Introducing Cayuse SP
Learning Sessions

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Todd Davidson, Grant Manager
LEARNING SESSION AGENDA

- What is CayuseSP?
- 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.)
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)
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
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
- bsu-t.cayuse424.com
Welcome to Cayuse SP

Use the Proposal Dashboard to:
- Start a new proposal
- Edit and track proposal records you have created or on which you are named as a contributing member.
- View proposal records in administering units to which you have been granted Proposal Data Access.
- Authorize preliminary award budget requests.

Use the Award Dashboard to:
- View awards on which you are listed as a member of the Research Team.
- View awards in administering departments to which you have been granted Award Data Access.

Use the Certifications/Approvals Dashboard to:
- Certify proposal records on which you are cited as the PI.
- Authorize proposal records in your role as a departmental/college/center Approver.

Administrative Support
Contact SPA for policies and procedures regarding the management and administration of research and sponsored activities. We serve as your primary contact for information about funding opportunities, proposal development, budget development, award administration and more.

Technical Support
For technical issues in Cayuse SP, contact SPA at one of the following:
- Email: spadmin@bsu.edu
- Phone: 765.285.1600
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
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).
PI CERTIFICATION

- 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’
UNIT APPROVAL

- 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.
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
Reporting Functions

- Reporting is divided into three major categories: Proposals, Awards, and Projects.
- View reports on proposal activity, funding rates, awards by unit, PI, or sponsor, and other categories. Reports can be exported to Excel.
- All users in Cayuse SP can run all reports, but the ability to see record data that is not shown in the report format is limited to those users with access to that record.
- To show in a report:
  - Proposals must have been approved
  - Awards must have a designation of obligated. Anticipated awards are not considered ‘awarded’.
UNDERSTANDING NUMBERS

- Previously proposal numbers were generated by the PM, now will be generated by SP - [FY]-XXXX
- Proposal number is connected with award and project numbers
  - 17-0047 = Proposal Number
  - A17-0066 = Project number
    - Project number doesn’t match proposal number, but they are connected.
  - A17-0066-001 = Award number
    - A = Award
    - 17 = Fiscal year
    - 0066 = 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. (forthcoming process)
MODULES - RELATIONSHIP LOGIC

Project

- Award
- Proposal
- Account
- Subcontract
UNDERSTANDING ACCESS

Proposal Data Access
- Clearance document
- Contact personnel in SPA
- Routing Status
- Compliance information
- Links to Awards
- All project attachments
- System generated emails sent regarding a proposal

Award Data Access
- Fund code / Account number
- Project Personnel
- Budget information
- Award project period
- All project attachments
- Legacy award number (G-code)
<table>
<thead>
<tr>
<th>BSU Term</th>
<th>Cayuse Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI</td>
<td>Lead Principal Investigator <em>(requires approval)</em></td>
</tr>
<tr>
<td>Co-PI</td>
<td>Principal Investigator <em>(requires approval)</em></td>
</tr>
<tr>
<td>Key Personnel</td>
<td>Investigator <em>(requires approval chain)</em></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>
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<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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