CAYUSE TRAINING

INTRODUCING CAYUSE 424 & CAYUSE SP

ORA Project Team:
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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 routing is now electronic
• Better proposal tracking & knowledge of award status
• Effort and allocation of credit is included
• Cayuse becomes the repository for proposal & award documents
• Project Summary Sheet (PSS) is an email with hyperlinks
• Finance system (Banner) is the system of record for financials (Cayuse does not show expenses)
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](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

SANDBOX LOGIN

Questions: ora@mines.edu
You will work in 424 and SP (the research modules)

424

- Find funding opportunities
- Develop Grants.gov proposals
- Manage your profile

SP

- Start all proposals here
- Handles routing
- Displays award information
DASHBOARDS

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*)
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
<table>
<thead>
<tr>
<th>Submitted</th>
<th>Prop No.</th>
<th>PI</th>
<th>Project Name</th>
<th>Sponsor</th>
<th>Dept</th>
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<td>00-2635</td>
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<td></td>
<td>Coordinated Riparian Zone and</td>
<td>New Mexico State</td>
<td>AQWATEC</td>
<td>Submitted to Sponsor</td>
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PROPOSALS IN MY DEPARTMENT

- Provides listing of all proposals and status
- Get the listing and click on a proposal to see the routing status
PROPOSAL ROUTING STATUS

- Provides approval info and status history in a single view
- View IPF (Internal Processing Form) allows you to view proposal docs
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
NUMBERING LOGIC

Legacy data begins with A00
NEW PSS

• Email with account info
• Provides project info
• Embedded hyperlinks to greater details like:
  • Accounts
  • Personnel and effort
  • Deliverables
  • Equipment
  • Travel
  • Other provisions
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
Awards:
- Lists awards, amounts, type of award, whether obligated or anticipated
- Award totals equal project totals
- Banner index number = account number = Prime Acct
PROJECT - EFFORT & CREDIT

- Shows cumulative effort per PI
- Credit is across PIs
- Legacy data does not have values but new data will
### 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
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>
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<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>
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<tr>
<td>View proposal documents</td>
<td>View IPF</td>
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<tr>
<td>Banner index number</td>
<td>Prime account</td>
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<tr>
<td>Fiscal officer/ program administrator</td>
<td>Account manager</td>
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<tr>
<td>Grant administrator</td>
<td>Program administrator</td>
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<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>
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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