Navigation

The landing page for all things Cayuse can be found at: https://bsu.cayuse424.com. From there, you are able to access Cayuse SP.

Within Cayuse SP, your 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.

- **My Dashboard**: Dropdown menu allowing you to quickly view, track, and authorize items assigned to you or that you have data access to. Clicking on the main My Dashboard link takes you to My Proposals.

- **Reporting**: View reports on proposal and award activity, including funding rates, awards by department, PI, or sponsor, and other categories.

- **Logout**: Exit SP.

In addition to these items you'll also see an Admin item. This item allows you to view or manage additional proposals, awards, and users in SP according to your role.

When you're on your Home, you'll see your Dashboards listed on the left side of the screen:

These links also appear while you are navigating between Dashboards, giving you quick access to relevant proposals, awards, and approvals.
Proposals In My Dept

Access Proposals for administering departments to which you have been assigned Proposal Data Access.

The dashboard displays information about the proposals in your department, including the proposal number, project name, department, and sponsor. It also shows when they were submitted and what the status is. If the proposal has not yet been submitted for routing, there will not be a date in the Submitted column. Federal proposals being submitted via Cayuse 424 are known as “Paired Proposals” and are shown with the pairing icon, which you can click to view the associated Cayuse 424 proposal.

You can sort the listing by clicking on the columns. Click once to sort, and again to reverse the sort.

From the dashboard, you can view the proposal record and associated attachments either by clicking the proposal number (Prop No) or by clicking the PDF icon to the right to review the summary form.

If the proposal is in an appropriate routing status, you can also prepare an Early Account Request or view the award information (if you also have Award Data Access for the department or proposal).

Awards In My Dept

View awards in administering departments to which you have been assigned Award Data Access.

The Awards dashboard has three tabs:
Recent Awards: Shows awards that have an Official Report Date (on the Award Administration screen, General tab) within the last 90 days and an active, prime account.

Active Projects: Shows projects for which the Project End Date is still in the future. On the Project, you can click through to the Awards tab to view each Award for the Project.

Inactive Projects: Shows projects for which the Project End Date has already passed. On the Project, you can click through to the Awards tab to view each Award for the Project.

The fields shown for Recent Awards are similar to those on the Award Administration screen under the General tab. Access the Award by clicking the Award Number (Award No).

The fields for the Projects tabs are somewhat different, but also display basic information for the project: title, Lead PI, Sponsor, project dates, and amount with account information. Click the Project Number (Project No) to access the project.

You can sort by these fields by clicking on the column headers. Click once to sort, and again to reverse the sort.

Routing a Proposal

Routing is the movement of a proposal through the internal steps necessary for departmental, college, compliance and SPA approval prior to submission to the sponsor.

After your Proposal Manager submits a proposal for routing, the proposal record is certified by the PI, authorized by department/unit/school/college (known as IPF Approvers), and reviewed by SPA. PI certification and Department approvals may occur in parallel; the departments do not need to (but may choose to) wait for the PI to certify before approving. All review and approval of the proposal record is handled electronically within SP.

Viewing the Routing Status

The Proposal Routing Status screen allows you to track the status of a proposal record in routing.

If you are a member of the Research Team, in additional to your Admin role, you can access this screen by going to your My Proposals dashboard and selecting the Submitted Proposals tab, then clicking the Proposal Number (Prop No).

IPF Approvers can see the proposal by accessing their Dept Approval Inbox under the Certifications/Approvals section of the Dashboard. If you or someone from your department has not yet approved the proposal, you'll see it under To Be Authorized. Otherwise, click the Previously Reviewed tab, then click the Proposal Number (Prop No).

Proposal Information

The upper section of the screen shows information about the proposal record, including assigned personnel (Lead PI and assigned departmental and Admin Office personnel), project title, sponsor, and deadline.
Click on the proposal number (Proposal No) to view the proposal data in SP, or the PDF icon to see a printable version of the proposal along with a section for routing information. The coversheet link generates a printable summary page. If the proposal is paired with a Cayuse 424 proposal, the pairing icon will show to the right of the coversheet link:

You can click the pairing icon to view the paired Cayuse 424 proposal.

Available Actions

Depending on the role or roles you have on the proposal, you'll see action buttons following the proposal information. Clicking View IPF allows you to review the proposal (you will not be able to make changes, since the proposal cannot be edited during routing). If you are an investigator, you can certify the proposal by clicking Certify Proposal. Departmental approvers can authorize or reject the proposal by clicking the relevant button.

Proposal Routing Functions

The bottom section of the screen shows the functions currently available for the proposal, each one in its own tab:

- **Approvals**: View the routing history of the proposal record. This tab is shown by default.
- **Compliance**: View the approval status for IRB studies and IACUC protocols.
- **Status History**: View a list of status changes to the proposal record including the person who made the change and the date and time when the change took place. This is the same information as is displayed under the Approvals tab in the Status History section.
- **Early Account**: Submit an Early Account Request associated with the proposal or view an existing one. For more information, see Submitting and Authorizing an Early Account Request.
- **Awards**: View the awards associated with the proposal. See Awards for more information. To view an Award, you must either be named as a member of the Research Team on the Award or have Award Data Access in the department administering the project.
- **Notes ( )**: Add or view comments while reviewing the proposal. Please note: Notes entered here appear at the Proposal, Project, and Award levels. They are visible to all members of the Research Team as well as the departmental administrators who approve the proposal. They cannot be deleted!
- **Attachments ( )**: Other than Notes, Attachments are the only part of the proposal that can be modified during routing, in order to allow those in the routing chain to upload supporting documents. Documents uploaded here appear at the Proposal, Project, and Award levels.
Dept Approval Inbox

Your Dept Approval Inbox allows you to review, authorize, and track proposals in departments for which you are an IPF Approver. The number of proposals requiring your authorization (if any) is displayed to the left of the Dept Approval Inbox.

Proposals that have not yet been reviewed by someone from your department will appear under the yellow To Be Authorized tab to the left. Proposals that have already been reviewed by someone from your department will appear under the Previously Reviewed tab.

In both tabs, the list shows the proposal number, which you can use to view the routing status and authorize or reject the proposal, along with the proposal's Lead PI, department, project name (short name), sponsor, and deadline. If the proposal is paired, click on the pairing icon next to the proposal number to view the associated Cayuse 424 proposal. To the far right, you can generate a PDF copy of the proposal for review using the PDF icon.

By clicking on the column names, you can sort the list of proposals by these columns to more easily find proposals or determine which proposals are most in need of attention. Click once on the column name to sort, and again to reverse the sort.

If the proposal has not been reviewed, you'll see whether the PI has certified or not on the right under PI Cert. If it has been, you will see the departmental decision (Authorized or Rejected) and the current proposal status.

Authorizing or Rejecting a Proposal

IPF Approvers (Deans, Chairs, Directors, or their designees) are notified via a system-generated email when a proposal record requires authorization. Departments/units/schools/colleges/centers must authorize in the routing order specified on the proposal record. Only one authorization is required at each level. After all departments have authorized, the proposal record is assigned to SPA for final review.

To review and authorize a proposal record:

1. From your Dept Approval Inbox, click the proposal number on the To Be Authorized tab.
2. Review the proposal by clicking the PDF icon to the far right of the proposal number, or by clicking the proposal number, then clicking View IPF on the Proposal Routing Status screen.
3. Click Authorize Proposal or Reject Proposal on the Proposal Routing Status screen.
4. Enter any comments you have regarding the proposal. This field is required for rejections. Your comments will be visible to the Research Team, proposal reviewers, and the Central Admin Office.
5. Click **Submit Authorization** or **Submit Rejection** to acknowledge the authorization statement.

When you reject a proposal, it receives the status Reopened, and the Research team and creator will be able to edit it and resubmit it for routing.

**Early Account Requests**

An investigator or departmental administrator submits an Early Account Request to request a preliminary award account for early funding. If the award is not granted as anticipated, the department is obligated to return all used money to the sponsor.

Once the request is submitted, it will be reviewed by administrators from the department and from the college. After the Early Account Request has been authorized by these reviewers, SPA creates a preliminary award account, notifies the Department and PI about the new account, and marks the Early Account Request as funded.

**Submitting a Request**

Anyone who has access to a proposal can submit an Early Account Request for the proposal. Usually these requests are submitted by an investigator or departmental administrator (someone with Proposal Data Access in the department).

To submit an Early Account Request, access the Proposal Routing Status screen for a submitted proposal through your My Proposals or Proposals in My Dept dashboard.

1. Click the **Early Account** tab in the Proposal Routing Functions:

2. Click **Add Early Account Request to Proposal**. A new window will appear.
   
   o For the **Description of Assurances of Funding**, enter any documentation you have received from the sponsor that describes a guarantee of funding. This may be a telephone conversation, email, or other document that is copied and pasted into the text box.
   
   o If the Account is associated with the American Recovery and Reinvestment Act (ARRA) or "Stimulus" funding (as indicated in the FOA), select Yes under that question.
   
   o In **Type of Account**, specify whether the preliminary funds will be distributed into a single account (New Account) or multiple accounts (New Account w/ Multiple Subs).
   
   o The Project Contact is the Research Assistant or Departmental Administrator who will serve as the primary contact for Accounting.

3. Click **Submit Early Account Request for Processing**.

An email notification will be sent to the Early Account Approvers for the administering department and school. One Early Account Approver from each of the department and the school must electronically authorize the Early Account Request in the Early Account Inbox.
Authorizing or Rejecting a Request

To authorize or reject an Early Account Request:

1. Access the request through your Early Account Inbox.
2. Click Manage on the To Be Authorized tab to the right of the Early Account Request requiring authorization. A new window will load:
3. Review the Early Account Request by clicking View / Print Early Account Request. This opens a PDF file containing the details of the request.
4. Return to the Early Account Request pop-up window and select either Authorized or Rejected from the drop-down menu. You can add a note to indicate why you are rejecting the request if you select Rejected.
5. Click Submit.
6. The window will close and the request will move to your Previously Reviewed tab, where you can see the decision and track the status of the request.

If you reject the request, by default, the submitter and the department approver will be notified by email of the rejection. The email will include the note you provided about the rejection, if any.

Reporting

Reporting is divided into three major categories: Proposals, Awards, and Projects.

You can view reports on proposal activity, funding rates, awards by department, PI, or sponsor, and other categories. Reports can be exported to Excel to further customize the report data.

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 (usually the Research Team and department personnel).

Accessing Reporting

Click Reporting in the upper navigation bar to view the available reports.

Choose a report by clicking on the report name. This will bring up a new window where you enter the information requested by the report.
Selecting Reporting Criteria

The available reports request information about department, Lead PI, Sponsor, or Sponsor Type. In the new window that appears, click the magnifying glass icon next to the relevant field to select from your institution's departments, people, and sponsors.

If a list is displayed with checkboxes, select multiple boxes, or use the box at the top, next to the column names, to check or uncheck all the available items. If you are searching for Investigators, search again using the magnifying glass and check the box(es) next to the additional people you'd like to add.

If you are searching Awards by Department, you can choose whether you want to search for Award Admin departments, Lead PI home (Appointment) departments, or both.

Department Code

Department reporting is done by looking up the Department Code. If the code has changed, the reports will not be able to find data that uses the old code.

Date Range

Adjust the date range of the query as desired. Click the calendar icon to modify a date. Dates are not required, and if omitted, the search will cover all dates.

Depending on the type of record, the date range selector looks for slightly different criteria. This is noted in the report description:

1. The date picker on Proposal reports searches for proposals with a Proposal Approved status history record between the dates you specify.
2. The date picker on Award reports searches for awards with an Award Begin Date between the dates you specify.
3. The date picker on Project reports searches for projects that are active for some period of time between the dates you specify.

Once you are happy with your criteria, click View Report. The report will appear in the window. You can download a report by clicking Export to Excel at the upper left corner of a report's output. You can also sort the report by any column that is underlined. Click once to sort, and again to reverse the sort.
What is shown in reporting?

Proposals, Awards, and Projects must possess certain attributes in order to show in Reporting.

For **Proposals**:
- There must be a "Proposal Approved" record in the status history of the proposal
  - This status may have a different name at your institution, but the same behavior applies
- The proposal must have a Lead Principal Investigator

For **Awards**:
- The Reporting Designation must be "Obligated"
- The Award must have a Begin Date
- The Award must have a Lead Principal Investigator

For **Projects**:
- The project must have a Project Begin Date
- The project must have a Project End Date