

CLARK
UNIVERSITY



CAYUSE SPONSORED PROJECTS USER GUIDE

Configuring Dashboards & Reporting

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Sponsored Projects User Guide: Configuring Dashboards & Reporting

1	Introduction.....	2
1.1	<i>Purpose and Use</i>	2
2	Configuring Dashboards	2
2.1	<i>Viewing Records by Status</i>	2
2.2	<i>Set Column View</i>	3
2.3	<i>Using the Search Box.....</i>	4
2.4	<i>Download to CSV.....</i>	5
3	Generating Reports	6
3.1	<i>Sort</i>	7
3.2	<i>Filter</i>	7
3.3	<i>Export</i>	7
3.4	<i>Save</i>	7
3.5	<i>Open.....</i>	8
3.6	<i>Grid.....</i>	8
3.7	<i>Restore</i>	8
3.8	<i>Format.....</i>	8
3.9	<i>Fields</i>	9
3.10	<i>Full Screen</i>	9

1 Introduction

1.1 Purpose and Use

Cayuse is Clark University’s online platform for managing the entire sponsored projects lifecycle. It supports proposal initiation, development, internal routing and approval, submission to sponsors, tracking proposal outcomes, and post-award management of externally funded projects. The Office of Sponsored Projects and Research (OSPR) is the administrator of the system.

This **Guide** assists Users in configuring the Proposals, Awards, and Subawards Dashboards, pulling proposal and award information, and creating reports. There are several ways to obtain information from Cayuse. Do you want to know what Proposal records are under internal review? Do you want to know how many Active Awards you have, or how many Active Awards are managed in your Department (if you are Chair or Grant Administrator)? Do you want to know how many National Science Foundation Proposals have been submitted? This guide covers the various ways available to view this type of information.

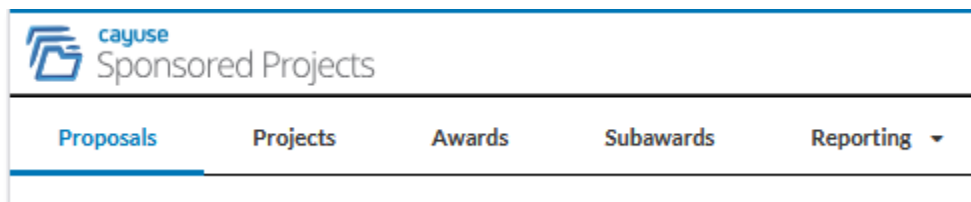
Note: You will only be able to access data that you've been given permission to access (based on Roles and Permissions).

2 Configuring Dashboards

When you log into Cayuse, you land on the [Home page \(My Tasks\)](#). In the upper right corner, under the Products drop-down menu, choose the **Sponsored Projects** module.

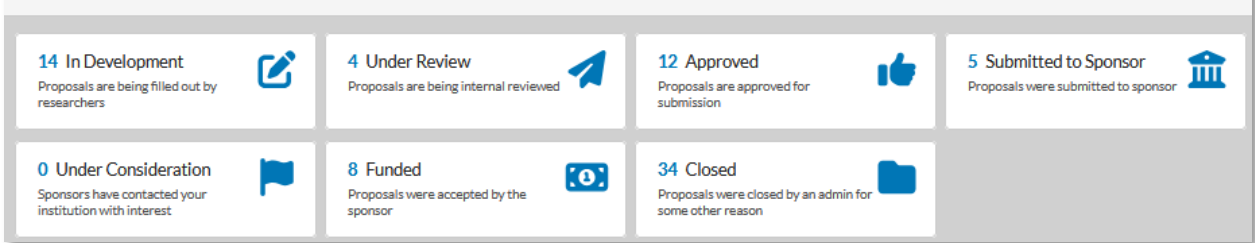
2.1 Viewing Records by Status

By default, the Sponsored Projects module lands on the Proposals Dashboard.

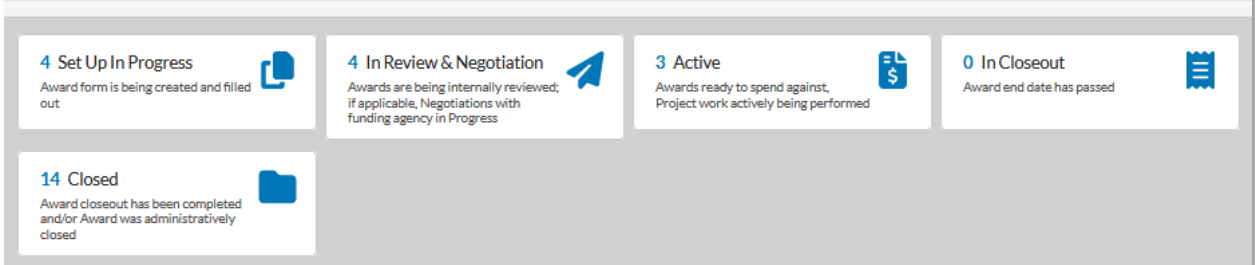


The Proposals Dashboard, along with the Awards and Subawards Dashboards, allow filtering by **Status** of records. You can view records assigned to a specific status by clicking on the desired status box. Records matching your selection will be displayed in the columns below the boxes.

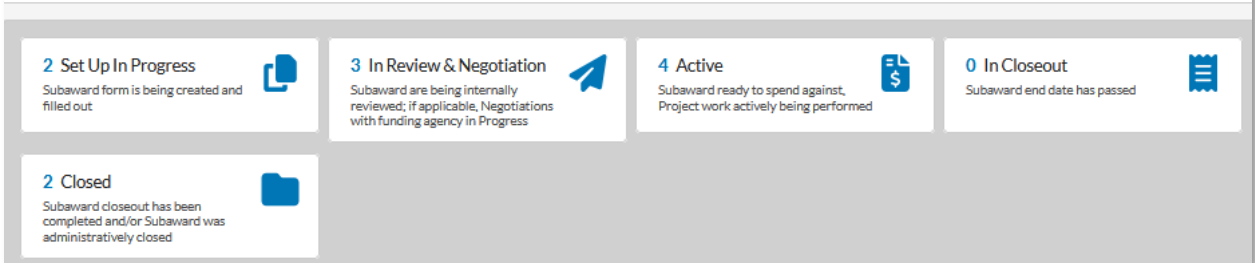
Proposals Dashboard



Awards Dashboard



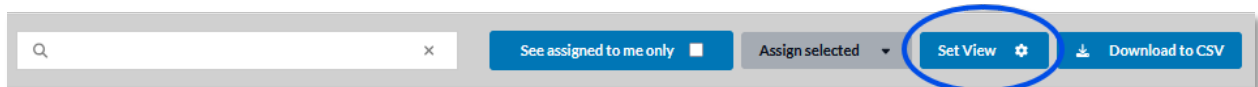
Subawards Dashboard



2.2 Set Column View

The Proposals, Awards, and Subawards dashboards allow customizing the displayed columns. You may choose **up to 11 columns** in your custom column view. Once set, this custom view should be displayed each time you log in. To set up your custom view:

1. Click **Set View** below the status boxes.



- Put a checkmark next to the columns of your choosing.
- Once your selections have been made, click Update. You may change the column view again at any time.
- To view a filtered list of only records assigned to you, click **See assigned to me only** (Proposals and Awards dashboards only).

Set View [Close]

Choose which columns to view on the table. This table can show a maximum of eleven columns at a time.

- Abstract
- Activity Type
- Additional Comments
- Admin Assigned
- Admin Unit
- Admin Unit Primary Code
- AE Application
- AE Application Numbers
- AE Application Reason

[Cancel] [Update]

2.3 Using the Search Box

The Proposals, Awards, and Subawards dashboards have a Search Box to filter records by any available data point.

- Begin by typing the name of a data point or scroll through the list of options in the dropdown. For example, if you want to see all the proposals for a specific PI, select **PI** as the data point.
- After selecting a data point, within the displayed box, enter the search criteria, e.g., Frances Faculty.

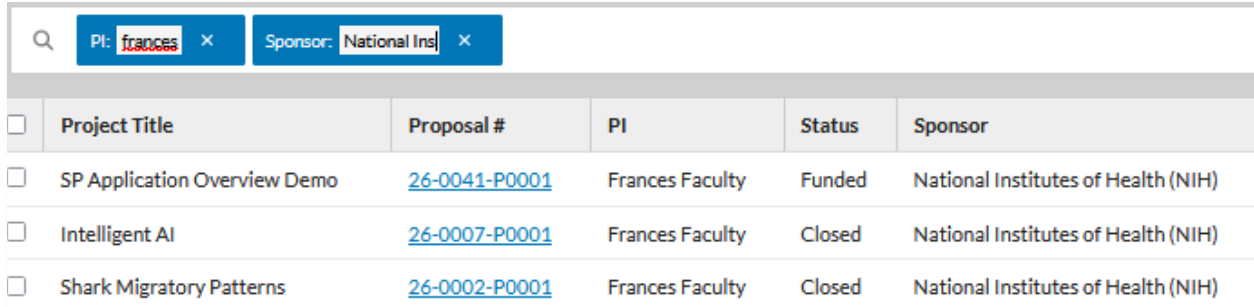
Search: pi

- PI
- PI Unit
- Subrecipient
- Subrecipient Attachment
- Subrecipient Name
- Subrecipient Name Org Type

	Project Title	Proposal #	PI
<input type="checkbox"/>	SP Application Overview Demo	26-0041-P0001	Frances Faculty
<input type="checkbox"/>	NASA - test	26-0031-P0001	Frances Faculty
<input type="checkbox"/>	Grants Group Proposal	26-0026-P0001	Frances Faculty
<input type="checkbox"/>	Intelligent AI	26-0007-P0001	Frances Faculty

- Multiple data points can be selected if desired.

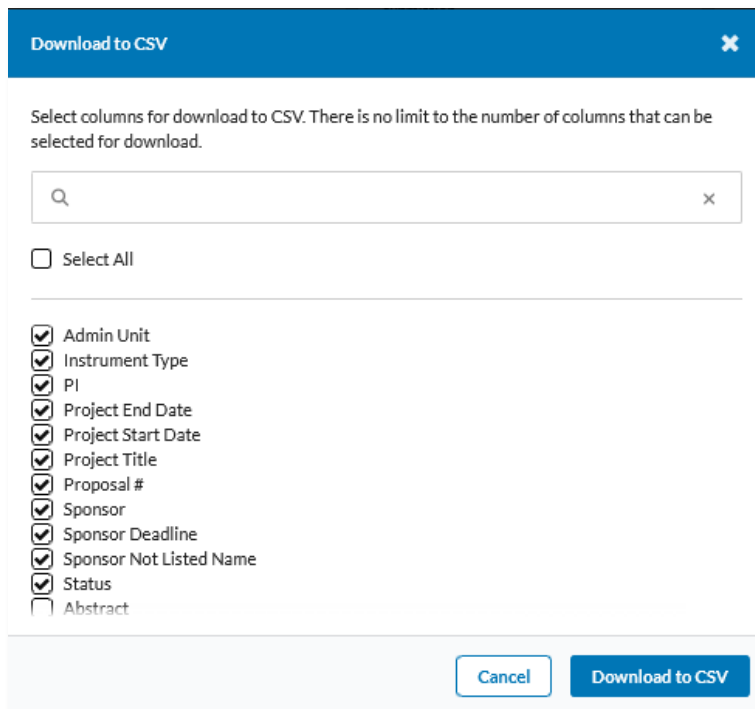
4. Records with values matching the search criteria for each selected attribute will be displayed in the columns below the Search Box.



<input type="checkbox"/>	Project Title	Proposal #	PI	Status	Sponsor
<input type="checkbox"/>	SP Application Overview Demo	26-0041-P0001	Frances Faculty	Funded	National Institutes of Health (NIH)
<input type="checkbox"/>	Intelligent AI	26-0007-P0001	Frances Faculty	Closed	National Institutes of Health (NIH)
<input type="checkbox"/>	Shark Migratory Patterns	26-0002-P0001	Frances Faculty	Closed	National Institutes of Health (NIH)

2.4 Download to CSV

The Proposals, Awards, and Subawards dashboard allows you to extract any data points into a convenient .csv file by selecting **Download to CSV**. Simply select the columns you'd like to capture by scrolling or using the search box, or click **Select All**. There is no limit to the number of columns you can select.



Download to CSV [X]

Select columns for download to CSV. There is no limit to the number of columns that can be selected for download.

[Search Box]

Select All

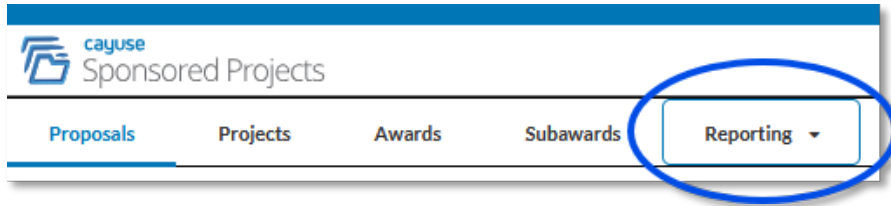
- Admin Unit
- Instrument Type
- PI
- Project End Date
- Project Start Date
- Project Title
- Proposal #
- Sponsor
- Sponsor Deadline
- Sponsor Not Listed Name
- Status
- Abstract

[Cancel] [Download to CSV]

Once you have chosen your columns, click **Download to CSV** to begin the file download. The file will be stored in your computer's default file storage location.

3 Generating Reports

Cayuse Sponsored Projects allows you to create, save and export Award, Subaward, and Proposal reports.



Access the Reporting tab from the SP home page.

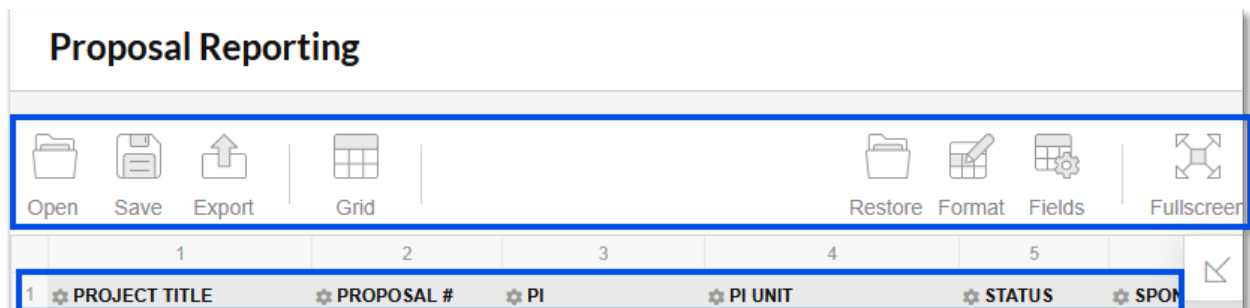
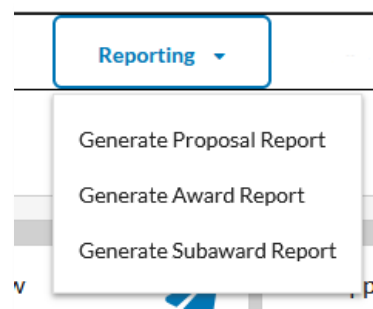
Note:

*You will only be able to access data that you've been given permission to access.
Reports containing large data sets may take several minutes to load.*

Select the type of report you want to generate and you will be taken to the selected Reporting dashboard.

When the report is generated, **default fields** will automatically populate with data available from the fields in your form and in your specific environment.

The default report view can be modified by accessing tools located on the report headers (Sort, Filter) and in the report dashboard (Open, Save, Export, Grid, Restore, Format, Fields, Full Screen).



3.1 Sort

Columns can be sorted in ascending or descending order. Hover your mouse over the column name (ex: AWARD #). An up or down arrow will appear to the right of the column name.

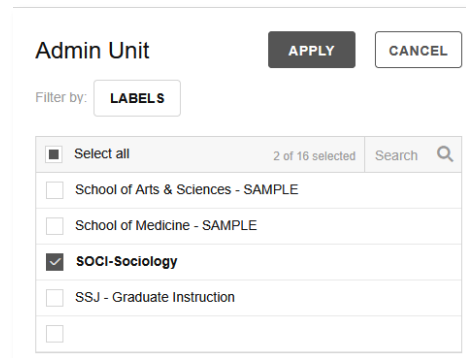
	1	2	3
1	AWARD #	PI	PROJECT TITLE
2	26-0057-A0002	Test Email	New Project Proj
3	26-0057-A0001-1	Clark Faculty	New Project Proj
4	26-0057-A0001-0	Clark Faculty	New Project Proj

3.2 Filter



Click the small gear icon next to the column name to view specific data within the columns.

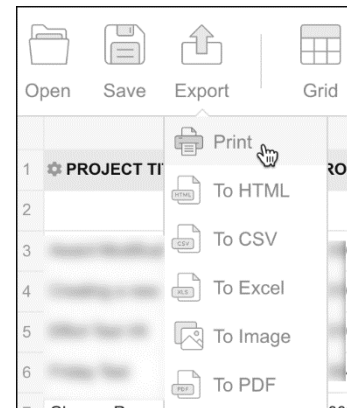
Check one or more boxes for the desired filters, then click Apply. The report will now display only results matching your filter.



3.3 Export



Export your report data to various formats for saving or sharing. Hover your mouse over the Export button, select the desired format, and the file will download to your device.



3.4 Save



Once you have modified your report, you can save it in the default .json file. The .json file will save your format only (not the data) to ensure your format is preserved for future use. The file will download to your device so that you can upload it in the future, using the **Open** feature discussed below.

For future retrieval, it is recommended that you create a folder in which to save the .json files and rename the formatted file so that it is identifiable. For example, if you create a Proposals Report for a single PI, name the file: *PI NAME-Proposals.json*.

3.5 Open



Open

Open your saved work, format, and layout using the previously downloaded .json file.

3.6 Grid



Grid

Click on Grid to return to the original column view. The Grid button will be more useful once Cayuse adds other views to the page in the future.

3.7 Restore



Restore

Click Restore to return to the default values and grid.

3.8 Format



Format

The format tool allows limited formatting of the selected column (text alignment, decimal separator, null value, etc.). Conditional Formatting allows you to change the appearance on the basis of conditions you specify.

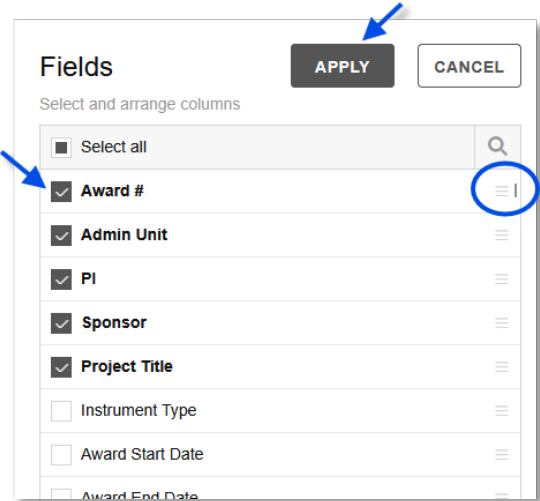
3.9 Fields



Fields

You can add or remove fields from the report using the Fields functionality. In addition to the default fields, you can add more fields using the Fields functionality.

You can rearrange the order of fields by dragging the button to the right of the column name (the 3 lines).



3.10 Full Screen



Fullscreen

Enlarge your report to the full size of your screen with the Full Screen button.