



G-Cloud 13 Framework

Service Description Document



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About us



We help empower institutions to conduct globally connected research projects, advance their impact on science, discovery, and society. We pride ourselves on a customer-driven development approach and high client satisfaction. Through exceptional service and value-added benefits (e.g., customer success, community, security), we are the right partner to help make your research and knowledge exchange goals scalable whilst supporting your ambitions to improve research infrastructure and research cultures.

Cayuse LLC acquired Haplo Services Ltd (UK based provider of researcher success solutions) in December 2020. We use Cayuse when referring to the company and products. As part of the Cayuse acquisition of Haplo Services Ltd, Graduate Education Manager and other products developed by Haplo will be integrated into the Cayuse Research Platform. Cayuse and Haplo Services Ltd. should be thought of as one organisation though within the UK we contract under the registered company Haplo Services Ltd.

Purchasing any application in the Cayuse Suite provides you access to our Research Platform, with the ability to add applications that can support other key areas of your research process. Cayuse enables a single platform interconnected solution offering scalability as your needs grow.

We are honoured to serve more than 570+ clients globally, including higher education institutions in the United Kingdom, Australia, New Zealand, Singapore, Canada, the United States, and the Middle East.

Some of our 570+ customers



Most software applications come out of the box with some customisation; however, Cayuse is really built for your institution,”

Emily Delacy, Business Systems Lead, London South Bank University



Research Suite

Cayuse, LLC develops, installs, and supports software solutions assisting the global research community. Cayuse has more than 550 research clients globally, including 60% of the top-100 by award volume, and enjoys a greater than 97% customer retention rate. We pride ourselves on a customer-driven development approach and strong client satisfaction. Our clients' success has always been our priority.

Cayuse Research Suite is centered on the solutions first developed by Chris Harker, PhD in 1994. Dr. Harker was a medical researcher, faculty director, and laboratory director at Oregon Health Sciences University when he developed our first product. He wanted an easier way to handle the processes associated with research administration and proposal submission so he could focus more on the actual science. Ease of use remains our guiding principle today.

Since 1994, Cayuse has continued to develop and release additional solutions to complete the Platform spanning pre-award, post-award, compliance, and facilities solutions. In total, Cayuse Research Suite offers market-leading solutions that cover the full research life cycle.

Cayuse Research Suite features an open architecture, allowing you to integrate with your current ERP and data warehouse systems. We can accept HR Data from any source, at any frequency. We can also extract data for placement into any source, including a finance system.

While still eliminating the burden of duplicate data entry, and the wasted time and mistakes that result, this method has several advantages over a programmatic integration:

1. It allows the Cayuse Research Suite to be agnostic to ERP providers and focus on the quality and content of the data coming in and going out.
2. It mitigates the risk of a connection "breaking" when either system is upgraded.
3. It allows greater flexibility on data being passed between systems as it is easier to add or subtract fields from an extraction than it is to rewrite an integration.
4. It allows for multiple uses of the same data sets (e.g., the same extract can feed both Peoplesoft and a data warehouse).
5. There are checks and balances in place for your finance team to feel confident about what is going into the ERP.

Administrator & Researcher benefits

- **Save time submitting proposals and managing projects**
- **Increase collaboration with PIs**
- **Speed up compliance protocol review process**
- **Reduce administrative burden**
- **Start research sooner**
- **Easily check remaining funding**



To execute this strategy, Cayuse Professional Services staff will work with your staff to determine what is needed in the data extraction, in what format, and how often. Because it is leveraging the built-in integration module, this can include any data in Cayuse Sponsored Projects including Pre-Award spending accounts, Proposal, Award, Project, and sub-award information, as well as both proposed and awarded budgets. Once the fields are determined, Cayuse staff can script the delivery of this data to run automatically on a set schedule, or you can decide to run it on demand. You are not limited to one extract or schedule to accommodate different workflows for different processes.

Additionally, the Cayuse Research Suite offers an API integration module at no additional cost to existing customers who use Cayuse's data connect capabilities. This API solution exposes data from the Cayuse Research Suite to a series of RESTful APIs you can leverage for integration, assuming the source system accepts API data. It allows bi-directional integration points in modern and flexible technology.

Everything you need in one cloud-based research suite

Manage awards from start to finish and drive impact across the entire hierarchy of challenges



“Efficiency has improved, and the ability to give quick reporting to our campus administration has increased dramatically.” Gina Hedberg, Director, Office of Sponsored Projects, University of South Alabama

For more information, please follow the link here: <https://cayuse.com/connected-research-suite-on-demand-overview-videos/>



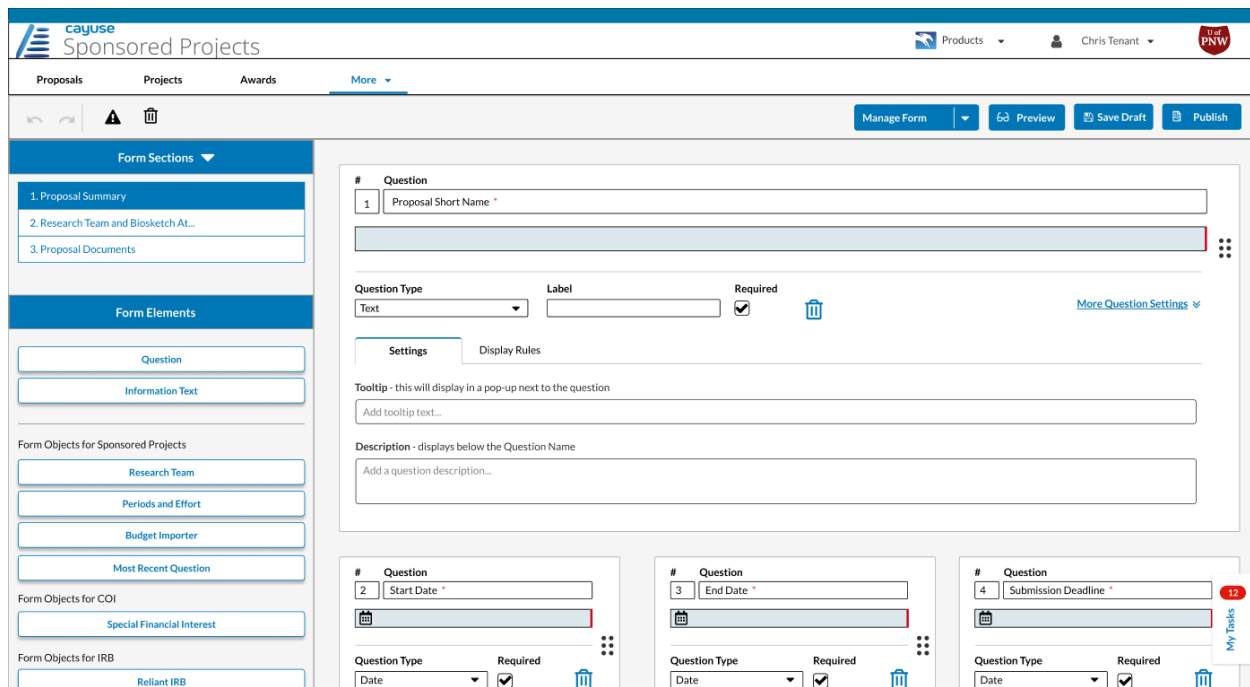
Research Suite

Simplify project lifecycle management from proposal creation to close-out

As a research administrator, there is a lot of anxiety around submitting proposals on time due to receiving information at the last minute and worries of potential fines due to submission inaccuracies.

There are also often uncertainties in knowing what your staff has on their plates, what researchers are devoting in terms of time to their different research endeavours, and whether they are overallocated to a project.

Sponsored Projects is the solution. It helps eliminate the administrative burden by allowing PIs to prepare a proposal quickly and accurately for internal routing and review.



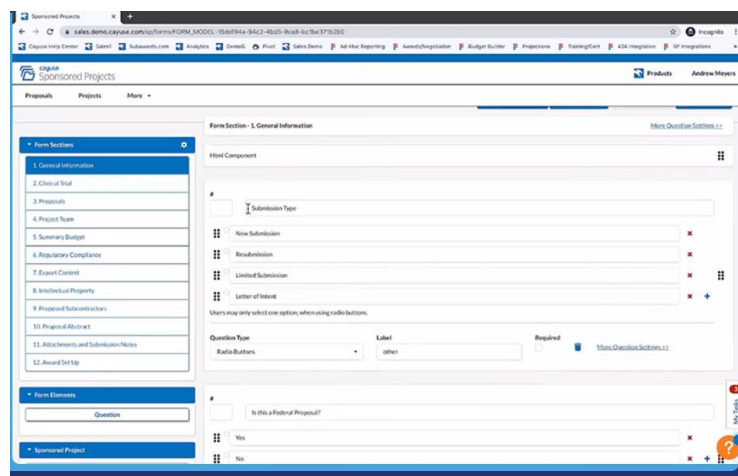
Cayuse SP streamlines research administration processes and provides transparency to your entire research portfolio, helping research institutions maximise resources, increase productivity, and improve strategic decision-making. As the system of record for your entire research portfolio, Cayuse SP creates a centralised repository for all project records and presents a unified, digital workspace for all users. From a single screen, administrators can easily manage the lifecycle of a project and view the status of every proposal and award.



Role-based dashboards help you easily find and act on the right tasks for priority projects, increasing efficiency and driving greater productivity.

Cayuse SP was built by research administrators and combines extensive industry experience with advanced technology to provide a superior user experience, including:

- Centralised capture and storage of all research administration data
- Real-time visibility into the status of projects, proposals, and awards
- Detailed award and subaward tracking
- Comprehensive overview of your entire research portfolio, simplifying management and improving oversight
- Robust search capabilities so you can find documents and information quickly
- Project-level organisation so you can easily see all awards, accounts, and proposals associated with a project
- Transparency into your award information with the ability to see both anticipated and obligated award amounts
- Role-based dashboards that provide access to all information related to proposals, awards, and projects, increasing efficiency and productivity
- Multiple reporting options including canned reports, Data Connect extracts, and Cayuse Analytics
- Industry-standard best practice projects management workflow with built-in flexibility to meet your needs
- Ability to work on common documents that are accessible from anywhere, enhancing collaboration between investigators and administrators
- Intuitive, electronic routing that speeds proposal review and approval cycles
- Data integration with institutional systems, improving data integrity and eliminating duplicate data entry
- Superior customer support, fast implementation, and expert consulting for a proven on-time and on-budget implementation to ensure a rapid return on investment.



For more please follow the link here: <https://cayuse.com/connected-research-suite-on-demand-overview-videos/>



Pre-Award Solutions

With pressure to find new sources of funding, meet proposal deadlines, and win awards against the increasing competition, working in a pre-award office can be challenging. Not only that but outdated organisational systems and processes can add to the frustrations.

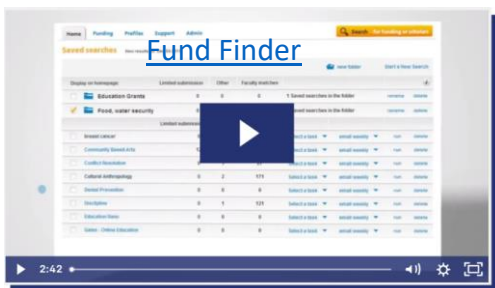
Your pre-award office needs an easier way to submit proposals and secure awards. A simpler process for gaining input, edits, and signatures—ideally, with time to spare! A single place to find the most up-to-date budget, protocol approvals, and PI information.

Cayuse’s pre-award management software solutions will help you grow your research portfolio, comply with changing regulations, and reduce administrative burden.

Our pre-award solutions help you:

- **Control your entire research portfolio**
- **Discover new potential sponsors, awards, and collaborators**
- **Develop, validate, route, and submit proposals more quickly**
- **Easily create budgets and projects**
- **Reduce errors and compliance risk**
- **Access the latest data instantly**
- **Collaborate more with post-award personnel and other departments**

Fund Finder



Cayuse is the only enterprise Research Administration system currently integrated with Pivot; a funding opportunity search product provided by ExLibris.

Cayuse partners with a funding opportunity search provider called Pivot. Pivot leverages profile information, including outputs, to pair researchers with opportunities that match their specialties.

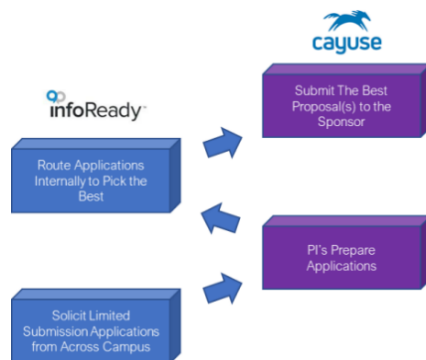
Pivot is a web-based discovery and workflow tool that combines a comprehensive source of global funding opportunities with the largest collection of scholar profiles into one intuitive solution. Pivot aids funding organisations to increase their discoverability and attract the best talent through focused award promotion. Pivot provides the functionality to be able to network on opportunities and disseminate information about early-stage proposals.

Opportunities are indexed by keywords for applicants to find and eligibility to make sure essential requirements are met. In addition to keyword search, Pivot has an advanced search feature that allows you to search/filter any or all fields including sponsor, CFDA, deadline, funding type, applicant type, sponsor type, activity location, and more. Users can include or exclude any of those criteria for advanced matching capabilities.



Pivot offers sharing for Research Admins based on saved searches called Curated Search. This feature enables Admins to share the results of any Saved Search. When this option is selected, the Saved Search result is displayed in the Curated tab for all Pivot users at the Admin’s institution. The Saved Search result set is dynamic and updated automatically as Funding Opportunities are added to or archived from the Pivot database. The Saved Search can also be unpublished and deleted if no longer needed.

Competitions



We have an integrated partnership with InfoReady, the leader for tools to support internal competitions. InfoReady solicits grant applications and proposals from across campus. It then routes them for review, approval, and selection. Simply put, it is higher ed’s best solution for decisions, grants, and awards. It also showcases opportunities for research grants, campus engagement, advancement and corporate relations to every stakeholder on campus.

InfoReady is now integrated with Cayuse Sponsored Projects. The seamless combination allows for the efficient assembly of compliant proposals, routing for limited submission selection, and transmission to sponsors. [Click here to let us know you're interested!](#)

With InfoReady’s ability to solicit, review and select internal applications, and Cayuse’s ability to create world-class proposals and submit them to research sponsors, the two platforms make a remarkable combination. Through integration technology, the two platforms speak to each other, making it an easy automated solution for research administrators. In fact, this solution has been something requested by many of our clients around the world.

Benefits for Limited Submissions

- Institutions can post a convenient menu of funding opportunities in one place
- Principal investors can create and submit complete and compelling proposals
- Administrators can easily check proposals for completeness
- Proposals can be automatically routed internally to collect comments, and ratings and select the best one(s)
- Reviewers receive automatic reminders
- The selected proposals can be transmitted quickly, and easily, in time for deadlines.

Cayuse Costing Tool

The Cayuse Costing Tool helps simplify research costing and pricing and supports both research and enterprise bids.

- Integrated within the Cayuse Research Suite



- Allows users to capture costing information quickly and efficiently and then share it with other systems that need to receive it.
- Can support multi-stage applications, multi-institution bids and/or bids with multiple participants (both internal and external partners).
- Allows costing templates to be created for any funder and allows creating templates tailored to specific funder schemes including fEC and TRAC.
- Clear workflow of costings through the bid lifecycle.
- Version control functionality to allow for a full audit trail.
- Permissions control can be configured to match your business rules.

The screenshot displays the Cayuse system interface for project costing. The main view is titled "Breakdown: CST2122-0031" and includes a navigation menu on the left with options like Home, University of Example, Humanities, Media, Science and Technology, Committees, Upcoming meetings, Past meetings, Using this demo, Guides, and Accessibility. The main content area shows "Costing Details" for project CST2122-0031, with an expected start date of 01 May 2022 and a duration of 36 months. A table shows income breakdown by year: 2021-22 (£8,799.73), 2022-23 (£34,216.20), 2023-24 (£35,730.62), 2024-25 (£27,255.97), and a total of £106,002.52. Below this, it lists "Directly Allocated" costs for Staff and "Directly Incurred" costs for Staff. A secondary view titled "Costing: CST2122-0031" shows "Deliverable 1" for May 2022 - 36 months, with a total of £110,563.34. This view breaks down costs into "Directly allocated" (Prof Tynan Gray - £52,000 FTE, £88,450.87 funded) and "Directly incurred" (Reagents - £125.49, Conference attendance - £125.50, Overheads - £16,749.96).



Post-Award Solutions

Post-award management is a major challenge. Communication can break down between pre-and post-award offices, so whether processes are paper-based or computer-based, it can be difficult to locate the latest information. Tracking and reporting on award spending in a timely manner is no small feat, especially if systems are not integrated.

Your post-award office needs an easier way to oversee grant spending and effort certification. A single place to monitor overall financial health, spend-down, and risks to compliance.

Cayuse's post-award solution will help you be a successful steward of your funding, manage your research portfolio, comply with changing regulations, and reduce administrative burden.

Our post-award solutions help you:

- **Oversee your entire research portfolio**
- **Improve budget oversight for multi-year projects**
- **Automate effort certification and reporting**
- **Generate easy-to-read financial summaries, burn rate, and P&L statements**
- **Project future year expenses to control spending**
- **Reduce errors and compliance risk**
- **Collaborate, share, and integrate data with pre-award personnel and other departments**

Fund Manager

Cayuse Fund Manager is an industry-leading project financial reporting and management solution that supplements and leverages your Enterprise Resource Planning (ERP) systems including your General Ledger (GL) and Human Resources (HR) systems.

Fund Manager allows you to:

- Interface to your existing finance system, including your ERP, GL, payroll, and purchasing systems
- Generate easy-to-read financial summaries, burn rate, and P&L statements
- Perform ad-hoc reporting
- Improve budget spend-down oversight
- Maintain budgets and balances for multi-year projects
- Track internal commitments with cost accounting functionality
- Compute and encumber projected salaries and benefits for individual budget periods
- Forecast salary coverage
- Generate reports for fiscal oversight and individual funds, research teams, and org units.



For more information, please follow the link here: <https://cayuse.com/connected-research-suite-on-demand-overview-videos/>



Risk Management

From human and animal subject protocols to hazardous materials and potential conflicts of interest, research compliance can be complex. With involvement from many departments and stakeholders, ensuring compliance is often time-consuming. High scrutiny and policy changes only add to the challenges.

You need a faster process for protocol review. An easier way to identify risks, monitor progress, and preserve integrity without impeding science. A centralised place to collect all necessary information, approvals, and supporting documents before deadlines.

Cayuse's research compliance solution will help you adhere to regulations, increase collaboration, and reduce administrative burden.

Our post-award solutions help you:

- **Oversee your entire research portfolio**
- **Improve budget oversight for multi-year research projects**
- **Automate effort certification and reporting**
- **Generate easy-to-read financial summaries, burn rate, and P&L statements**
- **Project future year expenses to control spending**
- **Reduce errors and compliance risk**
- **Collaborate, share, and integrate data with pre-award personnel and other departments**

Human Ethics

Get transparency into all phases of a protocol with Cayuse Human Ethics. Enjoy increased efficiency with 100% electronic preparation, submission, and routing of human research study protocols. It's never been easier for administrators, researchers, and committee members to collaborate.

- Collaborate online for submission, review, and approval with electronic routing, system alerts, and notifications
- Compare submissions side by side for faster protocol review
- See activity pipeline and protocol status with role-based dashboards and automatic reminders
- Manage meetings with increased efficiency and compliance

The screenshot displays the Cayuse Human Ethics dashboard. At the top, there are navigation tabs for Dashboard, Studies, Submissions, Tasks, Meetings, Reporting, and More. A user profile for 'Robt Analyst' is visible in the top right. The dashboard features several key metrics and lists:

- Workflow Stages:**
 - In-Draft: 9
 - Awaiting Authorization: 2
 - Pre-Review: 3
 - Unclear Review: 23
- Submissions that are Unassigned:**
 - IRB-EY2022-73: Responding to turbulent times: Coping with the COVID-19 pandemic and its aftermath
- My Tasks:**
 - IRB-EY2022-37: Complete Analyst Pre-Review
 - IRB-EY2022-48: Complete Post Review
 - IRB-EY2022-49: Complete Analyst Pre-Review
 - IRB-EY2022-71: Assign Analyst
 - IRB-EY2022-17: Complete Post Review
- Submissions by Type:**
 - Renewal: 9
 - Initial: 36
 - Modification: 8
 - Incident: 5
 - Withdrawal: 0
 - Closure: 0
 - Legacy: 0
- Submissions under review:**
 - Full Board Reviews: 10
 - Expedited Reviews: 7
- Studies Expiring in 30 days:**
 - IRB-EY2022-14: Alliance to Discriminate Addiction Prevention and Treatment (ADAPT): A Statewide Learning Health System to Reduce Substance Use among Justice-Involved Youth in Rural Communities
 - IRB-EY2022-30: Collaborative Research: A "Citizen Science" approach to examine COVID-19 social distancing effects on children's language development
- My Meetings:** A calendar view for December 2021, showing dates from Sun to Sat.



Ethics Monitor

Ethics Monitor streamlines the approval of applications for ethical review. Ethics Monitor has been carefully and thoughtfully designed resulting in an intuitive and user-friendly experience for all users.

Transparent and efficient, Ethics Monitor is an easy-to-use online solution that saves time and ensures good research governance across your institution.

The user interface is clear and intuitive regarding accessibility, ease of use, and mobile access. Extensive training is not normally required.

It provides online forms, streamlined approvals, and comprehensive reporting. Ethics Monitor includes a comprehensive set of default management information reporting dashboards that are tailored to your institution during the implementation process.

High-Level Overview

Ethics Monitor has been carefully and thoughtfully designed resulting in an intuitive and user-friendly experience for all users. The user interface is clear and intuitive regarding accessibility, ease of use, and mobile access.

In particular:

- the user interface is kept clean and clear of clutter.
- clear markers guide the user to the next action.
- Easy to revise and resubmit applications
- Provides applications to approve significant amendments to a research
- Stores previous versions of applications and highlights changes
- Supports applications requiring approval by external bodies

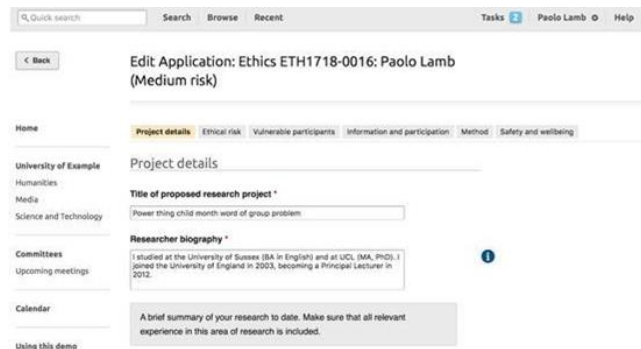
The screenshot shows the 'Ethics applications overview' dashboard. At the top, there are navigation links: Search, Browse, Recent, Add, Tasks (3), Isa Hunt, and Help. Below this, there are four summary cards: 28 Applications, 5 Approved, 2 Approved after conditions, and 1 Not approved. A search bar and a risk level filter are also present. The main table lists the following applications:

Application	Type	Applicant	Category	Risk level	Status	Submitted	Last action
ETH1718-0016	University	Paolo Lamb	Doctoral Resear...	Medium	Awaiting more inf...	08 May 2018	14 May 2018
ETH1718-0028	NHS	Ms Hedwig Moore	Doctoral Resear...		Awaiting submis...		10 May 2018
ETH1718-0025	University	Prof Janina Burr...	Researcher		Awaiting submis...		09 May 2018
ETH1718-0026	University	Prof Janina Burr...	Researcher	Medium	Approved after c...	09 May 2018	09 May 2018
ETH1718-0027*	Significant A...	Prof Janina Burr...	Researcher	Medium	Awaiting reviewe...	09 May 2018	09 May 2018
ETH1718-0017	NHS	Prof Ceil Cooper	Researcher	Medium	Approved	08 May 2018	08 May 2018



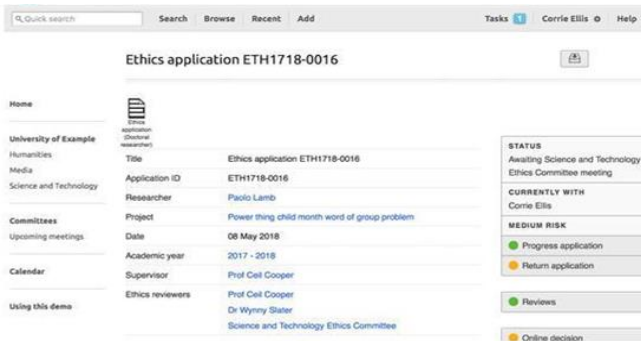
Extensive reporting on every aspect of research ethics applications because:

- It has real-time management information dashboards
- It classifies risk levels automatically
- It highlights high-risk applications
- It highlights overseas research
- It monitors time-to-decision
- It maintains an audit trail of actions taken for each application
- It provides oversight of processes delegated to faculty committees



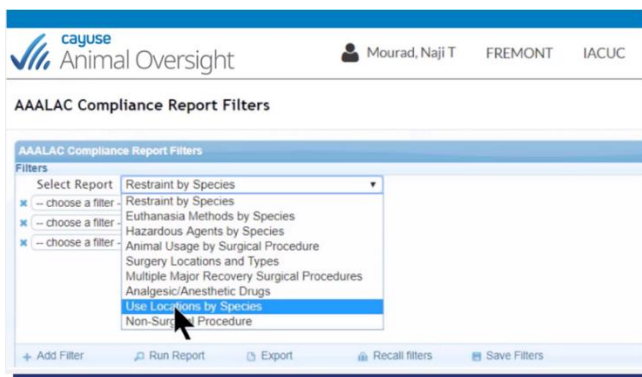
Easy to assure good research governance because:

- Has automatic prompts to review applications
- It routes applications to the correct reviewer
- It flags conflicts of interest
- It enables reviewers to add comments to applications
- It supports ethics committees with online decisions and creates agendas and minutes automatically
- It notifies applicants of outcomes via an editable template
- It provides visibility of the status of applications at every stage



Animal Oversight

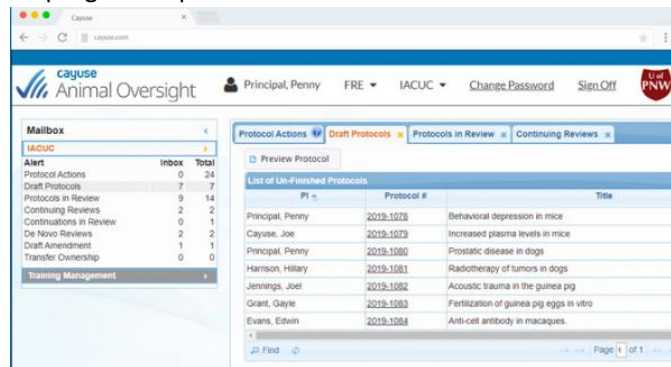
Cayuse Animal Oversight allows the seamless management of full-lifecycle animal protocol needs including authorship, submission, review, approval, amendments, continuation/full reviews, and compliance reporting with a user-friendly, intuitive system. Automated email notifications help ensure compliance by reminding users of critical upcoming tasks. IACUC compliance is a complex matter that can be simplified by using Cayuse Animal Oversight to provide ease, transparency, and to support collaboration across departments.



- Utilise built-in best-practice workflow based on 30 years of knowledge and expertise



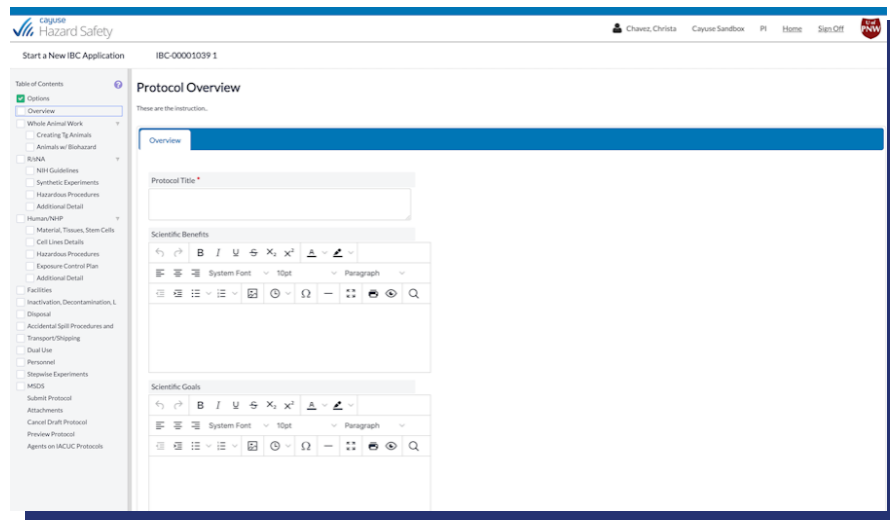
- Configure the protocol document to reflect your program’s specific needs
- Integrated with Cayuse Hazard Safety for insight into biohazardous agents marked for animal use
- Quickly generate protocol reports, including critical compliance reports
- Instantaneously view and submit animal orders on approved IACUC protocols from Cayuse Animal Procurement



Hazard Safety

Cayuse Hazard Safety helps ensure that the management and review of biohazardous agent use is done in the most efficient way possible, all while supporting adherence to IBC and NIH requirements.

- Configurable IBC protocol document to align with organisational needs
- Integrated with Cayuse Animal Oversight for insight into IBC agent use on animals
- Full authorship, review, amendment, and continuation workflow



Outside Interests

It is more important than ever for research staff to complete conflict of interest (COI) disclosures. Failure to disclose risks serious repercussions, from whistleblower reporting and agency investigation, to grant suspension and public mistrust. Cayuse Outside Interests is an intuitive software that helps you stay compliant, with little training needed.

- Auto-approve disclosures that have no potential conflict of interest
- Ensure compliance and minimise liability



- Gain a comprehensive, transparent overview of disclosure status
- Easily search and export data
- Protect research integrity
- Maintain high ethical standards
- Save valuable time on administrative tasks and focus more on research

For more information, please follow this link: <https://cayuse.com/connected-research-suite-on-demand-overview-videos/>



Resource Management

It is difficult to manage a lab animal research facility, considering tasks like feeding, care, staffing, and billing. Paper-based systems do not reflect sudden changes, and even technology doesn't always meet staff needs.

For efficient resource management, you need a high-level overview as well as real-time insight into critical issues.

Cayuse's Resource Management solution provides powerful visibility into data and reduces administrative burden, facilitating communication, teamwork, and animal welfare. It's supported by three decades of experience and leadership in life sciences research and facility management.

Cayuse's Resource Management applications include Animal Procurement, Animal Inventory Management, Services, Billing, Veterinary Care Management, and Resource Scheduling. The suite of applications is the most robust, all-encompassing electronic management system in the industry. Built to minimise and streamline the myriad of tasks involved in efficiently managing an animal facility, it is extremely user-friendly and intuitive.

- Choose which applications best suit your needs
- Automatically track animal usage, validations against animal protocols, various charges, animal health concerns, and technician scheduling
- Can integrate with your financial system to efficiently record animal-related charges
- Integrated with Cayuse Animal Oversight to help ensure compliance with approved animal numbers

"What used to take up to 20 minutes of frustration with the old system now takes less than 5 with the Cayuse products. We're able to do our work much quicker and easier."

M. Tennat, Case Western Reserve University

Our research resource management solutions help you:

- **Avoid non-compliance fines and penalties while reducing overall compliance risk**
- **Maintain necessary employee certifications**
- **Ensure smooth management of lab animal facilities**
- **Procure research animals and schedule veterinary care**
- **Oversee and schedule facility personnel**
- **Instantly adapt to animal illness or staff absence**
- **Accurately manage census, vivarium operations, billing, and forecasting**



Vivarium Operations

Cayuse Vivarium Operations (Animal Procurement)

Procurement shouldn't stall your research project. Once an IACUC protocol is approved, research staff must move quickly to procure animals and begin research activities. But if the procurement process is complicated, it can delay research, which makes PIs unhappy. Now it's easy to avoid setbacks and begin research on time. Researchers and staff can submit, review, approve, modify, and cancel orders electronically with Cayuse Animal Procurement.

- Submit requests for commercial orders, non-commercial imports, and wildlife capture
- Request modifications to submitted orders
- Set up automatic recurring orders and see delivery schedule
- Receive single or batch orders with a single click
- Print cage cards anytime and activate census when orders are received

Cayuse Vivarium Operations (Animal Inventory)

Things are constantly changing at research facilities, so billing and cost recovery can feel like moving targets. With paper or spreadsheets, animal counts are quickly outdated, leading to wasted money and frustrated staff. You need correct data to maximize savings and empower researchers. With Cayuse Animal Inventory, you can see real-time census data on your tablet or computer anywhere with internet access. Compliance, accuracy, and peace of mind are just a few clicks away.

- Scan cages with a mobile app for real-time updates and inventory reconciliation
- Ensure compliance with behind-the-scenes protocol debits and credits of animals
- Stay proactive with notifications for weaning schedules
- Achieve accurate care-day charges with automatic calculation of all census activities for active cages during the period

Cayuse Vivarium Operations (Service Charges)

Having information in different systems can make it especially difficult to ensure grant-to-project congruence. Now you can speed up the billing process without losing data integrity with Cayuse Service Charges, an intuitive software solution for automating service charge management.

- Enter program-specific services and rates during setup
- Create service groups and packages by grouping services and setting up lists and preferences
- Quickly and easily adjust service charges
- Automatically bill service/supply groups or packages by category and billable item



Cayuse Vivarium Operations (Billing)

Business offices need precise, current info to create invoices and ultimately support your institution’s research program. But billing is a pain with manual or disparate systems, and inaccurate data leads to inaccurate charges—jeopardising grants and even institutional integrity. Get peace of mind with Cayuse Billing.

With access to real-time information, staff can process billing faster, make projections for better decision-making, and ultimately ensure projects are aligned with funding.

- Set up, split, and manage accounts easily
- Automatically compile and calculate animal purchase charges, completed service charges, veterinary care charges, and period-to-date care-day charges
- Generate electronic invoices from period closes and immediately make them available online

The screenshot displays the Cayuse Vivarium Operations web application. The interface includes a navigation menu on the left with categories like 'Animal Procurement', 'Alert', 'Order Animals', 'Draft Orders', 'Draft Imports', 'Draft Wildlife', 'Draft Standing Orders', 'New Orders', 'New Imports', 'New Wildlife', 'New Standing Orders', 'Confirmed Orders', 'Confirmed Standing Orders', 'Wait Listed', 'Expected Deliveries (7 days)', and 'Standing Shipments'. The main content area shows a 'Confirmed Orders' view with a table of orders. The table has columns for Order #, #, Protocol, Requestor, Vendor, Requested On, Placed, Expected, Notification(s), Species, Qty, and Strain. The data shows several orders for 'Mouse Large Phenotype' from 'Procurement Laboratory'.

Order #	#	Protocol	Requestor	Vendor	Requested On	Placed	Expected	Notification(s)	Species	Qty	Strain
Y001044-1 - 1 Item(s)											
Y001044-1	1	2019-1028	Mourad, Naji T	Procurement Laboratory	02/16/2020		02/18/2020		Mouse	5	Mouse Large Phenotype
Y001046 - 1 Item(s)											
Y001046	1	2019-1028	Chavez, Christa	Procurement Laboratory	02/16/2020	05/20/2020	05/22/2020		Mouse	5	Mouse Large Phenotype
Y001048 - 1 Item(s)											
Y001048	1	2019-1028	Chavez, Christa	Procurement Laboratory	02/16/2020	05/20/2020	05/22/2020		Mouse	20	
Y001075 - 2 Item(s)											
Y001076 - 2 Item(s)											
Y001094 - 1 Item(s)											
Y001092 - 1 Item(s)											



Vet Care

Animal welfare is key to compliance. But managing animal records can be complicated and time-consuming, especially if your facility has a large or varied animal population. It's easier to provide the highest quality of animal support with Cayuse Veterinary Care. Staff can focus more on animals and less on record-keeping, thanks to greater visibility and automation tools.

The result is improved efficiency, organisation, and adherence to regulations.

- Create general or species-specific treatment templates for individual animals, groups of animals, or entire rooms
- Set up activity recurrences and assign treatment activities
- Access daily schedules on mobile devices and the online calendar
- Report cageside health observations and incidents online
- Record vitals in real-time with anesthetic monitoring capability
- Automatically create service charges for completed activities

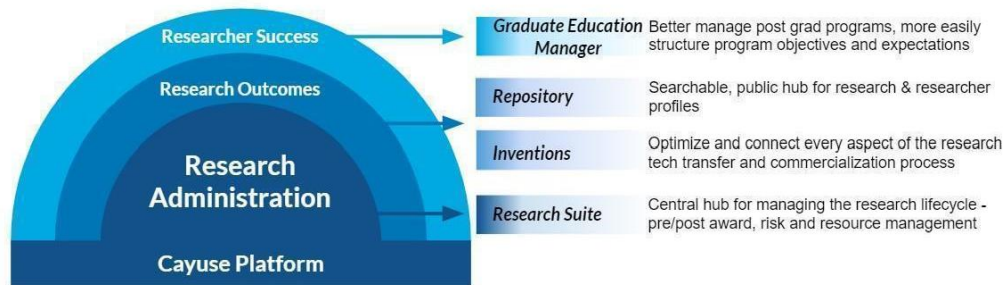
The screenshot displays the Cayuse Vet Care web application. On the left is a navigation sidebar with categories like IACUC, Animal Procurement, Animal Inventory, and Veterinary Care. The main area shows a 'New Health Reports' section with buttons for submitting reports and starting new cases. Below this is a table of health reports with columns for Card ID, Priority, Case ID, Species, Observations, Other Observations, Notes, Submitted By, and Reported. The table lists several reports for mice, including details on flooded cages, skin ulcerations, and pinworm outbreaks.

Card ID	Priority	Case ID	Species	Observations	Other Observations	Notes	Submitted By	Reported
0000001338	Low	HR: 0000001045-00	Mouse	Flooded Cage:Sick:Skin Ulceration		Test	Mourad, Najj T	03/16/2020
0000001338	Low	HR: 0000001074-00	Mouse			stest	Mourad, Najj T	04/21/2020
0000001341	Normal	HR: 0000001039-00	Mouse	Flooded Cage		dfdsfdfsdf	Mourad, Najj T	03/13/2020
0000001341	Normal	HR: 0000001040-00	Mouse	Flooded Cage:Pinworm Outbreak		0000001341	Mourad, Najj T	03/13/2020
0000001338	Normal	HR: 0000001056-00	Mouse	Flooded Cage			Mourad, Najj T	03/25/2020
0000001338		GC: 0000001042-00	Mouse					03/13/2020



Research Outcomes & Success

Funding for institutions today is harder than ever before. Cayuse research outcome solutions bolster revenue generation and drive ROI. By generating never-before-seen connectedness and collaboration that better supports faculty—all of which can help attract future talent—our Inventions and Repository solutions deliver transformative impact.



“What’s most important to me is ensuring each Doctoral Researcher is receiving effective support and has the best chance of timely and successful completion,” explained Professor Simon Joss, Director of the Graduate School. Our completion rates have risen significantly over the past year, and PhD Manager has played a key part in enabling that success.” Pr. S. Joss, Westminster University.

Graduate Education Manager

Graduate Education Manager (GEM) is a comprehensive and time-saving solution for postgraduate researchers, supervisors, and graduate schools. Keeping information in one place streamlines the process of supervision meetings, progression monitoring, examinations management, and reporting. Our user interface is designed to be intuitive and user-friendly so that little to no training is required for end-users engaging with the system. Cayuse GEM will enable your users with capabilities such as the creation of accurate, comprehensive, and up-to-date records of postgraduate research projects that can be accessed by students and supervisors.

GEM enables students and supervisors to record supervision meetings easily that can be shared with the entire supervisory team and allows them to track where supervision meetings are not happening. Graduate Education Manager provides online forms making administration easier to manage including any change requests. Finally, it provides tools to effectively manage training and development events and provides extensive reporting on every aspect of a Doctoral Research programme.

Cayuse GEM offers:

- Comprehensive and accurate records that provide reliable reports
- Accessed by Post Research students and supervisors
- Easy integration with your student record system



GEM enables Researchers and Supervisors to record supervision meetings easy because

- It is a central place to store supervision meeting records
- It shares with the entire supervisory team
- It tracks where supervision meetings are not happening.

GEM provides online forms making administration easier through

- key stage applications
- change request
- annual monitoring reviews
- streamline and speed up processes

GEM provides tools to manage training and development events effectively because

- It organises events online
- It publicises tailored events
- It manages attendance
- There are skills and training logs

GEM provides extensive reporting on every aspect of a Postgraduate Research programme.

- It provides
- real-time management information dashboards
- analytical reports showing trends over time
- Visa monitoring reports
- Export reports filter and sort reports

For more information, please follow the link here:

<https://cayuse.com/connected-research-suite-on-demand-overview-videos/>

This screenshot shows a web form for logging a supervision meeting. It includes a search bar at the top, a navigation menu on the left, and a main form area with sections for 'Participants' (listing Ana Ali, Prof Daisy Stewart, and Prof Theodore Gill), 'Date of meeting' (03 Jan 2016), and 'Meeting format' (radio buttons for 'In person', 'Telephone', 'E-Mail', and 'Video conference'). A 'Doctoral Researcher discussion notes' section contains the text: 'We discussed draft chapter three and the paper I'm preparing for'.

This screenshot shows a 'Declaration' form with three radio button options: 'I declare that all the material contained in this thesis is my own work.', 'I declare that no material contained in the thesis has been used in any other submission for an academic award', and 'I declare that the following material contained in the thesis formed part of a submission for the award of:'. Below these are fields for 'Award', 'Awarding body', and 'Please list materials submitted'.

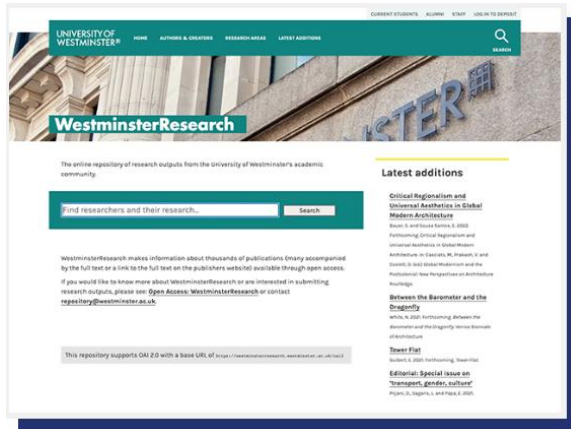
This screenshot shows an event page for 'University Workshop 1.1, Day 1, 27th January 2016'. It displays event details such as date, time, location (Main Boardroom), and faculty. A table lists the cohort (DRDP Cohort) and dates (2015 January PT and FT). An 'Invite group' sidebar shows statistics: 20 invites sent, 3 accepted, 2 not attending, 24 no response, 0 on waitlist, and 1 deferred.

This screenshot shows a 'Visa activity' report table with 131 records. The table has columns for Doctoral Researcher, Faculty, Department, Last activity, Visa type, Stage, Current, and Intended. The data is as follows:

Doctoral Researcher	Faculty	Department	Last activity	Visa type	Stage	Current	Intended
Anneel, Christopher	Social Sciences	HE...	22 Jul 2015	Tier 4 Student	Active	M.Phil.	Ph.D.
Anneel, Luka	Art	Communicatio...	15 Sep 2014	Tier 4 Student	Examined	Ph.D.	Ph.D.
Alexander, Mia	Science	CSSE	22 Jul 2015	Tier 4 Student	Active	Ph.D.	Ph.D.
All, Ana	Art	Communicatio...	03 Jan 2016	Tier 4 Student	Active	M.Phil.	Ph.D.
Ashon, Fatima	Art	Communicatio...	12 Jun 2015	Tier 4 Student	Active	M.Phil.	Ph.D.
Auer, Angela	Architecture	Archit...	12 Oct 2015	Tier 4 Student	Active	Ph.D.	Ph.D.
Barbu, Magdalena	Architecture	Prope...	20 Jul 2015	Tier 4 Student	Active	Ph.D.	Ph.D.
Barnes, Alva	Art	Communicatio...	14 Jun 2015	Tier 4 Student	Active	M.Phil.	Ph.D.
Bates, Alan	Art	Centre for Res...	23 Jul 2015	Tier 4 Student	Active	Ph.D.	Ph.D.



Repository

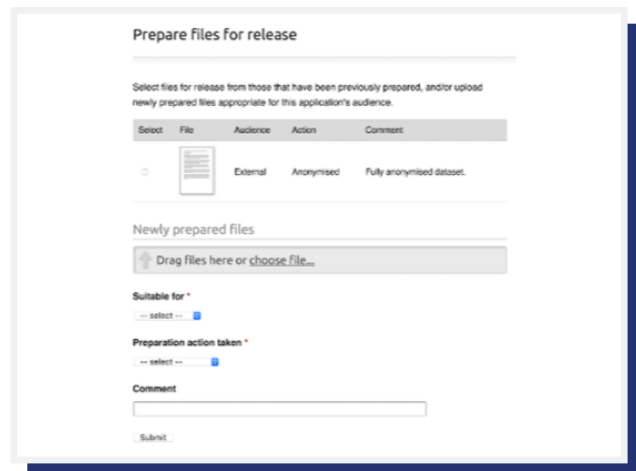


A single repository to manage all research outputs, including traditional scholarly publications, practice-based research, and research data. With integrated workflows and an intuitive user interface, it streamlines processes and increases engagement. Cayuse Repository provides an extensive API for publishing and receiving machine-readable structured data in open formats. As well as standards-based APIs, our open server-side API makes it easy to support custom integrations. We support direct harvesting from external services, minimising manual data entry by researchers. Encrypted data is transferred to dedicated preservation services for

long-term preservation and storage. Our software can integrate with an institution's authentication system enabling users to log in with their usual username and password and can receive enhanced information from your institution's HR and Student Record Systems.

Repository is provided as an ISO27001 certified service. Cayuse's focus on security makes it the reassuring choice for storing sensitive data and managing embargoed or restricted files.

Our focus on security and easy-to-use access request workflows enables restricted files to be managed confidently in an open repository. Requests are routed to the repository manager and author. On approval, users can be required to agree to a license and are granted access to the files for a limited period. All requests and downloads are logged for auditing.



Every part of the access request process is configurable for each institution.

Cayuse Repository:

- Has the ability to become a public portal or be an internal portal
- Every aspect of the public portal is customisable, from the kinds of information it displays, to the way that information is structured and presented.
- Creates researcher profiles
- Researchers can self-deposit outputs from their research
- It draws publication metadata and citation information from external databases to which the institution subscribes
- Real-time reports



- Researchers can submit all their research outputs datasets, practice-based research outputs, and traditional research outputs can be stored together, and all outputs related to the same research project are linked together
- Any type of file can be stored and managed within the repository
- Creates unique author profiles per person, not per citation.
- All an institution's repository can be searched to find and reuse research
- A detailed audit trail and support for version control provides reassurance of the origin and integrity of all changes within the repository
- Data is kept safe in a repository where security is an integral part of the design
- Supports and enhances the REF process

Output	Author	Accepted	Faculty : Department	REF Unit of assessment	Published	REF compliant
Aggregation Limits Surface ...	Dr Nia Faber	24 Feb 2016	FST : CM	05 Biological ...		✓
Investigating The Mind	Stella Bailey	01 May 2017	FST : Engineering	01 Clinical M...	10 May 2017	✓
Preconditioning 2D Integer ...	Prof Amelia B...	27 Jan 2016	FST : BMS		03 Mar 2016	✓
Akkermansia muciniphila a...	Dr Alexis Ne...	01 May 2015	WBS : Dept of Fina...	05 Biological ...	01 Mar 2016	✓
Kroppenstedtia pulmonis s...	Valentina Kay	02 Feb 2016	SS : Westminster Pr...	05 Biological ...		✓

Inventions

Inventions is a cloud-based enterprise platform that facilitates an organised and effective lab-to-market operation. Built from user experience with peers at Ohio State, Duke, Washington University, St. Louis, and others and designed for data transparency and integrity, Cayuse streamlines access to information and enhances collaboration across the commercialisation value chain. Reimagine the way you manage all aspects of the lab-to-market process related to technology transfer, IP management, and research commercialisation with Cayuse Inventions. Our intuitive and connected lab to market hub helps tech transfer teams collaborate more efficiently, make better decisions, and prioritise commercialisation activities.

- Agreement/receivables management
- CDA / MTA Management
- Online disclosure and agreement request
- Royalty distributions (w/ fees and cost recovery)
- Patent management workflow
- COI, IRB collaboration
- Built-in Marketing Platform
- Internal and external notification system
- Deal-flow and Start-up Pipelines
- In-platform invoicing
- Robust reporting for all departments/stakeholders
- iEdison reporting

For Inventions demo, please follow this link <https://cayuse.com/inventions/>



Implementation Approach & Support

The Cayuse Research Platform can be implemented in a phased approach by module, or all modules can be implemented simultaneously. We estimate nine months from implementation to go-live if all modules are implemented simultaneously.

Our proven method for successful implementation and training, honed through experience with more than 650 customers, includes four phases: **Discovery**, **Configuration**, **Delivery**, and **Roll-Out**.



Support

Cayuse takes customer support seriously and has earned a reputation for high-quality interactions with our client community. Upon project close, you will receive a smooth transition to our support team and your customer success manager (through our customer handoff process).

Our support desk operates from multiple locations through our portal to provide a near 24/7 service, however, our core UK hours are Mon - Fri 8 a.m. - 5 p.m. GMT(BST). We have a core team in the UK and additional members in Australia, East, Central and West coast USA. These members can be reached via our online portal, email, or phone service.

Your primary business contacts will have access to an emergency number for "after-hour" support. All primary support staff is located in the UK, with additional support provided by our Australian and US-based teams.

Cayuse maintains an active Customer Advisory Board (CAB) for its research products to help shape our strategic direction and feature enhancements. Membership is offered on a rotating basis and comprises a range of clients in both size and focus. All customers are eligible to apply for a seat on the CAB once their system is live and in use, with each participant signing a CAB agreement covering the protection of confidential information.



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