SP SP cayuse **SLCC Office of Sponsored Projects User Guide**

Introduction and General Overview of Cayuse SP

The Office of Sponsored Projects (OSP) at Salt Lake Community College (SLCC) uses Cayuse SP to manage all sponsored projects.

Cayuse SP captures and organizes sponsored project information that will be used for proposal development, SLCC's internal approval process, and to complete the project application. Proposals must be created in Cayuse SP for all sponsored projects.

Cayuse SP also serves as the OSP management tool for awards, tracking post-award activities, compliance and closeout.

Getting Started with Cayuse SP

Browser Support for the Research Suite
Cayuse SP can be accessed on various browsers on either Windows or Macintosh systems.

> **Windows**
> - Recent versions of Google Chrome, Microsoft Internet Explorer 11 or Mozilla Firefox are supported.
> - Provisional support for Microsoft Edge.
> - Internet Explorer 10 and older versions are not supported.
>
> **Macintosh**
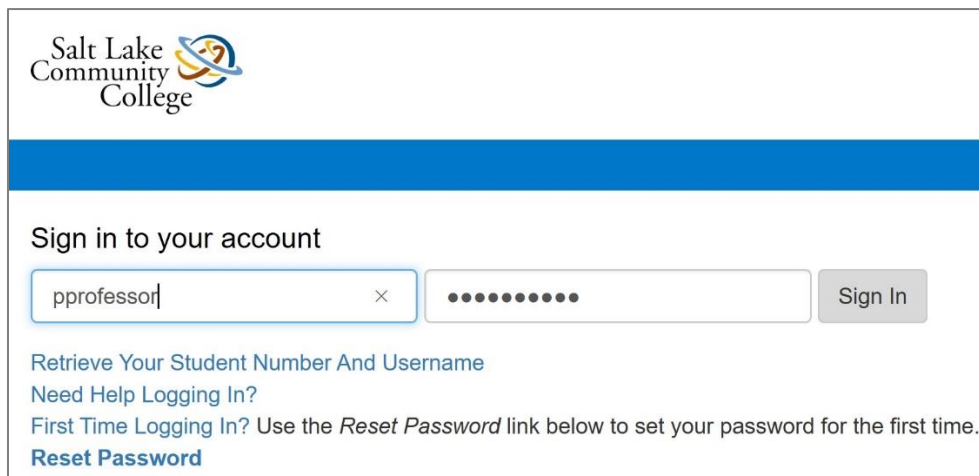> - Provisional support for recent versions of Google Chrome and Apple Safari.

Cayuse SP runs entirely in a web browser. Upon navigating to Cayuse for the first time, your browser may present a security warning prompting you to accept a certificate. This is safe. Cayuse purchases and maintains electronic certificates that are approved for Internet commerce and are compliant with Internet security standards. Accept the certificate permanently and you will proceed to the login screen.

In order to use Cayuse, you will need to configure your browser to enable cookies, allow pop-ups, enable JavaScript and clear cookies.

In some browsers, cookies and pop-ups can be configured on a site-by-site basis. For detailed instructions on how to configure your browser, see **Appendix 1: Browser Settings Setup** at the end of this document.

Logging into Cayuse SP

The main login page for Cayuse SP is: https://slcc.cayuse424.com/. This address will send you to your Salt Lake Community College login page as seen below.

This is a single sign-in application. Your username and password are the same login assigned to you by Salt Lake Community College (the username and password that you use to log into MySLCC and other SLCC applications). Enter your username and password and click the **Sign In** button. You will then see the Cayuse Research Suite main landing page where you can launch Cayuse SP:
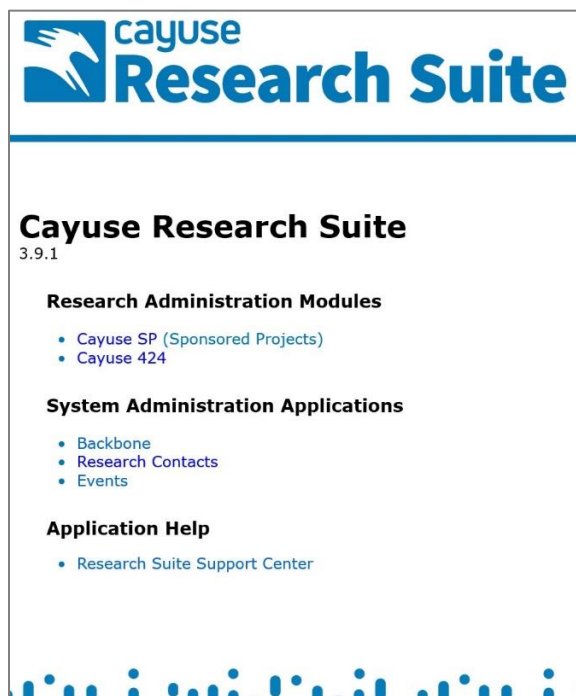
Select the desired application from the list seen below to launch the application in a new browser tab.
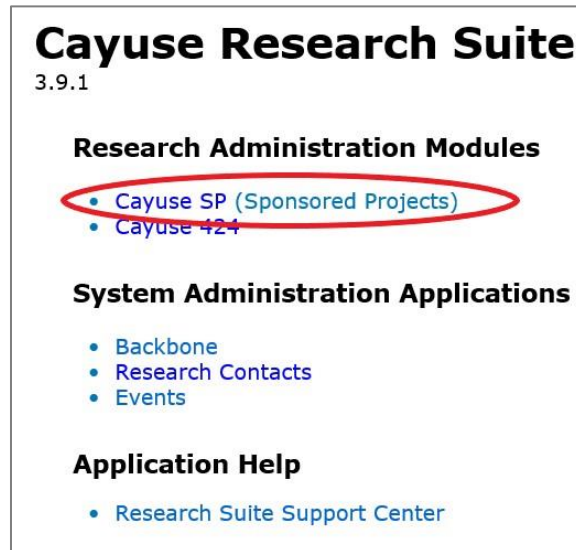
Click **Cayuse SP (Sponsored Projects)** to enter the Cayuse SP module and begin developing your proposal.

For further information on other modules and application within the Cayuse Research Suite, see the brief bulleted descriptions below:

- **Cayuse SP** is used to begin a proposal, develop a proposal, complete SLCC's internal approval process, and submit the project application. All Principal Investigators (PIs) at SLCC must use Cayuse SP for their proposal to be eligible for submission to the sponsor. This user guide is specific to Cayuse SP.

  Cayuse SP also serves as the OSP management tool for awards, tracking post-award activities, compliance and closeout.

- **Cayuse 424** is a module that provides an easier, faster interface to Grants.gov for submitting research proposals to federal agencies. Cayuse 424 collects the necessary data and attachments, performs validity checks and makes an automated "system-to-system" submittal to Grants.gov. The system stores profile information, SLCC institutional data, populates forms and helps to reduce common errors. All Grants.gov, Research.gov and Fastlane submissions are submitted through Cayuse 424. OSP administers all proposal submission. For more information contact your grant officer.

- **Backbone** is used by the Office of Sponsored Projects to manage information within Cayuse SP. Principal Investigators will not have access to this application.

- **Research Contacts** provides quick access to department and personnel contact information at SLCC. It also provides information on roles within the Cayuse Research Suite.

- **Events** is an application that is used by the Office of Sponsored Projects to manage workflow within Cayuse SP. Principal Investigators will not have access to this application.

- **Research Suite Support Center** provides access to the Cayuse Help Center. Instruction for setting up a help center account is described later in this user guide.

Cayuse SP Home Page

Once you have clicked into Cayuse SP (Sponsored Projects) from the Cayuse Research Suite main landing page, you will be directed to the Cayuse SP home page:
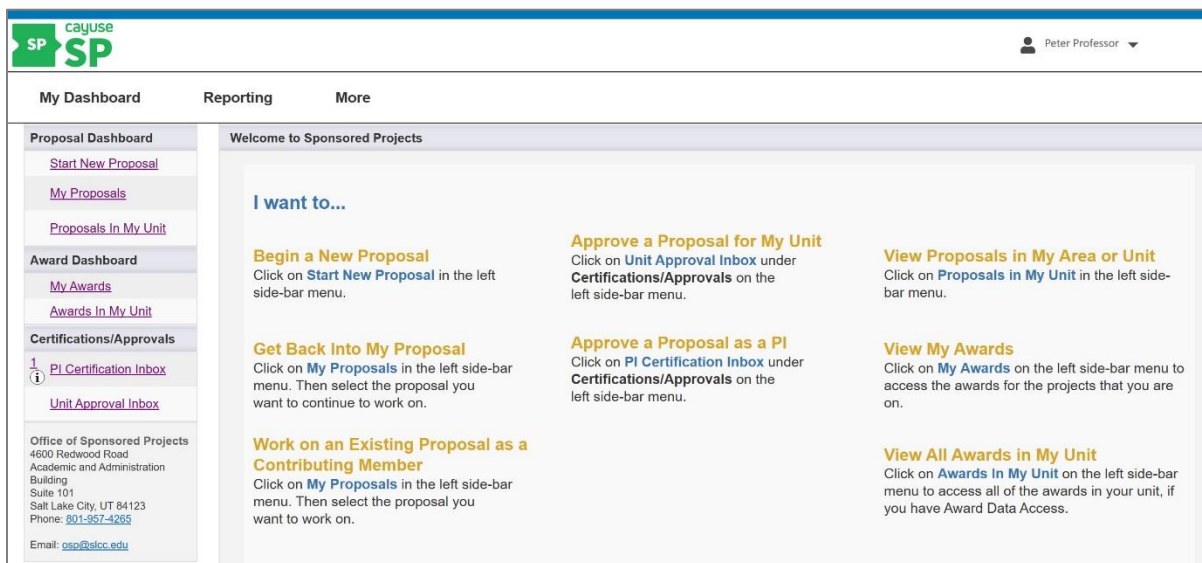
This page displays instructions on how to use the left-side menu depending on the user's role and authorization in Cayuse SP, and the current status of the proposal(s) and award(s). These eight instructions are described in more detail below:

- **Begin a New Proposal:** If you are a Principle Investigator (PI) and want to begin a new proposal, click on **Start New Proposal** located under **Proposal Dashboard** on the left side-bar menu. This will send you to the first page that you need to fill out in order to begin your proposal.

- **Get Back into a Proposal:** If you are a Lead-PI and want to get back into a proposal, click on **My Proposals** located under **Proposal Dashboard** on the left side-

bar menu. This will send you to a list of proposals that you have started or have access to.

- **Work on an Existing Proposal as a Contributing Member:** If you are a contributing member of a research team and want to work on an existing proposal, click on **My Proposals** located under **Proposal Dashboard** on the left side-bar menu. This will send you to a list of proposals that you have access to.

- **Approve a Proposal for My Unit:** If you are an approver who has been notified that you need to review and approve a proposal, click **Unit Approval Inbox** located under **Certifications/Approvals** on the left side-bar menu. The Unit Approval Inbox is only for Directors, Associate Deans, Deans, Vice Presidents, Cabinet, and other authorized approvers for the Salt Lake Community College internal approval process.

- **Approve a Proposal as a PI:** If you are the Lead-PI on a proposal and ready to certify your proposal, you will click on the **PI Certification Inbox** located directly under **Certifications/Approvals** on the left side-bar menu. The PI Certification Inbox is only for Lead-PI's who have proposals ready to be certified and routed for approval.

 By certifying the proposal, the Lead-PI confirms that:
  - The information submitted within the application is true, complete, and accurate
  - Any false, fictitious, or fraudulent statements or claims may subject them, the College, and other investigators to criminal, civil or administrative penalties
  - They are responsible for the scientific, fiscal and ethical conduct of the project and to provide all required reports and materials to the sponsor if an award is made
  - They have read the solicitation thoroughly and will comply with all relevant state and federal regulations, College policies and contractual obligations in administering the award
  - They are not presently debarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from participation in government grant activities by any government agency.

  The Lead-PI must certify their proposal to begin the SLCC internal approval process.

- **View Proposals in My Area or Unit:** If you want to view proposals in your area or unit, click on **Proposals in My Unit** located under **Proposal Dashboard** on the left side-bar menu.

- **View My Awards:** If you want to view your awards, click on **My Awards** located directly under **Award Dashboard** on the left side-bar menu. This will give you access to a list of all obligated awards on which you are listed as a member of the Research Team.

- **View All Awards in My Unit:** If you want to view all the awards in your unit, click on **Awards in My Unit** located under **Award Dashboard** on the left-side menu. This will give you access to a list of obligated awards in units which you have been granted award data access.

The home page **Top Menu Bar** is a permanent feature to help you navigate the Cayuse SP module.
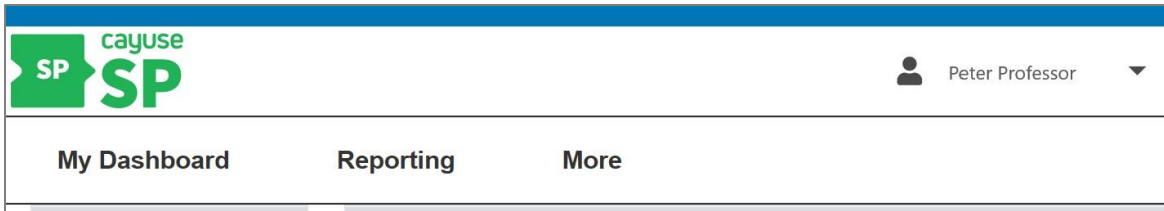

The **My Dashboard** button is a drop-down menu that contains all the left side-bar menu items as described above. Click on My Dashboard to reveal the drop-down menu.
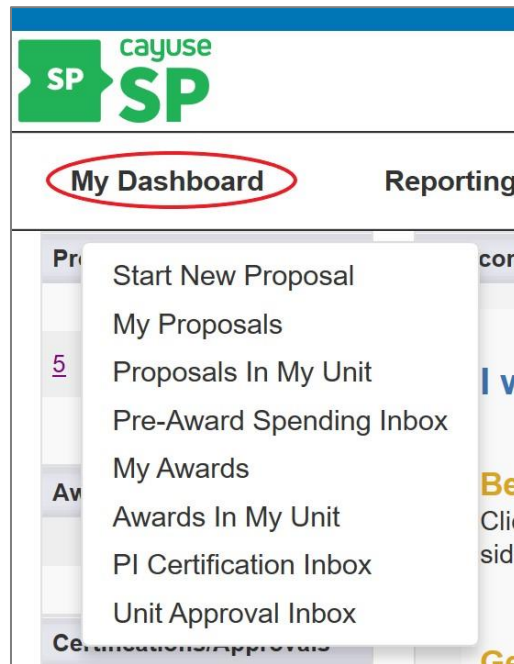
The My Dashboard drop-down box also includes a **Pre-Award Spending Inbox** link which is used to authorize or reject pre-award spending requests. You need to have pre-award spending approver permissions for your unit in order to use this feature.

The **Reporting** button on the Top Menu Bar takes you to the Cayuse SP Reporting page. This page is divided into three major categories: Proposals, Awards, and Projects. Users can generate reports on proposal activity, funding rates, awards by unit, PI, sponsor, and other categories. Reports can be exported to Excel to further customize the data. All users in Cayuse SP can run

reports, but the ability to see record data in the report format is limited to those users with access to that record, usually the research team and unit personnel.
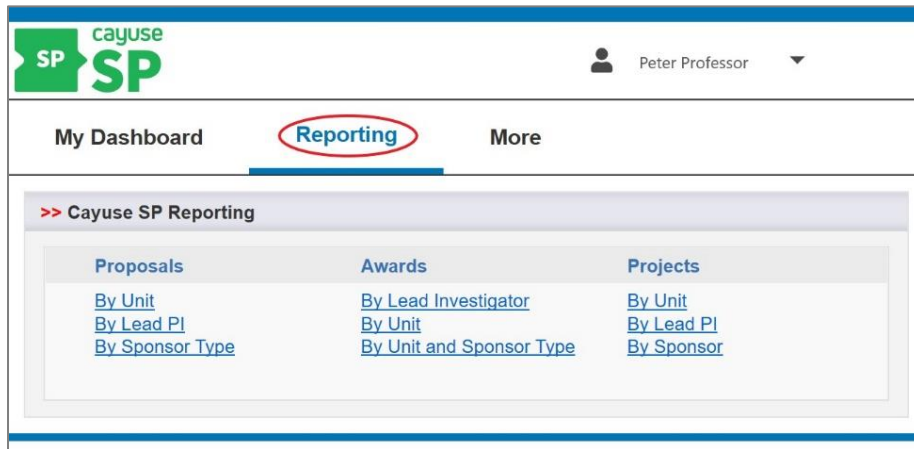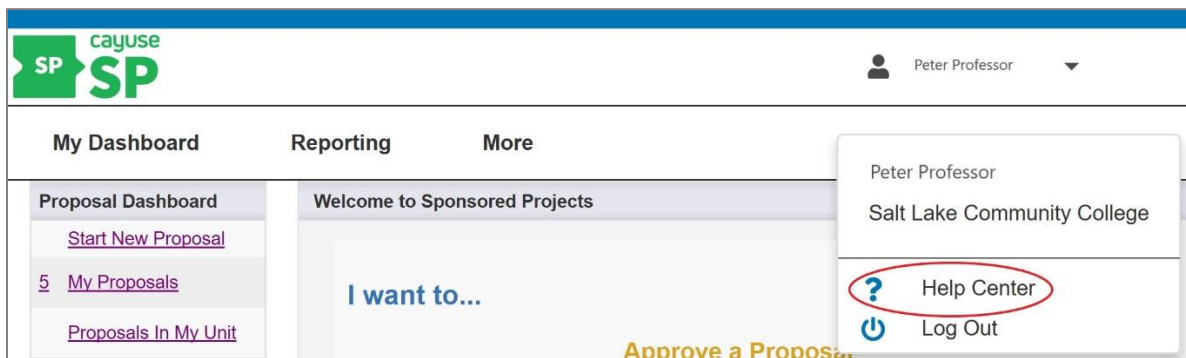

For more information on reporting, contact OSP.

The **More** button on the Top Menu Bar provides access to **Research Contacts**, which is a searchable tool used to find contact information for personnel working on sponsored projects at SLCC.
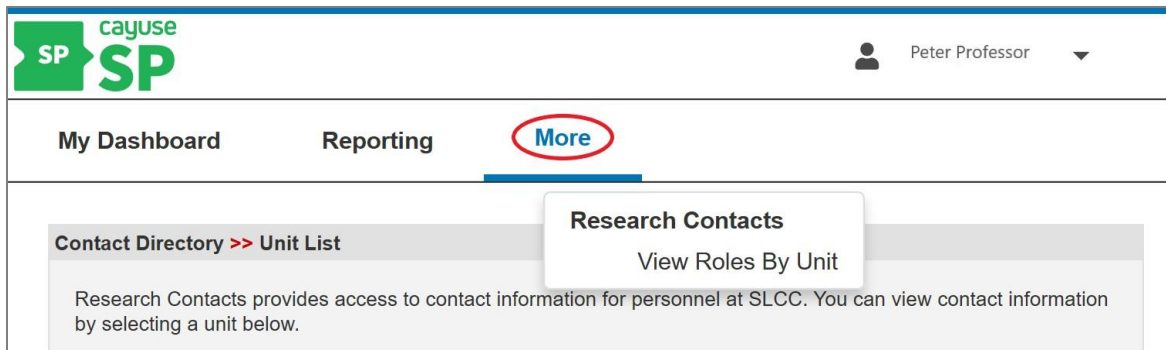
The **Help Center** is accessed by clicking the drop-down arrow next to your name in the upper right-hand corner of the screen.

Clicking on **Help Center** will take you to the Cayuse Help Center website: https://support.cayuse.com. The first time you access the Help Center website you will need to sign up for an account. Click the blue sign-up link and follow the instructions on the Cayuse Help Center sign-up page to set up your account.
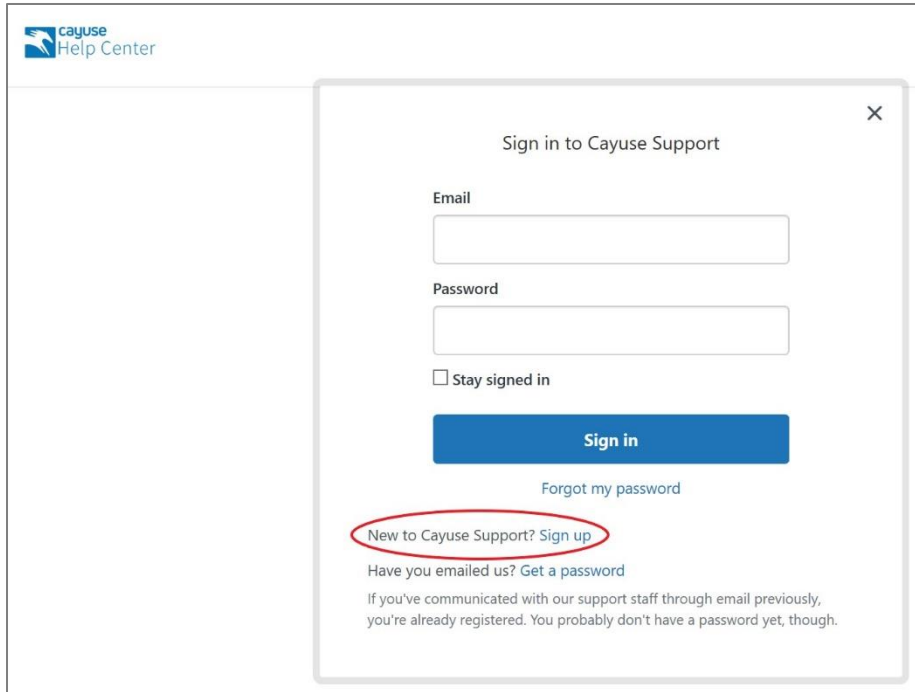
Other help options are available within Cayuse SP. When you see an orange question mark circle or a white information circle , these indicate help materials or more information is available on certain topics. Click on the question mark or information circle to reveal the helpful information.

The **Log Out** button is accessed after clicking the down arrow next to your name in the top right-hand corner of the screen. Clicking the Log Out button will log you out of Cayuse SP.
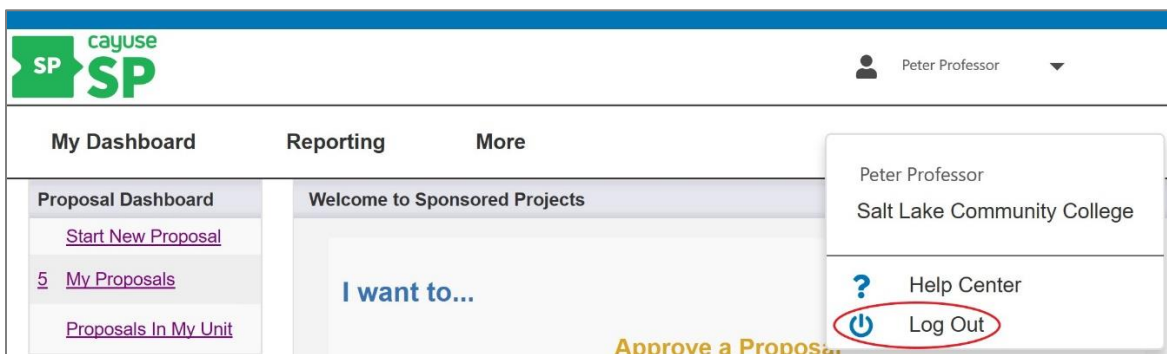
In order to fully log out of the Cayuse Research Suite, locate the Log Out button under your username on the right-hand side of the Cayuse Research Suite main landing page as shown below:

Troubleshooting

If you encounter browser issues while using Cayuse SP, please refer to **Appendix 1: Browser Settings Setup** at the end of this document for help. The appendix will walk you through setting adjustments within Chrome, Firefox, Internet Explorer, Microsoft Edge, and Safari to help you access the needed features in Cayuse SP and the Cayuse Research Suite.

Next Step

Navigating **My Dashboard**
For more information, see [Cayuse SP - User Guide: My Dashboard](#)

Instructions for developing each section of your proposal can be found in the [Cayuse SP-User Guides](#) on the OSP website at: https://i.slcc.edu/osp/cayuse.aspx. Please ensure you understand how to navigate **My Dashboard** before you move on to **Start New Proposal**.

APPENDIX 1: Browser Settings Setup

In order to use the Research Suite, you will need to configure your browser settings to enable cookies, allow pop-ups, enable JavaScript and clear cookies. Below are some basic instructions for Chrome, Firefox and Internet Explorer. It is highly recommended that you reach out to the SLCC Technical Support Help Desk for assistance in configuring your web browser for the purpose of using Cayuse.

Contact information for the SLCC Help Desk:
      Phone: (801) 957-5555
      Email: heldesk@slcc.edu

Chrome Settings

Accessing Chrome's Content Settings:

1. To open the settings page, click the Customize and control Google Chrome (three-line) button at the top right of the browser window to open the drop-down menu.

2. Select Show advanced settings at the bottom of the window.

3. Find the section labeled Privacy and security, and select site settings:

- **Enabling Cookies in Chrome**
  Under **Cookies and site data**, if **Allow site to save and read cookie data** is selected, cookies are already being accepted, and no changes are needed. If **Block third-party cookies** is selected, add an exception by adding the cayuse link as it appears in your browser into the Allow section.

- **Allowing Pop-Ups in Chrome**
  Under the **Pop-ups and redirects** section, if **Blocked** is selected, add an exception by adding the Cayuse link as it appears in your browser into the Allow section.

- **Enabling JavaScript in Chrome**
  If you see a message on the Cayuse login page that says *This site requires that JavaScript be enabled* or if you are unable to perform some actions within Cayuse, you may need to enable JavaScript. Under the **JavaScript** section, if **Allowed** is selected, JavaScript is enabled, and no changes are needed. If **Block** is selected, add an exception by adding the Cayuse link as it appears in your browser into the Allow section.

- **Clearing Cookies in Chrome**
  Click the icon at the top right of the screen and select **History**. Select **Clear Browsing Data** in the submenu. Click the **Advanced option** and under **Time range** select **All time**. Check the box beside **Cookies and other site and plug-in data**. Make sure that none of the other items are checked if you do not wish to also delete these items. Then, click **Clear browsing data** at the bottom of the window.

- **Please Note**
  These processes may differ from what is stated above, depending on your version of Chrome. If you have any questions or concerns, please contact the SLCC Help Desk to guide you through the steps for enabling cookies, allowing pop-ups, enabling JavaScript, and clearing cookies in Chrome.

Firefox Settings

At the top left of your Firefox window, click the **Firefox** button and select **Options**. Alternatively, if you do not see a **Firefox** button, click the button in the upper right and select **Options**.

- **Enabling Cookies in Firefox**
  Navigate to the **Privacy & Security** section.
  If **Remember History** is selected under the History section, cookies are already being accepted and no further changes are required. If **Never remember history** is selected, select **Remember history** or **Use custom settings for history.**
  If creating an exception, enter the Cayuse link as it appears in your browser, then select **Allow**.

- **Allowing Pop-Ups in Firefox**
  Navigate to the **Privacy & Security** section and make sure that **Block pop-up windows** is unchecked. Alternatively, if you wish to allow pop-ups only for Cayuse while blocking pop-ups on other sites, click **Exceptions** and enter the Cayuse link as it appears in your browser then click **Allow** and **Save Changes**.

- **Enabling JavaScript in Firefox**
  If you see a message on the Cayuse login page that says *This site requires that JavaScript be enabled* or if you are unable to perform some actions within Cayuse, you may need to enable JavaScript. The ability to disable JavaScript in Firefox was removed from the standard options panel. You will need to reach out the SLCC Help Desk for assistance or use another browser.

- **Clearing Cookies in Firefox**
  Click the view history icon at the top right of the screen and select **History**. Then, select **Clear Recent History**. Alternatively, if you do not have this icon, select **History** at the top left of the screen, and then select **Clear Recent History.** Under **Time range to clear,** select **Everything.** Click the icon next to **Details** to display a list of selectable items. Check the box beside **Cookies**. Make sure that none of the other items are checked if you do not wish to also delete these items. Click **Clear Now** at the bottom of the window.

- **Please Note**
  These processes may differ from what is stated above, depending on your version of Firefox. If you have any questions or concerns, please contact the SLCC Help Desk to guide you through the steps for enabling cookies, allowing pop-ups, enabling JavaScript, and clearing cookies in Firefox.

Internet Explorer Settings

At the top right of your Internet Explorer window, click the tools icon and select **Internet Options**.

- **Enabling Cookies in Internet Explorer**
  Go to the **Privacy** tab. Under **Settings** add an exception for Cayuse by clicking the **Sites** button. Enter the Cayuse link as it appears in your browser, then click Allow and click OK.

- **Allowing Pop-Ups in Internet Explorer**
  Go to the **Privacy** tab. If **Turn on Pop-up Blocker** is unchecked, then you do not need to change anything. If it is checked, add an exception for Cayuse by clicking **Settings**. Enter the Cayuse link as it appears in your browser, then click Add.

- **Enabling JavaScript in Internet Explorer**
  If you see a message on the Cayuse login page that says *This site requires that JavaScript be enabled* or if you are unable to perform some actions within Cayuse, you may need to enable JavaScript.
  Go to the **Security** tab. If your Security Level for **Internet** is set to **High**, then you will need to add Cayuse to the list of Trusted sites. Select the green **Trusted sites** icon, then click **Sites.** In the Sites window, enter the Cayuse link as it appears in your browser, then click **Add**. Under **Security level for this zone** for your Trusted Sites determine if the slider is at **High.** If so**,** no changes are needed. Otherwise, select **Custom level** to specifically enable scripting. Under **Scripting**, make sure that **Active scripting** is set to **Enable**, then click **OK**.

- **Clearing Cookies in Internet Explorer**
  Click the tools icon in the top right of the screen, then go to **Safety**-> **Delete Browsing History**. Alternatively, if you do not have a gear icon, select **Tools** at the top left of the screen, then go to **Delete Browsing History.** Check the box to delete **Cookies and website data**. Make sure that none of the other options are selected if you do not wish to also delete these items. Click **Delete** at the bottom of the window.

- **Please Note:** These processes may differ from what is stated above, depending on your version of Internet Explorer. If you have any questions or concerns, please contact the SLCC Help Desk to guide you through the steps for enabling cookies, allowing pop-ups, enabling JavaScript, and clearing cookies in Explorer.

Microsoft Edge Settings

At the top right of your Microsoft Edge window, click the upper right button and click settings.

- **Enabling Cookies in Microsoft Edge**
  Go to the **Privacy & Security** tab.

If the Cookies tab reads **Don't block cookies**, cookies are already being accepted and no further changes are required.

Microsoft has not enabled an exception option for Edge yet, and none of the officially supported extensions do, either. If **Block all Cookies or Block only third-party cookies** are selected, you will need to change to **Don't block cookies** or use another browser.

- **Allowing Pop-Ups in Microsoft Edge**
  Go to the **Privacy & security** tab. If **Block Pop-ups** is unchecked, then you do not need to change anything.
  Microsoft has not enabled an exception option for Edge yet, and none of the officially supported extensions do, either. If **Block pop-ups** is checked, you will need to uncheck it or use another browser.

- **Enabling JavaScript in Microsoft Edge**
  If you see a message on the Cayuse log in page that says *This site requires that JavaScript be enabled*, or if you are unable to perform some actions within Cayuse, you may need to enable JavaScript.
  Go to the search bar located next to the **Start** tab on your Microsoft device and type **Edit group policy** and select it. Expand the **User Configuration -> Administrative Templates -> Window Components** folder. Expand the Microsoft Edge folder. Double-click allows you to run scripts, like JavaScript. Choose **Enable** and click OK to confirm.

- **Clearing Cookies in Microsoft Edge**
  Click the icon in the top right of the screen, then go to **Privacy & security**. Under Clear browsing data click **Choose what to clear.** Make sure the box **Cookies and saved website data** is checked. Make sure that none of the other options are selected if you do not wish to also delete these items. Click **Clear** at the bottom of the list.

- **Please Note:** These processes may differ from what is stated above, depending on your version of Microsoft Edge. If you have any questions or concerns, please contact the SLCC Help Desk to guide you through the steps for enabling cookies, allowing pop-ups, enabling JavaScript, and clearing cookies in Microsoft Edge.

Safari Settings

In the top menu bar, click **Safari** and select **Preferences**.

- **Enabling Cookies in Safari**
  Go to the **Privacy** tab. For **Block cookies and other website data**, if **From third parties and advertisers** or **Never** is selected, cookies are already being accepted and no changes are needed. If **Always** is selected, select one of the other options.

- **Allowing Pop-Ups and Enabling JavaScript in Safari**
  Go to the **Security** tab. For **Web content**, confirm that **Enable JavaScript** is checked, and **Block pop-up windows** is unchecked. These settings must be in place for Safari to display Cayuse properly. You may revert to your previous settings when your Cayuse

session is complete. If you are having any trouble accessing Cayuse or the Research Suite, you may want to clear your cookies.

- **Clearing Cookies in Safari**
  Click **Safari** at the top right of the screen and select **Preferences**. Select the tab labeled **Privacy**. Under Cookies and other website data click Remove All Website Data. Click Remove Now in the next window.

- **Please Note:** These processes may differ from what is stated above, depending on your version of Safari. If you have any questions or concerns, please contact the SLCC Help Desk to guide you through the steps for enabling cookies, allowing pop-ups, enabling JavaScript, and clearing cookies in Safari.