the information from D&B and update the exclusion record if needed.	13686
Fixed an issue to ensure alternate addresses provided on the Identification Information page of the exclusion process will be displayed on the Exclusion Review page.	14028
Updated the application to only display one Remove button per cross reference streamlining the Manage Exclusions process.	15131
Fixed an issue where the Legal Business Name, DUNS and Address all appearing in the Organization Name field when viewing an exclusion that was added via the Search More Locations process.	15706
Removed Legacy CT Codes and Exclusion Types from appearing on the Exclusion Summary page and fixed the CT Code link so that when clicked it navigates to a stand-alone "help" page increasing usability.	15924
Updated the SAM Exclusions e-mail and XML Web Upload box to provide information about the new SAM Exclusion XML Upload process.	16091

Fixed an issue where the Classification filter under My Agency's Exclusions was not filtering the correct classification of exclusions.	17355
Implemented a Special Entity Designation exclusion investigation email notification, and updated text/page descriptions when reviewing changes, once the investigation is complete increasing data quality.	17637
Implemented D&B Investigations for Special Entity Designation exclusions uploaded through the SAM Exclusions XML uploader increasing data quality.	17638 / 18865
Added functionality that allows users to add multiple cross-references more easily to an exclusion record increasing usability.	17890
Added logic to ensure no changes are saved to an exclusion record until the user selects Submit on the last page of the exclusion record.	18272
Manage Data Access	
Updated the page titles, page descriptions, and page field labels on the Data Access request pages so that users can better navigate the data access request process.	10792
Resolved an issue where SAM administrators were unable to see the Government Security Officer for certain archived data access requests.	13624
Updated the error message encountered when character input limit is reached while entering Justification Reason for a Data Access Request increasing usability.	14238
Resolved a display issue on the SAM System Account administration page which prevented Help Desk and GSA Data Approvers from fully viewing archived data access requests.	14476
Updated the SAM expiration email notifications to include the data access role that will be expiring.	15594
Removed Legacy roles from the GSA Data Approver drop down menu.	15599
Register/Update Entity	
Fixed an issue where entities with expired registration records were prevented from viewing their registrations if a Work in Progress was initiated.	17423
Resynchronized the SAM Corporate Hierarchy with the D&B Hierarchy to correctly display updates to an organization's structure.	17543
Restored a link to allow Entity Administrators to download their Active registrations in XML format on the Register/Update Entity > Complete Registrations page.	18008

Manage Entity Core Data	
Added a validation rule to prevent users from saving invalid DUNS+4 values, e.g. NONE and NULL, within their Financial Information increasing data quality.	13309
Removed the word “null” from the Agency Location Code drop down box on the Financial Information page of a Federal registration increasing usability.	15452
Removed the 90-day grace period to provide international owners' CAGE/NCAGE Code in accordance with FAR Subpart 4.18. All users who state that their entity has an Immediate or Highest-Level Owner will need to provide the parent's CAGE/NCAGE Code prior to submitting their registration.	16056
Changed the default setting for Country of Incorporation on the General Information page to "Please select a value." All registrants will have to select a country from the drop-down. Those who select United States will then have the option of selecting a State of Incorporation further increasing data quality.	16231
Removed duplicate asterisks for mandatory questions on the Purpose of Registration page reducing confusion.	16236
Implemented a validation rule to prevent users from providing their entity's CAGE/NCAGE Code for their Immediate and/or Highest-Level Owner or providing the same CAGE/NCAGE Code for both owners, increasing data quality. In either scenario, the user will receive a mandatory error message on the CAGE Ownership Details page.	17425
Removed the conditional credit card payment statement on the Financial Information page for IGT registrations with the business purpose of Buyer.	17664
Fixed an issue where U.S. Territories were getting an incorrect error message when attempting to refresh their legal business name and physical address information from D&B.	18704
Manage Entity Assertions	
Fixed an issue where the application was inserting a "0" in the Annual Revenue field of on the Size Metrics page of an IGT Only registration (Seller, or Buyer and Seller) when the user entered nothing.	13912
Updated the text in the Entity Registration Record PDF to display "Disaster Response Information" instead of "Disaster Relief."	17420
Manage Entity Reps & Certs	

Inserted on-screen SAM Assistant text for the Reps and Certs section within an Entity Registration increasing usability.	14081
Fixed an issue where FAR 52.223-9 and FAR 52.223-4 were being marked as "certified" by the user even though they answered "No" to Question 4 in the Reps & Certs increasing data quality.	11640
Implemented changes to the Reps & Certs section of an All Awards registration pertaining to FAR Case 2016-006 Prohibition on Contracting with Inverted Domestic Corporations [IAESAM-240].	17628
Removed references to FAR 52.219-22 per FAR Case 2009-016 which included making Question 18 of the Reps & Certs section reserved.	17895
Updated the text in FAR 52.219-1 Alternate 1 from "May 2014" to "Sept 2015" and changed (b)(9) to (c)(9) and (b)(2) to (c)(2).	18705
Manage Points of Contact	
Fixed an issue where the incorrect Points of Contact were displaying if a user switched their Purpose of Registration from All Awards or Federal Assistance Awards, to IGT Only.	16679
Manage Federal Hierarchy	
Fixed the infinite regeneration of the processing swirl after adding a level to the Federal Hierarchy. When processing is complete, the user will be redirected back to the My SAM Homepage.	16355
Manage Entity Users	
Updated the User Information page to display a user's Granted User Roles increasing usability.	11999
Disabled the ability for Help Desk users to view deactivated entities on the Manage Entity Users pages in order to prevent them from assigning roles to deactivated entities.	13508
Implemented the processing swirl when a user is to be directed to the User Information Page.	16290
Updated query to always display a user's Pending Roles Request to the approver no matter if the user changes his/her account settings.	17836
Manage User Account	
Resolved an issue to filter individual SAM accounts from the system account password reset workflow.	10228
Removed a link instructing a user to update their email address after they have disassociated their account from an entity.	12886

Updated the error message users receive when attempting to reuse an old password within their 10 limit.	16016
Reorganized the error messages within the Create System Account process for clarity. The messages will be displayed in a single block to provide a more user-friendly presentation.	16950
Manage Search Records	
Updated the display of counties in the Disaster Response Registry. Counties selected will display as their name not a two-digit code, increasing usability.	17684
Viewing Records	
Fixed an issue where the print page displayed "null" when trying to print the Excluded Family Members page via Search Records.	14006
Fixed an issue where Product Service Codes (PSCs) were not displayed on the Entity Record PDF.	17422
Updated the text on the Search Records, Entity Record, and Core Data pages in Search pertaining to the SBA's Dynamic Small Business Search to inform users that they need to access the DSBS through a SAM View or Update, or use the direct access to the SBA Supplemental page in the SBA GLS.	17563
Site-Wide	
Implemented the SAM interface to sync the SAM Federal hierarchy with FPDS-NG.	4917
Updated the interface that populates the vendor hierarchy.	7892
Corrected references to "Federally Funded Research and Development Corporation" business type and associated terms to "Federally Funded Research and Development Center."	13921
Added a footer to the bottom of the SAM Status Tracker page that displays the server number so that it can be used to troubleshoot issues that users encounter while using the SAM Status Tracker.	14236
All references to data access "Viewer" have been converted to "User" throughout the application on order to reduce user confusion.	16229
Fixed the Entity Information page within the Create System Account process to ensure the SAM Assistant header is not statically expanded. A user may now expand/collapse the header.	16308

Added distinct page titles for all pages within the SAM application to indicate to a user what page he/she is on increasing usability and accessibility.	16695
Added an additional validation rule to the mailing addresses to prevent users from inputting unicode characters increasing data quality for interfacing systems.	16703
Removed the Save button from the Delete/Deactivate Exclusion pages, Entity Record Confirmation page, and the Assign User Roles Confirmation page as it served the same function as the Print button.	17419
Fixed an issue where saved searches were not displaying a time stamp under the My Saved Queries section.	17421
Removed the "General FAQ" sub-tab to reduce navigation redundancy on the Help > FAQ page. This also increases usability and accessibility for users who rely on assistive technology.	17489
Updated the definition of the Government Business Point of Contact in the Content Glossary, User Guide, and the SAM Assistant text on the POC page to include SBA small business subcontracting opportunity language.	18381
Updated the SAM Exclusions Extract User Guide to reflect the updated layout and display the max element length for each data item.	18769
Disabled the Legacy EPLS XML upload interface.	19173
Web Services	
Added FAR 52.204-17 to display in the Reps and Certs section of the SAM Entity Management web service.	17171 / 19083
API	
Added modular options to the SAM API getData procedure. Users can choose to return all fields including those that have no value, i.e. are null, or just those in which the field is completed.	16293 / 17951
Fixed the SAM API JSON return to include all public data information to a user who requests. Additional public data now included in SAM API getData are the bonding information, POC notes, and correspondence flag.	17952 / 16983
Fixed field names associated with the address object within SAM API to provide clarity and consistency throughout the JSON return.	17113
Added the Standard Form 330 for Architect Engineer Response information to the SAM getData API. This form provides the firm's professional qualifications regarding Architect-Engineer services.	17116

Fixed several data elements pertaining to specific FAR and DFAR clauses that were not displaying accurate information in the SAM API.	17117