

Leanne Every

From: Paul Kelley
Sent: Monday, November 30, 2015 5:02 PM
To: activepis-l@research.umass.edu; biz-managers@research.umass.edu
Cc: Leanne Every; Paul Kelley
Subject: SmartGrant - Important changes to Electronic Routing - Browser cache clear required for all users - November 30, 2015
Attachments: Web Browser Settings for SmartGrant Users_OCT2015.pdf

Important browser setting notice to SmartGrant users:

Please follow the below vendor provided browser cache and history clear instructions before your next SmartGrant login. This is in response to recently reported browser cache issues after the electronic routing upgrade was completed.


If the below steps are not specific for your browser, please contact your local IT support staff for assistance or send a question back to the SmartGrant support staff for further assistance.

The below settings clears all data and will completely refresh the browser.


For IE:

1. Click on the Tools menu or icon, scroll down and select Internet Options
2. Select the General tab.
3. Click the Settings button under the Browsing History section
4. For Check for newer versions of stored pages select "Every time I visit the webpage"
5. Click OK
6. Restart browser

For Chrome:

1. In the top-right corner of Chrome, click the Chrome menu .
2. Select More tools > Clear browsing data.
3. In the dialog that appears, select the checkboxes for the types of information that you want to remove.
4. Use the menu at the top to select the amount of data that you want to delete. Select beginning of time to delete everything (or best selection for user).
5. Click Clear browsing data.
6. Restart browser

For FIREFOX:

1. Click the menu button  and choose Options.
2. Select the Advanced panel.
3. Click on the Network tab.
4. In the Cached Web Content section, click Clear Now.



5. Close the about:preferences page. Any changes you've made will automatically be saved.
6. Restart browser

For Safari:

1. Click Safari.
2. Reset Safari.
3. Check ALL boxes.
4. Click Reset.
5. Restart browser.

I have also attached the updated Web browser settings document for SmartGrant. This version will be loaded to <http://www.umass.edu/research/e-systems/smartgrant>, Known Issues, Browser settings.

Questions or Feedback to <http://www.umass.edu/research/webform/ogca-electronic-data-systems-support-form>

Thank you

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From: Paul Kelley
Sent: Friday, November 27, 2015 6:37 PM
To: 'OGCA'; activepis-l@research.umass.edu; biz-managers@research.umass.edu
Cc: Leanne Every; Paul Kelley (pakelley@research.umass.edu)
Subject: RE: SmartGrant - Important changes to Electronic Routing - Complete

The update is complete. SmartGrant is back online.

Guides for the new module are uploaded at <http://www.umass.edu/research/e-systems/smartgrant>.

Questions or Feedback to <http://www.umass.edu/research/webform/ogca-electronic-data-systems-support-form>

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From: OGCA [<mailto:ogca@research.umass.edu>]
Sent: Friday, November 20, 2015 4:58 PM
To: activepis-l@research.umass.edu; biz-managers@research.umass.edu
Cc: Leanne Every; Paul Kelley
Subject: SmartGrant - Important changes to Electronic Routing (projected 11/27/15)

We want to alert you to improvements that we anticipate will be installed in the SmartGrant system after 5 PM on November 27th. In response to feedback from Approvers and Administrators, programming changes have been made that should improve the routing process. Please see below for a list of the most important changes. Though we do not anticipate any difficulties with proposals or awards already in routing when this update is installed, we suggest that pending actions, or actions being routed next week, be completed if at all possible before 5 PM on Friday 11/27/15. If routing has not been initiated and can wait until after the 27th, we recommend waiting until the new routing has been installed.

Changes in the Routing map and Approver levels:

- There are 3 Approver Tiers: Tier 1 is the PI; Tier 2 are all other academic/administrative approvers; Tier 3 is the OGCA approvers
- The PI as Tier 1 and cannot be moved or removed from the routing map
- Once the PI approves the proposal/award, all other approvers will simultaneously receive an email notification stating that Action is Required
- Tier 2 Approvers may approve the proposal or award in any order
- The map may be modified prior to or after initiation and all changes will be made in Tier 2

Changes/Clarifications to email notifications:

- PI will receive an email with an approval hotlink ONLY if someone besides the PI initiates routing
- Each approver after the PI will receive an "Action required" email with a hotlink
- Every Approver, including the PI, will receive a Confirmation notification email indicating that they have successfully approved the proposal/award
- PI will receive an email after ALL approvers in Tier 2 have approved and that the action is now pending with OGCA
- Subject line in email notifications will indicate "Proposal" or "Award" as appropriate depending on the action item
- All other informational emails currently being sent, will no longer be sent

Change in Online Routing screen

- There is now a Reminder email timer that may be set only BEFORE routing is initiated. The timer can be set in 15 minute intervals which is expressed in fractions of an hour, i.e. 15 minutes is .25 hours. The default reminder time is 24 hours. This reminder will send emails to ALL pending approvers.
- We advise **caution** when using the timer feature and to use it only when necessary.

Guides for the new module will be uploaded to <http://www.umass.edu/research/e-systems/smartgrant> late next week.

Thank you,

SmartGrant Support Team

Questions or Feedback to <http://www.umass.edu/research/webform/ogca-electronic-data-systems-support-form>