Cayuse SP 3.8.0 Release Notes (USERS)

These release notes are cumulative for Release 3.7.1, 3.7.2 and 3.8.0
Enhancements

General SP

- Search results may now be exported to CSV from throughout the application including the following dashboards: My Proposals, Proposals in My Unit, My Awards, Awards in My Unit and the Project Dashboard. Any search or filter criteria that have been applied will be included when generating the CSV file extract.

- Date selection has been improved throughout the application. Users now have the option to hand enter dates or select them from the date picker.

Proposals

- Internal and third-party cost sharing can now be tracked for the entire project as well as the current budget period. Departments providing cost share in subsequent budget periods are also included in the proposal routing chain, allowing for the approval records to be captured within SP.

- When entering cost sharing amounts on the Budget page of the proposal IPF, the amount fields now allow up to ten digits instead of seven.

- Information on the proposal header was rearranged and additional information was added to provide a better overview of key proposal information and align displayed information between the proposal, award, and project. The following fields were added: Admin Unit, Prime Sponsor, Instrument Type, Project Begin and End Dates, Total Proposed Amount. Proposal and Contract Specialists are now displayed together as a list of Specialists to accommodate newly added information.

Projects

- Information on the Project Header was re-arranged to better align with information on the Proposal and Award Headers. Sponsor, Prime Sponsor, Admin Unit, and Instrument Type were added to the header and Account Manager was removed.

Awards

- The information displayed in the record header in Award Administration was updated to provide more information, reduce the clicks needed to find key information and to better align with the Project and Proposal record headers.

- The following fields were added: Admin Unit, Instrument Type, Sponsor, Prime Sponsor, Award Begin and End Dates. Primary Admin Contact was removed. The Copy Award link was moved to a button at the bottom of the tab next to the other action buttons.
Issues / Bug Fixes

General SP

- Proposal abstracts that were not marked as publicly accessible were not visible to IPF Approvers.
- When searching for projects or viewing project reports, the project amount was showing as $0.00 for projects that had linked awards with non-zero amounts in cases where the awards were originally created with an "anticipated" amount and then subsequently updated to "obligated".
- The Research Suite branding has been updated to reflect our standing as Cayuse LLC, independent from Evisions Inc.
- Inadvertent double clicking upon creating SP records (proposals, awards, projects) no longer creates unintended duplicate records.
- Dates and times displayed in SP will now always be consistent with customer time zone.
- Time stamps for proposal authorization, attachment upload, and email sent time now consistently reflect the time as well as the date the action took place.
- Certain customers with large numbers of proposals were experiencing unacceptable page load times on these proposal-related dashboards: My Proposals, Proposals in My Unit, and Unit Approval Inbox. We improved the application performance so that these pages load faster.
- When users clicked on URLs to specific applications pages, for example clicking on a link to a proposal from within a review reminder notification and the user wasn't currently logged in to SP, the user was redirected to the login screen and then the SP landing page. This redirection has been corrected so that now the user is redirected to the desired proposal or award, speeding up reviews and reducing frustrated searchers for the correct file.

Proposals

- The Sponsor field on the General tab of the proposal was not displaying special characters such as ampersands (&) that are commonly used in sponsor names.
- Internal cost sharing units were not appearing in the PDF of the proposal IPF if the cost sharing amount was $0.
- When adding a person to the proposal research team with the role of Proposal Editor, their home department was incorrectly being added to the routing chain as an Approving Unit.
- When copying a proposal, it was possible to inadvertently create multiple duplicate proposals with the same proposal number.
- In the Investigators/Research Team proposal section, a person's total percent effort could exceed 100%. SP will now display an error if the Sponsored Effort % and Cost Shared Effort % total is greater than 100%, or if the Allocation of Credit % is greater than 100%.
• Attempting to add a note on the Proposal Admin Notes tab or in the Submission Notes section of the proposal IPF was sometimes resulting in an error that would prevent all users from adding notes to their proposals.
• Departmental Authorization is now being recorded consistently in the Proposal Status History irrespective of whether or not a comment is made on the authorization decision.
• When navigating away from the proposal budget page, user is no longer asked to save changes when no changes were made.
• Proposal status history now consistently shows status Unsubmitted assigned to new proposals.
• The applicable Parent Project number now populates in the Proposal Administration area when a new Award or Project record is created from the proposal.
• Proposal load times are no longer increased due to SP and 424 pairing.
• The Project Title is no longer auto-populated with the Short Project Title entered on the IPF General Info Page.
• Submit for Routing button is now only active when the proposal is complete and the Proposal’s status is either Unsubmitted or Re-opened.
• Inadvertent double-clicking on the Add Note button in a Proposal’s Notes tab no longer creates duplicate notes.
• The Proposal Status History was only displaying the date but not the time that the status was changed. Now both date and time are displayed.
• When a proposal was copied, the status of the original proposal was also being copied, putting the new proposal in an incorrect state.
• Now, when a proposal is copied, an entry is put into the Proposal Status History to indicate that the proposal was copied and the proposal status is then set to Unsubmitted.
• The Proposal Budget cost sharing section now accepts units with a unit code that begins with zero and this unit is now properly displayed on the Proposal Approving Units page.
• When removing a subcontractor from a proposal, the user was erroneously asked to save unsaved changes. This prompt has been removed.

Projects

• Sponsor names can no longer be edited from the Project Administration screen; Sponsors can only be selected using the Sponsor finder.
• On the Project Personnel tab, only the number of decimal points that are entered by the user will be shown in the effort, credit, and person months fields.

Awards

• Inadvertent double-clicking on the Award Administration Attachment upload section no longer creates unintended duplicate attachments.
• Awards were not displaying correctly if the value in the Document No started with a number. This has been corrected.
Reporting

- When reporting against sponsor types, if any sponsor code had an apostrophe in it, this would cause the list of available sponsor types to appear empty.
- Awards By Unit report now returns the correct Sponsor Type.
- Sorting a Proposal Report by Sponsor Type no longer returns an error.
- Awards by Unit report now always includes the same Awards that would display in the user interface given identical parameters.
- Awards by Unit Report no longer shows duplicate award records and proposals links now work.
- Proposals by Unit Report now display report dates according to customer time zone.
- Awards by Unit Report now exports to Excel without creating duplicate entries.
- Unique date ranges no longer produce a ColdFusion timeout error when running Proposals by Sponsor Type Report.
- SP Award reports now include an accurate list of proposals linked to a particular award.
- In Proposal reports, when more than one research team member was listed in the Other Personnel column, each person was listed on a separate line. This cause Excel report exports to fail. For clarity and accuracy we have merged the Other Personnel and Role columns and data will now display like this: person 1 (role 1); person 2 (role 2)
- SP Proposal Reports were not including proposals that matched on the last day in the selected date range. Report results will now include all proposals that match the first or last date in the date range as well as any dates in between.
- When reporting on Awards, clicking on the View Report button without first entering any search criteria will now show all obligated Awards instead of no awards.
- When reporting on proposals or awards, clicking View Report without entering any search criteria was not returning any results when it should have returned all proposals.