Introducing Cayuse SP
Learning Sessions

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LEARNING SESSION AGENDA

- What is CayuseSP?
- Why now?
- What are some of the workflow changes?
- How do I navigate the system?
- How will proposal routing and approval work?
- How do I see my proposal / award information?
CAYUSE RESEARCH SUITE DEFINED

- CayuseSP is a web-based platform for electronic creation, tracking, and management of proposals and awards along with other aspects of research operations to improve collaboration among administrators and faculty teams, and provide transparency from pre-award through post-award.

- Integrates seamlessly with Cayuse424
- Electronic proposal tracker, router and certification
- Direct submission & validation of Federal Grants.gov proposals via 424
- Proposal & award reporting system (college, dept, center, PI, sponsor, etc.)
- Finance System (Banner) still handles expenses & finances, not Cayuse
WHY CAYUSE SP?

- Response to SPA Action Plan!
  - Communication from Pre -> Compliance -> Post -> Reporting
  - Supports objectives of SPA being a full-service office with increased transparency
- Easy to use interface: Web-based platform that is accessible to faculty, administrators, approvers, & SPA staff at any time
- Enhanced accessibility through multiple browsers and devices (including mobile and tablet)
- Replaces 424 for routing and data tracking
- Data Connect allows EVERY data point to be reportable to a data warehouse
WORKFLOW

- Proposal initiation begins in CayuseSP by your Proposal Manager
- PI Assurances are now part of the workflow/IPF form
- Community Benefits now ID’ed during proposal stage
- CayuseSP becomes the repository for proposal & award documents
- Finance system (Banner) is still the system of record for financials (Cayuse does not show expenses)
- Funded grants information available via Award and Project modules, Connected with proposal data
BROWSER INFORMATION

- The Research Suite is supported in recent versions of Firefox and Internet Explorer, and provisionally supported in recent versions of Chrome and Safari.
- iPhone, iPad & Droid enabled (convenient for proposal approvals)

Here are the main configuration items for your browser:
- JavaScript Enabled
- Cookies Enabled
- Pop-ups Allowed
GETTING STARTED

- New branded landing page for the Evisions Research Suite
- SP
- 424
- Choose Cayuse SP (Sponsored Projects)
- All proposals originate in Cayuse SP (even Grants.gov - 424 proposals)
- Always contact your Proposal Manager for development assistance
System Navigation

- Within Cayuse SP, Dashboards provide fast access to proposals, awards, and routing certifications or approvals.
- You'll always see the links in the upper navigation bar, and can go Home to see all your dashboards.
PROPOSALS DASHBOARD (Faculty)

- Find proposals currently in progress of which you are part of the project team (unsubmitted proposals) and
- All proposals submitted with you named as part of the project team.
AWARDS DASHBOARD (Faculty)

- Recent awards: today’s date is before the project start date
- Active Projects: today’s date is within the project start & end dates
- Inactive Projects: today’s date is past the project end date
MODULES - RELATIONSHIP LOGIC

Project

- Proposal
- Award
- Account
- Subcontract
- Subcontract
UNDERSTANDING NUMBERS

- Previously proposal numbers were generated by the PM, now will be generated by SP - [FY]-XXXX
- Proposal number will follow along to project and award number
  - XX-XXXX = Proposal Number
  - AXX-XXXX = Project number
  - AXX-XXX-001 = Award number
  - AXX-XXXX-S001 = Associated subcontract number
    - Sample: A16-856-001
      - A = Award
      - 16 = Fiscal year
      - 856 = Sequential project number
      - 001 = First award
UNDERSTANDING RECORDS

- Legacy award data begins with FY = A00
- “Legacy” Award number = G-- Banner ID
- Account number = FUND CODE
  - Can be found in Award Administration under ‘Distributions’ and
  - On Project Administration screen under ‘Accounts’.
- Legacy proposal data begins with FY = 00-
- “Legacy” proposal number = assigned proposal number, corresponds with 424 record title
- All attachments ever to be associated with a project, proposal, and award, will be in the Attachments tab [ ]
  - The Internal Report will be uploaded here by your Unit’s Grant Manager rather than being emailed monthly.
UNDERSTANDING RECORDS

- For those listed project personnel & departmental personnel with Proposal Data Access, Proposal Administration screen gives access to
  - Clearance document
  - Contact personnel in SPA
  - Routing Status
  - Compliance information
  - Links to Awards
  - Links to Events (post-award reporting purposes)
  - All project attachments
  - System generated emails sent regarding a proposal
UNDERSTANDING RECORDS

- For those listed project personnel & departmental personnel with Award Data Access, Award Administration screen gives access to
  - Fund code / Account number
  - Project Personnel
  - Budget information
  - Award project period
  - Links to Events (post-award reporting purposes)
  - All project attachments
  - Legacy award number (G-code)
PROCESS (Faculty)

- Your proposal manager will create the proposal record in SP
- They will notify you when the record is ready for your assurances on compliance (regulatory, COI, export control), IP/TT considerations, and community benefits.
- Once these screens are complete (everything has a green check), the PM will authorize the approval chain and route for approvals.
- Personnel will receive notification first to certify
- Department/Unit approvals can be horizontal or vertical in nature (Formblaster structure)
CERTIFYING

- Certification Inbox shows when you have approvals to perform.
- Notification will come by email as well, but you are able to log in at any time to check proposals via your dashboards.

Below is a list of proposals that require your certification as Lead or Principal:

<table>
<thead>
<tr>
<th>Date Submitted</th>
<th>Proposal No.</th>
<th>Project Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/12/2013</td>
<td>13-0013</td>
<td>test</td>
</tr>
<tr>
<td>11/29/2012</td>
<td>13-0074</td>
<td>Routing Test</td>
</tr>
<tr>
<td>10/16/2012</td>
<td>13-0055</td>
<td>Erica's Test</td>
</tr>
<tr>
<td>7/24/2012</td>
<td>13-0018</td>
<td>SP-424 Perms Test</td>
</tr>
<tr>
<td>6/01/2012</td>
<td>13-0018</td>
<td>Testing</td>
</tr>
</tbody>
</table>
PROPOSAL ROUTING STATUS SCREEN

- Provides approval info and status history in a single view
- View IPF (Internal Processing Form) allows you to view proposal docs
- Add comments to proposal
- Request early account
PI APPROVAL

- Click on PI Certification Inbox
- Click on your proposal number
- View IPF to review proposal documentation
- Click CERTIFY PROPOSAL to approve
- Department Head view is similar but can ‘Reject Proposal’
<table>
<thead>
<tr>
<th>BSU Term</th>
<th>Cayuse Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI</td>
<td>Lead Principal Investigator</td>
</tr>
<tr>
<td>Co-PI</td>
<td>Investigator</td>
</tr>
<tr>
<td>Department / Unit / Center / Office</td>
<td>All considered to be departments</td>
</tr>
<tr>
<td>Proposal Summary / Clearance Sheet</td>
<td>View IPF</td>
</tr>
<tr>
<td>Route for Approvals / Clearance</td>
<td>Submit for Routing</td>
</tr>
<tr>
<td>Fund Code</td>
<td>Prime account / Account Number</td>
</tr>
<tr>
<td>Proposal Manager</td>
<td>Proposal Specialist</td>
</tr>
<tr>
<td>Grant Manager</td>
<td>Grant Specialist</td>
</tr>
<tr>
<td>Legacy Proposal ID</td>
<td>External System ID</td>
</tr>
</tbody>
</table>
Questions?

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