

# 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

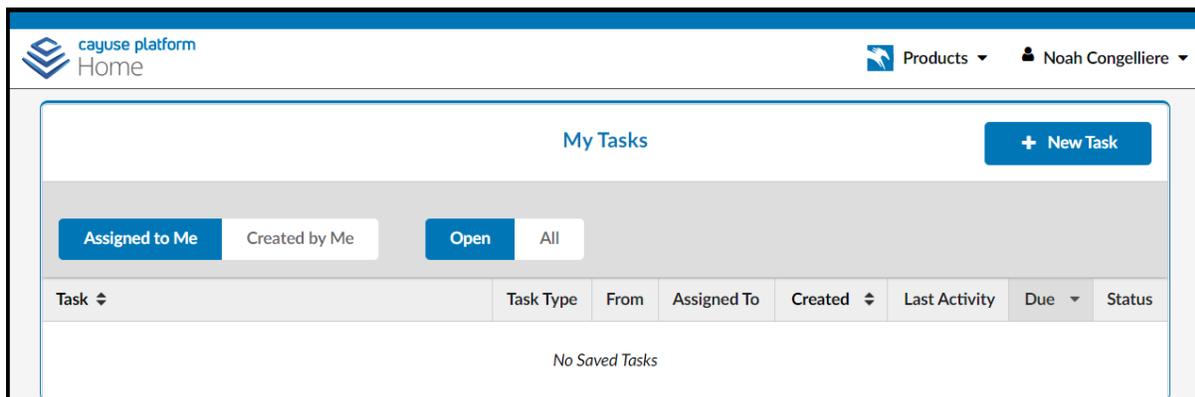
## Logging In

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).



**WILLIAM PATERSON UNIVERSITY**  
Office of Sponsored Programs  
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Dear Andrew Cooper:

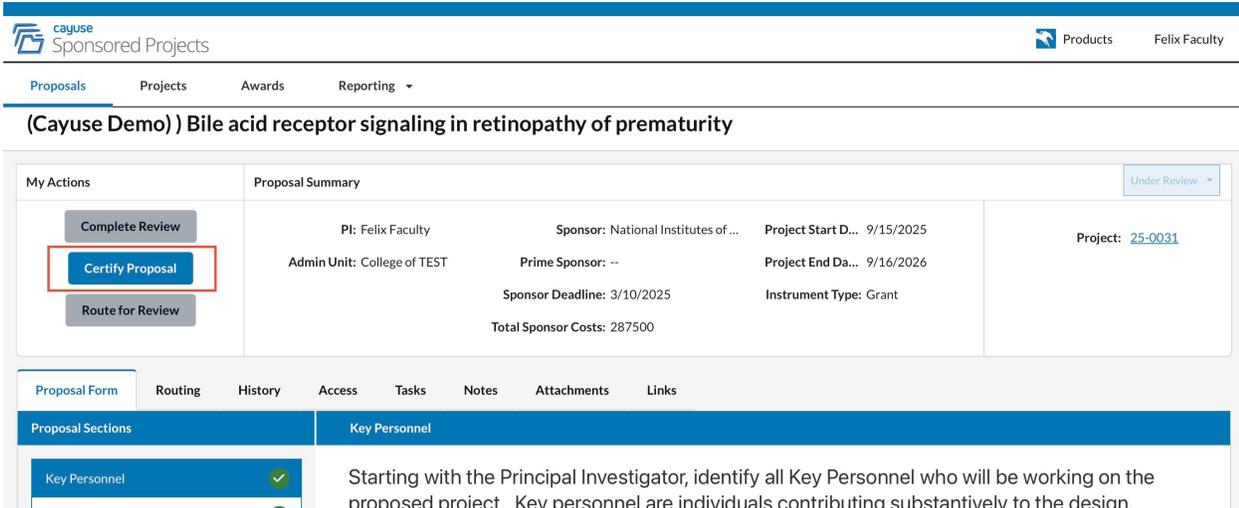
A proposal on which you are listed on the research team has been distributed for review. Your certification is required before this proposal may be submitted to the sponsor.

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](mailto: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.



The screenshot shows the Cayuse Sponsored Projects web interface. At the top, there is a navigation bar with the logo and 'Sponsored Projects' text, and a user profile for 'Felix Faculty'. Below this is a menu with 'Proposals', 'Projects', 'Awards', and 'Reporting'. The main content area displays the title '(Cayuse Demo) Bile acid receptor signaling in retinopathy of prematurity' and a status of 'Under Review'. The 'My Actions' section contains three buttons: 'Complete Review', 'Certify Proposal' (highlighted with a red box), and 'Route for Review'. The 'Proposal Summary' section provides details: PI: Felix Faculty, Admin Unit: College of TEST, Sponsor: National Institutes of..., Prime Sponsor: --, Sponsor Deadline: 3/10/2025, Total Sponsor Costs: 287500, Project Start Date: 9/15/2025, Project End Date: 9/16/2026, Instrument Type: Grant, and Project ID: 25-0031. Below the summary is a tabbed interface with 'Proposal Form' selected, and a 'Key Personnel' section with a green checkmark icon and a description: 'Starting with the Principal Investigator, identify all Key Personnel who will be working on the proposed project. Key personnel are individuals contributing substantively to the design.'

Please:

1. Read the Certifications (See Below).
2. Check the “Confirm My Certification” box.
3. Click “Certify”.

Proposal Summary

Confirm Certification

I understand and certify that:

- The information submitted within this application is true, complete and accurate to the best of my knowledge.
- Any false, fictitious, or fraudulent statements or claims may subject the Organization, and the investigators, to criminal, civil or administrative penalties.
- I have the responsibility for the scientific, fiscal and ethical conduct of the project and to provide the required progress reports if an award is made.
- I will comply with all relevant state and federal regulations, University policies and contractual obligations in administering the resultant award.
- I have reviewed applicable U.S. Export Control requirements and institutional policy on Export Controls and will comply with the export control requirements.
- I will work to ensure that my relationship with the sponsor of this project is either free of conflict of interest or consistent with a previously disclosed conflict of interest management plan.

Confirm my Certification

Comment

Please add a comment.

Cancel 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.

Project Title	Proposal #	PI	Status	Sponsor
NJHC Test 2025	<a href="#">25-0033-P0001</a>	Felix Faculty	In Development	New Jersey Historical Commis
(Cayuse Demo ) Bile acid receptor signaling in retinopathy of prematurity	<a href="#">25-0031-P0001</a>	Felix Faculty	In Development	National Institutes of Health -

## 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:

The screenshot shows the Cayuse SP interface. At the top, there is a search bar and buttons for "Set View" and "Download to CSV". Below is a table of proposals. The second row is highlighted with a red box around the proposal number "25-0031-P0001".

Below the table, the "Proposals Dashboard" is shown. It features a navigation bar with "Proposals", "Projects", "Awards", and "Reporting". A "Start New Proposal" button is in the top right. The dashboard contains seven status buckets:

- 4 In Development**: Proposals are being filled out by researchers.
- 0 Under Review**: Proposals are being internal reviewed.
- 0 Approved**: Proposals are approved for submission.
- 18 Submitted to Sponsor**: Proposals were submitted to sponsor.
- 0 Under Consideration**: Sponsors have contacted your institution with interest.
- 6 Funded**: Proposals were accepted by the sponsor.
- 1 Closed**: Proposals were closed by an admin for some other reason.

- **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

[My Active Projects](#) / [\(Cayuse Demo.\)Bile acid receptor signaling in retinopathy of prematurity](#) / 25-0031-P0001

### **(Cayuse Demo) ) Bile acid receptor signaling in retinopathy of premat**

My Actions	Proposal Summary
<p><a href="#">Complete Review</a></p> <p><a href="#">Certify Proposal</a></p> <p><a href="#">Route for Review</a></p>	<p>PI: Felix Faculty                      Sponsor: National Instit</p> <p>Admin Unit: College of TEST              Prime Sponsor: --</p> <p>Sponsor Deadline: 3/10/2025</p> <p>Total Sponsor Costs: 287500</p>
<a href="#">Proposal Form</a>	<a href="#">Routing</a> <a href="#">History</a> <a href="#">Access</a> <a href="#">Tasks</a> <a href="#">Notes</a> <a href="#">Attachments</a> <a href="#">Links</a>
<a href="#">Proposal Sections</a>	<a href="#">Key Personnel</a>
<a href="#">Key Personnel</a> 	Starting with the Principal Investigator,

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).

My Tasks		+ New Task					
Assigned to Me		Created by Me		Open		All	
From	Assigned To	Created	Last Activity	Due	Status		

### 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”.

## New Task

\* **Assign To**

Q Felix Faculty

\* **Due Date**

📅 10/4/2024

\* **Task**

Add Budget Justification.

URL

/sp/proposals/bbdd8ad3-71bc-4cec-af57-f1c16f7a2920

Add Attachment ▼

Cancel

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.

The screenshot shows the 'My Tasks' interface in the Cayuse Platform. At the top left, there is a 'Home' link and the Cayuse Platform logo. At the top right, there are 'Products' and 'Felix Faculty' dropdown menus. The main content area is titled 'My Tasks' and features a '+ New Task' button. Below the title, there are filter buttons: 'Assigned to Me', 'Created by Me', 'Open', and 'All'. The 'Open' filter is currently selected. A table displays the task list with the following columns: Task, Task Type, From, Assigned To, Created, Last Activity, Due, and Status. The table contains one row with the following data: Task: Add Budget Justification., Task Type: SP Ad Hoc Task, From: Andrew D Cooper, Assigned To: Me, Created: 09/26/2024, Last Activity: 09/26/2024, Due: 10/04/2024, Status: Open. At the bottom of the table, there is a '10 per page' dropdown and a 'Showing 1 of 1 items' indicator.

Task	Task Type	From	Assigned To	Created	Last Activity	Due	Status
Add Budget Justification.	SP Ad Hoc Task	Andrew D Cooper	Me	09/26/2024	09/26/2024	10/04/2024	Open

- **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”.

Attachment Name	Date and Time Uploaded	Uploaded By	File Size	
	9/26/2024 01:27:18 PM	Felix Faculty	13 KB	

Open

Closed

Open ▾

Cancel

Save Changes

## Add an Attachment

To add an attachment:

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

URL ▼

**Add Attachment** ▼

Add Comment ▼

2. Click on the “Upload File” button

Add Attachment ▲

Add up to nine (9) attachments per task. File size limit is 75 MB per attachment. Attachments with file type .exe cannot be accepted.

Drop files here to upload

or

**Upload File** 📁

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