November 11, 2015

To: University of Tennessee sponsored research community

From: Taylor Eighmy, Vice Chancellor for Research & Engagement

CC: Research Council
Associate Deans for Research
Center & Institute Directors
Deans
Chancellor Cheek & Cabinet
Dr. Stacey Patterson, AVPR, UT System
OSP Interim Directors Beth Eslick, Theresa Sears, David Smelser

Re: Upcoming TERA-PAMS Conversion to Cayuse SP

Since about 2013, the University of Tennessee has been involved in a procurement effort for all campuses in the system to acquire a vendor-supported enterprise level (1) sponsored project life cycle management system and (2) an electronic proposal development and submittal system for Grants.gov (which encompasses most federal agencies) and Fastlane (for NSF only). A committee comprised of representatives from each campus selected the Cayuse SP and Cayuse 424 suite from eVisions.

We have relied on TERA-PAMS as our sponsored project life cycle management system for about six years. It was developed at UNC about twelve years ago. We kept one of the earliest versions of TERA-PAMS and relied on UT OIT to periodically tailor it to our needs. It worked well, but had no vendor enterprise support—especially around electronic proposal submission.

Fortunately for us, the TERA-PAMS architecture was acquired from UNC by Cayuse. Cayuse was subsequently acquired by eVisions (https://evisions.com). The new sponsored project life cycle management system offered (Cayuse SP) is based on a later version of TERA-PAMS and is very similar to the original TERA-PAMS architecture. Some users here have compared the two and suggest that it is about 70% similar. Cayuse SP also has the Cayuse 424 electronic proposal development and submittal system for Grants.gov (and eventually for Fastlane). Cayuse 424 looks very much like the Adobe Grants.gov form already used by faculty, but includes many automated features to allow
completion of the grant application more simply, accurately, and efficiently.

Many universities use Cayuse SP and Cayuse 424 (about 130 use one or the other or both, including Ohio State, Penn State, NC State, Notre Dame, NYU, Northwestern, Rice, RPI, U. Cal universities, UT Austin).

**Roll Out:**

The implementation at the Knoxville campus will be done in two stages. Given the significant similarities between TERA-PAMS and Cayuse SP, we will roll out Cayuse SP first, over the holiday break. Since Cayuse 424 is more new to our research administrators and faculty, it will be rolled out next spring after extensive training.

For the Cayuse SP implementation, eVisions personnel are training Office of Sponsored Programs staff later this week and then OSP will demonstrate the system to test groups with representation from all the colleges next week. OSP will offer at least seven training sessions (and, provisionally, three more) between late November and mid-January. Additionally, information about Cayuse SP has been and will be shared with the Research Council, the Associate Deans for Research, and the Research Administrators OutReach (RAOR) Forum.

**Critical Dates for Cayuse SP Roll Out:**

- Thursday and Friday, November 12-13: OSP personnel training
- Thursday, November 19: Test Group (invited) demonstration and training
- Friday, November 20: Test Group (invited) demonstration and training
- Wednesday, December 2: Reading day
- Thursday, December 3: Exams start
- Thursday, December 10: Exams end
- Thursday, December 17: TERA-PAMS goes dark at 12:00 p.m. ET and will be unavailable
- Friday, December 18: Migration of TERA-PAMS data to Cayuse SP begins
- Monday-Friday December 21-25: UT closed
- Monday, December 28: UT opens; Cayuse SP goes live at 8:00 a.m. ET
- Thursday, December 31: UT closes
- Monday, January 4: UT re-opens
- Wednesday, January 13: Classes begin

**If You Have Proposals Needing Submittal between December 18 through December 31:**

Given the system conversion and the holiday closures, if you have a proposal needing
submittal between Friday, December 18 and Thursday, December 31, then please plan on having your proposal submitted to OSP no later than Thursday, December 10. If you have a concern regarding this request, please call the OSP main phone line at 974-3466 between 8:00 a.m. and 5:00 p.m.

**Open Training Sessions on Using Cayuse SP:**

All training sessions will be two hours and are open on a first come, first served basis. To sign up, please go to the ORE website at: [http://research.utk.edu/training-workshops/](http://research.utk.edu/training-workshops/). Classes will be held in A004 Blount Hall.

The training dates and start times are shown below:

- Monday, November 23, 10:00 a.m.
- Thursday, December 3, 2:00 p.m.
- Tuesday, December 8, 1:00 p.m.
- Wednesday, December 9, 9:00 a.m.
- Monday, December 14, 1:00 p.m.
- Wednesday, January 6, 2:00 p.m.
- Tuesday, January 12, 10:00 a.m.
- Thursday, January 14, 2:00 p.m. (tentative, will be made available if needed)
- Monday, January 25, 2:00 p.m. (tentative, will be made available if needed)
- Friday, January 29, 2:00 p.m. (tentative, will be made available if needed)

OSP will provide phone support during work hours (Monday-Friday 8:00 a.m. to 5:00 p.m.) at 974-3466 if you have questions about Cayuse SP.

**Resources Available to You:**

Information about the new Cayuse research suite and online tutorials can be found here: [http://research.utk.edu/cayuse/](http://research.utk.edu/cayuse/). As soon as OSP training materials are developed they will be available for download at that link as well.

The OSP main desk number is 974-3466. If you have specific questions about Cayuse SP roll out, please call this number.

If you have any general questions or concerns, then please contact me (teighmy@utk.edu, 974-8701).