CAYUSE RESEARCH

INTRODUCING CAYUSE 424 & CAYUSE SP

ORA Project Team:
Ralph Brown
Johanna Eagan
Katy Ginger
Lisa Martinez-Conover
CAYUSE AGENDA

• What is Cayuse?
• Why now?
• What are some of the workflow changes?
• How do I login?
• What does the system know about me?
• How do I start a proposal?
• How will proposal routing and approval work?
• How do I see my award information? (e.g. PSS)
• Is there a hands-on opportunity to explore?
CAYUSE DEFINED

• Web-based platform for proposal & award management
• Provides list for Grants.gov funding opportunities
• Electronic proposal tracker, router and certification
• Direct submission & validation of Federal Grants.gov proposals
• Proposal & award reporting system (college, dept, center, PI, sponsor, etc.)

• Finance System (Banner) still handles expenses & financials, not Cayuse
WHY CAYUSE?

- Web-based platform that is accessible to researchers, ORA and administrative groups at any time
- Replaces an aging system
- Easy to use interface
- Price and vendor hosting was appropriate
- Data remains Mines data
- Support strategic plan objective of business efficiencies
WORKFLOW CHANGES

- Proposal initiation begins in Cayuse
- Proposal routing is now electronic
- Cayuse becomes the repository for proposal & award documents
- Project Summary Sheet (PSS) is an email with hyperlinks
- Finance system (Banner) is still the system of record for financials (Cayuse does not show expenses)
- Cayuse has IP, Conflict of Interest & Export Control questions
BROWSER INFORMATION

- Internet Explorer & Firefox (fully compatible)
- Chrome & Safari work except cannot do document uploads
- iPhone, iPad & Droid enabled (convenient for proposal approvals)

Need
- Javascript enabled
- Cookies enabled
- Pop-ups allowed

See http://support.cayuse.com/docs/browser-support-configuration to set browser configurations
LOGIN INFO: PROD & SANDBOX

**PRODUCTION INFO**
- **URL:** mines.cayuse424.com/
- **Username:** Trailhead
- **Password:** Trailhead
- **Data:** considered real

**SANDBOX INFO**
- **URL:** mines-uat.cayuse424.com/
- **Name:** Trailhead
- **Password:**
- **Data:** considered play

**Questions:** ora@mines.edu
LOGIN INFO: PROD & SANDBOX

PRODUCTION LOGIN

Questions: ora@mines.edu

SANDBOX LOGIN
Find funding opportunities
Develop Grants.gov proposals
Manage your profile

Start all proposals here
Handles routing
Displays award information

You will work in 424 and SP (the research modules)
YOUR PROFILE: MINES UPLOADS

• Name
• CWID
• Contact info
• Dept
• Title
• Salary
• Fringe rate
• Role (e.g. PI)
• Site
YOUR PROFILE: YOU UPLOAD

- Bio-sketch for agencies
- Degrees
- Demographics

All optional: bio-sketch is convenient
GETTING STARTED

- Choose Cayuse SP (Sponsored Projects)
- Start all proposals in Cayuse SP (even Grants.gov – 424 proposals)
Highlights tasks & recent actions:

- Dr. Carr is working on a proposal (*My Proposals*)
- Dr. Carr recently started routing on a different proposal; it’s waiting for his certification as a PI (*PI Certification Inbox*)
START A NEW PROPOSAL

• Sponsor info
• General info: name, title, dates (project and sponsor)
• Submission method (Grants.gov indication)
• Contacts: research team, award department, administrative
**SPONSOR INFO**

- Sponsor name
- Funding opportunity
- Program name
- URL to proposal guidelines

**GENERAL INFO**

- Short project name; start date/ end date
- Activity code
- Proposal type (select New)
- Instrument (select Grant)
AWARD DEPT
- Department receiving the funding
- May be different than your home department

ADMIN CONTACT
- You or....
- Administrative person in your dept. or the award dept.

Submission Method
- Cayuse 424
- Grants.gov forms
- FastLane
- Sponsor website
- Email
- Paper
- Other
TITLE & DEADLINE

- Include full title
- Enter sponsor deadline

424 PAIRING

- Select ‘Create a Paired Proposal’ if you are responding to a Grants.gov RFP
- Generally, Grants.gov proposals use a Cayuse 424 submission method
MONTHS & EFFORT

- Enter months of effort over entire project
- Portion of the entire project paid by sponsor

COST SHARE & CREDIT

- Portion of entire project not paid by the sponsor
- Percentage of credit for each PI (equals 100% across all PIs)

E.g. 3 months total project effort / 36 month project period = 8.3% Sponsored Effort
NEW PROPOSAL TIPS

• Find Your ORA Proposal Analyst
  http://inside.mines.edu/ORA-About-Proposal-Contract-Grant-Assignments

• Work with ORA Proposal Analyst
  • Complete ‘Start a New Proposal’ and ‘Research Team’ pages
  • Then analyst can see proposal & help with budget, other forms, etc.

• PIs & co-PIs
  • PIs are called Lead Principal Investigators
  • co-PIs are called Principal Investigators

• Sponsor info
  • If not listed, select ‘Other’
  • Email ora@mines.edu with a sponsor add request (name & website)

• Months & Sponsored Effort
  • If information is unknown, enter ‘0’ (because required value) and complete when more information is known; can be updated at any time during proposal prep
• Ensure all PIs, co-PIs, Center Directors & Dept Heads are listed
• Use ‘Add Department’ to add missing persons; change order if need be
• Click ‘Authorize’ to set routing chain (does not submit for approval)
SUBMIT FOR ROUTING

- Proposal will be locked and can no longer be edited (except by ORA)
- PIs & Dept Heads notified by email to certify
- After PI and Dept certification, proposal arrives in ORA for final review
Proposal Number: 00-0001
Proposal Lead PI: Colin Wolden
Proposal Title: An Investigation of the Heterogeneous Chemistry Occurring Between Atoms and Organometallics During Thin Film Synthesis

The above proposal has been submitted for routing and approval. As a PI, you need to certify the proposal within Cayuse SP. You may need to login and click the PI Certification Inbox depending on how your email client handles the link above.

All PIs named on this proposal must complete their own certifications in Cayuse SP.

Without certifications, ORA will not submit the proposal to the sponsor. To track the progression of the proposal through all affiliated departments, use the PI Certification Inbox and click on the appropriate proposal number.

If you have any questions, please contact ORA.
CERTIFYING

- Certification Dashboard shows when you have approvals to perform
- Dr. Greife has to make an approval as a PI
- Dr. Greife has to make an approval as a Dept or Center Director
PI APPROVAL

- Click on PI Certification Inbox
- Click on your proposal number
PROPOSAL ROUTING STATUS

- Provides approval info and status history in a single view
- Click ‘Certify Proposal’ to complete final approval
- View IPF (Internal Processing Form) allows you to view proposal docs
**PROPOSAL CERTIFICATION - PI**

- Write any comments
- Click ‘Submit Certification’ to approve proposal
- Dept Head view is similar but can ‘Reject Proposal’
ROUTING TIPS

• **Email Requests**
  - Act on after today’s training

• **Approving depts**
  - Do not include ORA

• **Submit for routing**
  - Submit in time so proposal arrives in ORA at least 5 days in advance; 10 days in advance for cost share, subcontracts, partner institutions or complex instructions
  - Completed routing makes for efficient & speedy submissions
NEW PSS

• Email with account info
• Provides project info
• Embedded hyperlinks to greater details like:
  • Accounts
  • Personnel and effort
  • Deliverables
  • Equipment
  • Travel
  • Other provisions
Legacy data begins with A00
AWARD DASHBOARD

- 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
**PROJECT - GENERAL**

- You cannot change information; even if you do, it will not stick
- **Program Admin:** your ORA award admin; new proposals will have
- **Acct Mgr:** dept contact; receives account notifications; can view docs
PROJECT - AWARDS

- Lists awards, amounts, type of award, whether obligated or anticipated
- Award totals equal project totals
- Banner index number = account number = Prime Acct
**PROJECT - NOTES**

- 2-letter code identifies note type (DV for deliverable; EQ for equipment)
- Notes are viewable to dept. account mgr, ORA, co-PIs, and PIs
- Cannot be deleted now
MINES
SPONSORED PROJECTS

Award Administration

Award No: A00-0008-001 (400489-001)  Amount: $200,984.00 (obligated)
(View Project) (Award Coversheet)

Sponsor Award No: NNX12A019G
Project Title: Advancing Multi-scale Landslide Hazard Prediction by Integrating High Resolution Remote Sensing Data and Subsurface In-situ Monitoring

Primary Admin Contact: Ning Lu
Program Administrator:

Distributions by Account

- Prime Acct: 400489 (Active)

<table>
<thead>
<tr>
<th>Prime Acct</th>
<th>Total Award</th>
<th>Date/Time</th>
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<tbody>
<tr>
<td>400489</td>
<td>$200,984.00</td>
<td>9/14/2012 1:00 AM</td>
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</table>

AWARD - DISTRIBUTION

- Familiar Banner index number = account number = Prime Acct.
- Shows total award & how much distributed per account
- Does not show expenses (use Banner)
AWARD TIPS

• 2-letter codes in Project Notes
  • EQ: equipment  CS: cost share  XX: terminated
  • DV: deliverables  SC: sponsor contact
  • OP: other provisions  TC: technical contact

• Colors
  • Purple is project level; green is award level

• PSS Emails
  • Live with Sep 10, 2014 launch
# NOMENCLATURE

<table>
<thead>
<tr>
<th>Mines 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>Principal Investigator</td>
</tr>
<tr>
<td>Department or center</td>
<td>All considered to be departments</td>
</tr>
<tr>
<td>View proposal documents</td>
<td>View IPF</td>
</tr>
<tr>
<td>Banner index number</td>
<td>Prime account</td>
</tr>
<tr>
<td>Fiscal officer/ program administrator</td>
<td>Account manager</td>
</tr>
<tr>
<td>Grant administrator</td>
<td>Program administrator</td>
</tr>
<tr>
<td>Submit</td>
<td>Submit for routing (PI)</td>
</tr>
<tr>
<td></td>
<td>Submit to sponsor (ORA)</td>
</tr>
<tr>
<td>PSS</td>
<td>Account notification</td>
</tr>
</tbody>
</table>
CONSULTS & TRAINING

Group Exploration (limit 10)
- Tue Oct 21, 4-5 pm
- Tue Nov 4, 4-5 pm
- Mon Dec 8, noon-1 pm
CTLM 152
More as necessary

Individual Consults
- Email ora@mines.edu
- In your office or
- In a library office
- Suggest a date & time

ORA Cayuse Web
http://inside.mines.edu/ORA-Training-Cayuse

424 Training: available online
http://support.cayuse.com/docs/cayuse-424-support/training-materials