



# SAM Release Notes

## Build 2016-06-24

June 24, 2016



## Change Log

Version #	Date of Change	Section	Description of Change	Changed By
1	06/02/2016	All	Initial Draft	IBM
2	06/06/2016	Release Notes	Incorporated GSA Comments	IBM
3	06/06/2016	Release Notes	Final Version	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 June 24, 2016.

## Release Notes

Description	Reference IDs
<b>Enhancements</b>	
Improved the usability of the POC Details page. Enhanced the Add Optional POC button and Copy From features for the Optional POCs section to allow registrants to select correctly formatted and completed POCs from the Copy From drop down menu increasing data quality.	11535
Combined the Complete/Incomplete/Inactive Registration pages into one Existing Entity Registrations page streamlining the process and increasing usability. Registrants will be able to view and take action on all entities with which they have roles from one single page. Improved the Entity List to sort entities alphabetically and display the unique identifier (DUNS Number or DoDAAC) next to the Legal Business Name. Provided more information in the Registration Details returned to include the entity's Purpose of Registration, CAGE Code, and Activation/Expiration Date.	11265
Added application logic to display data entered on the Ownership Details page via the Entity Dashboard view, Search Dashboard view, and Entity Record PDF. Users will now be able to view their Ownership Details data as part of the complete entity record as well as within the context of FAR 52.204-17 Ownership of Offeror in the Reqs & Certs section.	13881
Improved the SAM Status Tracker user interface to make it consistent with the overall application. Updated it an HTML URL to a JavaServer Page (JSP). This not only improved the look and feel of the page, but also the security, by bringing it in the secured portal context within a portal session. Additionally, improved the on-page information provided on the registration process to reduce confusion.	19379



Added validation logic for foreign ownership increasing data quality. On the General Information page, users who report a foreign Immediate or Highest-Level Owner on the Ownership Details page must select for-foreign-owned as one of the their business types. As well, if users indicate only U.S. owners on the Ownership Details page, they will not be able to select foreign-owned as an entity business type on the General Information page.	19624
Improved usability for administrators to manage role requests. Added additional fields on the Manage Role Requests page. Redesigned the page layout to provide enough information for the administrator charged with reviewing and approving role assignments for their entity to take appropriate action at a glance.	20265
Updated the Extract Daily/Monthly file links to incorporate Julian Dates reducing user confusion between files. Julian dates are a three-digit representation of the exact month and day of a given year.	23147
Incorporated logic to allow users who register as a single-member Limited Liability Company classified as a disregarded entity to use their Social Security Number (SSN) as their Taxpayer Identification Number (TIN) in accordance with tax law.	24195
Updated the data element label "POC Name:" on the Entity Overview Page to "Last Updated By:" as it only represents the user name of the entity administrator or representative who last updated the registration record. Official POCs are captured and presented in the POC section.	25102
Changed the color of the Address Update Required "Yes" indicator triggered by the business monitoring service in the Entity Registration section from red to black removing the perception of an error.	25103
Improved the exclusion management process by updating the Identification Information Address Display for Special Entity Designation Exclusions to match the display for Individual and Vessel Exclusions.	25105
Improved small business concern validation logic to increase data quality. Certain types of entities can never be considered small for procurement purposes. Those types of entities can no longer select the Woman Owned Small Business (WOSB) or Economically Disadvantaged WOSB options as a socio-economic category on the on the General Information page. In addition, entities with a physical address outside the United States and its territories cannot be considered a small business concern.	25108



Enhanced usability of key record date presentation. Reordered and re-named the key dates displayed within the Core Data module of an entity registration so users can more easily understand the Initial Registration, Submission, Activation, and Expiration dates.	25120
Added validation logic to the SAM Exclusion uploader to verify the uniqueness of the National Provider Identifier (NPI) of a new or updated exclusion record improving data quality.	25501
<b>Accessibility Enhancements</b>	
Triggered mandatory errors to be read aloud by a screen reader upon page reload increasing usability for users who navigate using only their keyboard.	17450
Fixed the focus order on certain pages identified as not having a sequential flow from a screen reader perspective. The updated pages now mirror the flow from a sighted user's perspective: left to right, top to bottom.	17457
Updated all pages to include heading levels 1-5. Users relying on screen readers will encounter a consistent heading structure throughout the application increasing usability.	17565, 22183
Removed the existing datepicker widget, which caused difficulty for keyboard navigation, from all affected pages. Implemented form input labels for date fields so keyboard-only users know the required format for the fields. Updated error messages on the Business Information and Proceedings Details pages to ensure users had all the necessary instructions to provide the appropriate data and continue with their registration.	20009
Constrained focus within the page-level SAM Assistant component while it is activated to ensure keyboard-only users have a consistent user experience. All users must collapse the component before they can take action on the page.	20015
Added labels to form input elements on the Login, My SAM, Search Records, and Search Results pages. Streamlined the Quick Search Results sub-filters to reduce confusion and ensure all input fields had appropriate labels increasing usability.	23163
<b>Exclusions Management</b>	
Fixed an issue where users were unable to delete certain alternate addresses on the Identification Information page for SED/Vessel Exclusions improving data quality.	19593



Removed the "Upload" button from the "Cancel Exclusion Update" page reducing user confusion.	20267
Fixed an issue where the list of My Exclusions would not display on page load after canceling out of the Delete or Deactivate process while managing exclusion records improving usability.	21632
Removed the limitation on the number of alternative addresses per exclusion in the SAM Exclusion uploader improving data quality.	21853
<b>Entity Registrations</b>	
Fixed an issue where users could submit a registration update, if all mandatory information was complete, after only passing the TIN Consent page. Users must review each page in their registration to certify their information is current and accurate.	20696
Fixed a typo in the Federal Service Desk phone number included in the email sent when a user deactivates their entity management registration.	21883
Fixed an issue where a screen reader was not reading the pop-up message after the Start Registration button on the Overview page was activated. This pop-up is a quick reminder to the user of what information is needed to get started with their registration.	22743
<b>Manage Entity Core Data</b>	
Improved the final Entity Review page in the Core Data section by removing the duplicate Physical Address and adding the Missing Address Line 2 increasing usability.	22758
Updated hyperlinks on the Commercial and Government Entity (CAGE) Code, Ownership Details, and Predecessor Details pages to navigate users to the correct CAGE Program or NATO Support and Procurement Agency (NSPA) sites providing quick access to external resources.	26620
Recorded new and updated SAM Assistant text for Predecessor Details and other Entity Registrations pages to provide on-screen help for users registering in SAM.	26731
<b>Manage Entity Assertions</b>	
Added logic to only allow government entities to select NAICS from Sector 92 - Public Administration increasing data quality.	17750
<b>Manage Entity Reps &amp; Certs</b>	



Fixed an issue where business type 52 (Self Certified Small Disadvantaged Business) was not being removed from the entity management registration when the user selected No to Question 17 in Reps & Certs increasing data quality.	19143
Updated the FAR links on the Reps & Certs page so users are navigated to the correct provision providing quick access to external resources.	21183
Removed any links or references to the now-reserved DFARS provision 252.225-7022 from the SAM Reps & Certs section reducing potential confusion.	21195
Revised the title of the expanded NAICS table under the View More button in FAR 52.212-3 paragraph (c) and FAR 52.219-1 paragraph (c) to clearly state it represents Small Business Status by NAICS Code reducing potential confusion.	21602
Fixed an issue where a previously selected country continued to display under DFARS 252.216-7008 even after the user changes the answer to Question 35 to No improving data quality.	21604
Updated the small business concern logic so foreign-owned entities with a physical address in the United States and its territories are not prevented from being considered small for procurement purposes improving data quality.	24470
Updated FAR 52.204-20 Predecessor of Offeror in SAM Reps & Certs to match the language of the provision effective April 2016.	25923
<b>Manage Points of Contact</b>	
Removed the Sole Proprietor POC type from the entity registration if the user changed their Entity Type from Sole Proprietor to a different selection improving data quality.	19144
Fixed an issue where the Address Line 2 field of the POC page was not displaying in the application improving data quality.	21015
<b>Manage Entity Users</b>	
Fixed an issue in the managing of entity users where the "Back to Users List" button was not navigating the user back to the User List page, with the radio buttons and search terms still displayed.	17154
Removed the 200 record limit on the Manage Roles page so all entities with which a user has roles will display in the Entity List. Updated the display of the federal and non-federal hierarchy for entity administrator and help desk users.	19429



Removed the 200 record limit from the Manage Roles > Summary page so it displays all of the Parent and Children entities that the user is being given roles to or being removed from.	22751
<b>Manage User Account</b>	
Removed the "Unlock Button" on the Request Role page for users who do not have their account locked reducing confusion.	9805
Removed the white space from the bottom of the Request Roles with New Entity > Select Entity page for a federal user improving the layout.	19432
Fixed an issue where, the Roles header on the Summary page was formatted incorrectly when a user requested a role with an entity reducing confusion.	22768
Fixed a typo on the Invitation Sent > Confirmation page from "Invitation Set" to "Invitation Sent" reducing confusion.	22809
Left aligned the fields on the Invite User > Summary page improving the layout.	22810
On the Invite User > Summary page, removed the fields that are not required to be populated which includes the Department and Agency Code fields, Level Status, and Address Line 3 and 4 reducing confusion.	23453
Fixed an issue where users could not remove the second POC during the System Account creation process.	22678
Updated the sub-navigation so users have clear instructions and navigation options for managing their user profiles improving the user experience.	26772
Created a reminder to re-enter password data in the Password and Confirm Password field for users who receive error messages during the Individual Account creation process ensuring users have the information they need to continue creating their user account.	26732
<b>Search Records</b>	
Fixed an issue where running a search in Advanced Search - Entity and running a saved search with the same criteria returned different results improving usability and search reliability.	22754
Added the Content and Search Glossary sections of SAM to the page focus order. Users can tab to the glossary section and expand/collapse the section using keyboard action only improving accessibility.	23132



Fixed the issue where a middle name shifted down one record in Advanced Search – Exclusions results. The middle name corresponding to an individual's name is now correct when saved as a PDF improving search result data quality.	24490
Updated the error message that displays when a user enters a search term into more than one box within Quick Search reducing confusion.	25124
Updated the static error message when searching for an entity via search and the entity dashboard reducing confusion.	26332
<b>Viewing Records</b>	
Incorporated a usability recommendation to tie the Reports section to user roles. Unauthenticated users and non-federal users without roles to the searched entity will no longer see a Reports section displayed. Federal users and users with roles for the entity will continue to have access to the Service Contract Report (SCR) and BioPreferred Report sections.	23143
<b>API</b>	
Added section P (Ownership of Offeror) and R (Predecessor Details) to FAR provision 52.212-3 for the SAM API increasing completeness of responses returned.	23671
<b>Web Service &amp; Extracts</b>	
Updated the SAM Entity Management web service to remove an existing undefined namespace improving downstream data processing.	19426
Resolved an issue that prevented the Entity Management web service response from properly sequencing Entity records which shared a common 9-digit DUNS in order of the DUNS+4 value improving downstream data processing.	19886
Added the Service Contract Report box and link to the System Account Entity Management extract page improving data access.	22184
Updated FAR 52.212-3 to include sections P (Ownership of Offeror) and R (Predecessor Details) in the Web Service improving completeness of responses returned.	22352
Resolved an issue in the Exclusion Search web service which prevented searches by name when other parameters were present and null improving completeness of responses returned.	22737



Updated the <includeArchive> tag in the SAM Exclusion Search web service to be <includeInactive>, removed it from the doSsnSearch operation, and made the tag searchable in the doSearch operation, improving consistency.	22813
Removed the Sensitive extract links from displaying for users with only For Official Use Only (FOUO) access. Although the links wouldn't work because the user didn't have the right data access role, their presence caused confusion.	22838
Fixed an issue where the exclusion search web service contained undefined namespaces which was preventing response parsing improving downstream data processing.	23210
Posted a simplified SAM Exclusions Public Extract layout document to increase user understanding of the data provided.	25892
Updated the Google Geolocation/Sunlight API logic to use ZIP Code as secondary parameter if the Google Geolocation does not return a result, increasing Congressional District data completeness.	26288
<b>Site-Wide</b>	
Updated additional text and user-guide references of "Foreign Owned and Located" text to correctly read "Foreign Owned" in compliance with the data element definition change implemented in February 2016.	20608
Updated the HMTL markup throughout the SAM application to better conform to the W3C HTML specifications. Examples include using appropriate tags to impart semantic meaning, updating tags used for presentation purposes only, and including only one pair of html open/close tags per page.	21904
Added unique page titles to the additional SAM login page scenarios. Updated the Page Description sections and page markup to provide clear instructional text and consistent heading level structure.	23123
Updated the SAM logo to navigate a user back to the homepage when selected.	23161
Updated the Small Business Administration (SBA) text and links text on the General Information > News > Announcements page and the My SAM page to provide more useful information to small business concerns.	26168
Constrained the emulation mode for SAM on Internet Explorer from version 8 to version 9. This will allow optimal performance for SAM users using IE9 and above moving forward.	26621



Removed redundant login fields and links in the global banner to improve user experience for users relying on screen readers.	26730
Improved the My SAM page sub-navigation menu to enable users navigating via keyboard only to expand and collapse the menu sections increasing accessibility.	26733