

Cayuse SP Upgrade

August 9, 2017



COLORADO SCHOOL OF MINES
EARTH • ENERGY • ENVIRONMENT

Why are we upgrading?

Evisions is providing an upgrade to Cayuse SP v3.6, which will improve overall functionality.

What are the pros to upgrading?

- Continued support from Evisions
- Faster processing speeds
- Several enhancements to existing Cayuse SP features will be helpful, and many bugs have been resolved

What are the cons to upgrading?

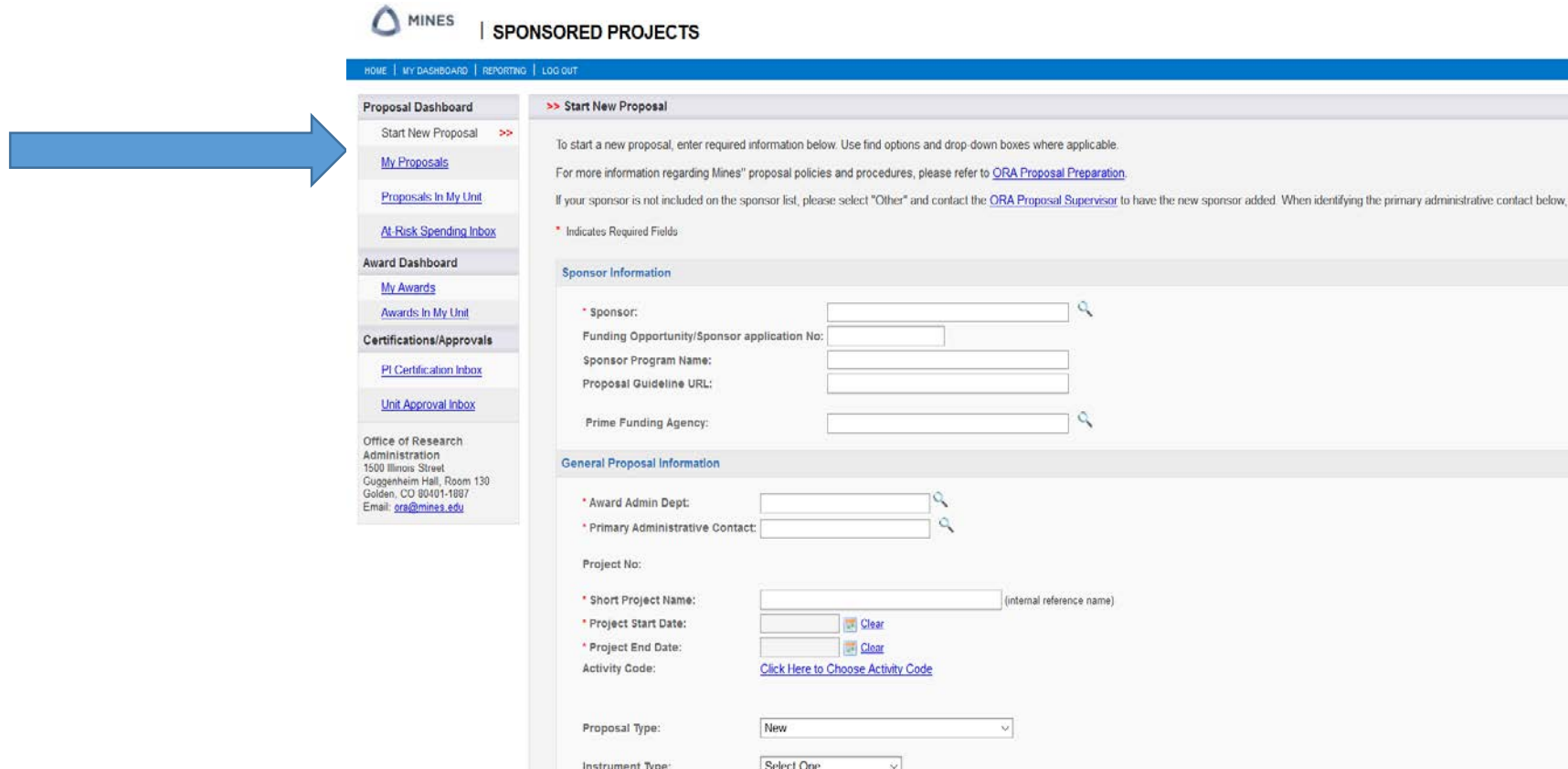
- Dealing with change – ACK!
- Campus-wide rollout could present unforeseen issues (which ORA will help resolve!)

Key Enhancements, Changes and Bug Fixes

- Increased speed
- More sophisticated search features
- Index/Account Number field was removed with v3.5, the chief reason we chose not to upgrade at the time, but has since returned
- New "Award Status" and "Project Status" drop-down fields give easy updates
- Column filters added in dashboards and search windows
- For fiscal officers, Proposal, Project, and Award Searches have been combined into the Project Dashboard
- "Search Again" function in pop-up window works now (ie: searching by PI)
- "Back to Search Results" finally takes you back to your search results
- Can search for any personnel listed in Research Team, instead of just Lead PI or Investigator
- Can filter notes and attachments based on the file type (ie: "Budget" for attachments, "Award" for notes)

Starting a Proposal

- PI ability to start a new proposal, upload attachments and submit for routing is unchanged.

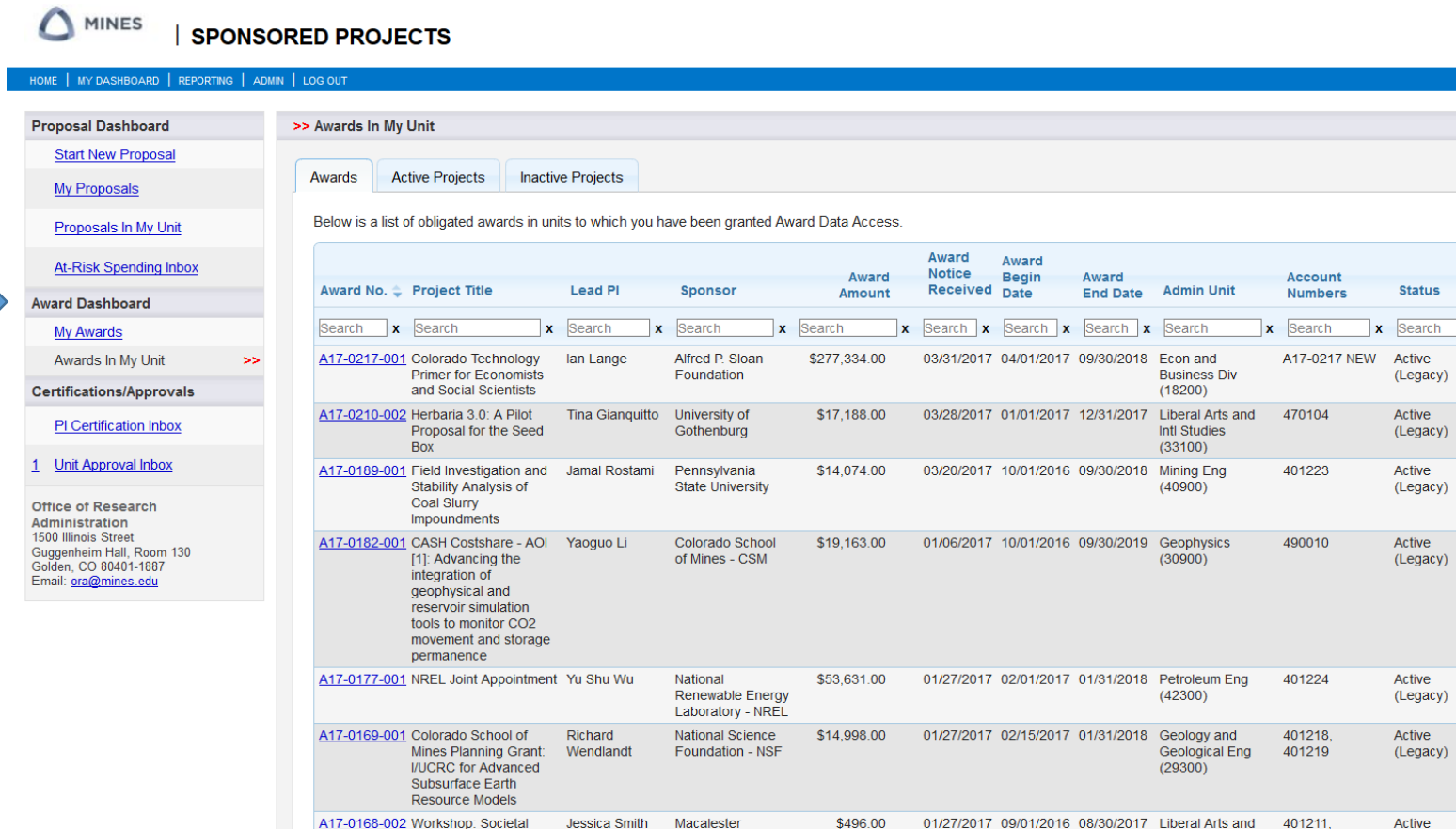


The screenshot displays the MINES SPONSORED PROJECTS web application interface. The top navigation bar includes links for HOME, MY DASHBOARD, REPORTING, and LOG OUT. The left sidebar contains a 'Proposal Dashboard' with links for 'Start New Proposal', 'My Proposals', 'Proposals In My Unit', and 'At Risk Spending Inbox'. Below this are sections for 'Award Dashboard' and 'Certifications/Approvals'. The main content area is titled '>> Start New Proposal' and contains instructions and a form. The form is divided into two sections: 'Sponsor Information' and 'General Proposal Information'. The 'Sponsor Information' section includes fields for Sponsor, Funding Opportunity/Sponsor application No., Sponsor Program Name, Proposal Guideline URL, and Prime Funding Agency. The 'General Proposal Information' section includes fields for Award Admin Dept, Primary Administrative Contact, Project No., Short Project Name, Project Start Date, Project End Date, Activity Code, Proposal Type, and Instrument Type. A blue arrow points to the 'Start New Proposal' link in the sidebar.



Enhancement

- Award Dashboard search filters allow you to more quickly find your awards by searching any column



MINES | SPONSORED PROJECTS

HOME | MY DASHBOARD | REPORTING | ADMIN | LOG OUT

Proposal Dashboard

- [Start New Proposal](#)
- [My Proposals](#)
- [Proposals in My Unit](#)
- [At-Risk Spending Inbox](#)

Award Dashboard

- [My Awards](#)
- Awards in My Unit >>

Certifications/Approvals

- [PI Certification Inbox](#)
- [1 Unit Approval Inbox](#)

Office of Research Administration
1500 Illinois Street
Guggenheim Hall, Room 130
Golden, CO 80401-1887
Email: ora@mines.edu

>> Awards In My Unit

Awards | Active Projects | Inactive Projects

Below is a list of obligated awards in units to which you have been granted Award Data Access.

Award No.	Project Title	Lead PI	Sponsor	Award Amount	Award Notice Received	Award Begin Date	Award End Date	Admin Unit	Account Numbers	Status
A17-0217-001	Colorado Technology Primer for Economists and Social Scientists	Ian Lange	Alfred P. Sloan Foundation	\$277,334.00	03/31/2017	04/01/2017	09/30/2018	Econ and Business Div (18200)	A17-0217 NEW	Active (Legacy)
A17-0210-002	Herbaria 3.0: A Pilot Proposal for the Seed Box	Tina Gianquitto	University of Gothenburg	\$17,188.00	03/28/2017	01/01/2017	12/31/2017	Liberal Arts and Intl Studies (33100)	470104	Active (Legacy)
A17-0189-001	Field Investigation and Stability Analysis of Coal Slurry Impoundments	Jamal Rostami	Pennsylvania State University	\$14,074.00	03/20/2017	10/01/2016	09/30/2018	Mining Eng (40900)	401223	Active (Legacy)
A17-0182-001	CASH Costshare - AOI [1]: Advancing the integration of geophysical and reservoir simulation tools to monitor CO2 movement and storage permanence	Yaoguo Li	Colorado School of Mines - CSM	\$19,163.00	01/06/2017	10/01/2016	09/30/2019	Geophysics (30900)	490010	Active (Legacy)
A17-0177-001	NREL Joint Appointment	Yu Shu Wu	National Renewable Energy Laboratory - NREL	\$53,631.00	01/27/2017	02/01/2017	01/31/2018	Petroleum Eng (42300)	401224	Active (Legacy)
A17-0169-001	Colorado School of Mines Planning Grant: IUCRC for Advanced Subsurface Earth Resource Models	Richard Wendlandt	National Science Foundation - NSF	\$14,998.00	01/27/2017	02/15/2017	01/31/2018	Geology and Geological Eng (29300)	401218, 401219	Active (Legacy)
A17-0168-002	Workshop: Societal	Jessica Smith	Macalester	\$496.00	01/27/2017	09/01/2016	08/30/2017	Liberal Arts and	401211,	Active



Enhancement

- Fiscal Officers can search by PI

MINES | SPONSORED PROJECTS

HOME | MY DASHBOARD | REPORTING | ADMIN | LOG OUT

Proposal Dashboard

[Start New Proposal](#)

[My Proposals](#)

[Proposals In My Unit](#)

[At-Risk Spending Inbox](#)

Award Dashboard

[My Awards](#)

Awards In My Unit >>

Certifications/Approvals

[PI Certification Inbox](#)

1 [Unit Approval Inbox](#)

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A17-0177-001	NREL Joint Appointment	Yu Shu Wu	National Renewable Energy Laboratory - NREL	\$53,631.00	01/27/2017	02/01/2017	01/31/2018	Petroleum Eng (42300)	401224	Active (Legacy)
A17-0126-002	Technical Progress, Current Status and Future Development of Reservoir Energy Supplement Methods in Unconventional Reservoirs	Yu Shu Wu	CNPC USA Corporation	\$0.00	01/11/2017	10/01/2016	06/30/2017	Petroleum Eng (42300)	450425	Active (Legacy)
A17-0126-001	Technical Progress, Current Status and Future Development of Reservoir Energy Supplement Methods in Unconventional Reservoirs	Yu Shu Wu	CNPC USA Corporation	\$80,000.00	10/27/2016	10/01/2016	12/31/2016	Petroleum Eng (42300)	450425	Active (Legacy)
A17-0010-001	Geothermal Reservoir Modeling with TOUGH2-EGS	Yu Shu Wu	National Renewable Energy Laboratory - NREL	\$10,119.00	06/21/2016	06/21/2016	09/20/2016	Petroleum Eng (42300)	401115	Active (Legacy)
A16-0092-002	The Software Development for the Optimization and Design of Hydraulic Fracturing Operations on Tight Sandstone	Yu Shu Wu	CNPC USA Corporation	\$133,762.60	12/21/2016	09/01/2015	11/30/2017	MCERS (43600)	450390	Active (Legacy)

Enhancement

- PIs can search by Sponsor

 | SPONSORED PROJECTS

HOME | MY DASHBOARD | REPORTING | ADMIN | LOG OUT

Proposal Dashboard

- [Start New Proposal](#)
- [My Proposals](#)
- [Proposals In My Unit](#)
- [At-Risk Spending Inbox](#)

Award Dashboard

- [My Awards](#)
- Awards In My Unit >>**

Certifications/Approvals

- [PI Certification Inbox](#)
- [1 Unit Approval Inbox](#)

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>> Awards In My Unit

Awards | Active Projects | Inactive Projects

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Award No.	Project Title	Lead PI	Sponsor	Award Amount	Award Notice Received	Award Begin Date	Award End Date	Admin Unit	Account Numbers	Status
<input type="text" value="Search"/> x	<input type="text" value="Search"/> x	<input type="text" value="Search"/> x	<input type="text" value="doe"/> x	<input type="text" value="Search"/> x	<input type="text" value="Search"/> x	<input type="text" value="Search"/> x	<input type="text" value="Search"/> x	<input type="text" value="Search"/> x	<input type="text" value="Search"/> x	<input type="text" value="Search"/> x
A11-0001-001	Predicting Higher-Than-Average Permeability Zones in Tight-Gas Sands, Piceance Basin: An Integrated Structural and Stratigraphic Analysis	Jennifer Aschoff	Department of Energy - DOE	\$771,433.00	05/08/2012	04/24/2012	09/30/2014	Geology and Geological Eng (29300)	400425	
A11-0001-002	Predicting Higher-Than-Average Permeability Zones in Tight-Gas Sands, Piceance Basin: An Integrated Structural and Stratigraphic Analysis	Jennifer Aschoff	Department of Energy - DOE	\$0.00	08/11/2014	04/24/2012	07/31/2016	Geology and Geological Eng (29300)	400425	

Enhancement

- Award Status field added
- As an award progresses through its review, the Award Status will be updated as needed

Award Administration [Back To Search Res!](#)

Award No: A18-0009-001	Amount: \$123,456.00 (Anticipated)	Prime Acct:
Project No: A18-0009		Copy Award
Sponsor Award No: 123456798	Last Update: 7/31/2017 10:47 AM (by Gretchen Wodniak)	Primary Admin Contact: Dorie Chen
Project Title: InFEWS/T1: Exploring the Role of Groundwater in the Food, Energy and Water Nexus- Bridging Scales and Combining Tools to Evaluate Agricultural Systems Across the U.S.		

General | People | Events | Budget | Distributions | Proposals | |

Sponsor Award No:	<input type="text" value="123456798"/>	Type:	<input type="text" value="New"/>
Document No:	<input type="text"/>	* Award Status:	<input type="text" value="Closed (Work Complete)"/>
* Admin Unit:	<input type="text" value="IGWMC"/>	* Reporting Designation:	<input type="text" value="Anticipated"/>
* Award Begin Date:	<input type="text" value="07/31/2017"/> Clear	Official Report Date:	<input type="text"/> Clear
* Award End Date:	<input type="text" value="07/31/2020"/> Clear	* Award Notice Received:	<input type="text" value="07/31/2017"/> Clear
PRIME ACCOUNT BEGIN DATE:	<input type="text"/>	PRIME ACCOUNT END DATE:	<input type="text"/>

- New Award Status field
- Will have new drop down options:
 - Received – Pending Review (*when ORA first receives award*)
 - Received – In Review (*when award is routed to contract admin*)
 - Pending Banner Setup
 - In Negotiations with Sponsor
 - Signing
 - Hold for Compliance
 - Hold for Missing/Revised Docs
 - Pending Grant Admin Review (*when award is routed to grant admin*)
 - Setup Complete

Enhancement

- Project Status field added
- Project Status will remain "Active" until project enters into Closeout

HOME | MY DASHBOARD | REPORTING | ADMIN | LOG OUT

Project Administration [Back To Search Results](#)

Project No: [A18-0009 \(Prime Acct: \)](#) Lead PI: [Reed Maxwell](#) Project Dates: 8/16/2017 - 8/15/2022

Account Manager: [Patricia Nichols](#) [Mary Carr](#) [Melanie Barnhart](#) [Dorie Chen](#) Total Anticipated: \$246,912.00

Project Title: InFEWS/T1: Exploring the Role of Groundwater in the Food, Energy and Water Nexus- Bridging Scales and Combining Tools to Evaluate Agricultural Systems Across the U.S. Total Obligated : \$0.00

General Awards Budget Overview Accounts Personnel Events Proposals Subcontracts

* Project Title: InFEWS/T1: Exploring the Role of Groundwater in the Foo * Project Status: Active

* Admin Unit: IGWMC Confidential:

* PI: Reed Maxwell Primary Administrative Contact: Dorie Chen

* Project Begin Date: 08/16/2017 Clear * Project End Date: 08/15/2022 Clear

* Sponsor: Syracuse University Prime Sponsor: National Science Foundation - NSF

Cfda No: Instrument Type: ...

F&A Activity Type: ... Agency Program Designation: Banner Grant Number:

Save Project Details Delete Project

Project Status Dropdown Options:

- Active
- Reviewing for Closeout
- Closed

Enhancement – Fiscal Officers

- Project Dashboard combines Proposal Admin with Award Admin

MINES | SPONSORED PROJECTS

HOME | MY DASHBOARD | REPORTING | ADMIN | LOG OUT

>> Project Dashboard [Refresh Dashboard](#) | [Create Project](#)

Proposals	Projects
Unsubmitted: 73	Proposed: 5
Departmental College Routing: 16	Active: 2
Reopened: 2	Active (Legacy): 688
ORA: 94	Suspended: 0
Proposal Analyst: 0	Closed (Work Complete): 1
Contract Specialist: 0	Closed (Unfunded): 0
ORA Approved: 0	Inactive (Legacy): 2304
Not Funded: 487	
More Documentation Needed: 0	
Submitted to Sponsor: 1575	
Under Award Negotiation: 0	
Funded: 1884	
Withdrawn: 48	

Awards
Active: 8
Active (Legacy): 2235
Suspended: 0
Closed (Work Complete): 6
Closed (Unfunded): 0
inactive_legacy: 6833

Subcontracts
(Awaiting) Admin Dept: 3
(Awaiting) Award Mgr/Analyst: 1
(Awaiting) Subcontractor: 2
Fully Executed: 110
Inactive: 186

Account Requests
Submitted: 2
Authorized: 0
Rejected: 0
Funded: 0
Deleted: 0

Search

Search By:

Proposal No: - (05-9999)

Process Review – Fiscal Officers

- Project Dashboard – Searching via Sponsor Award Number
- You can still use the search toolbar to search for your Awards by index

The screenshot displays the MINES SPONSORED PROJECTS dashboard. At the top left is the MINES logo. Below it is a navigation bar with links for HOME, MY DASHBOARD, REPORTING, ADMIN, and LOG OUT. The main header area includes '>> Project Dashboard' and links for 'Refresh Dashboard' and 'Create Project'. The dashboard is divided into three main sections: Proposals, Projects, and Awards. The Proposals section lists various stages and counts: Unsubmitted (73), Departmental College Routing (16), Reopened (2), ORA (94), Proposal Analyst (0), Contract Specialist (0), ORA Approved (0), Not Funded (487), More Documentation Needed (0), Submitted to Sponsor (1575), Under Award Negotiation (0), Funded (1884), and Withdrawn (48). The Projects section shows: Proposed (5), Active (2), Active (Legacy) (688), Suspended (0), Closed (Work Complete) (1), Closed (Unfunded) (0), and Inactive (Legacy) (2304). The Awards section shows: Active (8) and Active (Legacy) (2235). A search bar is located on the right side of the dashboard, with a blue arrow pointing to it. The search bar contains a dropdown menu set to 'Awards', a 'By:' dropdown set to 'Sponsor Award No', and a 'Search' button. Below the search bar is a text input field labeled 'Sponsor Award No:'.

Process Review – Fiscal Officers

- Project Dashboard – Search results for Sponsor Award Number

>> Awards

Search Awards By: Sponsor Award No containing "41025"

Award No	Lead PI	Title	Sponsor	Award Amount	Reporting Designation	Sponsor Award No	Award Status
			NREL				
A15-0104-003	Eric Toberer	Development of Earth Abundant Thin Film Solar Ce...	National Renewable Energy Laboratory - NREL	\$0.00	Obligated	UGA-0-41025- ...	Active (Legacy)
A15-0104-002	Eric Toberer	Development of Earth Abundant Thin Film Solar Ce...	National Renewable Energy Laboratory - NREL	\$0.00	Obligated	UGA-0-41025- ...	Active (Legacy)
A15-0104-001	Eric Toberer	Development of Earth Abundant Thin Film Solar Ce...	National Renewable Energy Laboratory - NREL	\$203,076.00	Obligated	UGA-0-41025- ...	Active (Legacy)
A15-0091-002	Alan Sellinger	HTM's for PSC's	National Renewable Energy Laboratory - NREL	\$0.00	Obligated	UGA-0-41025- ...	
A15-0091-001	Alan Sellinger	HTM's for PSC's	National Renewable Energy Laboratory - NREL	\$70,008.00	Obligated	UGA-0-41025- ...	
A15-0086-006	Alfred Eustes	Horizontal Geothermal Well Completions	National Renewable Energy Laboratory - NREL	\$0.00	Obligated	UGA 41025-88	Active (Legacy)
A15-0086-005	Alfred Eustes	Horizontal Geothermal Well Completions	National Renewable Energy Laboratory - NREL	\$110,000.00	Obligated	UGA 41025-88	Active (Legacy)
A15-0086-004		Horizontal Geothermal Well Completions	National Renewable Energy Laboratory - NREL	\$288,589.00	Anticipated	UGA-0-41025- ...	Active (Legacy)
A15-0086-003	Alfred Eustes	Horizontal Geothermal Well Completions	National Renewable Energy Laboratory - NREL	\$20,000.00	Obligated	UGA-0-41025- ...	Active (Legacy)
A15-0086-001	Alfred Eustes	Horizontal Geothermal Well Completions	National Renewable Energy Laboratory - NREL	\$20,000.00	Obligated	UGA-0-41025- ...	Active (Legacy)
A15-0085-011	Sumit Agarwal	Advanced Contact and Passivation Development for...	National Renewable Energy Laboratory - NREL	\$16,000.00	Obligated	UGA-0-41025- ...	Active (Legacy)

View 1 - 100 of 474

Page 1 of 5

NOTE: "View All" is no longer an option for multiple page results.



Process Review – Fiscal Officers

- Project Dashboard – Searching via Proposal/Project Title
- You can still use the search toolbar to search for proposals by title, PI, proposal number

HOME | MY DASHBOARD | REPORTING | ADMIN | LOG OUT

>> Project Dashboard [Refresh Dashboard](#) | [Create Project](#)

Proposals

- Unsubmitted: [73](#)
- Departmental College Routing: [16](#)
- Reopened: [2](#)
- ORA: [94](#)
- Proposal Analyst: [0](#)
- Contract Specialist: [0](#)
- ORA Approved: [0](#)
- Not Funded: [487](#)
- More Documentation Needed: [0](#)
- Submitted to Sponsor: [1575](#)

Projects

- Proposed: [5](#)
- Active: [2](#)
- Active (Legacy): [688](#)
- Suspended: [0](#)
- Closed (Work Complete): [1](#)
- Closed (Unfunded): [0](#)
- Inactive (Legacy): [2304](#)

Awards

Search

Search By:

Project Title:

De-bugged

- Project Dashboard – Searching via Research Team Member

PROJECTS

Projects

Proposed:	5
Active:	3
Active (Legacy):	688
Suspended:	0
Closed (Work Complete):	1
Closed (Unfunded):	0
Inactive (Legacy):	2304

Awards

Active:	10
Active (Legacy):	2235
Suspended:	0
Closed (Work Complete):	6
Closed (Unfunded):	0
inactive_legacy:	6833

Search

Search: Awards By: Research Team Member

Research Team Member:

People Search (choose the person by clicking the name)

Smith, Adam T.	VP Student Life
Smith, Collin	Mining Eng
Smith, Jessica Smith	Liberal Arts and Intl Studies
Smith, Nicole M.	Mining Eng

[Search Again](#) [Person Not Listed](#) [Close Window](#)

You can now search for everyone associated with a specific award, project, or proposal. If the results are not what you are looking for, you no longer have to go back to the dashboard. Simply click on the "Search Again" option to go back to the search field.

Questions?

If you have any questions about the Cayuse SP upgrade, please reach out ora@mines.edu.