

Cayuse SP: Administrative View Access Guide

University of California, Davis

Administrative View provides staff in the Sponsored Programs Office, Grad Studies, Clinical Trials Contracts and some other units access to different screens in Cayuse than standard users, with an increased ability to modify records.

Note: This document provides a quick overview. For more comprehensive guidance, those with **Administrative View** access can request the **Cayuse SP Business Process Handbook** by emailing proposals@ucdavis.edu.

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Obtain Access

To request **Administrative View** access email ORCayuseHelp@ucdavis.edu and include a reason for the data access. If you do not already have Cayuse access, additionally provide the following:

- Full Name
- Job Title
- Department/Unit/Office
- UCD Email
- Kerberos ID (can differ from UCD email)
- Will they be serving as an investigator on a proposal, yes or no?

The OR Cayuse helpdesk will forward your request to the SPO Director and provide access if/once approved.

Project Dashboard

1. Login to the Cayuse Research Suite (<https://ucdavis.cayuse424.com>) with your Kerberos ID and passphrase.



2. Select **Cayuse SP**.

Cayuse Research Suite

3.9.2

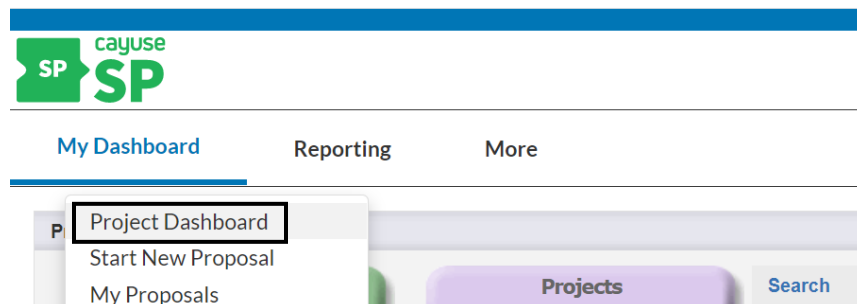
Research Administration Modules

- Cayuse SP (Sponsored Projects)
- Cayuse 424

System Administration Applications

- Backbone
- Research Contacts
- Events

If you are not automatically taken to the **Project Dashboard**, Under **My Dashboard** select **Project Dashboard**.



Find a Project, Proposal, Award or Subaward (Subcontract)

My Dashboard

Reporting

More

Project Dashboard

Refresh Dashboard | Create Project

Proposals

Unsubmitted: [428](#)
Dept Approval In Process: [51](#)
Admin Office In Process: [6](#)
PS Review: [29](#)
CS Review: [92](#)
New - Graduate Studies: [2](#)
New - UC Davis Health: [0](#)
Proposal Approved: [0](#)
Reopened: [8](#)
Submitted to Sponsor: [4033](#)
Withdrawn: [186](#)
Not Funded: [1456](#)
JIT Request Unsubmitted: [24](#)
JIT Request Received: [10](#)
JIT Request Approved: [235](#)
Pending Award: [14](#)
Under Award Negotiation: [10](#)
Funded/Preliminary: [0](#)
Funded: [7656](#)
Created In Error: [43](#)
Rejected - Late Submission: [3](#)

Projects

Active: [12610](#)
Closed (Work Complete): [88](#)
Inactive (Never Funded): [968](#)
Inactive (Work Not Completed): [21](#)
Created In Error: [257](#)
Terminated: [8](#)
Unknown: [1](#)

Awards

Active: [11149](#)
Pending: [1686](#)
Unsuccessful Negotiation: [83](#)
Closeout in progress: [510](#)
Suspended: [62](#)
Closed (Work Complete): [130](#)
Created In Error: [25](#)

Account Requests

Submitted: [6](#)
Authorized: [4](#)
Rejected: [23](#)
Funded: [189](#)
Deleted: [87](#)

Search

Search

Proposals

By: Proposal No

Search

Proposal No:

21

-

(16-9999)

Locate a **Project, Proposal, Award** or **Subcontract** using one of the following methods:

By Bucket

- Find the appropriate bucket then select the number hyperlink for the relevant type of Project, Proposal, Award or Subaward (Subcontract).

By Search Box

- Select the appropriate category (**Projects, Proposals, Awards, Subcontract, Attachment**).
 - Accounts** is not used by SPO.
- In the **By** field, select the desired search parameter.
- Complete the pop-up or text field based on the chosen search parameter.
- Click **Search**.

Projects, Proposals, Awards and Subawards (Subcontracts)

Projects are the overarching folders that contain associated **Proposals, Awards** and **Subawards**. The Sponsored Programs Office (SPO) creates a new **Project** if the:

- PI is different from existing proposals having the same sponsor and similar project title.
- Sponsor is different from previous proposals having the same PI and similar project title.
- Proposal is new – it is not revision or resubmission of a previously submitted proposal.
- Root award number or FAIN number changes from any previous award.
- Project is for a Confidential Disclosure Agreement (CDA). CDAs require stand-alone Projects.

Proposals: Cayuse SP uses the terms “**Proposal**” and “**Internal Processing Form (IPF)**” interchangeably.

- IPFs are the electronic forms routed (with attachments) in Cayuse SP for required internal campus review and approvals.

- IPFs are created not only for proposals but for significant award modifications.

Awards are created in Cayuse SP when a Notice of Award is received from a sponsor.

- As it is common for a new **Award** to be created for each funded period of a multi-year project, it is common for a single **Proposal** to have multiple **Awards**.

Subawards (“Subcontracts”): Cayuse SP refers to subawards as **Subcontracts**.

- **Subcontracts** in Cayuse SP refer exclusively to “outgoing” subawards, which is when UC Davis receives funding from a prime sponsor and sends an “outgoing” subaward to a subrecipient institution for intellectually significant collaborative work on a research project.
- Incoming subawards are handled like regular awards in Cayuse SP.

Determine the Status of a Project, Proposal, Award or Subaward (Subcontract)

1. The **Status** is listed to the right of a search list.

Projects							
Search Projects By: Lead PI = Charlie Apple							
Filter Projects: Active Inactive All							
Project No	Lead PI	Title	Sponsor	Obligated Amount	Begin Date	End Date	Status
+ A21-0732	Charlie Apple	Version 3.9 Project Screenshot	National Science Foundation (NSF)	\$0.00	07/01/2020	06/30/2024	Active
+ A21-0730	Charlie Apple	SDPS Class Sample - Do not delete	NIH National Institute of Allergy and Infectious Diseases (NIAID)	\$759,350.00	01/01/2021	02/28/2022	Active
+ A20-3499	Charlie Apple	CDA: In Vivo Testing, MOU: Keep Tahoe Blu	Frogs Leap Farm, LLC	\$0.00	03/01/2020	02/28/2021	Active
+ A20-3497	Charlie Apple	Testing...	American College Of Rheumatology Inc.	\$142,750.00	01/01/2018	03/31/2021	Closed (Work Complete)

- a. See **Status Definitions** (in **Appendix**) for [Projects](#), [Proposals/IPFs](#), [Awards](#) or [Subcontracts](#)
- b. See [below](#) to determine the status of an **Advance Account Request**

Additional Award Status details

- On the **Award Administration** screen (*see next section to help find it*) you can see both the **Award Status** and **Reporting Designation**.

Award: [A20-3497-001](#) Sponsor: American College Of Rheumatology Inc. Award Begin-End Dates: 01/01/2018 - 12/31/2019
 Project: [A20-3497](#) Prime Sponsor: Amount: \$142,750.00 (Obligated)
 Lead PI: Charlie Apple Sponsor Award: 123456 Prime Account:
 Admin Unit: Med: Intl Med- Infectious Disease Instrument Type: Contract
 Project Title: Testing...

General

People

Budget

Distributions

Proposals

Flags

Sponsor Award No:

123456

Type:

New

Document No:

A20-3497-001

* Award Status:

Closed (Work Complete)

* Reporting Designation:

Obligated

* Admin Unit:

Med: Intl Med- Infectious Disease

Official Report Date:

mm/dd/yyyy

Clear

Award Status Reporting Designation

Pending	Anticipated	A Notice of Award has not yet been received by UC Davis.
Pending	Obligated	A Notice of Award has been received but not yet approved/signed by the Sponsored Programs Office (SPO) on behalf of the UC Regents.
Active	Obligated	The Notice of Award has been approved/signed by SPO and during an overnight update will be/has been sent to Contracts and Grants Accounting (CGA) for distribution of funds.

- See [Award Status Definitions](#) for additional details.

View Associated Cayuse Records

Depending on what you searched for determines where you end up.

- Clicking on a **Project No.** brings you to the **Project Administration** screen.

Project: [A21-0730 \(Prime Acct: \)](#) Sponsor: NIH National Institute of Allergy and Infectious Diseases (NIAID) Project Begin-End Dates: 1/01/2021 - 2/28/2022
 Lead PI: [Charlie Apple](#) Prime Sponsor: Anticipated Amount: \$0.00
 Admin Unit: Med: Intl Med- Allergy Instrument Type: Obligated Amount: \$759,350.00
 Project Title: SDPS Class Sample - Do not delete

General

Awards

Budget Overview

Accounts

Personnel

Proposals**Subcontracts**

* Project Title:

SDPS Class Sample - Do not delete

* Project Status:

Active

* Admin Unit:

Med: Intl Med- Allergy

Confidential:

No

* PI:

Charlie Apple

Primary Administrative




Amie Admin

- From here, you can navigate to related **Awards**, **Proposals** or **Subcontracts**.
- The **General**, **Budget Overview** and **Personnel** tabs provide useful information.
 - The Sponsored Programs Office (SPO) does not use the **Accounts** tab.

- Clicking on a **Proposal No.** brings you to the **Proposal Administration** screen.

Proposal Administration [Back To Search Results](#)

Proposal: 20-2621	Sponsor: NIH National Institute of Allergy and Infectious Diseases (NIAID)	Submission Deadline: 4/17/2020
Project: A21-0730	Prime Sponsor: None	Proposed Begin-End Dates: 1/01/2021 - 12/31/2022
Lead PI: Charlie Apple	Instrument Type: Grant	Proposed Total Amount: \$ 0.00
Admin Unit: Med: Intl Med- Infectious Disease	Specialists: Kassie Obelleiro	
Project Title: Socio-ecological factors in Malaria transmission		

General Routing Compliance **Awards** Flags   

Investigator(s) who must certify this Proposal



Investigator	Role	Decision
Charlie Apple	Lead Principal Investigator	Not Yet Reviewed
Kassie Obelleiro	Principal Investigator	Certified on 07/14/2020 04:10 PM PDT

- From here, you can navigate to related **Awards** or to the **Project**, by clicking on the **Project** number.
 - Navigate to related **Subcontracts** from the **Project**.
- The **General**, **Routing** (*more below*) and **Compliance** tabs provide useful information.
 - SPO does not use **Flags**.

- Clicking on an **Award No.** brings you to the **Award Administration** screen.

Award Administration [Back To Search Results](#)

Award: A20-3497-001	Sponsor: American College Of Rheumatology Inc.	Award Begin-End Dates: 01/01/2018 - 12/31/2019
Project: A20-3497	Prime Sponsor:	Amount: \$142,750.00 (Obligated)
Lead PI: Charlie Apple	Sponsor Award: 123456	Prime Account:
Admin Unit: Med: Intl Med- Infectious Disease	Instrument Type: Contract	
Project Title: Testing...		

General People Budget Distributions **Proposals** Flags  

Sponsor Award No:	123456	Type:	New
Document No:	A20-3497-001	* Award Status:	Closed (Work Complete)
		* Reporting Designation:	Obligated

- From here, you can navigate to related **Proposals** or to the **Project**, by clicking on the **Project** number.
 - Navigate to related **Subcontracts** from the **Project**.
- The **General**, **People** and **Budget** tabs provide useful information.
 - SPO does not use **Distributions** or **Flags**.

- Clicking on a **Subcontract No.** brings you to the **Subcontract Administration** screen.

>> Subcontract Administration

Subcontract No: **A21-0730-S002** [\(View Project\)](#)

Subcontract Type: Original Amount: \$40,000.00

Status: (Awaiting) Award Mgr/Analyst Last Updated: 2/20/2020 03:05 PM PST - Kassie Obelleiro

Project Title: SDPS Class Sample - Do not delete Primary Admin Contact: [Amie Admin](#)



General  

- From here, you can only navigate back to the related **Project**, from where you can navigate to related **Proposals** and **Awards**.

View Notes

From any Administration screen, select the **paper** icon to view notes pertinent to that Project, Proposal, Award or Subcontract.

- Select a Note's hyperlink to view full text if necessary.

General Awards Budget Overview Accounts Personnel Proposals Subcontracts  

Notes List



Note Area Filter: Project

Note	Last Updated By	Date	Note Area	Category	Access
This is a note.	Kassie Obelleiro	09/08/2020	Project	General	Admin Office, All Parties

View Attachments

From any Administration screen, select the **paperclip** icon to view attachments pertinent to that Project, Proposal, Award or Subcontract.

- Select the attachment title to view (and then, if desired, download) the attachment.

General Awards Budget Overview Accounts Personnel Proposals Subcontracts  

Attachment List


Attachment Filter: All

Attachment	File Type	Final	Upload Type	Attachment Type	Access
FirmCommitment.pdf Uploaded by: Charlie Apple Uploaded On: 05/27/2020 At: 3:16 PM PDT	Correspondence	<input type="checkbox"/>	Post Approval	Proposal	All Parties
Agreement-FE.pdf Uploaded by: Amie Admin Uploaded On: 03/04/2020 At: 3:44 PM PST	01 Fully Executed- Sub Initial	<input type="checkbox"/>	Investigator	Award Subcontract	All Parties

Monitor Routed Internal Processing Form (IPF, aka “Proposal”)

The **Routing** tab on the **Proposal Administration** screen shows certifications, authorizations and status changes.

Proposal Administration [Back To Search Results](#)




Proposal: **20-2621**  Sponsor: NIH National Institute of Allergy and Infectious Diseases (NIAID) Submission Deadline: 4/17/2020

Project: **A21-0730** Prime Sponsor: None Proposed Begin-End Dates: 1/01/2021 - 12/31/2022

Lead PI: **Charlie Apple** Instrument Type: Grant Proposed Total Amount: \$ 0.00

Admin Unit: Med: Intl Med- Infectious Disease Specialists: [Kassie Obelleiro](#)

Project Title: Socio-ecological factors in Malaria transmission

General **Routing** Compliance Awards Flags   

Investigator(s) who must certify this Proposal

Investigator	Role	Decision
Charlie Apple	Lead Principal Investigator	Not Yet Reviewed
Kassie Obelleiro	Principal Investigator	Certified on 07/14/2020 04:10 PM PDT

Unit(s) that must authorize this proposal

Order	Unit	Authorizing Person(s)	Authorizing Decision
1	Med: Intl Med- Infectious Disease	Stuart Cohen , Kaitlyn Kirk	Not Yet Reviewed
2	Med: Intl Med (Use the PI's Int Med Dept.)	Timothy Albertson , Monique Vasquez	Not Yet Reviewed
2	School of Medicine (Use 049000)	Anurad Erdembileg , Tammi Olineka , Tasska Johnson , Randi Freeman	Not Yet Reviewed
2	OVCR - Sponsored Programs	Terrence Duperron , OR Help , Charlie Apple , Amie Admin	Not Yet Reviewed
3	UC Davis Sponsored Programs Office	Admin Office	

Status History

Status	Person	Date
Changed to: Dept Approval In Process	Changed by Amie Admin	4/16/2020, 10:25 AM PDT
Changed to: Submitted for Routing	Changed by Amie Admin	4/16/2020, 10:25 AM PDT
Changed to: Unsubmitted	Changed by Amie Admin	4/16/2020, 10:03 AM PDT

- This is where you determine the status of a submitted Internal Processing Form (IPF) and who to contact if there is a delay in the routing for required approvals.
 - Under **Investigator(s) who must certify this Proposal** look to see who has **Not Yet Reviewed**, and under **Unit(s) that must authorize this proposal** look to see the unit(s) that have **Not Yet Reviewed**.
 - To more easily prompt an individual to certify, click their name to reveal **Person Details** that include their email address.
 - Note the **Order** in the far left of the **Unit(s)** section. A **1** must review and approve before **2's** are prompted to review and approve.
 - All units must approve before the IPF will arrive to the Sponsored Programs Office (SPO) for institutional review.
 - Routing can proceed without required certifications, but these will be requested by SPO.
- The entry at the top of **Status History** is the current status of the IPF.
 - See [Proposal/IPF Status Definitions](#)

Identify the Proposal Owner, Assigned Proposals Analyst or Awards Analyst

1. [Find and open the Proposal](#) (link leads to prior section in this document).
2. On the **Proposal Administration** screen under **Specialists** (in the center of the top section) see the assigned proposals analyst.
 - a. **If two names are shown:** the name on the left is the assigned proposals analyst; the name on the right is the assigned awards analyst.
 - i. Click on a name to reveal **Person Details** that include their email address.

Proposal Administration [Back To Search Results](#)

Proposal: 20-2621	Sponsor: NIH National Institute of Allergy and Infectious Diseases (NIAID)	Submission Deadline: 4/17/2020
Project: A21-0730	Prime Sponsor: None	Proposed Begin-End Dates: 1/01/2021 - 12/31/2022
Lead PI: Charlie Apple	Instrument Type: Grant	Proposed Total Amount: \$ 0.00
Admin Unit: Med: Intl Med- Infectious Disease	Specialists: Kassie Obelleiro	
Project Title: Socio-ecological factors in Malaria transmission		

General Routing Compliance Awards Flags

Proposal Type: New	Parent Project: A21-0730
Admin Unit: Med: Intl Med- Infectious Disease	Proposal Owner: Amie Admin
Initial Funds Requested: \$42,410.00	Proposal Specialist: Kassie Obelleiro
Total Funds Requested: \$ 0.00	Contract Specialist:
Admin Office: UC Davis Sponsored Programs Office	Approving Person: Kassie Obelleiro
Status: Submitted to Sponsor	Sponsor-Assigned Proposal No: 123456
	Legacy Proposal ID:
	External System ID:
	Date Submitted to Sponsor: 06/03/2020 Clear

3. On the **General** tab of the **Proposal Administration** screen additionally see:
 - a. **Proposal Owner:** The individual, often a department administrator, who created the Internal Processing Form (IPF).
 - b. **Proposal Specialist:** Assigned proposals analyst
 - c. **Contract Specialist:** Assigned awards analyst
 - d. **Approving Person:** Signing Institutional Official for proposal submission to the sponsor

Identify Assigned Subawards Analyst

1. [Find and open the Subcontract](#) (link leads to prior section in this document).
2. Click on the **Notes** tab (paper icon). The assigned subawards analyst is entered as a Note.

>> Subcontract Administration

Subcontract No: A21-0730-S002 (View Project)	
Subcontract Type: Original	Amount: \$40,000.00
Status: (Awaiting) Award Mgr/Analyst	Last Updated: 2/20/2020 03:05 PM PST - Kassie Obelleiro
Project Title: SDPS Class Sample - Do not delete	Primary Admin Contact: Amie Admin

General

Appendix

Project Status Definitions

Status	Definition
Active	There is ongoing activity on this Project, either on a Proposal, Award, Subcontract or master agreement.
Closed (Work Complete)	Project and all associated Awards, including the closeout process, are complete.
Inactive (Never Funded)	Associated Proposal was either withdrawn, determined to not be within SPO's delegation of authority, not funded or negotiations were unsuccessful and there are currently no other Proposals in process or funded under this Project.
Inactive (Work Not Complete)	Suspended and transferred Awards, Proposals and/or Subcontracts.
Created in Error	Project was created in error.
Terminated	Project was terminated.

Proposal/Internal Processing Form (IPF) Status Definitions

Status	Definition
Unsubmitted	IPF not (yet) submitted for routing.
Dept Approval in Process	Pending unit(s) approval by IPF Approver(s).
Admin Office in Process	Received by the Sponsored Programs Office (SPO) but not assigned.
PS Review	Under review by Proposals Analyst (PS = "Proposal Specialist")
CS Review	Under review by Awards Analyst (CS = "Contracts Specialist")
Reopened	Proposal reopened for department to edit
Submitted to Sponsor	Proposal or administration action that required an IPF was submitted to the sponsor.
Rejected – Late Submission	Proposal was not submitted to the sponsor due to late submission by the PI/department and/or necessary document(s) not provided.
Withdrawn	Proposal withdrawn by the Principal Investigator (PI)
Not Funded	Either the Proposal was not funded by the sponsor, this IPF was for a letter of intent or pre-proposal that was invited to submit a full proposal, or the award mechanism was identified as one for which SPO does not have delegation of authority (e.g. vendor/service contract or gift).

JIT Request Received	SPO or PI received a Just-in-Time (JIT) request from the sponsor, which is a time-sensitive request for additional or updated content during proposal review.
JIT Request Approved	SPO has approved the JIT information provided by the PI/department.
JIT Request Unsubmitted	The PI decided not to submit JIT information.
Funded	SPO received/was forwarded a Notice of Award from the sponsor. This does not mean the award has been executed.

Award Status Definitions

Status	Definition
Active	Award is fully executed and during an overnight update will be/has been forwarded to Contracts and Grants Accounting (CGA) for distribution of funds.
Pending	Notice of Award was received. Award is being worked on; not fully executed.
Unsuccessful Negotiation	Anticipated award was not received due to either a failed negotiation, a Prior Approval denied by the sponsor, or the award mechanism was determined to be one in which SPO does not have delegation of authority.
Closeout in progress	Closeout procedure (at conclusion of funded project) is underway.
Suspended	Anticipated award not received due to a reason other than failed negotiation.
Closed (Work Complete)	Award is complete or terminated if Award designation is Active/Obligated . Award was suspended by the Award Analyst if Award designation is Pending/Anticipated .
Created in Error	Award was created by mistake.

Subaward Status Definitions

Status	Definition
(Awaiting) Admin Dept	Action is required by the PI/department
(Awaiting) Award Mgr/Analyst	Action is required by the SPO Awards Analyst
(Awaiting) Subcontractor	Action is required by the Subrecipient
Fully Executed	The Subaward is fully executed and has been sent to CGA