Cayuse SP Training: Hands on Instruction

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Why we use Cayuse SP

• It serves as the proposal record for UNM.
• It is the portal for submitting proposal documents to OSP for review and submission to the sponsor.
• It is used to document the internal approvals electronically.
• It serves as the archive for submitted proposals as well as tracking the awards.
What is the difference between Cayuse SP and Cayuse424?

- CayuseSP is used for the internal tracking of proposals and awards.
  - Generally, ALL proposal submissions need a CayuseSP record. (see handout for details concerning when a CayuseSP record is and is not required.)

- Cayuse424 is used for creating the applications for system-to-system submissions through Grants.gov.
  - ONLY needed when you are submitting to a sponsor who uses Grants.gov as the submission portal.
Preparing to use Cayuse SP

• If you or the PI or Co-PIs need access to Cayuse SP:

  ▪ Submit a request to the UNM Office of Sponsored Projects (OSP) here: http://osp.unm.edu/cayuse-research-suite.html
    • Click “Request a Cayuse Research Suite User Account” and you will be directed to enter your UNM Net ID and Password so you can access the page where you will submit your request.

  • Once you receive an email confirmation from OSP (may take 24 to 48 hours) you will be able to log in to Cayuse SP: unm.cayuse424.com using your UNM NetID and password to log in.
Starting a New Record in Cayuse SP

Step-by-step process presented in screen in a computer lab setting

- Start a New Proposal
  - General Information
  - Investigators/Research Team
  - Budget
  - Conflict of Interest
  - Regulatory Compliance
  - Subcontractors
  - Export Control
  - Intellectual Property
  - Location of Sponsored Activities
  - Proposal Abstract
  - Proposal Attachments
  - Approving Units
  - Additional Notes
Cayuse SP 3.9 Upgrade

*Cayuse SP will be upgraded to version 3.9 on Thursday, February 20, 2020, from 6:00 p.m.-8:00 p.m. MST.*

• Cayuse Research Suite will be unavailable during this upgrade.
• Clear your browser cache and cookies after this upgrade to ensure that you can log in to Cayuse Research Suite.
• Training today will be conducted in the upgraded version.
• ***The department-level user experience will be minimally impacted.***
Cayuse Test Site

Cayuse Test Site Link: http://unm-uat2.cayuse424.com/

Password: L08o5!
Reporting Capabilities

• Sponsored Research Data Portal in MyReports was created in February 2017
• The portal uses Cayuse data and Banner Finance data.
• Provides data on pre- and post-award
• Access must be granted through a BAR

More information will be shared in the handout sent out after the training.
Cayuse SP 3.9 Release Notes

**Release Notes:**

• SP dashboard has a new look. The SP header will begin to reflect the new design of the Cayuse suite.

• Loading SP proposals when they are paired with 424 proposals now takes significantly less time.

• Proposals and Awards can now be flagged by administrators (OSP) for reporting purposes.
  • Flags on proposals and awards are viewable but cannot be added or edited by departments.

*Report any Cayuse 3.9 issues to osp@unm.edu or nolson8@unm.edu*