

# CAYUSE DEPARTMENTAL ADMINISTRATIVE STAFF END USER GUIDE



**STEPHEN F. AUSTIN STATE UNIVERSITY**  
**OFFICE OF RESEARCH & GRADUATE STUDIES**

# CONTENTS

Introduction .....	3
What is Cayuse? .....	3
Important Notes.....	3
Icons & What They Mean.....	3
Role of administrative staff.....	3
Resources .....	4
A. ORGS User Guides .....	4
B. SFA Knowledge Base .....	4
C. Cayuse Resource Center.....	4
Cayuse numbering system .....	5
Accessing Cayuse.....	6
Viewing SP dashboard.....	8
Viewing proposal form.....	9
Proposal routing.....	11
Viewing awards .....	12
Searching records.....	14
Creating reports .....	16

# INTRODUCTION

## WHAT IS CAYUSE?

Cayuse is cloud-based software that provides an integrated suite of electronic research administration products to manage the entire research portfolio. SFA utilizes two modules within Cayuse for grant opportunities: Sponsored Projects (SP) and Proposals (S2S).

### Sponsored Projects (SP)

- A cloud-based application replaced paper processes for all ORGS managed grant proposals as the University-wide grants management solution.
- SP includes electronic proposal initiation and development, proposal routing and review, award initiation and tracking, budget building, and role-based dashboard views and access.
- Offers smart form technology with conditional logic to show only the questions needed for the proposal type.
- Provides a centralized at-a-glance dashboard based on user roles.
- Streamlined and automated routing based on SFA hierarchy.
- Simplified approvals with a modern look and feel.

### Proposals (S2S)

- A cloud-based application utilized to simplify the creation, review, approval and electronic submission of Grants.gov proposal applications through a secure and direct connection.
- Note that this module is not utilized when completing Internal Funding Proposals.

## IMPORTANT NOTES

- Preferred Internet Browsers: Google Chrome, Firefox.
- Cayuse requires the use of pop-ups when utilizing Cayuse Proposals (S2S).
- Cayuse automatically saves after each change in the form.
- A Proposal Abstract is required for each proposal and must be 100-5000 characters in length.
- The lead person is indicated by selecting the Principal Investigator (PI) role.

## ICONS & WHAT THEY MEAN

- \* - A red asterisk indicates a required field.
- 4 - A red circle with a number next to a section indicates the number of incomplete required fields.
- ✓ - A green check mark next to a section indicates all required fields are complete for that section.

## ROLE OF ADMINISTRATIVE STAFF

- Can enter proposals on behalf of the PI (similar to Concur delegate role)
- Help monitor routing process
- Assist with awards (entering requisitions, EPAFs, etc.)

# RESOURCES

## A. ORGS User Guides

Access via the ORGS website: <https://www.sfasu.edu/academics/orgs/grants-sponsored-programs/cayuse>

1. Internal Funding: Instructions for submitting internal grant proposals to ORGS.
2. External Funding: Overall instructions for submitting external proposal in Cayuse. All external proposals must be routed in Cayuse and approved by appropriate university personnel prior to submission. Anyone who intends to submit an external grant should contact ORGS prior to starting a Cayuse record as each external proposal is unique.
3. Departmental Administrative Staff: Instructions for viewing proposals, awards, and tasks. Allows for monitoring of proposals and awards.

## B. SFA Knowledge Base

Access through the SFA IT Help Desk: <https://help.sfasu.edu/TDClient/2027/Portal/Home/>

1. Sign in (upper right-hand corner)
2. Select **Knowledge Base** on menu
3. Scroll down to **Cayuse**
4. **End User Guides**
5. **Cayuse FAQ**

## C. Cayuse Resource Center

Access on every screen via the orange question mark in bottom right side.



1. Announcements
  - i) Will contain a link to the latest Cayuse update
  - ii) Link to Connect Community (more for grant administrators)
2. Show me how to (onboarding guides). *Coming soon*
  - i) Coming soon - Cayuse Academy
  - ii) Click Register. Then "Staff"
3. Help Center (articles and guides). *Coming soon*

# CAYUSE NUMBERING SYSTEM

- The Cayuse system uses a hierarchical numbering system for each project that allows for linkage between proposals, awards, and award modifications for the same project.
- Cayuse automatically generates the numbers.

## A. Project number

1. This number represents the top-level of a project.
2. It is a unique number.
3. There can be multiple proposals and awards from the same project.
4. Numbering system is always **xx-xxxx**
  - a. **xx** – Fiscal year (currently 23. Determined by the date the record was initiated)
  - b. **xxxx** – The next numerical number. The first record for each year will be 0001
  - c. First FY23 project number is 23-0001.

## B. Proposal number

1. This number represents the individual proposal.
2. All proposal numbers stem from the related project number.
3. All proposal numbers include a **“P”** followed by the next numerical number.
  - a. Project number 23-0001
  - b. Proposal number 23-0001-**P0001**
    - i. Indicates the first proposal associated with the project.
  - c. Proposal number 23-0001-**P0002**
    - i. Indicates the second proposal associated with the project.
    - ii. May also indicate an issue with the first proposal.  
Ex: if the PI selects the wrong type of proposal under P0001, ORGS will ask the PI to create P0002 then we close the first proposal.

## C. Award number

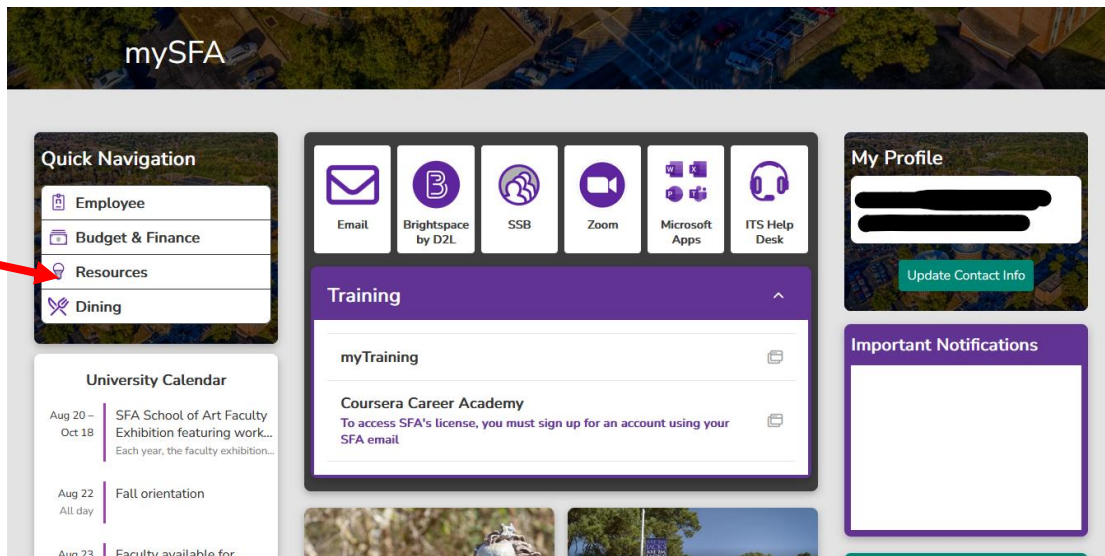
1. This number represents the individual award.
  - a. If award is based on a proposal already in Cayuse, the award number will stem from the proposal.
  - b. If there is not a related proposal in Cayuse, the award setup will create a new Cayuse number.
2. All award numbers include an **“A”** followed by the next numerical number.
  - a. Project number 23-0001
  - b. Proposal number 23-0001-P0001
  - c. Award number 23-0001-**A0001**
3. Modification/amendment to a current award adds a number. This number is also sequential, so one award may have numerous modifications.
  - a. Award number 23-0001-A0001
  - b. First modification 23-0001-A0001-1

# ACCESSING CAYUSE

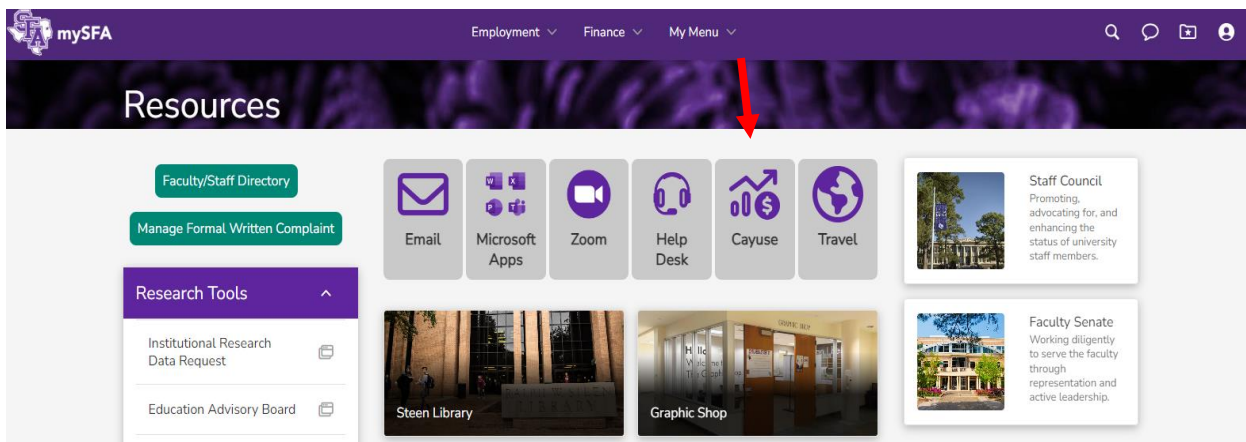
1. Login to Cayuse using your mySFA username and password.



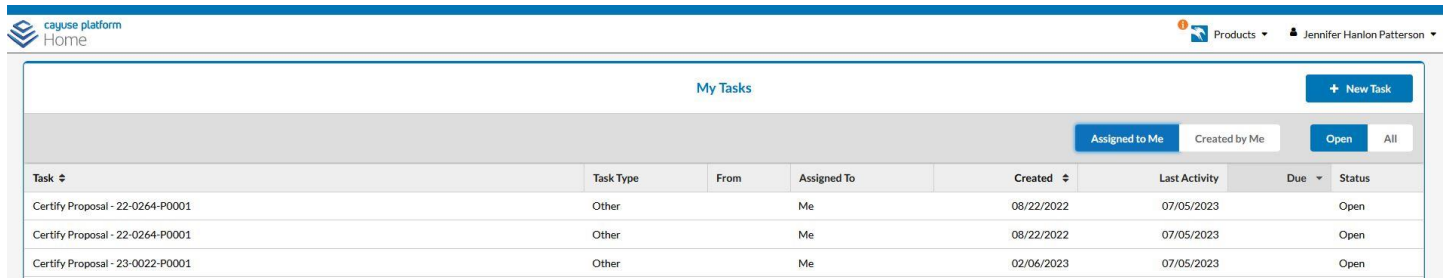
2. Under Quick Navigation, select Resources



3. On the Resources screen, select Cayuse from the middle menu



4. **Cayuse Home** page. The home screen is defaulted to show any tasks assigned to you. Separate task instructions will be available soon.

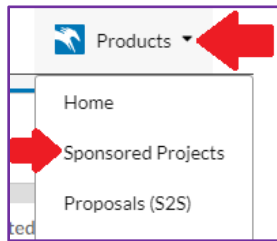


The screenshot shows the 'My Tasks' section of the Cayuse Home page. It features a table with columns for Task, Task Type, From, Assigned To, Created, Last Activity, Due, and Status. There are also filter buttons for 'Assigned to Me', 'Created by Me', 'Open', and 'All', and a '+ New Task' button.

Task	Task Type	From	Assigned To	Created	Last Activity	Due	Status
Certify Proposal - 22-0264-P0001	Other		Me	08/22/2022	07/05/2023		Open
Certify Proposal - 22-0264-P0001	Other		Me	08/22/2022	07/05/2023		Open
Certify Proposal - 23-0022-P0001	Other		Me	02/06/2023	07/05/2023		Open

# VIEWING SP DASHBOARD

A. From the home page, select **Products**, then click **Sponsored Projects** in the drop-down menu.



B. The default **SP Dashboard** contains all proposals and awards available to you based on your assigned roles and Banner hierarchy.

A screenshot of the 'SP Dashboard' interface. At the top left is the 'cajuse Sponsored Projects' logo. On the right, it says 'Products' and 'Jennifer Hanlon Patterson'. Below the logo is a navigation bar with 'Proposals' (circled in red), 'Projects', 'Awards' (circled in green), 'Reporting' (circled in blue), and 'More'. Below this is the 'SP Dashboard' title and a '+ Start New Proposal' button (pointed to by a green arrow). The main content area features six summary cards: '143 In Development', '64 Under Review', '25 Approved', '1 Submitted to Sponsor', '0 Under Consideration', and '5 Funded'. Below these is a '29 Closed' card. At the bottom, there is a search bar, a 'See assigned to me only' filter, an 'Assign selected' dropdown, a 'Set View' button (boxed in green), and a 'Download to CSV' button. A table below shows a list of proposals with columns for Project Title, Proposal #, PI, Status, Sponsor, Prime Sponsor, Admin Unit, Project Start Date, Project End Date, Proposal Type, and Instrument Type. A red star is next to the first row.

Project Title	Proposal #	PI	Status	Sponsor	Prime Sponsor	Admin Unit	Project Start Date	Project End Date	Proposal Type	Instrument Type
Proposal to Award Attachment Push	23-0020-P0002	--	In Development	--	--	--	--	--	New Proposal or Application	--
Travel to Dallas	23-0025-P0001	Angela Raney	In Development	--	--	Research & Sponsored Programs	4/28/2023	5/3/2023	Internal	Internal
travel to collect data	23-0021-P0002	--	In Development	--	--	--	--	--	Internal	--

1. Top menu shows available forms you can access.
  - a. Proposal (Red circle above)
  - b. Awards (Green circle above)
  - c. Reporting (Blue circle above)
2. Categories indicating where proposals are in the review process (Red square above)
3. A list view of proposals available to you based on assigned roles (Red star above)
4. Ability to start a new proposal (Green arrow above)
5. Configurable based on Set View (Green box above)



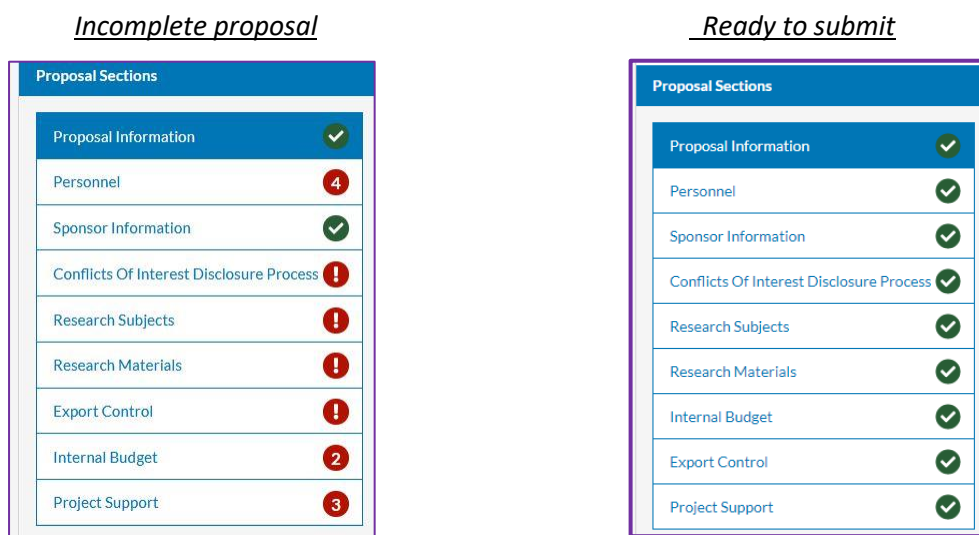
# VIEWING PROPOSAL FORM

Select any proposal from the proposal list, or search to find the record you wish to view. The **Proposal Form** will open in the same window showing various information fields.

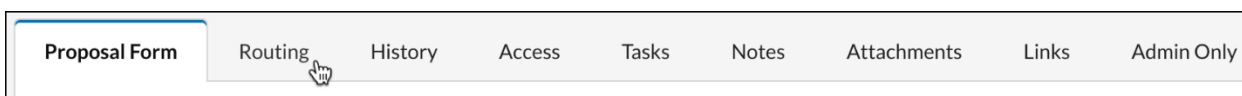
*The Proposal Sections and individual questions will change based on conditional logic.*

1. **Proposal Information:** Includes project title and Cayuse proposal number.
2. **My Actions:**
  - a. **Complete Review:** For reviewers/approvers with the appropriate Cayuse roles.
  - b. **Route for Review:** For lead person to start the automated routing process once all proposal information is entered.
3. **Proposal Summary:** Provides at a glance information such as the person in charge of the project, sponsor name, deadlines, and proposed amount. Fields remain blank until data has been entered.
4. **Status:** The status section alerts users to the current proposal stage:
  - a. In Development: User has started a record.
  - b. Under Review: Proposal has been routed for review.
  - c. Approved: All university approval (including ORGS) has been obtained.
  - d. Submitted to Sponsor: Proposal has been submitted to sponsor (for internal grants, only used if awarded).
  - e. Under Consideration: Sponsor has contacted SFA to indicate an award is a possibility
  - f. Funded: Sponsor has awarded project. Proposal record will be closed and Award record begun.
  - g. Closed: Proposal is no longer active. Typically used when proposal was not funded by the sponsor, the lead person withdrew the proposal, or the proposal was funded and an award was created.
5. **Proposal Related Tabs:** These tabs provide additional information, allow you to monitor the routing process, and some users may include additional information. See **Proposal Form Tabs Overview** for more detail.

6. **Proposal Sections:** Contains the required sections of each proposal based on selections within the form (smart conditional logic). Refer to separate internal and external guides for more details.
  - a. The red number to the right of each section indicates the number of incomplete required fields (see below example).
  - b. **Proposal Information** section must be completed first. If the incorrect project type is selected, then all sections may be incorrect.
    - I. The required fields in each section are based on conditional logic.
    - II. For example, an Internal Travel Proposal will not require the same sections as any other Proposal Type.
  - c. All sections must have a green checkmark in order to route the proposal for review (see below example).
  - d. An exclamation mark means that the section contains a required field that hasn't yet been completed (see below example). A record may not be submitted for review until all fields have been completed.



## 7. Proposal Form Tabs Overview



- a. **Proposal Form:** Refer to previous section.
- b. **Routing:** Shows who needs to or has approved the proposal.
- c. **History:** View proposal status and history. Proposal status can also be viewed from the Sponsored Projects dashboard.
- d. **Access:** Lead person can manage who can view or edit the proposal.
- e. **Tasks:** View open tasks relating to the proposal.
- f. **Notes:** Add comments to the proposal for reference.
- g. **Attachments:** Upload files relevant to the proposal.
- h. **Links:** Displays data from records in connected systems (currently not used).
- i. **Admin Only:** ORGS use only.

# PROPOSAL ROUTING

## Routing notes

- The routing queue is not in chronological order (It's a Cayuse thing).
- Routing process does not begin until user completes all proposal sections, then changes the status to "Route for review."
- Each Team may have multiple persons listed who can approve. However, only one person is required to approve. Once the person approves, any others in that routing queue are removed.

## Routing order

**The general order for both internal and external proposals follow this routing process:**

1. PI/PD (lead grant person) routes for review to ORGS
2. ORGS reviews
  - a. If proposal is missing items or has incorrect data:
    - i. ORGS changes status to "In development"
    - ii. ORGS emails PI or creates a Cayuse Task
    - iii. As needed, ORGS will copy the chair, dean, etc.
  - b. If proposal is accurate and complete, ORGS approves.
3. PI/PD and any co-PIs certify the proposal
4. ORGS completes review and approves
5. Supervisor level
  - a. Academic colleges - chair and dean review
  - b. Director level or above - no further approvals required
  - c. Other units – supervisor reviews

Next steps depend on proposal type.

### **For Internal proposals:**

1. Proposal submitted to University Research Council (URC) for review - process may take up to 4 weeks
2. If proposal is approved:
  - a. URC chair
    - i. emails PI and copies ORGS
    - ii. reviews and approves proposal in Cayuse
    - iii. leaves a comment
  - b. ORGS
    - i. Closes the proposal in Cayuse
    - ii. Sets up award in Banner and Cayuse
    - iii. Emails PI and department administrative staff
3. If proposal is not approved:
  - a. URC chair will email PI and copy ORGS
  - b. ORGS closes proposal in Cayuse

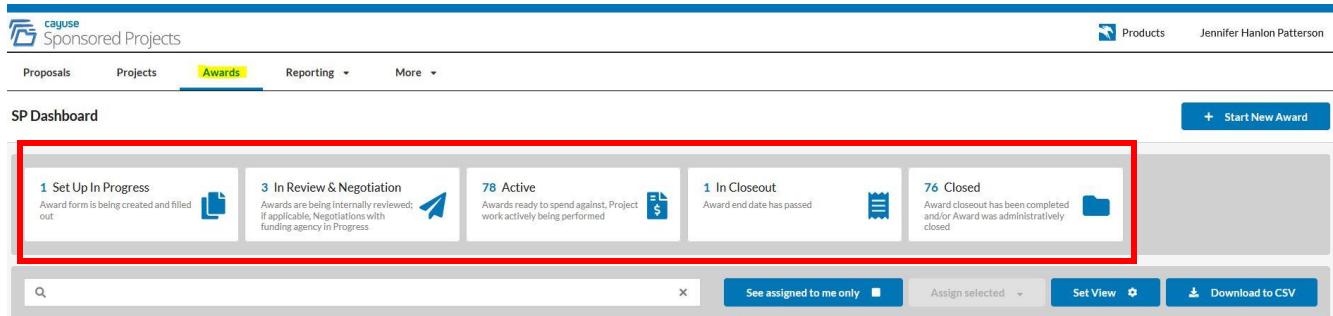
### **For external proposals:**

1. ORGS approves (for submission purposes)
2. ORGS Dean approves (for submission purposes)
3. For federal proposals or proposals over \$450,000, the appropriate VP and the President must approve. ORGS is responsible for this approval.

# VIEWING AWARDS

Only ORGS creates awards in Cayuse.

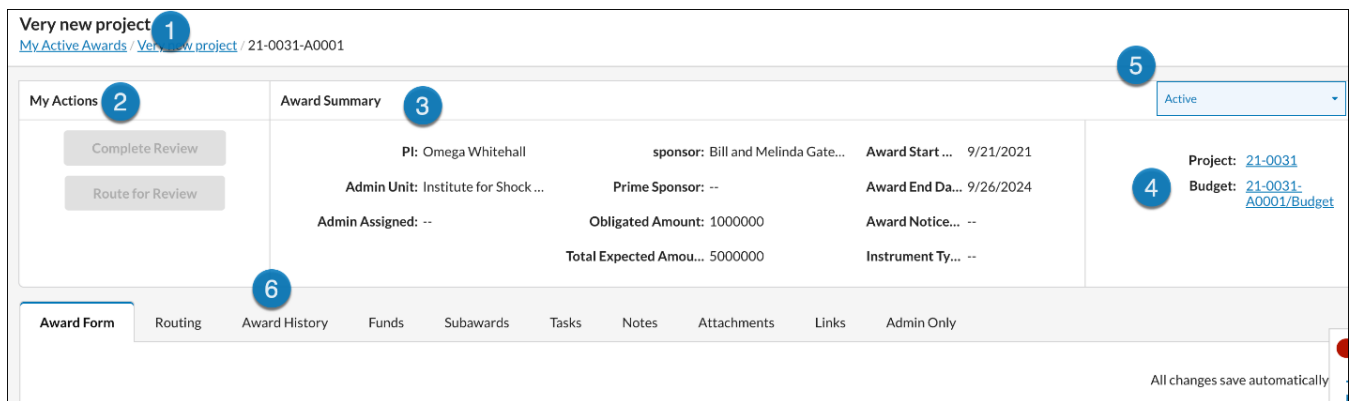
A. From the top menu, select **Awards**. The award stages include:



1. **Setup in progress:** Award document has arrived and ORGS/Financial Reporting is setting up the award in Banner and Cayuse.
2. **In review and negotiation:** Award agreement has been received and negotiations are underway between the sponsor and SFA.
3. **Active:** All sponsor and SFA approvals have been received, and award is setup in Banner and Cayuse. The project is active and funds may be spent.
4. **In Closeout:** Either project is complete or the project end date has passed. Project is pending close by either the sponsor and/or SFA.
5. **Closed:** Award has been closed by both the sponsor and SFA. The records retention section has been updated.

B. Select any award from the list, or search to find the record you wish to view. The **Award Form** will open in the same window showing various information fields.

C. Award Interface



1. **Award Name:** This section also contains breadcrumbs back to the award's project, as well as the user's active projects.

2. **My Actions:** The Route for Review button will activate once each section beneath Award Sections has a check mark.
3. **Award Summary:** This section will provide at-a-glance information, such as Sponsor, Deadlines, and Obligated Amount. The fields will remain blank until established at a project or award level.
4. **Connected Link:** Links to any connected project or proposal.
5. **Status:** The status flag lets users know what phase the award is in: Set Up In Progress, In Review and Negotiation, Active, In Closeout, Closed.
6. **Award Tabs:** The award tabs provide additional information, and let you add additional assets to your award.

#### D. Award Form tabs



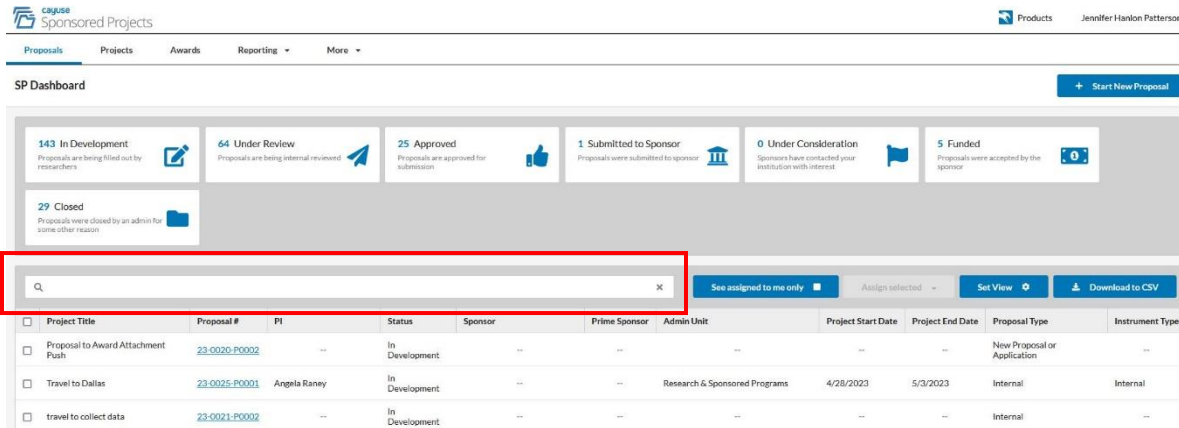
1. **Award Form:** Main tab (ORGS completes).
2. **Routing:** Shows who needs to or has approved the award. Currently only the PI and ORGS approve awards.
3. **Award History:** View award status and history. Award status can also be viewed from the Sponsored Projects --> Awards dashboard.
4. **Tasks:** View open tasks relating to the award.
5. **Notes:** View comments added.
6. **Attachments:** Upload and view related award files.
7. **Links:** Displays data from records in connected systems (currently not used).
8. **Admin Only:** ORGS use only.

# SEARCHING RECORDS

Cayuse has a robust search feature allowing you to search any field. Most searches will center around three fields:

- PI name
- Proposal number
- Award number

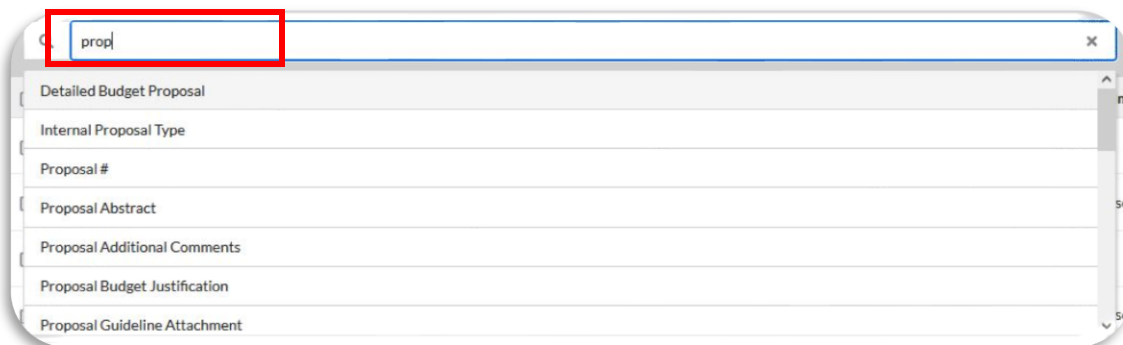
A. From either Proposals or Awards, select the search box.



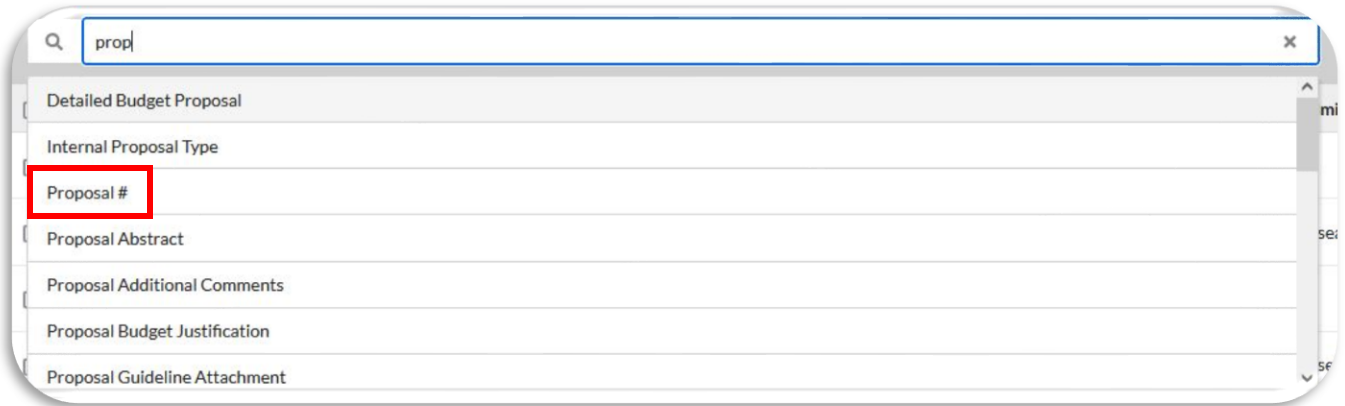
B. Click in the search box to access available search fields. All fields will populate.



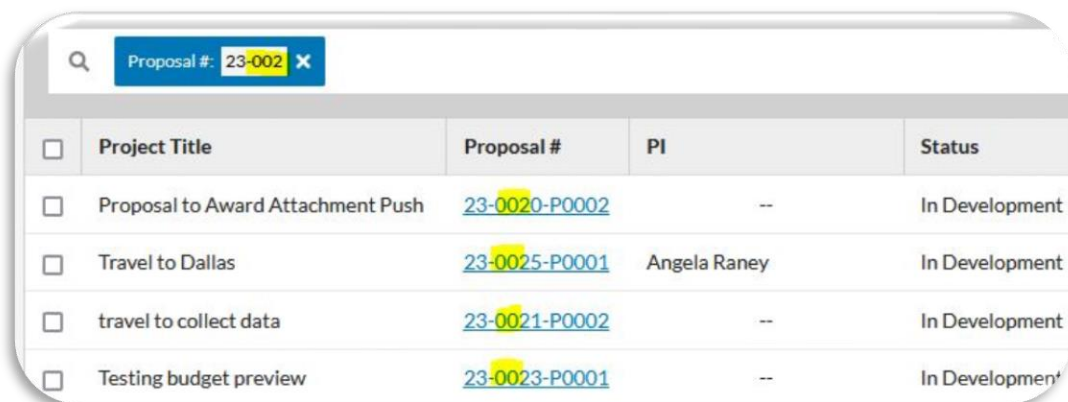
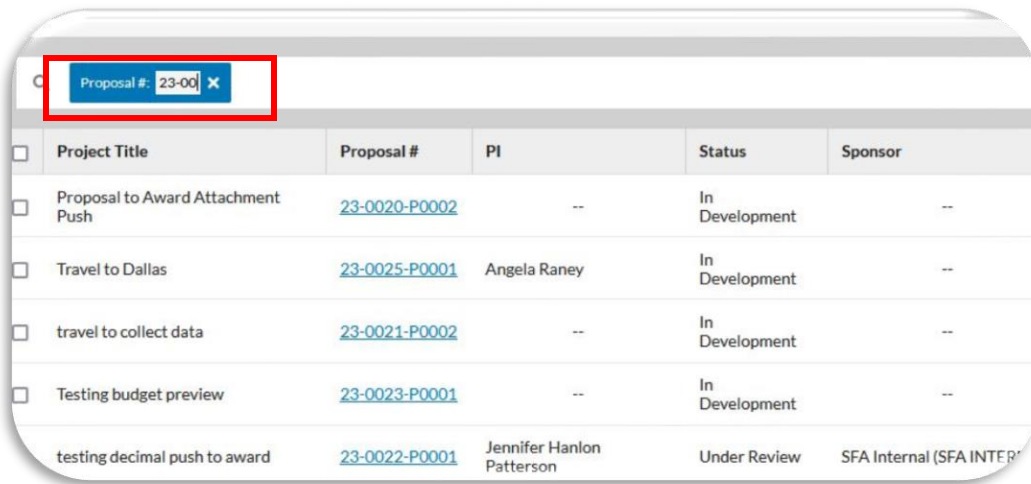
C. Start typing the field you wish to search for in the box. Once you enter a few letters, the fields will narrow based on your entry.



D. Click on the correct field.



E. A blue box with the field populates in the search box. Enter the search term (proposal or award number, or PI name). As you type, the items in the list will shorten to match your search.



F. You can then click on the Proposal or Award number to view the record.

# CREATING REPORTS

## A. Two options for generating reports:

1. **Reporting** menu allows for an overall listing of the below. You can download the report as an Excel document and customize:
  - a. Generate Award Report – downloads all awards in your unit
  - b. Generate Proposal Report – downloads all reports in your unit
2. **Download to CSV** is a customizable report so you can select what fields to run. The report will show as an Excel download.

## B. Reporting menu, select either the award or proposal report.

1. You can view the report in Cayuse or you can save or export.
2. You can sort the fields in Cayuse.
3. Fullscreen option on the far right.

AWARD #	PI	PROJECT TITLE	SPONSOR	PRIME SPONSOR	INSTRUMENT TYPE	AWARD START DATE	AWARD END DATE
22-0101-A0001	Alice Administrator	Archival Trip	SFA - Internal (SFA Internal)	--	Internal	--	--
22-0073-A0001	Irene Investigator	TEST	Department of Education	Kellogg Foundation	--	--	--
22-0266-A0001	Lex Guthery	TEST	National Institutes of Health (NIH)	--	Challenge Cost Share (CS)	28/08/2022 19:00:00	--
22-0083-A0001	Debra Dean	Paris	--	--	--	--	--
22-0069-A0003	Irene Investigator	alexis internal test	--	--	Challenge Cost Share (CS)	25/04/2022 19:00:00	--
23-0019-A0001	Alexis Guthery	Proposal to Award Attachment Push	Akzo Nobel (AKZO)	--	Grant (G)	--	--
22-0064-A0001	--	For Letitia	--	--	--	--	--
22-0251-A0001	Sherry Tucker	NCURA Conference	SFA Internal (SFA INTERNAL)	--	Internal	--	--
22-0069-A0001	Irene Investigator	alexis internal test	--	--	--	--	--
22-0074-A0001	--	Internal Project Support	--	--	--	--	--
22-0102-A0002	Irene Investigator	Summer Salary	SFA Internal (SFA INTERNAL)	--	Internal	--	--
22-0115-A0001	Irene Investigator	Tamoxifen Multiple Drug Resistant Glioblastoma Multiforme by Photobiomodulation	SFA Internal (SFA INTERNAL)	--	Internal	24/06/2022 19:00:00	--

## C. Download to CSV

Sections – You can select “all” but we do not recommend this! Below are the likely items you should include.

1. Amount matched by applicant – Only for internal proposals. This is the dollar amount the individual will provide towards the project.
2. Budget Project End State – Estimated end date.
3. Budget Project Start Date – Estimated start date.
4. College Matching Amt – For internal proposals only. Dollar amount the college will provide towards the project.
5. Cost sharing Items – For external proposals only. List of items that SFA will cost share. Typical items include salary, use of GIS lab, and equipment purchased by SFA. Chair/dean must review.
6. Course Load Reduction YN - For external proposals only. Response indicates if any faculty are requesting a course load or other reduction of work load. Chair/dean must review.



7. Created date – Date individual began the Cayuse record. Useful for monitoring purposes.
8. Department matching amount – For internal proposals only. Dollar amount the department will provide towards the project.
9. Internal proposal type – For internal proposals only. Indicates which internal grant the PI is applying for. Each type has different requirements.
10. PI – Principal Investigator. This field indicates the lead person who will manage the project. One person must be selected as the PI. This field also populates in the dashboard.
11. Prime sponsor – For external proposals only. Original source of funds. Some grants are passed down from a prime sponsor to a sponsoring entity.
12. Project # - Cayuse project number initiated by the system.
13. Project title – Title as included by the person who started the record.
14. Proposal # - Cayuse generated unique identification number for the individual proposal.
15. Proposal type – Will indicate if proposal is internal or external.
16. Sponsor – For internal grants, always “SFA Internal (SFA INTERNAL)”. For external grants, the name of the sponsoring agency.
17. Sponsor deadline – Date proposal due to sponsor. All SFA approvals must be completed no later than 5 business days prior to sponsor deadline to ensure submission. This deadline may change depending on ORGS staffing, if a new sponsor portal is required, or if other administrative approvals are required. *Any proposals received in less than 5 business days from the sponsor deadline will be submitted if time allows.*
18. Status – Current status (in development, under review, etc.).
19. Submission method – For external proposals only. This is the how SFA submits the proposal. For new sponsors or new portals, ORGS requires additional review time.
20. Total project cost – Entire cost of project (Grant + SFA).
21. Total 3<sup>rd</sup> party CS – Amount of an external entity who commits cost sharing. Additional documents are required.
22. Total SFA cost share – Total amount SFA commits to the proposal. This commitment is binding.
23. Total sponsor costs – Total amount requested from the sponsor.
24. TS Select destination - Only for internal travel grants. Will state either within Texas, out of state, or international.