

Form Management in Sponsored Projects

This week's tip is on managing your Proposal, Award, and Subaward forms in Sponsored Projects on the Platform.

If you're not familiar with Sponsored Projects on the Platform, you may not have seen the Form Manager function yet. It looks like this:



Here you can access the Form Builder to create, edit, and publish your customized Proposal, Award, and Subaward forms. The blue buttons to the right allow you to download and upload these forms.

So, here's my tip – When you're happy with your current form, publish it and then download that published version. Save it to your desktop or shared drive (please note you cannot open the downloaded forms with any program other than Cayuse Sponsored Projects). This will give you an archive of forms you have published and the ability to revert to an earlier version or restore in case of emergency.

Bonus tip – Best practice is to edit your forms in your training environment then download and upload to production. Don't forget to publish in production after the upload!

For more information about Sponsored Project on the Platform, visit our support site at <https://support.cayuse.com/hc/en-us/categories/360001581913-Sponsored-Projects-New-> to view guides, articles and release notes or you can reach out to your Customer Success Manager.