Cayuse FAQ's for Research Administrators

- **Internal Cayuse webpage**: https://www.k-state.edu/research/faculty/research-administration/index.html
    - o Houses instruction sheets and helpful resources about the system
    - o Where you can request a new user and new sponsor/sub/consultant
- **What are the four primary levels/screens and how are the linked? (see attached diagram)**
    - o IPF (Internal Processing Form): replaces what we used to call transmittal – level/screen where all PI, budget, compliance info is entered)
    - o Proposal Admin (PreAwards functions involving reviewing, routing and executing proposals, awards, award modifications, etc).
        - ▪ Note: zero dollar awards never leave the Proposal Admin level even when fully executed because they never route to SPA
    - o Award Admin (PreAwards 'sends' the processed transaction to SPA for Oracle setup and input into Cayuse under one umbrella project),
    - o Project Admin (SPA functions involving any management of the funds such as invoicing, expenditure reporting etc. (*highest level or umbrella view*)
- **What level/screen do I need to be on to see ALL of the attachments?**
    - o Project Admin (highest level that all 'lower' level information/attachments flow up to)
- **How can I search the Global Access dashboard by:**
    - o **Sponsor**? Proposal/Sponsor OR Project/Sponsor
    - o **Sponsor's IDC rate**? Proposal/Sponsor, select record, open PDF or go into IPF to view budget section OR Project/Sponsor and select a project, click Budget Overview, scroll down and see rate
    - o **Funding status**? Proposal/Researcher Team Name
        - ▪ Important to remember that each IPF represents a ROUTING. There may be multiple records for proposal, award, mods; if you sort by Title it will help group routings that are potentially linked/related
        - ▪ Status field on far right will indicate progress made by PreAwards
        - ▪ Reference *Master Status Listing* on resources webpage linked at top of FAQs
    - o **Faculty member**? Proposal/Researcher Team Name
    - o **Department**? RADAR (Departmental Award Search report under RAC)
        - ▪ Important to note that Cayuse Global Access dashboard searches by Admin Unit (lead department unit for the record, not all of the departments involved). Must use RADAR search to pull all awards where faculty in one department may not be the lead.
    - o **Oracle award number**? Cayuse Global Access Dashboard: Award/Award Legacy No (it will accept partial account numbers)
    - o **Oracle project number**? Cayuse Global Access Dashboard: Accounts/Account Number (this will work for Oracle award number too unless it is a legacy award #)
- **Why are some Oracle account numbers listed as only the Oracle project while others are both the Oracle award number followed by project number?**

- o The legacy information was loaded into the system with just Oracle project number. It was quickly determined that it would be better to have both award and project number so accounts entered after July 1, 2019 will contain both award and project number.
- **Where can I find the Oracle award number in a record, if I don't already know it.**
  - o Award Administration screen under General tab. Field name Legacy Award No.
- **What is RADAR and would it be helpful for me?**
  - o K-State built system, using Microsoft PowerBI, for reporting. Reports are being added continuously for your use. If you have other needs for reporting, please contact radar@ksu.edu.
- **How do I know if something has made it to SPA yet and/or how do I know if SPA is done?**
  - o Search Global Access dashboard by Project/Number (if Mod and you know the Cayuse #) or by Lead PI Name; select appropriate record from the search results.
  - o Click Awards tab and check Award Status
  - o Reference *Master Status Listing* on the Cayuse Resources webpage linked at top of FAQs (Awards section)
  - o Click into Award record; Official Report Date is the date PreAwards sent record to SPA
- **How do I request an Overdraft?**
  - o Reference *Requesting an Overdraft o*n resources webpage linked at top of FAQs
- **How do I find the routing status of an Overdraft?**
  - o Global Access dashboard – red/orange box at bottom titled "Account Requests" is where all requests are listed. You can confirm if the overdraft is still under "Submitted" and awaiting either department head or dean approval or if it is under "Approved" and is being process/has been processed by PAS and SPA.
- **How do I process a:**
  - o **NCTE**? If you are unsure of what the sponsor requires, then email Cecelia to initiate and she will confirm what she needs; no Cayuse action is required (will be done by Cecelia)
  - o **Budget Revision**? Email Tim to initiate the revision and he will confirm required docs, potentially internal breakdown, Expanded Authorities Authorization (EAA)form, etc.; no Cayuse action is required (will be done by Tim)