Navigation

The landing page for the Research Suite can be found on my.bsu.edu or directly 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. Clicking on the main My Dashboard link defaults to My Proposals.
- **Reporting**: View reports on proposal and award activity, including funding rates, awards by department, PI, or sponsor, and other categories for which you have access.
- **Log Out**: Exit SP.

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 Unit

Access Proposals for administering departments to which you have been assigned Proposal Data Access. Your Proposal Manager will be responsible for creating a new proposal record and completing a majority of the required information.

The dashboard displays information about the proposals you have Proposal Data Access to, 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.
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 paired with Cayuse 424 (again for federal submission purposes), you'll see the pairing icon in the Item List header, and the Cayuse 424 Proposal element in the Item List.

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 Unit**

The dashboard displays information about the proposals you have **Award Data Access** to, including the award number, project title, Lead PI, and sponsor.

- **Recent Awards**: Shows awards that have been entered with a date 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.
- **Inactive Projects**: Shows projects for which the Project End Date has already passed.

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

Access the **Award** record by clicking the Award Number (**Award No**). This information is read-only. If you have questions about the information, please contact your Grant Manager.

The fields for the **Projects** tabs are somewhat different, but 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 record. Within each project record, you can access associated awards and proposals.
Routing a Proposal

Routing refers to obtaining University approvals prior to submission to a sponsor. After a proposal is submitted for routing, the proposal record is certified by the PI, authorized by department/unit/school/college (known as IPF Approvers), and reviewed by SPA AOR. 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.

SPA AOR will not provide final approval until all project team members have certified.

Viewing the Routing Status

The Proposal Routing Status screen allows you to track the status of a proposal record in routing. Members of the Research Team can access this screen by going to the My Proposals dashboard, selecting the Submitted Proposals tab, then clicking the Proposal Number (Prop No).

Unit Approvers can see the proposal by accessing their Unit 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 Routing Status

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 (IPF) of the proposal along with a section for routing information.

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 sections (during routing proposal is Read-Only). 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.
- **Compliance**: View the approval status for IRB studies and IACUC protocols, as applicable.
- **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.
- **Awards**: View the awards associated with the proposal. 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.

Unit Approval Inbox

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

Proposals that have not yet been authorized will be shown under the yellow **To Be Authorized** tab. Click the **Previously Reviewed** tab to view proposals that have already been authorized.
In both tabs, the list shows the date the proposal was submitted and its proposal number, which you can use to view the routing status and authorize the proposal, along with the proposal's project name (short name), sponsor, and deadline. 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.

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 reviewed, you will see the departmental decision (Authorized or Rejected) and the current proposal status.

**Authorizing 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 **Unit Approval Inbox**, click the proposal number on the **To be Authorized** tab.
2. Review the proposal by clicking the **PDF icon** to the right of the proposal number, or Click the **proposal number** to review the sections individually.
3. To perform your certification after review, click **Authorize Proposal** or **Reject Proposal** on the Proposal Routing 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 SPA. **Submission notes cannot be deleted. Take care in entering comments!**
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.
Submitting an Early Account Request

Anyone with access to a proposal can submit an Early Account Request, but typically these requests are submitted by the Lead investigator. To submit an Early Account Request, access the Proposal Routing Status screen for a submitted proposal through your My Proposals or Proposals in My Unit 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.
   - 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. SPA will follow up for additional documentation for the grant file.
   - In **Type of Account**, select NEW or CONTINUING. Default is New Account.
   - The **Project Contact** is the Lead PI for the project, who will serve as the primary contact to SPA.

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 an Early Account 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.
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).

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.
- 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
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, you can select multiple boxes, or use the box at the top, next to the column names, to check or uncheck all the available items. You can only view information you have been given proposal/award data access.

Department Code: Department reporting is done by looking up the Department Code. If your department code has changed since July 1, 2016, you’ll need to select multiple department codes (new and old – ‘Historical’) to ensure you are seeing all the information.

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.

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.

Understanding Awards and Projects ~ Relationships

During the pre-award process, there is only a standalone Proposal record. After a proposal is awarded, data on the Award, any Subcontracts, and the Award's Accounts has to be organized and tracked. In SP, information about Awards and related proposal records is stored in a Project.

The post-award hierarchy in Cayuse SP consists of Projects, Awards, Subcontracts, and Accounts (FUND).

As you can see from the diagram, a proposal is connected to a project through an award. For a proposal to be connected to a project, it must have been funded and an award linked to the proposal.
Reading Project, Award, and Subcontract Numbers

The Project number is the basis for the associated Award and Subcontract numbers. Project Numbers are formatted as AXX-XXXX. An example is shown below that should help you understand the record numbers and relationships.

Sample Project: A18-0045
- A = Signifies award/project
- 18 = Fiscal year
- 0045 = Sequential project number

The fiscal year is determined by the Project Begin Date and your institution’s fiscal year rollover date. For example, if your Project Begin Date is 9/1/2016, and your rollover date is 7/1, then the project would be assigned the FY prefix 17, while a project with a Begin Date of 5/1/2016 would have FY prefix 16.

Sample Award: A18-0045-001
Award numbers consist of the project number plus an -XXX suffix.
- A18-0045 = Project number
- 001 = Sequential award number (001 is the first award created under the project, 002 is the second, and so on)

Sample Subcontract: A18-0045-S001-A01
Subcontracts add an SXXX suffix, with an additional AXX suffix for amendments.
- A18-0045 = Project number
- S001 = Sequential subcontract number
- A01 = Sequential amendment number