



Kuali Coeus Version 5.1.1 Release Notes

Date: July 15, 2013

Copyright © 2013 Kuali Foundation, Inc.

Purpose: The purpose of this document is to summarize the major changes included in this latest software application system release version.

For More Information: help@kuali.org

What's New in This Release?

KC Release 5.1.1 includes:

- Fixes and additional features in the Conflict of Interest (COI) to meet functional equivalence to Coeus
- Critical fixes to other KC modules
- Upgrade of Rice to version 2.1.7

Notes:

- COI workflow: If an implementer applies Kuali Enterprise Workflow (KEW) to COI disclosures, please be aware that a Disapprove action in KEW will cause the disclosure document to be locked down and uneditable.
- The KC User Manual for Release 5.1.1 will be made available in about three weeks.
- Information on KC Email Service set up can be found at: <https://wiki.kuali.org/display/KRADOC/KC+Email+Service+Setup>
- The KC release packaging has been modified in a way that will change deployment procedures for implementers who use the precompiled war. There is no longer a hardcoded environment within the war and it should be passed via the web application container (for example, in the catalina.sh within the JAVA_OPTS parameter as `-Denvironment=ptd`).



Detailed List of Changes:

COI

Release 5.1.1 includes the following improvements and bug fixes in COI:

Key	Summary
KRACOEUS-6605	COI: Entity relationship maintenance: error "The Description (Description) may only consist of letters or digits." received when adding text with spaces to description
KRACOEUS-6604	Manual event and FE displaying multiple times in 2nd annual disclosure
KRACOEUS-6603	COI: Can't Approve Annual Disclosure - NPE under certain conditions
KRACOEUS-6602	COI: Disclosure (history) panel on annual/master does not display Project Name and Number correctly for approved disclosures, when FEs for the reporter added after some disclosures approved
KRACOEUS-6600	COI: Disclosed Projects Panel Shows incorrect project listing
KRACOEUS-6599	COI: Can't certify Annual Disclosure if additional Project with new FE approved after Annual initiation
KRACOEUS-6558	Hide Approve Button and Status Message on change in Admin Actions->Disclosure Actions
KRACOEUS-6557	Disclosure Lookups should have permissions to restrict users from seeing all activity
KRACOEUS-6556	COI - Financial Entity Review blank on manual disclosures
KRACOEUS-6555	COI - Financial Entities do not show up on first disclosure for a user.
KRACOEUS-6551	COI - "All/None" buttons on Related column for project-fe panel does not work
KRACOEUS-6549	COI - Getting "Disposition status is required." error as reporter trying to certify a manual or event disclosure when reporter has no FEs
KRACOEUS-6547	Annual and Updated Master Disclosure become stuck when a project/event disclosure is disapproved
KRACOEUS-6543	COI - System does not save reviewer notes & attachment if complete review is not done in same session or reviewer does not click on save following clicking on "close".
KRACOEUS-6541	Financial Entity: Include added fields in FE view
KRACOEUS-6535	COI Disclosure > IACUC records appear in IRB Protocol sub-panel, but without the name or record ID - Disclosures won't validate
KRACOEUS-6533	COI Annual Disclosure mishandling Institute Proposals
KRACOEUS-6531	COI - System disallows approval of manual & irb event disclosure - with error saying "annual cannot be approved"
KRACOEUS-6530	COI: COI disclosure status in Coeus does not have an equivalent in KC
KRACOEUS-6529	COI - "Yes" response in Screening Questionnaire upon submission without any FE did not display the error message.
KRACOEUS-6528	COI - FE Status review panel should contain project information
KRACOEUS-6527	COI - Stack trace on coiaadmin opening an update master disclosure
KRACOEUS-6521	COI - Review Status panel disappears after reviewer assignment is done on an annual disclosure
KRACOEUS-6518	COI: unusual message displays at top of master disclosure after coiaadmin approval
KRACOEUS-6512	COI - Disclosure print template missing certain disclosure sections
KRACOEUS-6511	COI: Print for an disclosure in progress or submitted, print indicates it is an "approved disclosure"
KRACOEUS-6508	COI: Coeus COI Financial Entity has five mandatory fields that further define the relationship
KRACOEUS-6507	COI: stack trace error on Update Master Disclosure if the user has no disclosures
KRACOEUS-6506	COI - Manual disclosure created with (include in annual but exclude FE) does not display project details within "update master"
KRACOEUS-6505	KCCOI - Admin's access to a (reporter entered note) note within manual disclosure, annual and update master
KRACOEUS-6504	COI - Adding mandatory questionnaire causes routed disclosures to be unapprovable.
KRACOEUS-6503	COI: Adding a financial entity while an annual disclosure is in process creates unclearable error
KRACOEUS-6497	COI: System automatically deletes attachments when Financial entity is made inactive
KRACOEUS-6496	COI: HTTP 500 Error when viewing deactivated entity for a manual project from the



Copyright © 2013 [The KualI Foundation](#).

	master
KRACOEUS-6494	COI: Coeus COI - To Approve Annual Disclosure, each Event-Based Disclosure must be Resolved
KRACOEUS-6482	COI - Disclosure stays in reviewer's "all my disclosure reviews" queue even after review is complete
KRACOEUS-6476	COI: Financial Entity Shows as a Number not a Name in Notes
KRACOEUS-6475	COI: Stack trace error when multiple users are editing a Disclosure
KRACOEUS-6473	COI - Allow COI administrators to update the individual dispositions on projects disclosures within an annual disclosure submission
KRACOEUS-6461	COI: Cancel Financial Entities: Yes and No Both Act the Same
KRACOEUS-6457	COI Questionnaires stack trace when clicking on expanded Text area.
KRACOEUS-6433	Assigned Reviewer unable to see Disclosure Actions Tab
KRACOEUS-6432	COI - "Reviewer actions" panel generated for a reporter when validation errors occurs within a disclosure
KRACOEUS-6427	KRACOEUS-6426 Annual Disclosure not Validating All Editable Questionnaires for Submit
KRACOEUS-6426	COI Questionnaire Validation/Display - CMU
KRACOEUS-6425	Validation Doc Errors in Update Master/Annual Disclosure return user to wrong CoiDisclosure.jsp
KRACOEUS-6422	COI: Coeus allows for a maintainable "note" type
KRACOEUS-6417	app title is hard-coded to "Kuali" in COI pages
KRACOEUS-6396	COI: System automatically sets review status to "assigned to reviewer" and "assigned review complete" when last reviewer has completed their review
KRACOEUS-6395	COI: Coeus COI does not allow disposition status to be set by Admin while being reviewed by reviewers
KRACOEUS-6394	COI: Coeus COI Reviewers' Access to Disclosures Depends Upon Reviewer Action Completion
KRACOEUS-6393	COI: Coeus COI Reviewers can change the Financial Entity Status
KRACOEUS-6392	COI: Coeus COI Reviewers have a specific Add Review Comment Panel
KRACOEUS-6391	COI: Coeus COI Proxy Review for an Assigned Reviewer
KRACOEUS-6390	COI: Coeus COI Administrator Can Flag Disclosure for Additional Review
KRACOEUS-6389	COI: Coeus has Screening Questions and defined behavior based upon responses
KRACOEUS-6388	COI: Coeus COI Look Ups
KRACOEUS-6387	COI: Coeus COI Admin Has 5 Different Types of Review Related Actions
KRACOEUS-6386	COI: Coeus COI has a Quick Approve Button
KRACOEUS-6384	COI - Add Additional Parameter COI Review Due
KRACOEUS-6383	COI: Coeus COI Reviewers are allowed to provide recommendations for Disclosures
KRACOEUS-6381	COI- Action for COI review complete
KRACOEUS-6380	COI: System provides a toggle view to view by projects or view by FE
KRACOEUS-6361	Create KRMS Functions for COI
KRACOEUS-6198	COI: Coeus COI Administrator Can Update Financial Entity Status in Disclosure
KRACOEUS-6114	COI submitted disclosure lookup on Central admin should be restricted.
KRACOEUS-6113	COI manual IACUC protocol projects and other manual projects not showing up in Master Disclosure.
KRACOEUS-5989	COI Financial Entity: Closing the financial entity document triggered a stack trace error
KRACOEUS-5726	Create COI Administrator Disclosure Lookup: Undisclosed Events
KRACOEUS-5725	KCCOI - Manual disclosure of type (include in annual but exclude financial entities) appear in reporter's annual or master after they are approved, incorrectly display FEs
KRACOEUS-5724	Create a unique constraint for the composite of disclosure number and sequence number on the disclosure table, and also perhaps design validation checks or other logic to avoid that constraint being violated.
KRACOEUS-5721	Remove Projects (PD/IP/AWD) that are related (by Medusa) when a COI disclosure is filed for any one of them
KRACOEUS-5712	KCCOI - Upon editing a note within "update master" the system does not open up the project selection dropdown
KRACOEUS-5710	KCCOI - Provide edit/delete actions for notes and attachments within update master in 5.1



KRACOEUS-5708	KCCOI - IACUC protocol disclosure "project details" not visible within the project-fe relationship panel
KRACOEUS-5707	Disclosure audit rule - refactoring for different disclosure types
KRACOEUS-5706	KCCOI - Attachment panel available to reviewer for adding attachment does not indicate mandatory fields with an asterisk
KRACOEUS-5705	Edit a single FE from within COI disclosure shows all active and inactive FE's for reporter resulting in a complex user interaction

Other fixes and tasks:

Release 5.1.1 also includes the following:

Key	Summary
KRACOEUS-6607	IRB: Protocol expiration date is not set correctly on approval of renewal
KRACOEUS-6608	IRB: Protocol expiration date is recalculated on approval of an SMR/SRR on an amendment
KRACOEUS-6598	Questionnaires cannot be copied via save - stack trace error
KRACOEUS-6548	Committee Home Unit AJAX lookup broken
KRACOEUS-6546	Award: Project Period Change of Final Expiration Date on Copied Award is not reflected in AWARD_AMT_FNA_DISTRIBUTION.End_date making T&M document uneditable.
KRACOEUS-6545	Subaward: System Does Not Allow User to View Attached File for History of Changes Entry on Financial Tab in View Mode
KRACOEUS-6539	Award & IP: Funding Proposal & Medusa displays aren't unlinked following a canceled IP version
KRACOEUS-6538	IRB: System Displays Stack Trace Error Upon User Clicking Submit on Notify Committee Action
KRACOEUS-6537	maintenanceNegotiations.tag is missing portalChannelBottom
KRACOEUS-6536	Question Maintenance - Lookup Class field missing a few options
KRACOEUS-6532	Sponsor AJAX lookup fix
KRACOEUS-6526	security: check for deleting note not sufficient
KRACOEUS-6525	Proposal Permissions Tab - Does not handle inactive roles now
KRACOEUS-6524	Proposal Permissions Tab - Proposal Role Templates cannot handle non-principal members now
KRACOEUS-6523	Proposal Permissions Tab - Proposal Roles with Group members that have the same identifier as that of Principals lead to erroneous association
KRACOEUS-6522	Proposal Permissions Tab - Logic for filtering document-scoped proposal roles need to be consistent
KRACOEUS-6520	Changes to affiliation types are not reflected in the permissions tab listings.
KRACOEUS-6519	Clicking on permissions tab results in null pointer exception stack trace in console.
KRACOEUS-6515	Remove hard coded value in AbstractBudgetCalculatedAmount for EB and Vacation rate class type
KRACOEUS-6502	Proposal Development - Able to submit prop dev document with KRMS validation error
KRACOEUS-6492	Cannot add more than one business rule to a KRMS agenda
KRACOEUS-6491	PD: Missing sub-panels after adding Person with no address info
KRACOEUS-6489	PD: Save XML to Adobe: After Save XML lightbox spins continuously
KRACOEUS-6488	IRB - Stack trace on running batch correspondence for renewal reminders in Trunk with a date range
KRACOEUS-6487	Research.gov - Update kc-config template
KRACOEUS-6484	SponsorHierarchyAction.saveSponsorHierarchy(..) does not check authorization
KRACOEUS-6483	IRB-Notify Committee Action throws STE
KRACOEUS-6480	Proposal Development - PI Certification question does not display when rule evaluates true after rule previously evaluated to false due to data change.
KRACOEUS-6479	PD: Get Not Certified Error when Proposal Person Certification says Complete (KRMS related?)
KRACOEUS-6477	IRB/IACUC: Wrong person details in protocol after changing PI on protocol tab
KRACOEUS-6471	FE missing: Reordering of Personnel in Key Personnel tab can only be done within



Copyright © 2013 [The Quali Foundation](#).

	a Role Category
KRACOEUS-6470	FE missing: Locks Descriptor incomplete
KRACOEUS-6469	IRB: IRB performance: Refactor ActionHelper.preparereview()
KRACOEUS-6466	Research Areas Maintenance document can be edited by users without any role membership.
KRACOEUS-6464	People Flow: Stack Trace Error - when clicking search button on PeopleFlow Member Lookup
KRACOEUS-6459	Negotiation: System Displays Stack Traces, Does Not Fully Render Negotiation Document or Allow User to Search for Negotiation Documents on Negotiation Lookup After User Clicks Back Button in Browser and Changes Negotiation Association Type
KRACOEUS-6455	Cannot re-order review comments nor change private and final flags in the manage review comments panel
KRACOEUS-6454	IRB Questionnaire: Incorrect Qnr Printing
KRACOEUS-6453	Researcher (PI) unable to view all submitted review comments
KRACOEUS-6452	System Parameters: System Does Not Automatically Generate Sponsor Code Upon User Creating New Sponsor When AUTO_GENERATE_SPONSOR_CODE is Enabled (Set to "Y")
KRACOEUS-6450	Award Time & Money: Create System Parameter to Disable the Auto-Generate-Periods in Direct/F&A Funds Distribution panel
KRACOEUS-6448	Questionnaire - System should deploy newly activated questionnaires *only* to protocols editable by researcher
KRACOEUS-6445	KRMS - Cannot trigger questionnaire for a COI disclosure based on COI data field
KRACOEUS-6444	IRB Agenda Generation - 'Other Actions' or information/discussion items either not appearing or repeated in agenda
KRACOEUS-6442	Questionnaire - Cannot delete usage entry from Questionnaire for IRB module and empty sub-module
KRACOEUS-6441	IRB Questionnaire: When qnr is updated and PI select copy answer to update the protocol qnr, answers did not get copied correctly
KRACOEUS-6437	IRB Online-Review: Allow the (User Entered) Due Date to Match the Requested Date
KRACOEUS-6436	IRB Review Comments: Manage Review Comments Non Display of Administrator Comment to Reviewer
KRACOEUS-6435	IRB/IACUC: Stack Trace Error returned when replacing a non-employee PI with a PI from employee list
KRACOEUS-6428	Refine display of notifications in history based on user
KRACOEUS-6423	IACUC and IRB - private box cannot be unchecked
KRACOEUS-6421	BIRT reporting: Invalid format error in Excel
KRACOEUS-6419	KRMS Notification not Sending Email
KRACOEUS-6416	Need to alter PERSON_BIOSKETCH & PERSON_CUSTOM_DATA tables
KRACOEUS-6414	IRB Committee: Agenda link in notification in action list return Stack Trace Error
KRACOEUS-6413	Award T&M: Error message won't let me save or submit a valid transaction that causes cum Obligated = Anticipated
KRACOEUS-6412	IRB Protocol Status not being retained upon Renewal or Amendment
KRACOEUS-6410	IACUC - "disapproved" protocol should disallow "submit for review" action
KRACOEUS-6405	Complete fix for Persistence of Notifications
KRACOEUS-6402	Clicking help icon in IRB Protocol Summary takes you to Time and Money Summary help
KRACOEUS-6401	Several action panels in IRB and IACUC do not show the latest review comments added via the review comments panel of other actions.
KRACOEUS-6398	Suppress Recall & Cancel option on recall in workflow
KRACOEUS-6397	Award: Non-employee Key Personnel should display Organization in Combined Credit Split error message and allow user to add Unit Details
KRACOEUS-6359	Incorrect change amounts in T&M document resulting from changes in Award amounts
KRACOEUS-6347	System display of reviewer Determination Recommendation across all versions of the protocol (Summary & History)
KRACOEUS-6332	Create IACUC Protocol notification prompt not displayed
KRACOEUS-6324	KRMS: Agenda Builder: Rule Proposition Changed Value(s) Removes Parameter Field & Does Not Allow Update



KRACOEUS-6274	IRB: Allow online review of an expedited protocol without the submission being assigned to a schedule
KRACOEUS-6137	Maint Docs: Organization field on Address Book Maintenance document should be a lookup instead of manual entry.
KRACOEUS-6124	Organization Rolodex/Address Book address is not shown in the info displayed for Organization
KRACOEUS-6106	Award T&M: Eliminate Processed Transactions subpanel - all transactions should be reversible
KRACOEUS-6087	KcTransactionalDocumentAuthorizerBase.getDocumentActions(..) does not expose "complete" action
KRACOEUS-5942	Subaward: SUBAWARD_AMOUNT_INFO fields [OBLIGATED_AMOUNT] and [ANTICIPATED_AMOUNT] are loading with no values.
KRACOEUS-5798	possible performance improvement for Qnnr - make transient reference to Qnnr in Disclosure to decrease database hits
KRACOEUS-5765	IRB Admin should have ability to assign committee based on lead unit of the Committee where the protocol is submitted (was "of the protocol")
KRACOEUS-5602	Sponsor Hierarchy: Add Sponsor Works Inconsistently
KRACOEUS-4695	Award: Initial T&M doc: History panel does not show dates and amounts like in Coeus if only using Award docs without T&M
KRACOEUS-6493	Audit Cleanup
KCINFR-817	Institutional Proposal/Grants.gov: validation warning message when Attachment filenames contain invalid characters should not be present in IP
KCINFR-816	Quartz link in system admin tab throws a stack trace.
KCINFR-813	Stack trace in embedded mode on Message of the day link under the system admin tab and Budget Editable Columns in Maintenance
KCINFR-807	Investigate why hundreds of kimcacheflushes happen during the initial save of a protocol.
KCINFR-801	KRMS: Agenda: STE on edit of copied Agenda
KCINFR-800	all kc services exposed for kfs integration broken
KCINFR-714	Issue with parameter kual.docHandler.url.prefix
KRACOEUS-6486	SQL errors during fresh 5.1 mysql install
KCINFR-814	Notification Permissions missing from 5.1 so maintenance screen has no edit capability

Important Technical Notes:

- iText 2.1.7 library is slated for removal in KC 5.2. Any implementer customizations or dependencies on this library should be removed.
- Workaround to import XML to Adobe Package ([KRACOEUS-6038](#)): The current implementation of saving the Grants.Gov XML requires the selection of forms to be printed before executing the Save XML action. The resulting zip document contains the XML and any related attachments needed for the selected forms. However, the XML content needs to be manipulated before it can be imported into the related Adobe Package. Implementers should use the workaround document attached to [KRACOEUS-6038](#) to build an XML document that can be imported into the Adobe Package.
- The required Oracle jdbc driver dependency within the project has changed from ojdbc14 to ojdbc6, because the older driver can cause issues with newer Oracle servers (and should not be used with a mismatched Java version, anyway). Be sure to update your local Maven repository with the appropriate driver, if you are building from source.
- The build process no longer allows for hardcoding the build.environment/environment into your resulting war file. If you desire to hardcode an environment code into a war rather than passing it through your



web application container, you can do so by adding an environment param within the kc-config-build.xml file along with the hardcoded value.

Known Issues with Upgrade Scripts:

- While upgrading MySQL, if the Rice server has already been upgraded separately to 2.1.7, the KC mysql install results in a few errors. Since this is not a common platform or procedure to upgrade KC, we will work with individual institutions that may see these.
- While upgrading Rice from 1.0.3.x to 2.x, an error is thrown by quartz on startup which reads something like "stream classdesc serialVersionUID = 5807770268543892618, local class serialVersionUID = 5096393175403095624". The fix for this is to delete all entries from the tables krsb_qrtz_blob_triggers and krsb_qrtz_triggers and restart Tomcat or to extract the data from the quartz tables using the version of quartz installed in your current installation and import it back in using the version of quartz in the upgraded installation.
- While upgrading from versions older than Rice 2.1.7, null constraint violations might be thrown about existing pessimistic lock entries in the KRNS_PESSIMISTIC_LOCKS tables. Please delete all entries from this table before upgrading.



Copyright © 2013 [The Kualii Foundation](#).