

Cayuse, Inc.



SSO Integration of Proposal Development System Supports User Acceptance and Decreases Administrative Burden

Cayuse424 uses local authentication and profile information.

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Institutional profile

The University of Wisconsin, Madison (UW-Madison) is the central campus for the University of Wisconsin System. UW-Madison is a very large research organization, ranked 8th overall in Federal Research funding and 4th overall in research expenditures among US public universities. UW-Madison creates, manages and submits research proposals in a widely distributed process with significant cross-collaboration between the various schools and graduate programs. The total estimated Federal Research funding in 2005 for UW-Madison was approximately \$449 Million, primarily from the National Institutes of Health (NIH) and the National Science Foundation (NSF). Over 2000 employees participate in the proposal development process.

Challenge

Seeing the Grants.gov initiative as both an opportunity to improve administration processes and a change to a high-functioning research apparatus, UW-Madison began to investigate potential vendors of integrated solutions for proposal development and submission in mid-summer of 2006. The business challenge was to select and deploy a solution which was both comprehensive and flexible enough to accommodate the requirements of the UW-Madison research enterprise, *and to do so in time for the February 5th NIH deadline.*

UW-Madison faced several challenges. As a large institution, UW-Madison required significant time and effort to deploy a campus-wide system and to train users on new work-methods. Additionally, the proposal development process is widely distributed, requiring great flexibility due to the wide variety of research and individual work methods.

The following technical standards also influenced the choice of vendors:

- An on-site deployment was required.
- The system required integration with both the University's Single Sign-on (SSO) system and the campus *directory services* databases. This required technical resources from both Cayuse and University IT.
- Linux operating systems and Oracle database were required.
- Rapid deployment and training would be required for December 2006 rollout.

Solution

Cayuse424 was selected in early October, 2006 with the following results:

- Web training completed on December 1, 2006
- Site deployment delivered on December 8, 2006
- Rollout to staff for use occurred on December 12, 2006, *nine weeks after contracting.*
- First electronic submission occurred on January 7, 2007

The results above were supported by the following Cayuse products and services:

- Cayuse424 on-site installation.
- Cayuse professional services for integration with university systems
- Cayuse best practices consulting
- Phone support and upgrade services.

Benefits

SSO and directory services integration was required by UW-Madison in order to make Cayuse424 behave in the same manner as other widely-adopted institutional systems. This feature was more than a convenience to the end-user, as many of the user configuration activities were handled by the integration.

Given the critical nature of the project and the high expectations for use, UW-Madison IT and Cayuse worked quickly to build, configure and test the integration in 3 weeks. The quality of the technical expertise at UW-Madison contributed significantly to the speed of this integration.

"Whenever we had a question, we would shoot it over to them. It was very rare that they took

longer than 3 hours to respond, with most responses coming back to us in an hour," said Sam Quiring, CTO of Cayuse, Inc..

In addition to authentication, the integration was able to detect first-time use of the Cayuse424 system by an authorized user. This detection allowed for profile creation and population of basic data from the University's directory services database. For example, profiles were automatically created for users with such important details as email addresses and correct contact information populated from an authoritative source.

Additionally, the integration allowed the system profile database to grow naturally with the user base, eliminating the need to pre-load Cayuse424 user and profile information. Finally, with profiles automatically connected to user logons, Cayuse424 routing and approval functions were automatically configured. The results were decreased training activities, reduced system configuration and increased quality of the profile information initialized within the system.

The tight integration of SSO and Directory services decreases the administrative burden for all participants, particularly the central research office. Since profiles were created by the user, the ongoing maintenance of individual profiles is handled by the person most familiar with the content of the profile. This approach matches up well with the distributed processes found at UW-Madison.

As of August, 2007, 1060 active users created and submitted 392 proposals.

Other Cayuse424 benefits include the following:

- Excellent end-user acceptance throughout the user community at all levels
- Efficient and rapid proposal development with minimal training
- Flexible and effective collaboration between the research centers
- Reliable submissions based on real-time proposal validations

"UW-Madison users have high expectations for institutional systems and when we make it easy for them from the moment they sign on, all of us can be more productive," said Diane Barrett, Assistant Director of Research and Sponsored Programs for UW-Madison.