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Cayuse SP v3.8 Release Guide

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Release Notes	Reported by
Enhancements	
Units in the Organization Hierarchy may now be marked as hidden. A unit that is hidden is still available in Backbone for management. If a unit has been added to a record, such as a proposal, it will continue to be displayed. Once a unit is hidden it may no longer be added to a record via the Unit Finder. Hidden units are still accessible via search and reporting.	Texas Tech University
Backbone and Research Contacts may now be accessed directly from the SP Admin menu, eliminating the need to navigate back to the landing page. The Cayuse Help Center may now be directly accessed via the My Dashboard menu.	
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.	
In the Award People sub-grid, only the number of decimal points that has	University of Tennessee

been entered will be displayed. No extra zeros will be displayed.	
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.	University of Tennessee
Date selection has been improved throughout the application. Users now have the option to hand enter dates or select them from the date picker. The tool used to pick dates is now the same for all applications: SP, Backbone, and Workflow.	
Updated Cost Reimbursement and Fixed Price Templates - expanded pages included. Added Unilateral and Bilateral Mod templates. Kept 2016 templates. Removed older templates.	
The Proposal delete button was moved to reduce unintended deletions.	Thomas Jefferson University
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.	
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.	
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.	Notre Dame, UC Santa Cruz
DataConnect: A new resource in SP Data Connect now lists for each proposal which IRB studies are linked to it. The same information is provided in the resource as is visible in SP when an IRB study is linked.	
DataConnect: A field has been added to the Backbone Department resource in SP Data Connect. The field name is "hide". A value of "1" means the department (unit) is hidden. A value of "0" or empty means the department is not hidden.	
Fixes	
In SP 3.7.2 the fiscal year used in the project and award number was	

incorrectly calculated based on the Project Create Date. The application has been corrected to again use the Project Start Date in this calculation.	
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.	Oregon State University
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.	UC Merced
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 Award and Award Budget resources in SP Data Connect were timing out without returning data for certain customers. The performance of these resources was improved so that results return faster.	University of Tennessee
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 clarify 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)	Rowan University
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.	UC Davis
When removing a subcontractor from a proposal, the user was erroneously asked to save unsaved changes. This prompt has been removed.	UC Davis
Awards were not displaying correctly if the value in the Document No started with a number. This has been corrected.	UC Davis
The tabs in the Backbone Sponsor part of the application are now properly formatted.	Thomas Jefferson University, UC Davis
Multiple zeros in a Workflow Event title was breaking the event. This has been corrected.	UC Davis
When users clicked on URLs to specific applications pages, for example clicking on a link to a proposal from withing 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.	Thomas Jefferson University, University of North Texas
When a proposal completed routing and was automatically transitioned to	Thomas Jefferson

the Admin Office in Process status, this action was not being recorded in the Proposal Status History. It is now being included in the history.	University, UC Merced
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.	Wake Forest University
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.	



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