2021 Platform Upgrade FAQ

Platform Upgrade Requirements & Cost

What version should I be on to upgrade to the platform?
All customers with cloud-based Cayuse apps can be upgraded to the platform.

If I am on-prem, how do I get the platform capabilities?
You will need to upgrade to the cloud to take advantage. We can likely perform both the cloud and platform upgrade at the same time.

Who should I contact to upgrade to the cloud?
If you know who your Customer Success Manager is, then reach out to them directly, otherwise please send an email to the success team at success@cayuse.com.

Is there a cost to upgrade from on-prem to cloud based Cayuse apps?
Yes, there will be a minimal cost, please contact your customer success manager to discuss or reach out to success@cayuse.com.

Is upgrading to the new platform required?
Yes, the platform brings great capabilities including central administration, connected Cayuse suite of apps with cross app workflows, additional integration capabilities leveraging the value of existing systems, and enhanced reporting.
You will all be upgraded to a version of the software that has the platform plugged into it.

If I am in the middle of an implementation, should I pause and wait for this platform upgrade?
No. It is best to get your implementation completed first, then we will work with you on the details/timing of the platform upgrade.

What is the cost to upgrade to the platform?
There is no charge for upgrading your existing cloud hosted application(s) to the platform.

Platform Upgrade Process & Timeline

What's the process?
Platform upgrade process for all Cayuse apps will start in January 2021 and continue throughout the calendar year.
The process will start with an email going out from the Support team to your point of contact 2 months prior to the upgrade date and will include all pertinent upgrade information.

How do I know when my upgrade is scheduled?
The support team will contact you 2 months prior to your upgrade to discuss expectations and to finalize the schedule.

When is my upgrade timeline?
Your exact upgrade timing is dependent on your product combinations, feature set and configuration complexity.
Human Ethics only customers will be among the first, followed by Proposals only customers.
The next wave would be for customers that have the above mentioned products with Sponsored Projects and Fund Manager.
The last wave is for customers that have the Animal Oversight, Hazard Safety, and Vivarium Operations.
In summary, any customer that has a combination of products will fall in the Q3/Q4 2021 upgrade timeline.
If you'd like to move faster or slower, please let your customer success manager know or reach out to success@cayuse.com.

If I have multiple Cayuse apps, do I have to go through multiple upgrades?
No, you will only have ONE platform upgrade event.

Can I upgrade sooner than the Cayuse timeline listed above?
We're always interested in working with people that want to adopt technology faster. Please let your customer success manager know or reach out to success@cayuse.com.

Would there be an option to request longer lead time notice for our transition or more time to spend in UAT?
Yes, we will give you as much time as possible. If there is a need for an extended time to test integrations, we will definitely coordinate on a client by client basis to organize that.

General Upgrade Questions

What IT resources will be necessary for this upgrade?
If you have SSO in production, we will need your IT for a small update on the day of the upgrade.

When do I need to notify my IT team that the upgrade is coming?
The local IT team should be informed when we send the initial email around scheduling.

Will I be able to login to my UAT (user acceptance testing) via our SSO?
Yes, the site will be ready to integrate with your SSO as part of the pre-upgrade validation process.

With the new UAT site, will the data be freshed from the current PROD database?
That will be dependent on the product. We can discuss once we start the communication.

When the new Training/UAT site is created, will organizations still have access to the information or test applications in their current Training site?
Yes, you will have access to the information in your current training site and that information won't be going away until after the upgrade is completed and the production looks correct. There will be a time where we will decommission the old UAT site after the upgrade is complete, but through the entire upgrade process you will have access to both the old site and the new site.

We have current integrations with other departments and systems. Will we still be able to integrate with these when upgrading to the platform?
Yes, we're building pre-built integrations, and we will have real-time APIs, so you will be able to integrate with everything that you have now plus more going forward.

If we already have HR Connect and SSO, will we be required to connect to these tools on the new platform, or does this happen automatically?
We will make sure the integrations are pointing to the right place but no significant work will be needed to ensure they continue to work.

Will the individual apps look and behave the same as they do now, after the platform upgrade?
Apart from a new place to manage users, the applications will function the same. The landing page will be the difference most non admin users will notice.

Is the improved data analytics for better reporting referencing the Cayuse SP product?
When we say improved data analytics, we are talking about the reporting in the application or the new cross app reporting functionality that comes as part of the platform. The product called Cayuse Analytics is currently only for Cayuse SP and will be expanded in the future to additional apps.

Will we be able to turn off the reporting features so that users can't access it?
Only users with the appropriate permissions and access level will be able to view the reports.

If the cloud happens to become compromised, will our data still be recoverable, or will that depend on the compromising event?
We take regular back ups that would allow a recovery in the event of a disaster.

Product-Specific Questions

We probably won't have started using Proposals by the time of the change, so would we need any special training? Could we delay it if we wanted?
There is no reason to delay going live with Cayuse Proposals. The application that you have done all your training on is still the same. Apart from a new landing page, this will not create changes for most users. How to add and manage people is a bit different but much easier on the Platform.

Does the SP move to the platform include moving to the latest Sponsored Projects app?
Yes, during your platform upgrade, you will be getting the latest release of Sponsored Projects.

Will the new platform allow drag and drop file transfers into the project/award?
This feature is specific to the latest release of Sponsored Projects (4.0). Upgrading to the platform will include this functionality as you will be upgraded to the latest version of Sponsored Projects as part of your platform upgrade.

Are you retaining the flag feature from SP?
Yes and we're making it even better. Customers will be able to configure not just Flags, but their entire Proposal and Award forms themselves. We also have roadmap plans for administrative checklists and other methods of administratively tagging records for easy reporting.

What pending upgrades are there for SP?
The next planned SP update is going to be upgrading clients to the platform and the latest version of Sponsored Projects, version 4.0.

Will this upgrade include linking information from SP to carryover to Fund Manager?
Upgrading to the platform lays the groundwork for additional integrations such as Sponsored Projects and Fund Manager. The work for additional integrations is ongoing, but upgrading to the platform will be a requirement to take advantage of them in the future.

Will there be more capabilities for apps to talk to each other (e.g. Hazard Safety/IBC and human Ethics/IRB)?
Yes, this platform version is what will enable that capability.

Additional Information

How can I get more information on the platform features?
We will share documentation on the community site.
There will be in-app guided walk throughs.
We will schedule webinars specifically on the platform.