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Overview
Cayuse SP includes reports related to proposals and awards for extramural research funding. The following on-demand reports are available to campus users.

- **Proposals**
  - Proposals approved by the Sponsored Programs office for submission to the funding sponsor on or after July 1, 2017.

- **Awards**
  - Awards for proposals approved by the Sponsored Programs office for submission to the funding sponsor on or after July 1, 2017.
  - Awards for proposals approved by the Sponsored Programs office for submission to the funding sponsor before July 1, 2017 but received, either in part or in whole, on/or after July 1, 2017. Original proposal materials are not available in Cayuse SP.

- **Active Projects**
  - Projects include the proposals, awards and (outgoing) subawards.
  - All active projects created by the Sponsored Programs office on or after July 1, 2017.

Any UC Davis user with access to Cayuse SP may run the reports. However, the related documents and details are only visible to those with the appropriate level of access.

- Proposal Data access is required to view Internal Processing Forms (IPFs) and related materials.
- Award Data Access is required to view award details and related materials.

Contact the Role Manager for the relevant unit to obtain access.

Features and Important Notes

- Proposal and Awards reports may be run based on the:
  - Administrative unit
  - Home unit of the lead investigator
  - Lead investigator’s name
  - Sponsor type

- Project reports may be run based on the:
  - Administrative unit
  - Home unit of the lead investigator
  - Lead investigator’s name
  - Sponsor

- All reports are exportable to Excel.
- Queries may not be saved for future use.
Instructions for Running Reports
Proposal, award and project reports all work in the same manner.

Basic Instructions
1. Use Mozilla Firefox for best results.
2. Login to: https://ucdavis.cayuse424.com with your Kerberos ID and Password.
3. Select “Cayuse SP”.
4. Select “Reporting”.

![Evisions Research Suite](image)

![UC Davis Office of Research](image)
5. Select the appropriate report.

<table>
<thead>
<tr>
<th>Cayuse SP Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Proposals</strong></td>
</tr>
<tr>
<td>By Unit</td>
</tr>
<tr>
<td>By Unit</td>
</tr>
<tr>
<td>By Sponsor Type</td>
</tr>
</tbody>
</table>

6. Place cursor in the relevant text field and complete the pop-up screens that follow.

7. Select dates to include in the query, and then select “View Report”. *(Note: Dates are optional. If left blank, all relevant records regardless of date will be returned.)*

8. Select “Export to Excel” (Optional).
Instructions for Searching by Unit
Applicable to proposal, award and project reports.

1. Follow the Basic Instructions steps 1 through 6 above.

2. Check the box to the left of the unit(s) to include in the query and select “Continue”.  
   (Note: Use the control+F command to search the list quickly.)

3. Select dates to include in the query, and then select “View Report”. (Note: Dates are optional. If left blank, all relevant records regardless of date will be returned.)

4. Select “Export to Excel” (Optional).
Instructions for Searching by Lead Principal Investigator
Applicable to proposal, award and project reports.

1. Follow the Basic Instructions steps 1 through 6 above.
2. Enter investigator’s last name and select “Search”.

   ![Search Box](image)
   
   Enter the last name of the person you are looking for:
   
   Last Name Only: apple
   
   Search

3. Check the box to the left of the investigator’s name and select “Continue”
   (Note: Use the control+F command to search the list quickly.)

   ![Personnel Search](image)
   
   Personnel Search (Check Appropriate Personnel)
   
<table>
<thead>
<tr>
<th>Name</th>
<th>Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apple, Charlie</td>
<td>OVCR - Sponsored Programs</td>
</tr>
</tbody>
</table>

4. Repeat steps 2-3 for each investigator to add to the query.
5. Select “Continue” when all investigators are added to the query.

6. Select dates to include in the query, and then select “View Report” (Note: Dates are optional. If left blank, all relevant records regardless of date will be returned.)

   ![Proposal Report](image)
   
   Proposals By Lead PI
   
   Investigator: Personnel Selected
   
   Proposal Approved between: 07/01/2017 and 03/01/2018
   
   View Report
7. Select “Export to Excel” (Optional).
Instructions for Searching by Sponsor Type
Applicable to proposal reports.

1. Follow the Basic Instructions steps 1 through 6 above.

2. Check the box(es) to the left of the unit(s) to include in the query and select “Continue”.

3. Select dates to include in the query, and then select “View Report”. (Note: Dates are optional. If left blank, all relevant records regardless of date will be returned.)

4. Select “Export to Excel” (Optional)
Instructions for Searching by Unit and Sponsor Type
Applicable to award reports.

1. Follow the Basic Instructions steps 1 through 6 above.

2. Check the box(es) to the left of the unit(s) to include in the query and select “Continue”.  
   (Note: Use the control+F command to search the list quickly.)

3. Select the appropriate way to filter the report:
   a. Award Admin or PI Home Unit
   b. Award Admin Unit and PI Home Unit
   c. Award Admin Unit
   d. PI Home Unit

4. Check the box(es) to the left of the Sponsor Type(s) to include in the query and select “Continue”.

5. Select “Direct” or “Prime”.
   a. Direct: Funding comes directly from the selected Sponsor Type.
   b. Prime: Funding flows through another funding sponsor but the funding ultimately comes from the selected Sponsor Type.

6. Select dates to include in the query, and select “View Report”. *(Note: Dates are optional. If left blank, all relevant records regardless of date will be returned.)*

7. Select “Export to Excel” (Optional).
Instructions for Searching by Sponsor
Applicable to Project reports.

1. Follow the **Basic Instructions steps 1 through 6 above**.

2. Check the box(es) to the left of the Sponsor(s) to include in the query and select “Continue”. *(Note: Use the control+F command or select “Search By Name” to search the list quickly.)*

3. Select dates to include in the query, and select “View Report” *(Note: Dates are optional. If left blank, all relevant records regardless of date will be returned.)*

4. Select “Export to Excel” *(Optional)*