Introduction

Cayuse Sponsored Projects (SP) is WPUNJ's pre-award and non-financial post-award management system. Cayuse SP integrates with systems like Workday, allowing for a more streamlined and efficient connection between WP's grants and financial systems.

Below is a list of important information that will assist Principal Investigators in:

- Logging into Cayuse SP
- Certifying Proposals
- Locating Proposals
- Verifying Proposal Routing Statuses
- Navigating of My Tasks

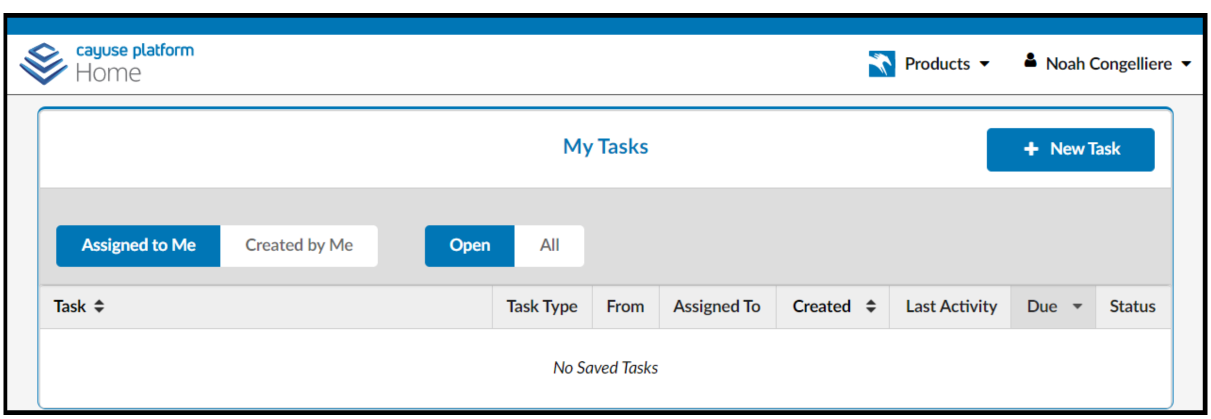
Logging In

Step 1: Navigate to the WPUNJ Cayuse Login Portal.

Step 2: Enter your SSO login information.

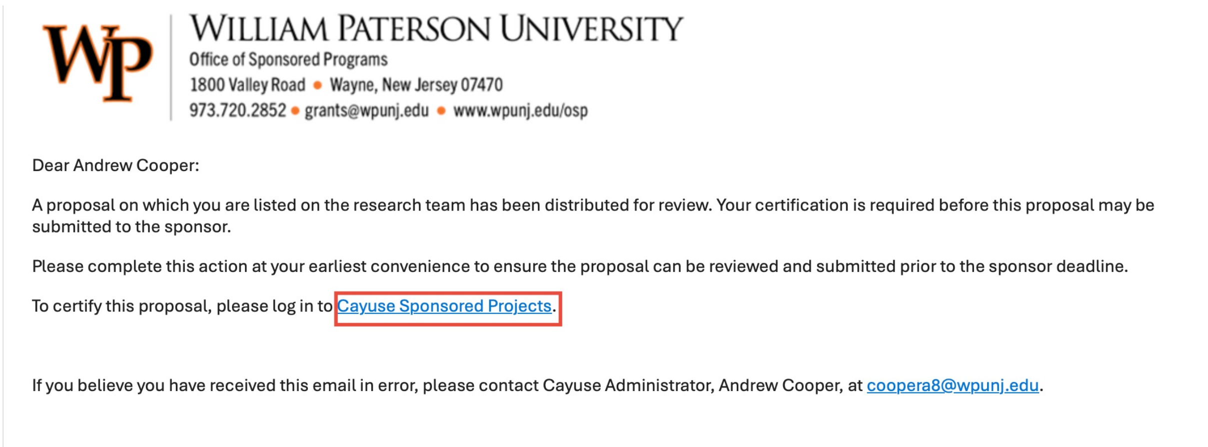
Step 3: Click "Sign in".

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



How to Certify a Proposal

When a Proposal Record has been submitted into routing, a required certification attestation will be sent to all PI, Co-PI and Multi-PIs identified in the Key Personnel section of the Proposal Record. Each PI will receive an email that contains a direct link to certify the proposal (see below).



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Dear Andrew Cooper:

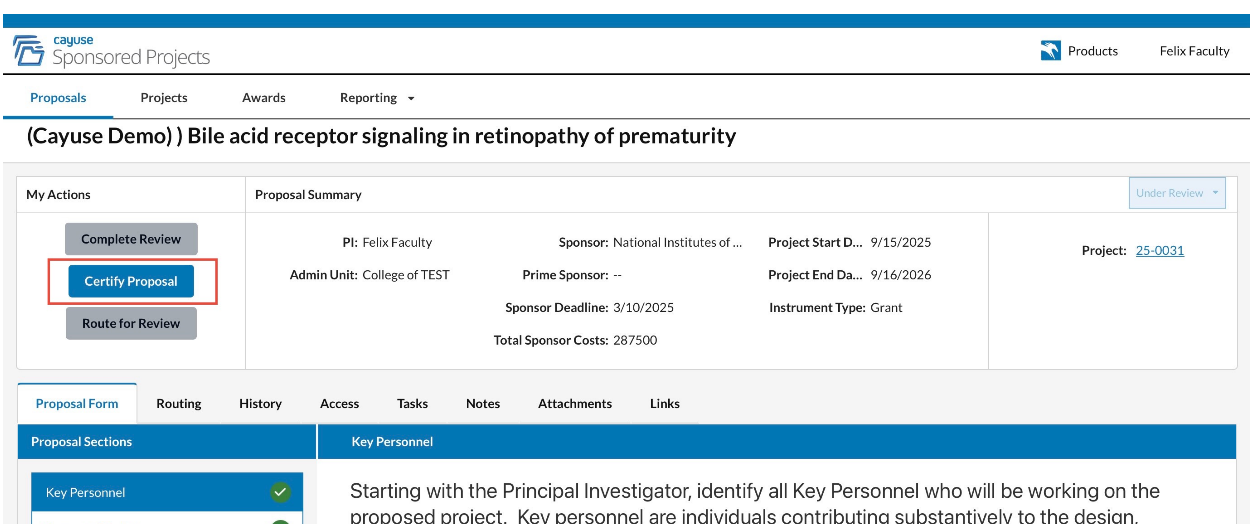
A proposal on which you are listed on the research team has been distributed for review. Your certification is required before this proposal may be submitted to the sponsor.

Please complete this action at your earliest convenience to ensure the proposal can be reviewed and submitted prior to the sponsor deadline.

To certify 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.

When the link is clicked from within the email, the Proposal Record will be automatically loaded. You will then need to click the “Certify Proposal” button in the upper-left corner of the Proposal Record under the “My Actions” area.

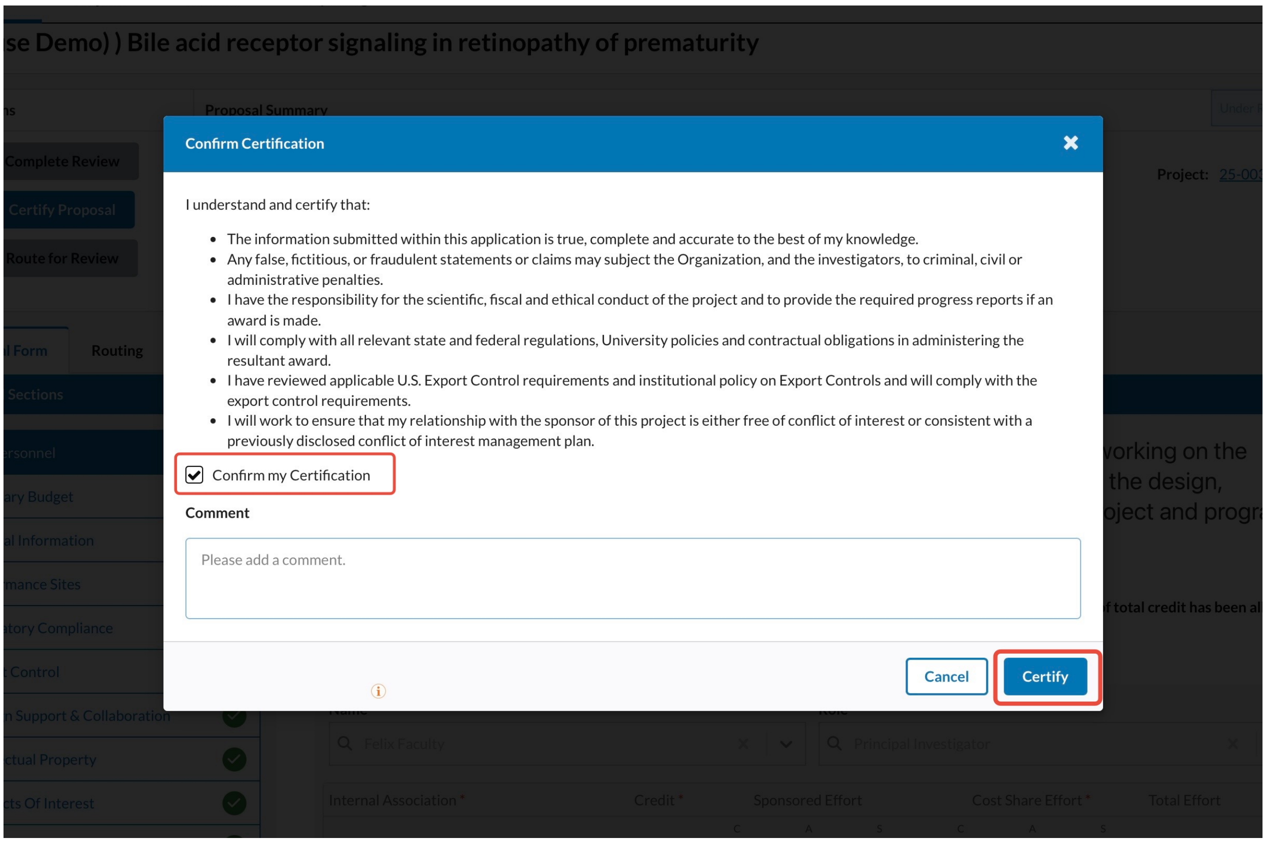


Please:

1. Read the Certifications (See Below).

2. Check the “Confirm My Certification” box.

3. Click “Certify”.



How to Locate Proposals

1. Log into [Cayuse SP]

2. Click Products > Sponsored Projects

3. Click “Proposals”

In the Proposals section, you will find Proposal Records where you are indicated as a PI, Co-PI, or Multi-PI.

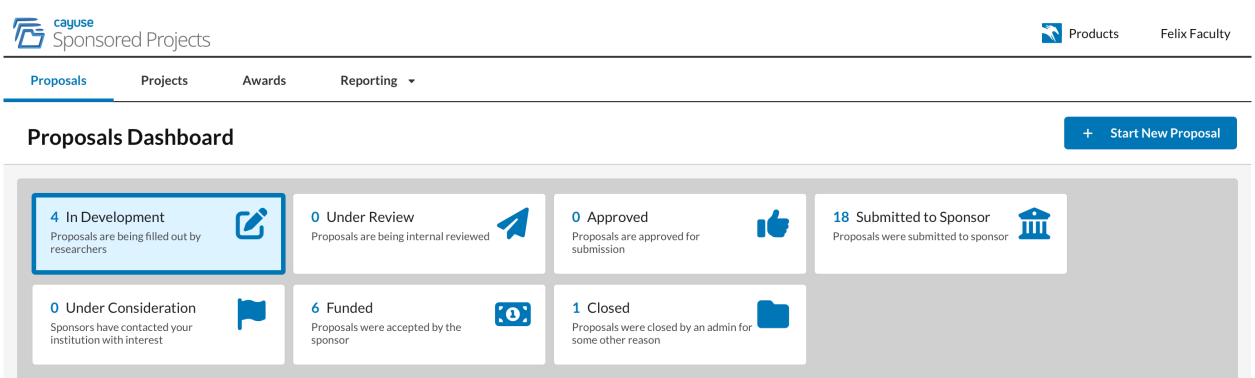
How to Open a Proposal

To open a Proposal Record, simply click the blue Proposal Number.

How to Sort Your Proposals

When you've clicked on the "Proposals" section of Cayuse SP, you will be taken to "The SP Dashboard". The default dashboard will display your total number of proposals.

You can narrow your list of proposals clicking on one of 7 status "buckets"/ tabs that organizes proposals based on their current step in the submissions cycle:



- **In Development-** Proposals that are being assembled for eventual internal review or submission.
- **Under Review-** Proposals that have been routed for internal review.

- **Approved-** Proposals that have been internally reviewed and approved.

- **Submitted to Sponsor-** Proposals that have been approved and submitted to sponsor.

- **Under Consideration-** Proposals that are under consideration by the sponsor.

- **Funded**- Proposals that have been funded by the sponsor. These will be converted into awards.
- **Closed-** Proposals are closed for the following reasons:
    - Not selected for funding
    - Withdrawn (by applicant or institution)
    - Not submitted

How to Search for Proposals

You can also use the search function of the SP Dashboard to narrow your proposals by various data fields (Ex. Sponsor, Sponsor Deadline Date etc.)

To Use the Search Function:

1. Click the Search Bar in the SP Dashboard.

2. Select the Data Field You Want to Search By (Ex. Sponsor)

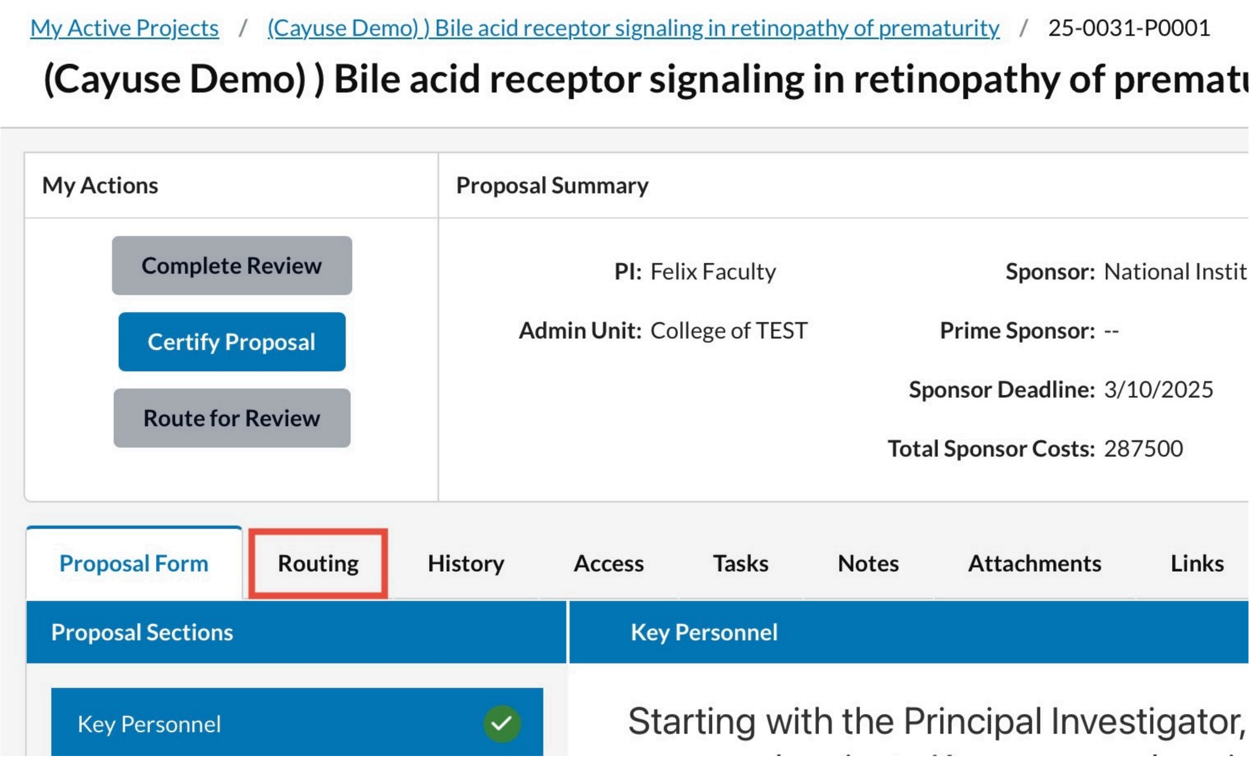
3. Type the Information into the Search Bar (Ex. National Science Foundation).

This will narrow the search results to show only the information you are searching for.

Where Is My Proposal in the Routing Process?

To check where your proposal is in the routing process:

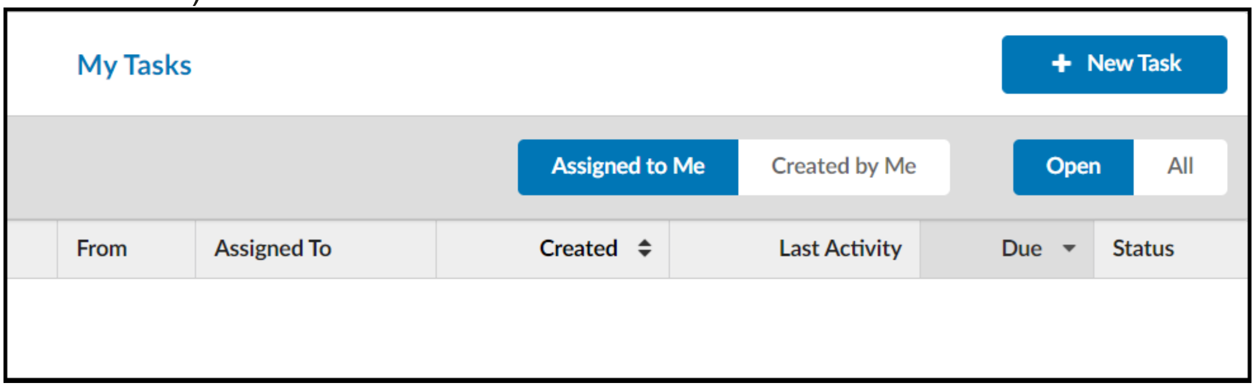
1. Log into [Cayuse SP]
2. Click Products > Sponsored Projects
3. Click “Proposals”
4. Open the Specific Proposal
5. Click the Routing Tab



The “Routing” Tab of the Proposal Form will show all person(s) who still need to approve the proposal record in order to move the proposal status from Under Review to Approved.

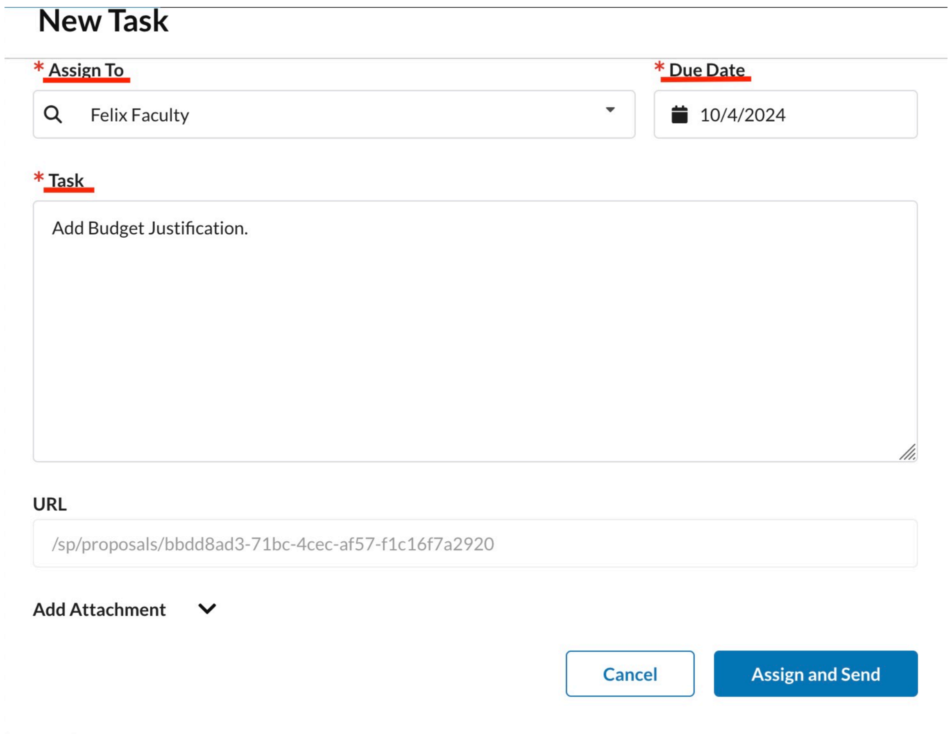
Overview of My Tasks

“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).



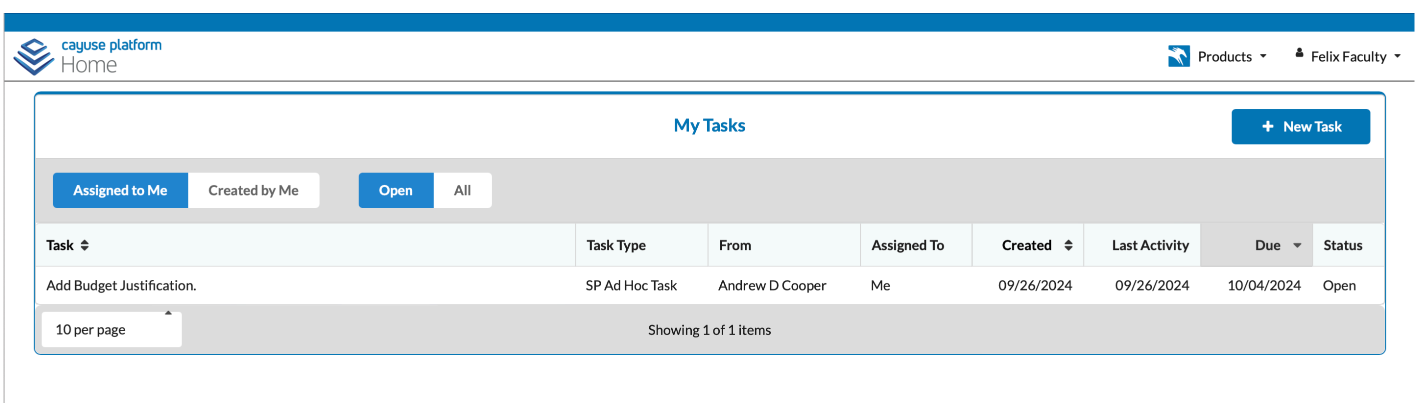
Creating a New Task

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).

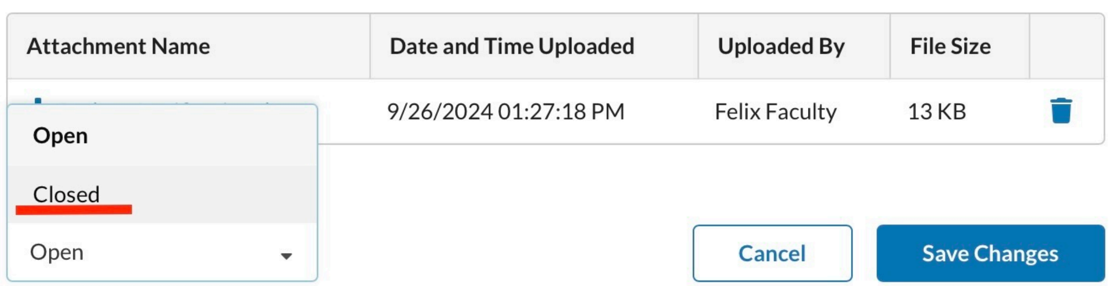
Completing a New Task

1. Click the task to open it.

2. Read what the task requires.

3. Complete the required task.

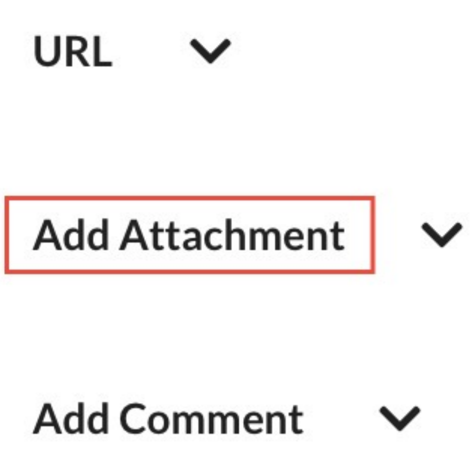
4. Change the “Task Status” from “Open” to “Closed” and then hit “Save Changes”.



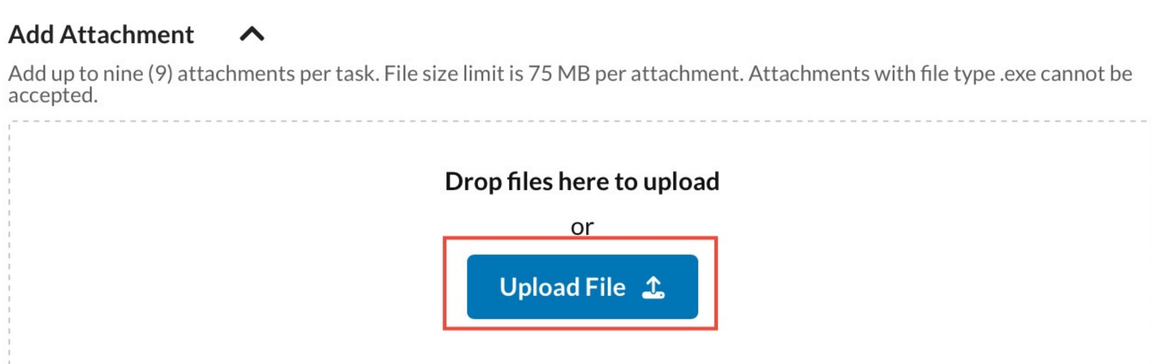
Add an Attachment

To add an attachment:

1. Towards the bottom of the page, click on the “Add Attachment” tab.



2. Click on the “Upload File” button



3. Select the desired attachment and “Upload” it.