

Cayuse Fund Manager Training Outline

I. Introduction to Cayuse

- Overview of Cayuse as Marshall University's research management software
- Modules in use:
 - - Cayuse SP (Sponsored Projects)
 - - Cayuse S2S (System-to-System Proposal Submission)
 - - Cayuse Fund Manager
- Modules for future use :
 - - Cayuse Effort Reporting

II. Accessing Cayuse (Step 1 – Step 3)

- Navigating to the Cayuse login portal
- Signing in with Marshall credentials
- Accessing the Fund Manager Live Environment

III. Proposal Management – MURC Grant Development/Pre-Award (Step 4)

- Navigating the Proposal Dashboard
- Understanding proposal statuses:
 - - In Development
 - - Submitted to Sponsor
 - - Closed
- Viewing proposal details:
 - - Title, Sponsor, Dates, Type, Instrument

IV. Award Management – MURC Post-Award (Finance, Grant & Subaward Compliance, Grants Receivable, Accounts Payable, Payroll) (Step 5)

- Accessing the Awards Dashboard
- Award lifecycle stages:
 - - Setup in Progress
 - - In Review & Negotiation
 - - Active
 - - In Closeout
 - - Closed
- Viewing award details:
 - - Award Number, Sponsor, Instrument Type

V. Cayuse Fund Manager - Fund Dashboard Overview (Step 6-9)

- Navigating to Fund Dashboard
- Viewing fund summary and balances:
 - - Direct, Indirect, Total
- Personnel distributions and salary details

VI. Fund Detail and Review (Step 10 – 72)

- Accessing Fund Detail tab (Step 10)
- Editing PI information (for MURC Admins) (Step 11)
- Fund Filter & Report Search – (Step 12 – 16)
- Viewing Fund Detail (Step 17 – Step 50)
 - Separate IDC - budget breakdown by object code (Step 18 - Step 20)
 - Group By Group 3 View – (Step 21 – Step 22)
 - Banner Budget comparison (Step 23 – Step 35)
- Understanding expense /object code pools: (Step 36 – Step 60)
 - - Salaries, Fringe, Travel, Equipment, Contractual, Supplies, Other
- Reviewing Encumbrances by account (Step 61 – Step 64)
 - Banner Encumbrance comparison (Step 65 – Step 69)
- Checking Salary Distributions - (Step 70 – Step 72)

VII. Transaction Review (Step 73 – Step 91)

- Navigating to Transaction Review tab (Step 73 – Step 75)
- Reviewing monthly transactions (Step 76 – Step 78)
- Choose Grant Fund in Review List (Step 79)
- Marking transactions as reviewed (Step 80 – Step 91)

VIII. Reporting and Exporting from Cayuse (Step 92 – Step 100)

- Using the Transaction Report tool (Step 93)
- Filtering by PI, Fund, Date (Step 94 – Step 104)
- Sort by Object Code/ Account order (Step 105)
- Exporting reports to Excel, PDF, CSV (Step 106 -
- Manipulating data in Excel (account sort, subtotal, etc.) (Step 109-112)

X. Questions, Troubleshooting and Support

- Contacting support:
- - CayuseSupport@marshall.edu
- - Brittany Bruce – MURC Director of Operations/Trainings
- Key Implementation personnel:
- - Kristen Martin (MURC – Senior Finance Officer)
- - Jennifer Wood (MURC – CFO / Associate VP for Finance & Compliance)
- - Rebecca Hill (MURC – Director of Grants Compliance)
- - Bob Walker (MU Finance)
- - Benjamin Dean (MU IT – Associate Director of Enterprise Applications)