

# Cayuse SP Training: Hands on Instruction

*Presented by*

*Michelle Casias, Proposals and Research Administration Systems  
Manager, OSP*

*Lindsay Britt, Contract and Grant Administrator, Department of  
Psychology and CASAA*

*Vincent Sarracino, Faculty Research Support Officer for A&S*

*Isela Roeder, Faculty Research Support Officer for SOE*

*Monica Fishel, Faculty Research Support Officer, FRDO*

## 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](http://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](mailto:osp@unm.edu) or [nolson8@unm.edu](mailto:nolson8@unm.edu)