CAYUSE SP 4.0: APPROVERS

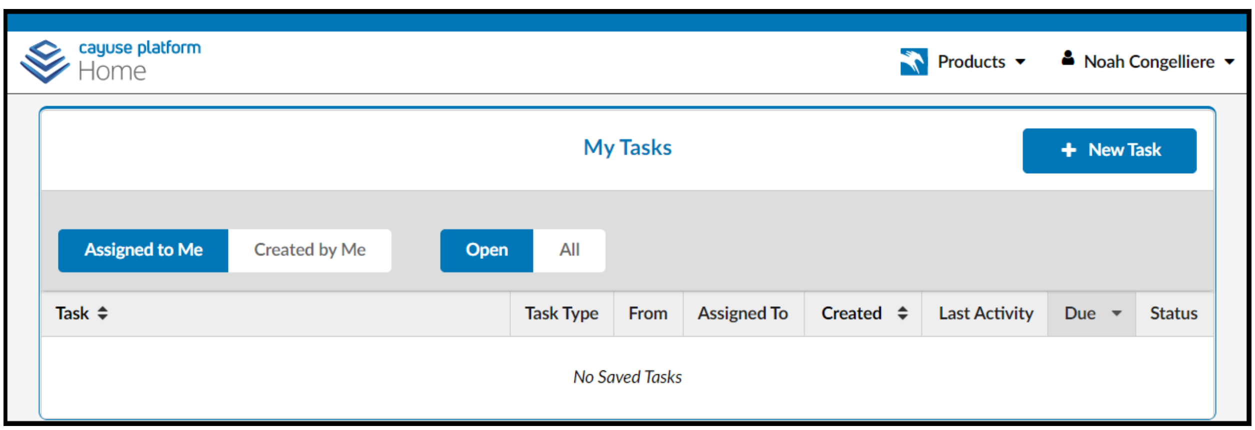
Logging In

Step 1: Navigate to the WPUNJ Cayuse Login Portal.

Step 2: Enter your SSO login information.

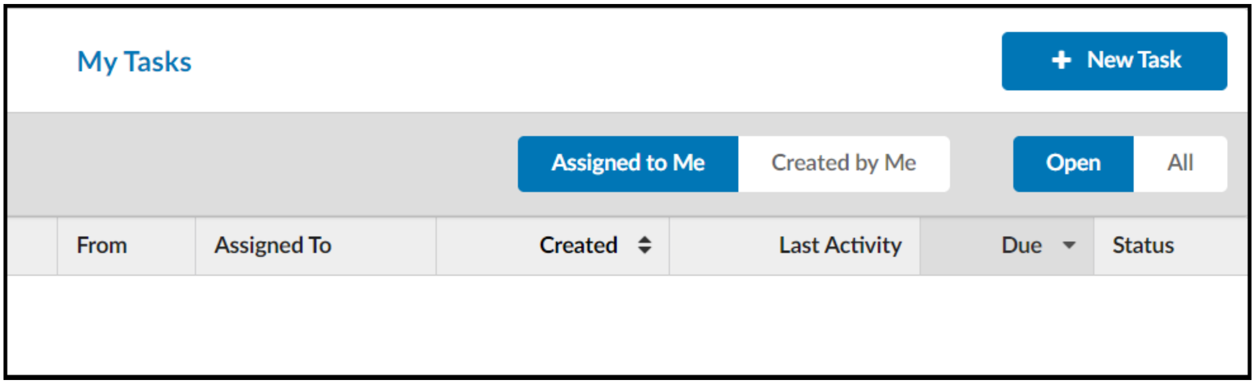
Step 3: Click “Sign in”.

Once logged in to the system, you will be taken to the Cayuse Home Screen:



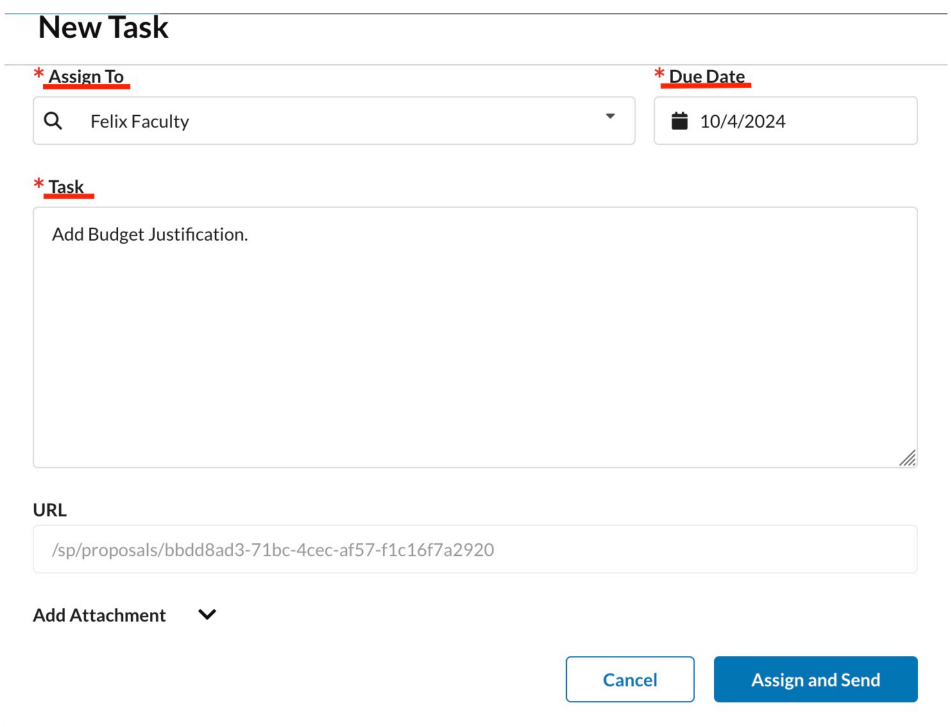
Overview of My Tasks

“My Tasks” is the area you first enter when logging into Cayuse SP. This section represents an inbox where users can create tasks related to proposal or award records and assign them to other users (Ex. You need a person to fix something on the proposal prior to submission).



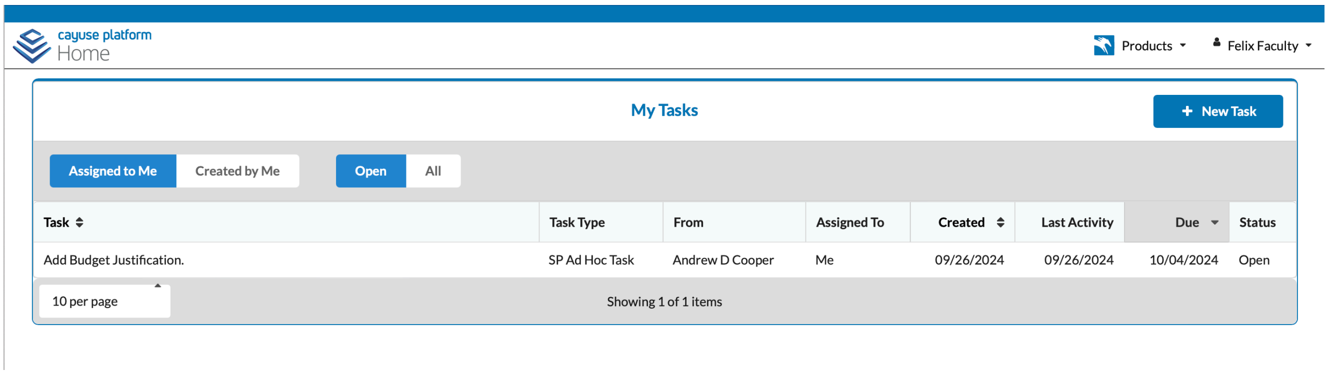
Creating a New Task

1. Click “New Task”.
2. Click “Assign To” and enter the person’s name.
3. Enter the date that the task is due.
4. Describe the task in the free-text field.
5. Click “Assign and Send”.



Receiving a New Task

If you are on the receiving end of a new task item, you will first receive an email letting you know a new task has been created for you. When you log into your "My Tasks" inbox, you will see that a new task has been added to your inbox.



- Task: The description of the requested task.
- From: The person who created the task.
- Assigned To: The person who received the task.
- Due: The date the task is due (as requested by the initiator)
- Status: The status of the task (open or closed).

Completing a New Task

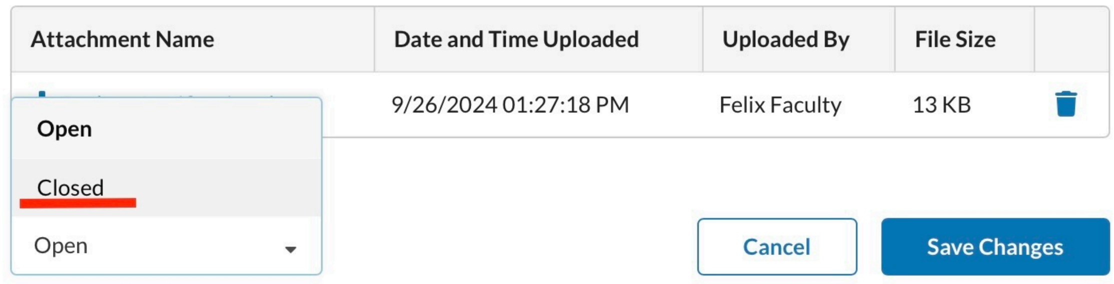
1. Click the task to open it.

2. Read what the task requires.

3. Complete the required task.

4. Change the "Task Status" from "Open" to "Closed" and then hit "Save Changes".

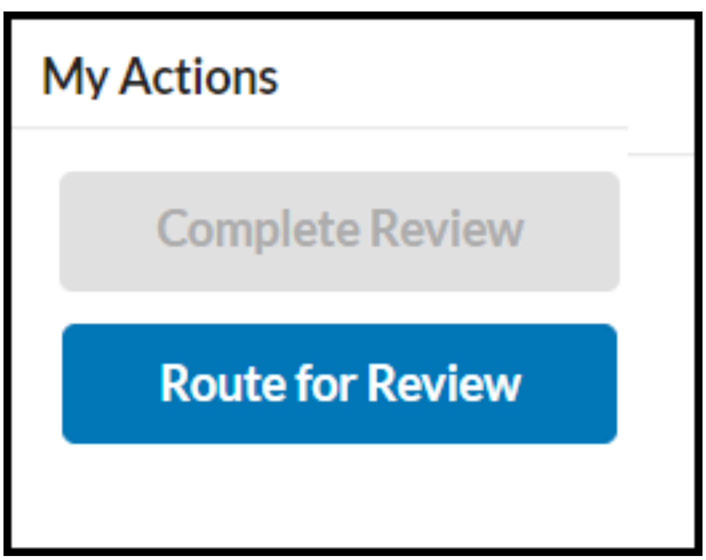
Add an Attachment



<u>Review Routing</u>

When a proposal record gets created, it's typically created by OSP Staff working closely with a Principal Investigator (PI) to develop their proposal.

Once the proposal record has been finalized, a "Route for Review" button will become clickable within the proposal record. This button will lock the proposal form and push the proposal record into a routing chain.



The Routing Chain

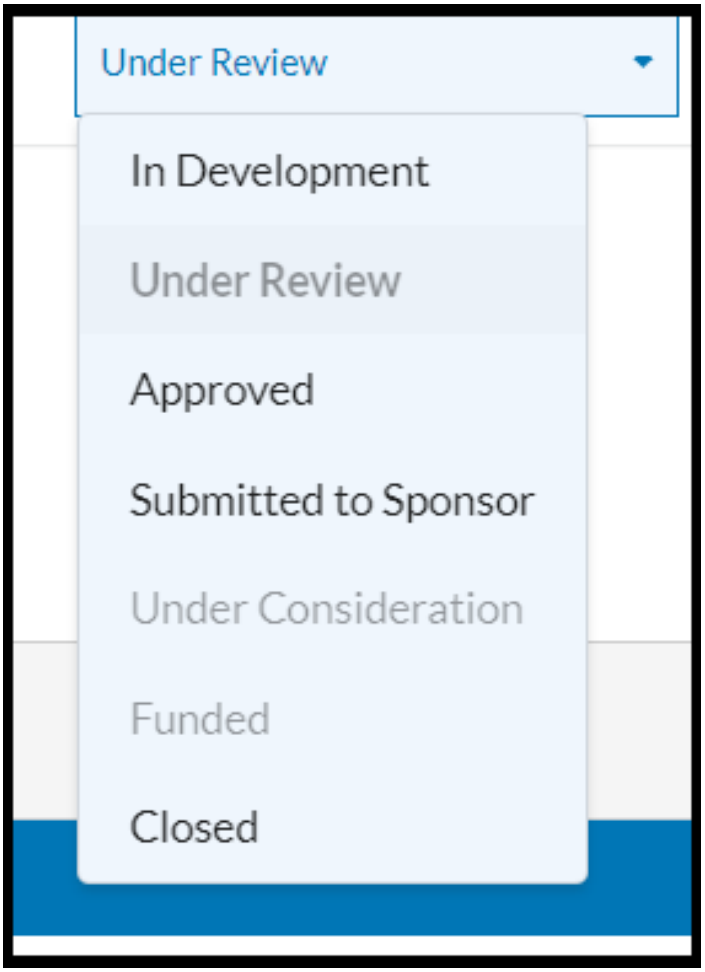
Proposal Form | Routing | History | Access | Tasks | Notes | Attachments | Links | Admin Only

Routing for Review

Review Order	Team	Members	Status	Date	Comment
1	Principal Investigator	Quayshaela Davis	Certified	9/27/2024 11:03:06 AM	
3	College of Adult and Professional Studies	Kara M Rabbitt	Pending	9/27/2024 11:03:05 AM	
4	Academic Affairs	Joshua B Powers Sandra B Hill	*Not Yet Active*		
5	OSP Executive Director	Anna Baiata	*Not Yet Active*		
--	Principal Investigator	Quayshaela Davis	Certified	9/26/2024 04:24:54 PM	

The PI (and any Co-PI's) will first certify the proposal record. They will get an email with a direct link to open the proposal record. Once opened, they will need to click the "certify" button and agree to the attestations. The proposal record is then routed to the school for approval. The proposal record is then routed to OSP for final approval and submission to the Sponsor.

At each of these different routing stages, there are associated "proposal statuses." These statuses will be visible on the proposal record (see below). From the time the proposal preparer creates the proposal record in SP, all the way until they click the "Route for Review" button, the proposal is considered "In Development". When the proposal record gets routed for review and approval, the proposal status will change to "Under Review". At this point, all of the fields on the proposal record are locked for editing.

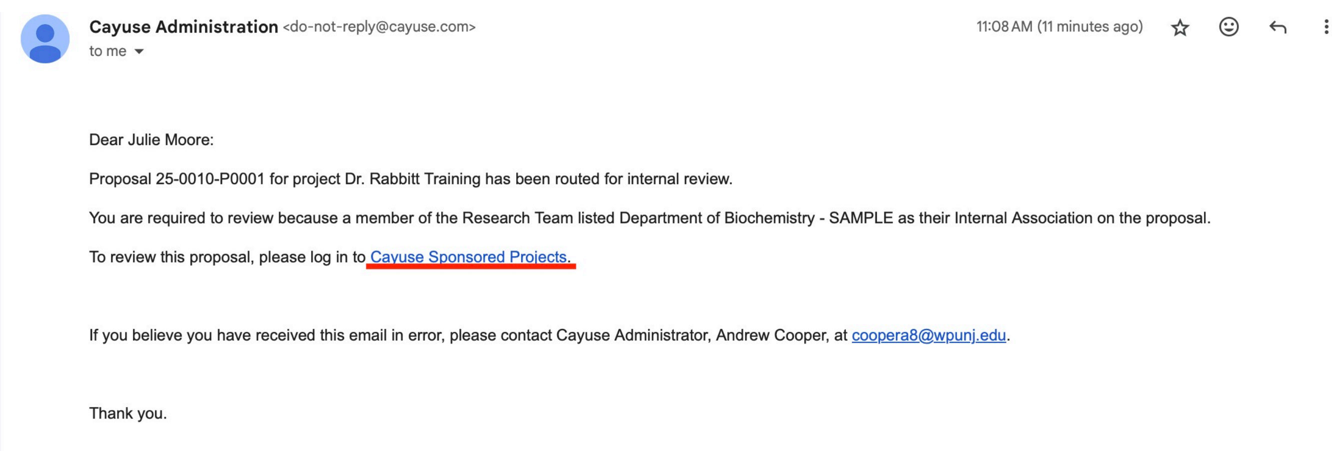


Once the proposal record is approved by OSP, the proposal status automatically changes to “Approved”. At this point, the proposal will be submitted to the Sponsor and then change the proposal status from “Approved” to “Submitted to Sponsor”.

If anyone in the routing chain disapproves the proposal record, they will be asked to supply a reason and then the proposal record will change from being “Under Review” back to “In Development”, at which point the proposal record would need to be rerouted from the beginning again.

Approvals

All proposal approvers will first get notified that a proposal record requires their approval via email (see below). The email will contain a direct link that will take the proposal preparer into the Cayuse SP proposal record.



Cayuse Administration <do-not-reply@cayuse.com>
to me

11:08 AM (11 minutes ago)

Dear Julie Moore:

Proposal 25-0010-P0001 for project Dr. Rabbitt Training has been routed for internal review.

You are required to review because a member of the Research Team listed Department of Biochemistry - SAMPLE as their Internal Association on the proposal.

To review this proposal, please log in to Cayuse Sponsored Projects.

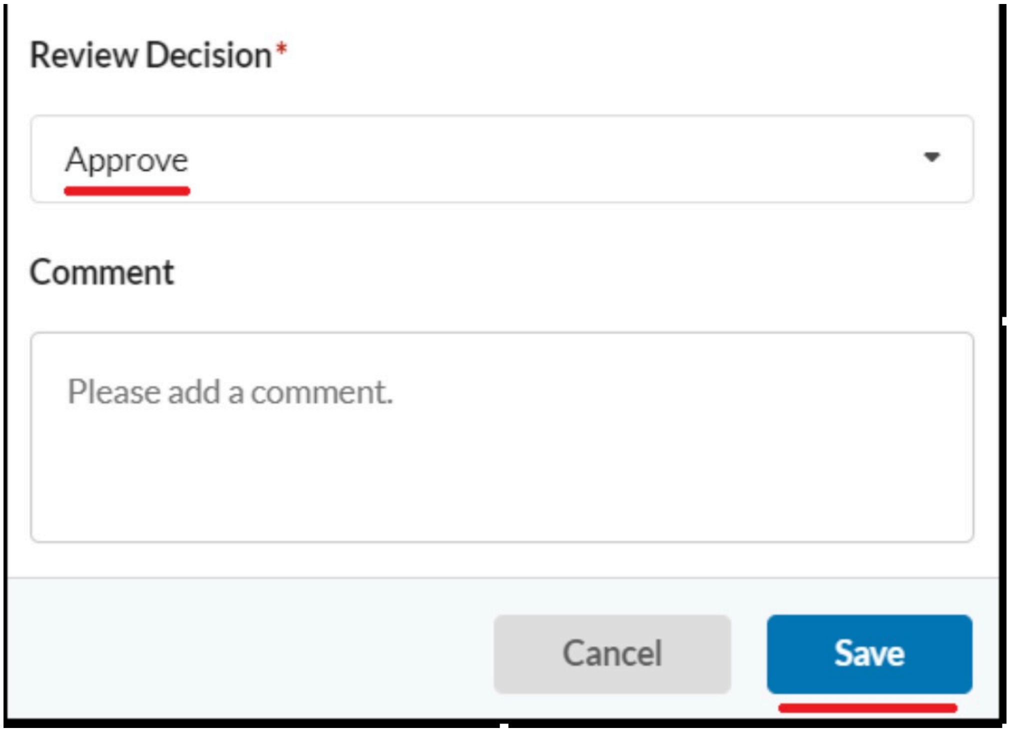
If you believe you have received this email in error, please contact Cayuse Administrator, Andrew Cooper, at coopera8@wpunj.edu.

Thank you.

To Approve a Proposal Record

1. Open the link provided in the email.
2. Click “Complete Review” in the My Actions section.
3. Select “Approve” from the dropdown.
4. Enter any optional comments.
5. Click “Save”.

The proposal record will now be approved by your routing level.



To Disapprove a Proposal Record

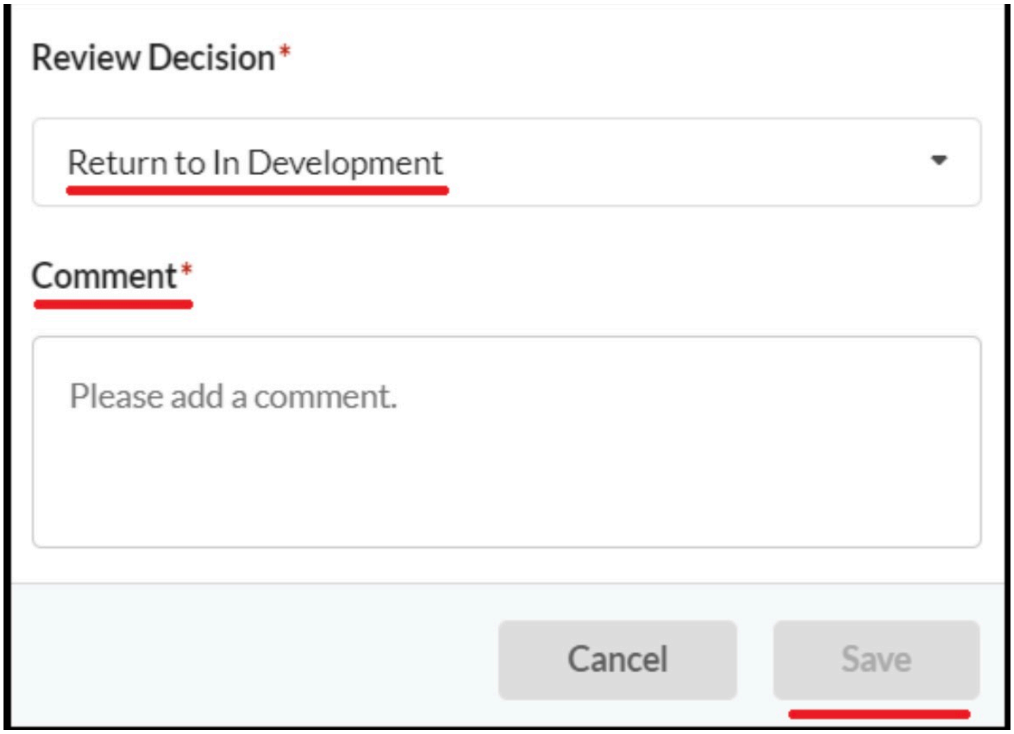
1. Open the link provided in the email.

2. Click “Complete Review” in the My Actions section.

3. Select “Return to In Development” from the dropdown.

4. Enter the required comments (Ex. the reason for disapproval).

5. Click “Save”.



The proposal record will now be returned to an “In Development” status and open to any form corrections. Once all corrections have been made, the proposal will need to be re-routed from the beginning again.

<u>Note:</u> It is best practice to provide detailed comments and action items that need to be corrected or addressed before your approval.