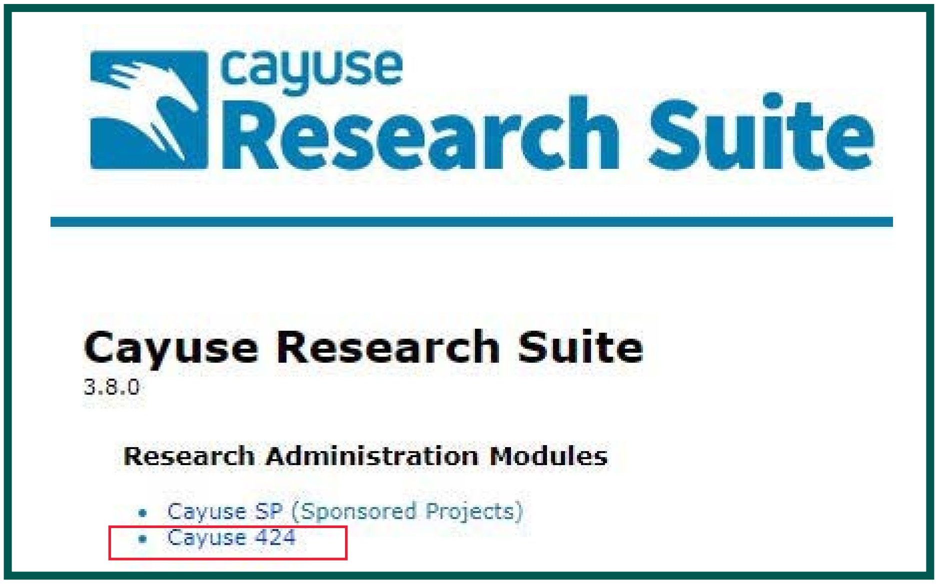
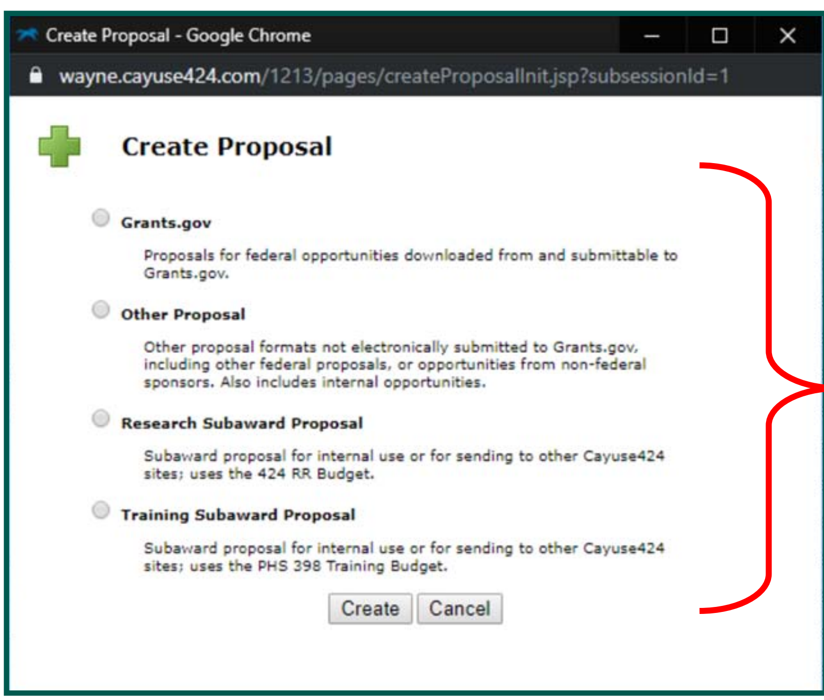


Create or Link a Proposal Using Cayuse 424

Cayuse 424 streamlines the development, collaboration, and electronic submission of grant proposals. You can easily locate funding opportunities and complete proposal forms. Wayne State University utilizes Cayuse 424 to develop and submit proposal applications for all federal funding opportunities.

BEST PRACTICE: Complete *at least* the General Information page of Cayuse SP before creating or linking a Cayuse 424 application to the record. **NOTE:** The entire SP record will have to be completed before internal approval routing.

This document describes how to create a proposal using Cayuse 424.



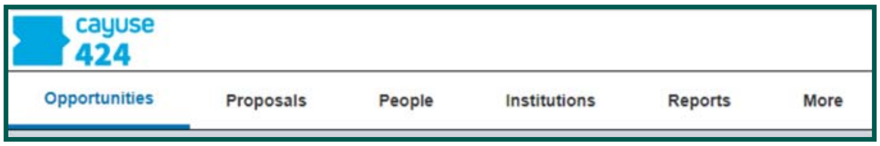
Four proposal types can be created using 424. Each type shares the budget development features of Cayuse 424: salary, fringe, indirect cost rates "baked-in".

Most often, users will select Grants.gov as the proposal type.

Find an Opportunity

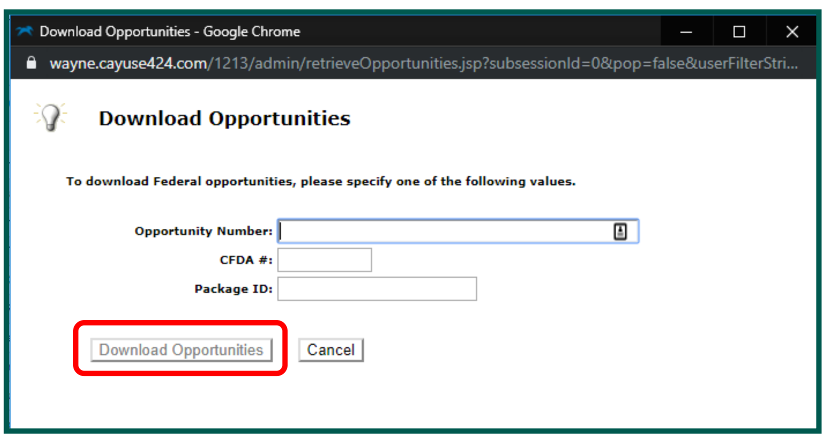
The **Opportunities** tab displays a list of federal funding opportunities that have been downloaded into Cayuse from Grants.gov. You can use the Search field to search the opportunities by keyword, Opportunity Number or CFDA Number.

1. From a browser, navigate to https//wayne.cayuse424.com/. This site can also be accessed via Research Resources in Academica.
2. Log in to The Cayuse Research Suite is Single Sign On (SSO), so whether you sign in via Academica or directly from the Cayuse link, you will be required to use your WSU Access ID and password.
3. Once you have gained access to Cayuse 424, select the **Opportunities** tab.



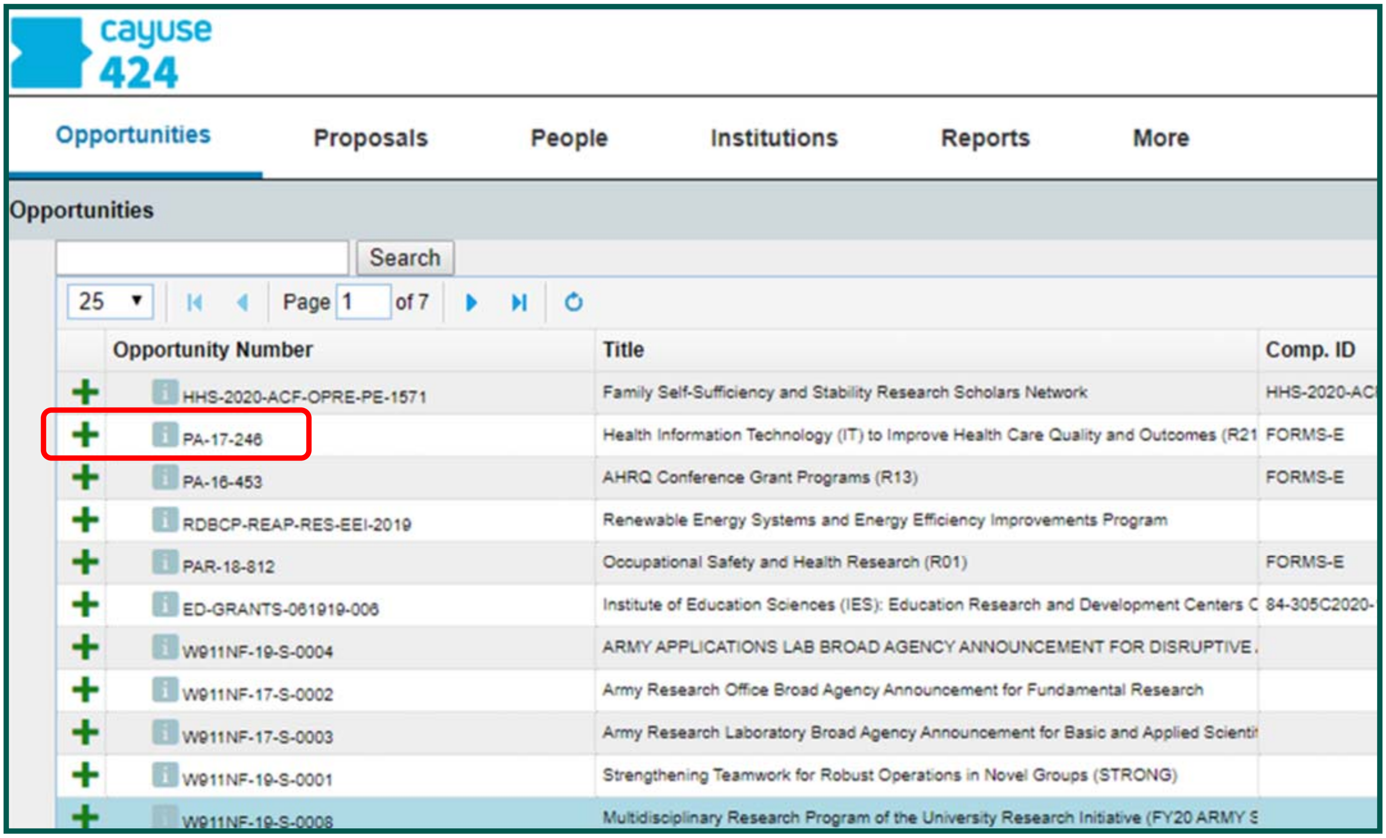
4. In the search field, enter a keyword, Opportunity Number, Package ID, or CFDA Number and click **Search**. The list filters to display any opportunities that match the entered criteria.
5. To view more information about a funding opportunity, click the **Opportunity Details** icon. 
6. **If the opportunity you are seeking is not displayed**, you can download additional opportunities from Grants.gov. To do this, perform the following steps:
   a. From the Opportunities tab, click the **Download Opportunities** button. 

   b. Enter the Opportunity Number, CFDA Number, or Package ID (if known). **HINT:** The more info provided, the better the search result.



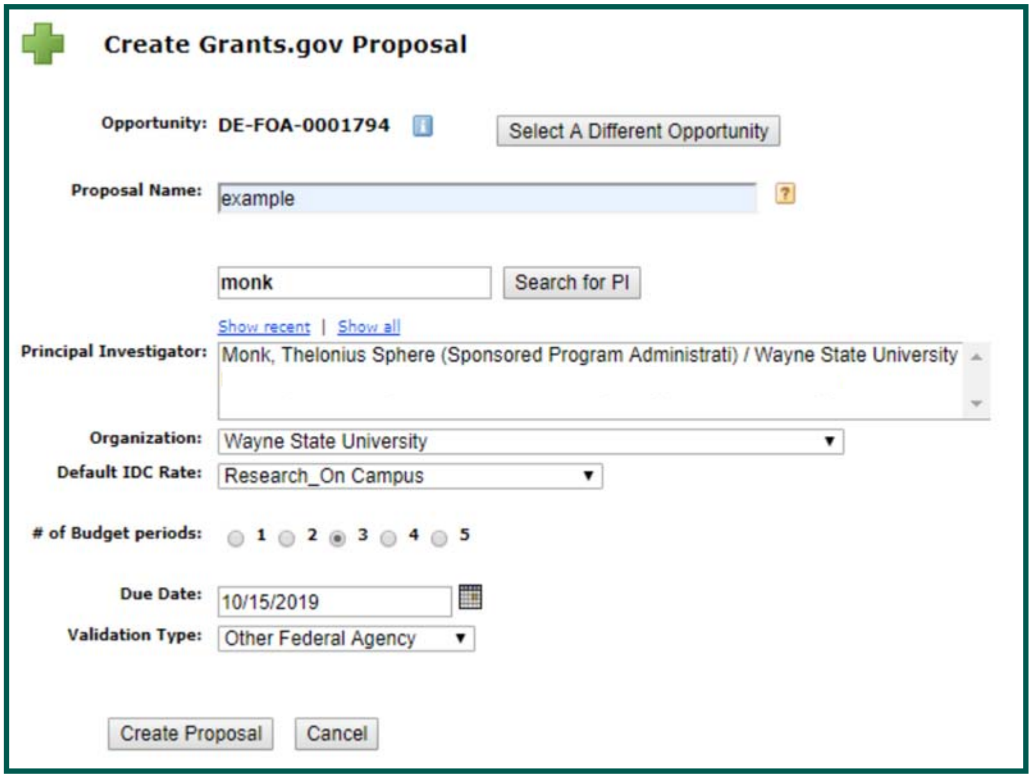
   c. Click Download Opportunities within the pop-up. The list will update to present any opportunities that include the search criteria. Repeat steps 4 and 5.

7. Select for the opportunity you wish to apply and begin the creation process.



Creating a Proposal

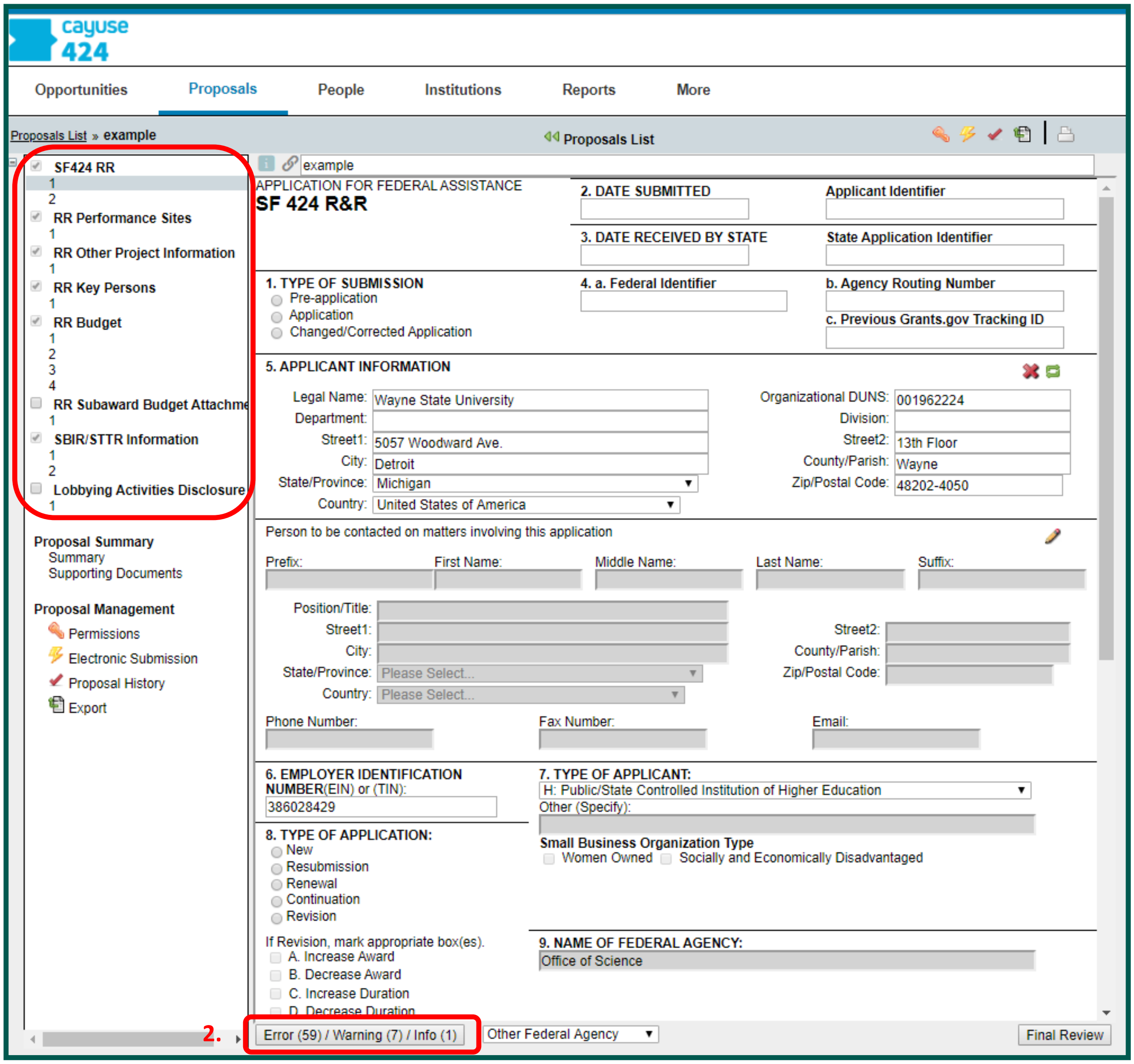
1. After selecting your opportunity, a pop-up window populates; complete the fields. Fields may vary depending on the opportunity selected



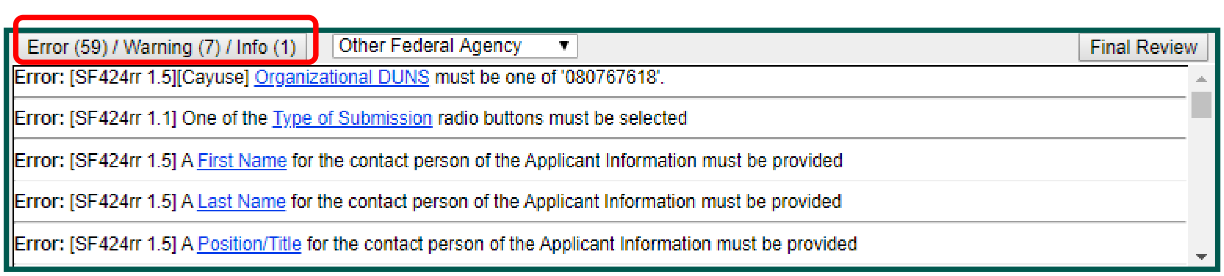
2. Enter a short title in the **Proposal Name** field. Each proposal is given a short name used only in Cayuse. Some solicitations require particular naming conventions you must follow. If not, enter any useful short tile that will help you identify this proposal in the future.
3. Select the **Principal Investigator**. Cayuse 424 keeps a list of recently used names, you can choose from that list if the intended name is present, or select Search for Name by entering the last name of PI and selecting **Search for PI**.
4. Typically, Wayne State University will populate in the **Organization** field for WSU personnel.
5. Select pertinent **Indirect Cost Type**.
6. Select the **# of Budget Periods** for the project.
7. Enter the proposal submission due date.
8. With Grants.gov opportunities, the validation type defaults to the validation of the solicitation sponsor: NIH, NSF, etc. The validation feature will provide feedback for any errors within the proposal.
9. Select **Create Proposal**. Cayuse will then display the 424 application form for completion.

The 424: Navigation

1.



1. The downloaded form indicates what information is required for submission. Users can either select the check-marked sections and complete the form accordingly or
2. Select the Error/Warning prompt to expand the selection:



Each “error” represents a required component of the funding opportunity. Simply click on an “error” hyperlink to be taken to the required field. Once the required information is provided, the total error count diminishes. **BEST PRACTICE**: complete the form via the hyperlinks. Once you have reached “0” errors, the application has reached a stage where it could then be submitted by SPA, provided information is correct.

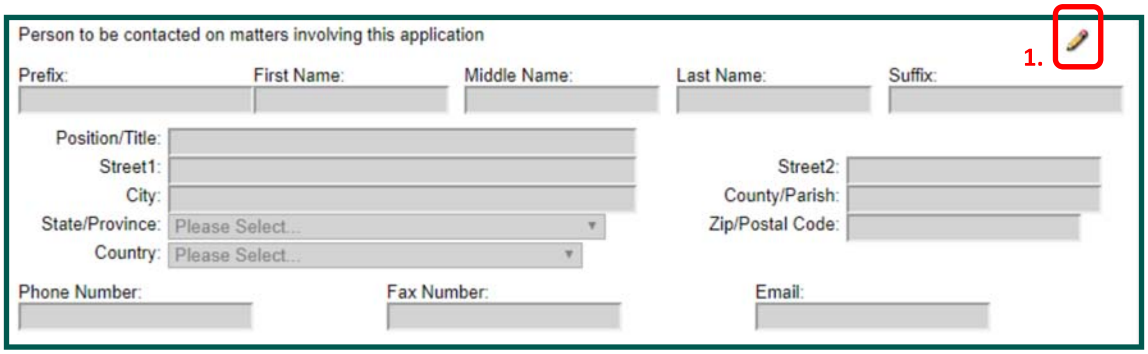
<u>Be aware that all errors need to be addressed before submission to the sponsor by SPA</u>.

The 424: AutoFill

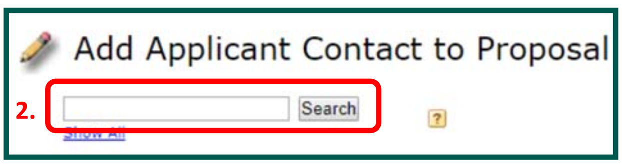
Cayuse 424 is linked to Wayne State University HR information, enabling the systems to “speak” to each other and provide Cayuse users quick and easy search capabilities.

EXAMPLE:

The cognizant SPA Grant & Contract Officer (GCO) name must be entered in the following section:



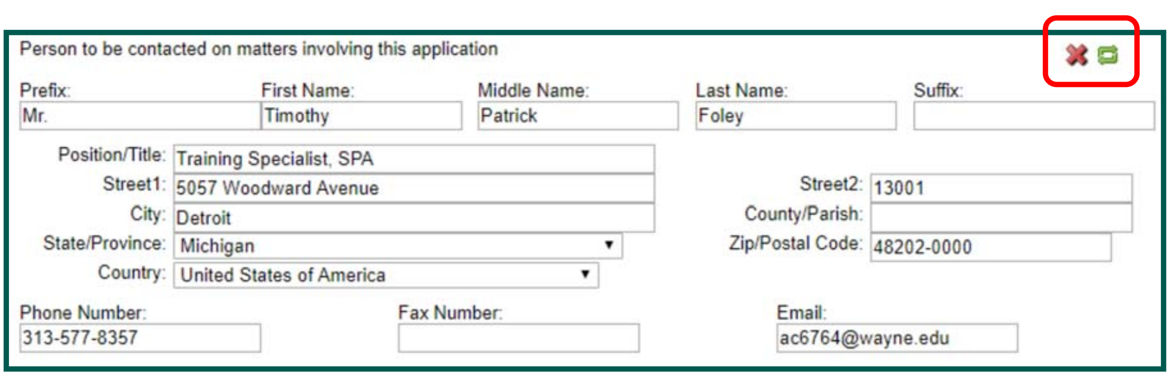
1. Select Pencil icon
2. Enter last name of GCO in pop-up and select **Search**



Keep in mind that if you utilize Cayuse 424 often, the system will create a list of recently auto-filled contacts. If this is the case, you can select the person name from the list rather than search. Once the person’s name is populated, regardless of search mechanism, select Add Applicant Contact.

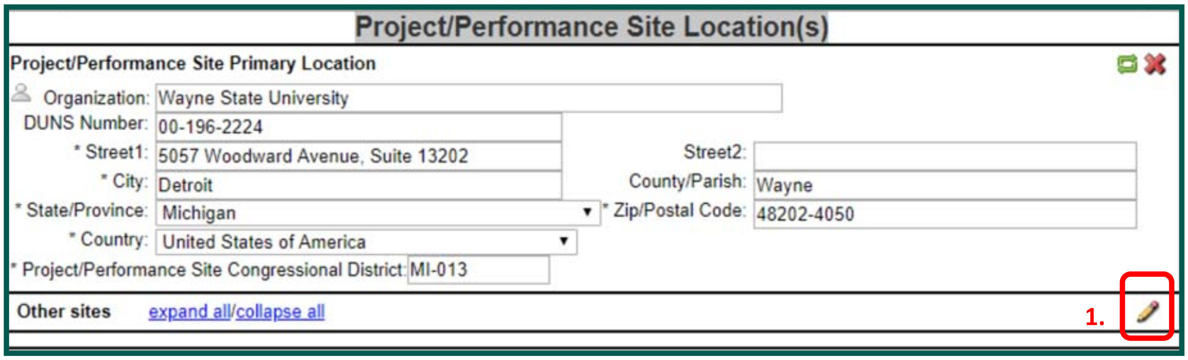
If incorrect contact information is entered, users can select either “delete” or “refresh” and repeat the auto-fill process.

The pertinent contact information is now auto-filled in the application:



The 424: Project/Performance Site Location(s)

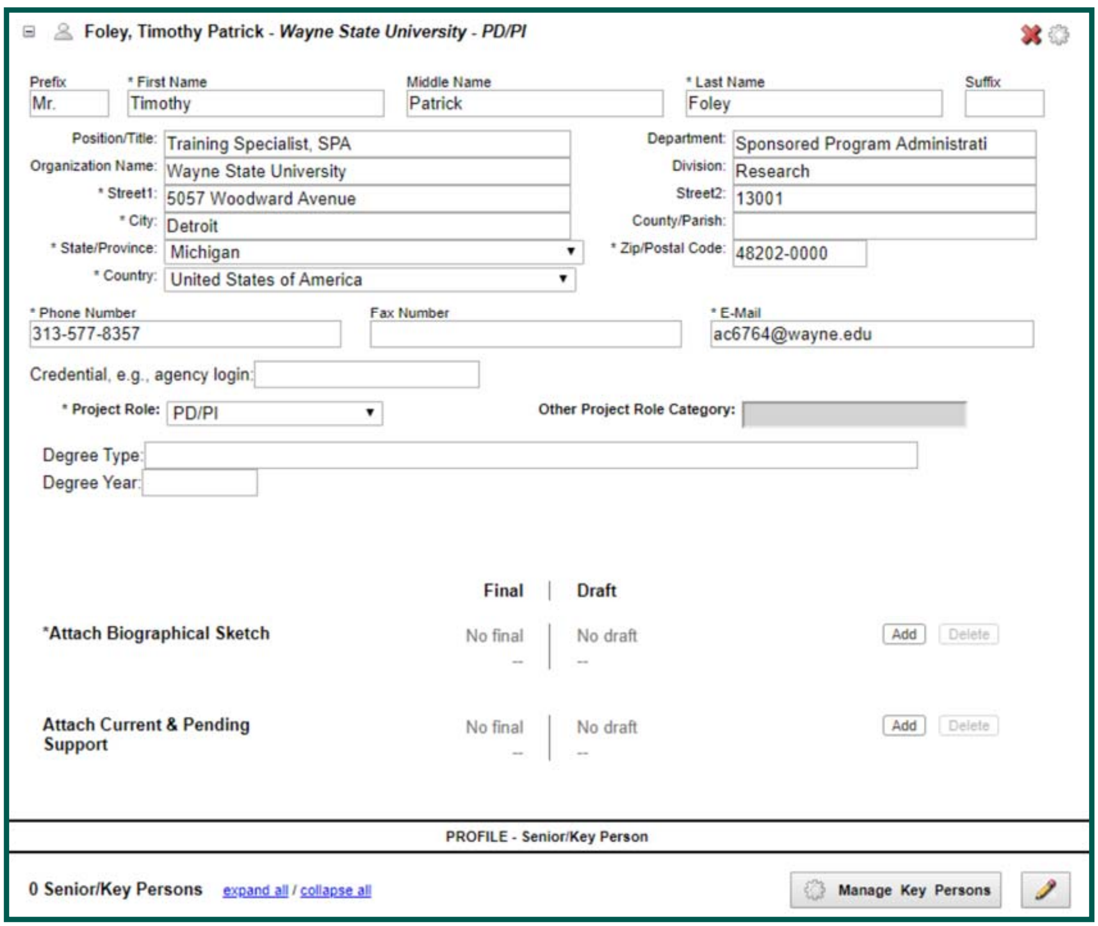
By default, the Project/Performance Site Primary Location is Wayne State University and the system will generate this information:



1. To add project specific sites, either on or off campus, select the pencil icon and add an additional location.

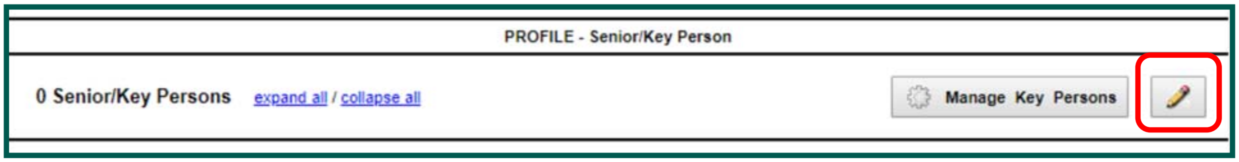
RR Senior/Key Person Profile

Principal Investigator information initially selected will populate:

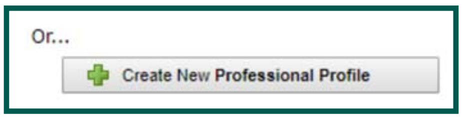


It is within this section that Biographical information and Current and Pending Support is attached. This can be done for each applicable project profile within the application.

To add additional persons to the project roster, select the **Pencil** icon. Wayne State personnel will be searchable entering and searching for the last name of the person in the pop-up window.



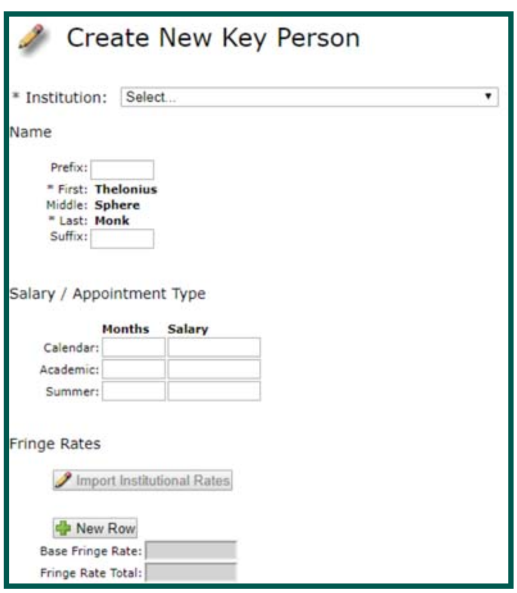
Non-WSU personnel can be manually created/added by users by selecting Create New Professional Profile



STEPS for creating New Professional Profile for <u>NON-WSU Personnel</u> (can also be done via the People tab):

1. Select Create New Professional Profile button
2. Enter First, Middle, and Last Name of person in pop-up window and select Create New Profile:

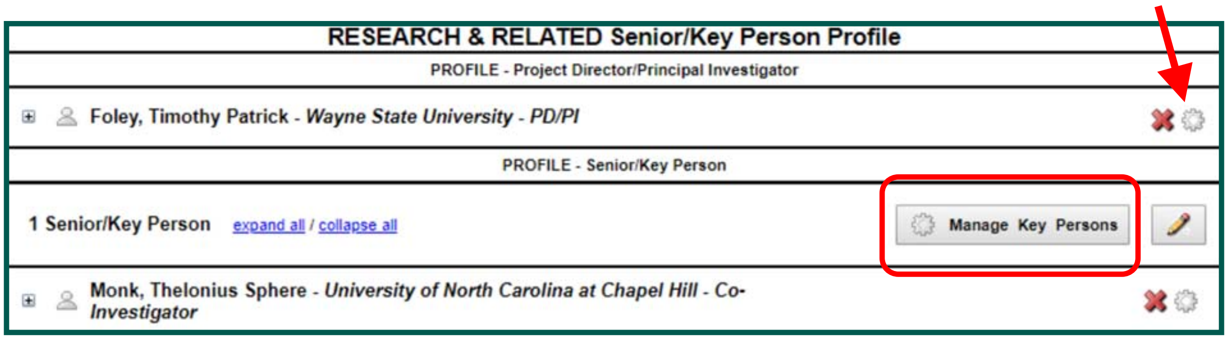
3. Select and enter information in the Create New Key Person pop-up window:



4. If the Key Person's corresponding Institution is not listed within the drop-down menu, please contact ac6764@wayne.edu for assistance. It is not necessary to provide salary and fringe information within this record. Most often, if applicable, budget information for non-WSU personnel is recorded within the RR Subaward portion of 424.

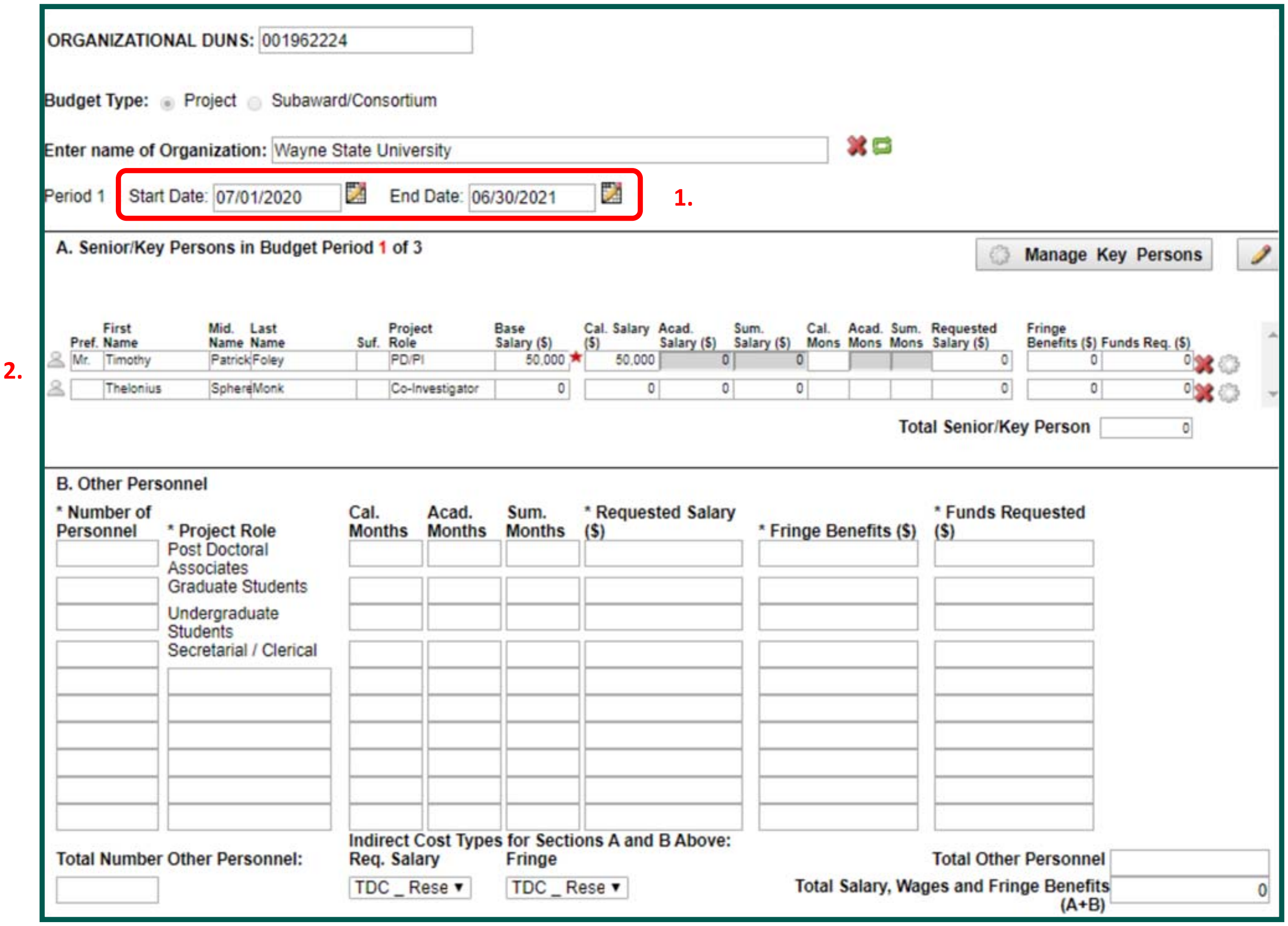
5. Once an institution record is selected for the Key Person, assign a project role, then close pop-up:

6. The RR Key Persons roster is completed and data within each person record can be managed via the "cog" icon:



7. If additional Key Persons need to be added to the roster, select the Manage Key Persons button and repeat the process.

The 424: RR Budget: Period 1: Salary/Fringe

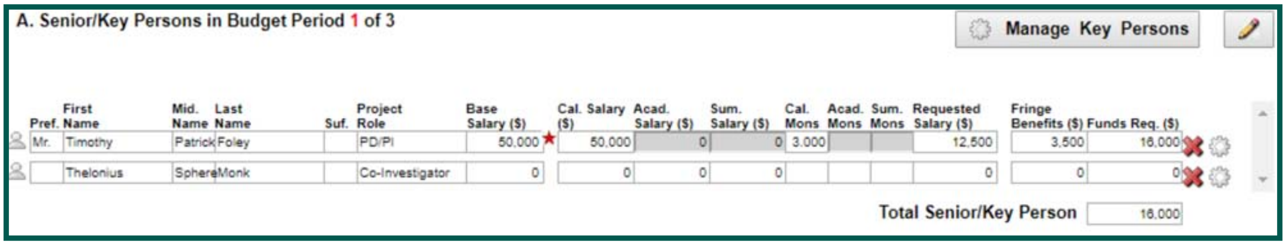


1. Ensure the correct Start Date and End Date are entered.
2. Notice that Base Salary and Salary Assignment type (Calendar, Adademic, Summer) are populated for personnel that are from WSU. This is "live" HR information. Once the devoted Calendar, Adademic, or Summer "person-months" are recorded, the system calculates the pertinent salary and fringe for that year's budget.

What is Person-Months?

- Person-months is the metric for expressing the effort (amount of time) PI(s), faculty, and other senior personnel devote to a specific project. The effort is based on the type of appointment of the individual with the organization; e.g., calendar year (CY), academic year (AY), and/or summer term (SM); and the organization's definition of such.
- Conversion of percentage of effort to person months is straightforward. To calculate person months, multiply the percentage of your effort associated with the project times the number of months of your appointment. For example:
- 25% of a 9 month academic year appointment equals 2.25 (AY) person months (9 x 0.25= 2.25)
- 10% of a 12 month calendar appointment equals 1.2 (CY) person months (12 x 0.10 = 1.2)
- 35% of a 3 month summer term appointment equals 1.05 (SM) person months (3 x 0.35= 1.05)
- Another example: If the regular pay schedule of an institution is a 9-month academic year and the PI will devote 9 months at 30% time/effort and 3 months summer term at 30% time/effort to the project, then 2.7 academic months and .9 summer months should be listed in the academic and summer term blocks of the application (9 x 30% = 2.7 person months; 3 x 30%= .9)
- [Excel-based Percent of Time & Effort to Person Months Calculator]()

Although salary information derives from HR information, the figures can be edited to suit the needs of the project. A red star indicates line item amounts that are manually edited by users.

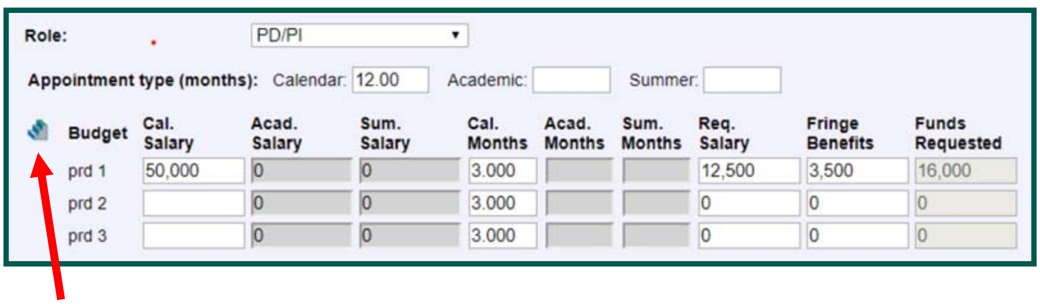


Manually edited base salaries account for salary increases expected during the project period. The increase is typically 3% (based on NIH inflation rate).

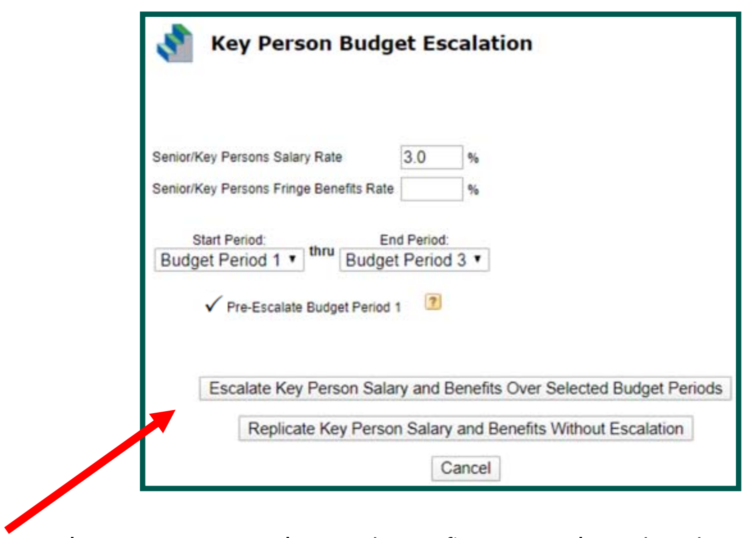
Pre-escalate Salaries

Salary amounts can be pre-escalated to account for any raises/salary increases that may occur prior to receipt of an award. Users can adjust the current base salary to reflect a 3% increase for year one thereby including additional amounts to the current base.

1. Select the “cog” icon for a particular person or select Manage Key Persons.
2. The current base salary information for that person will populate.

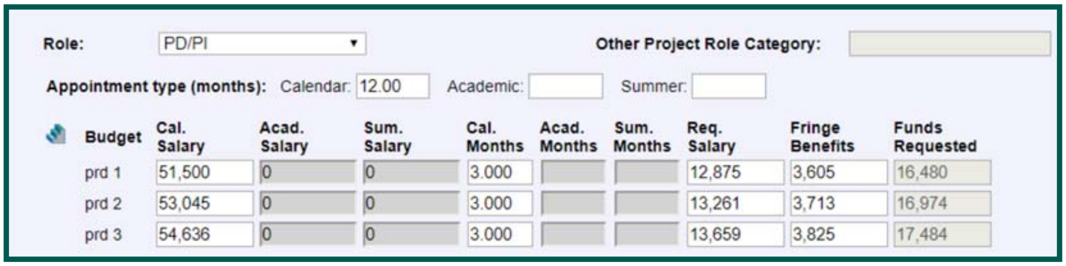


3. Select the “Stairs” icon to escalate the person salary information.
4. Ensure that 3% is indicated for the rate increase, select the budget period start and end (typically the entire project period), and select Pre-Escalate Budget Period 1.



5. Select Escalate Key Person Salary and Benefits Over Selected Budget Periods.

6. All three periods of the project now reflect the inflated salary rate, including the pre-escalated rate for year one.



Role: PD/PI   Other Project Role Category:

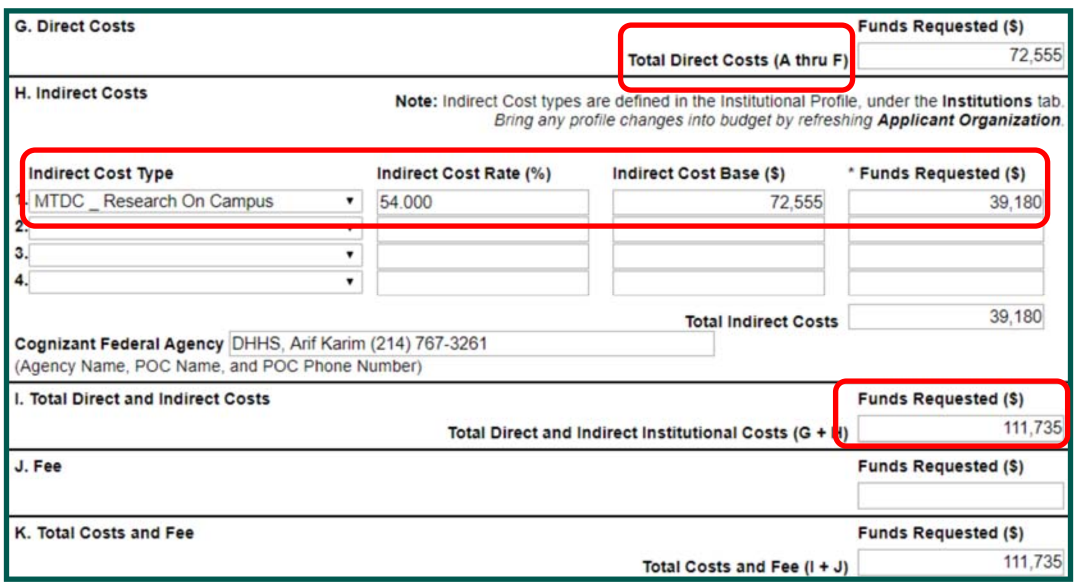
Appointment type (months): Calendar: 12.00 Academic: Summer:

Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	51,500	0	0	3.000			12,875	3,605	16,480
prd 2	53,045	0	0	3.000			13,261	3,713	16,974
prd 3	54,636	0	0	3.000			13,659	3,825	17,484

Fringe Benefit rates are automatically calculated based on the Roster roles, as set forth by WSU Fiscal Operations.

RR Budget: Year One Other Direct Costs:

- Other Personnel
- Equipment
- Travel
- Participation Support
- Publication Costs
- Consultant Costs
- Publication Costs
- Consultant Costs
- Subaward/Consortium



G. Direct Costs — Funds Requested ($)

Total Direct Costs (A thru F): 72,555

H. Indirect Costs

Note: Indirect Cost types are defined in the Institutional Profile, under the **Institutions** tab. *Bring any profile changes into budget by refreshing **Applicant Organization**.*

	Indirect Cost Type	Indirect Cost Rate (%)	Indirect Cost Base ($)	* Funds Requested ($)
1.	MTDC _ Research On Campus	54.000	72,555	39,180
2.				
3.				
4.				

Total Indirect Costs: 39,180

Cognizant Federal Agency: DHHS, Arif Karim (214) 767-3261
(Agency Name, POC Name, and POC Phone Number)

I. Total Direct and Indirect Costs — Funds Requested ($)

Total Direct and Indirect Institutional Costs (G + H): 111,735

J. Fee — Funds Requested ($)

K. Total Costs and Fee — Funds Requested ($)

Total Costs and Fee (I + J): 111,735

Review the totals for the Year One budget:

- **Direct Cost total**
- **Indirect Cost Type**
- **Indirect Cost Rate**
- **Indirect Cost Base**
- **Total Direct and Indirect**

***At any point of the application creation process, users can change the indirect cost type by selecting from the Indirect Cost Type drop-down menu.**

RR Budget: Escalating Out-Years:

For multi-year projects, users can auto-fill out years by selecting the "stair" icon at the top of any budget section page. Follow the same steps for pre-escalation of salaries.

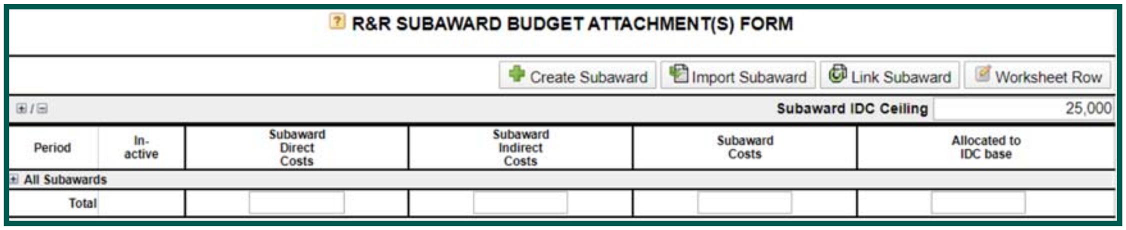
- Be sure to de-select Salary and Fringe categories if you already pre-escalated those categories.
- Select the other pertinent categories to escalate.
- 3% is the default rate - ensure Start Period is Budget Year 1 and the End Period is the last year of your project.
- Select the Escalate Selected Categories button
- Make necessary edits to any line item in any year (for example, Equipment budget is usually awarded in the first year of an award; in this instance out-years for equipment are most likely zero and would have to be amended thusly.

SF424 RR Other Sections: Subawards

Other sections within the SF424 may be required, depending on the program announcement and requirements of your program. These sections are self-explanatory and typically require input of information into the form or an attachment. Follow the explicit instructions of the proposal announcement.

RR Subaward Budget Attachment

When a proposal has a subaward as part of the budget and project, a separate budget (PHS398) needs to be included.



1. Either select Create Subaward and follow similar steps from the Creating a Proposal Section of this manual.
2. Or import a completed PHS 398 from your desktop.
3. If a subawardee institution utilizes Cayuse 424, subawards can be linked within Cayuse.

Attachments:

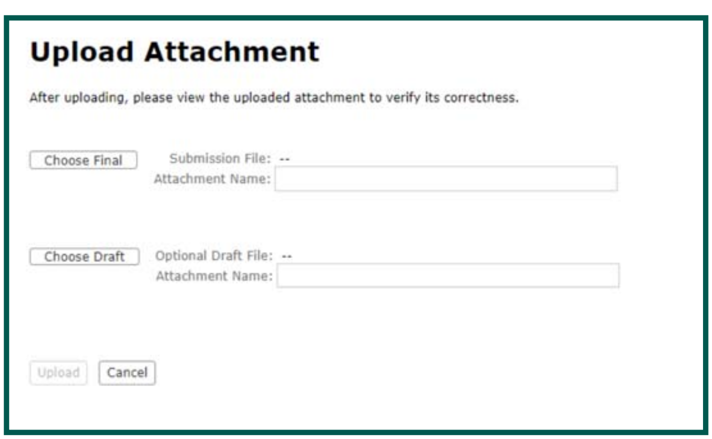
Cayuse 424 allows you to attach PDF documents to your proposal to provide important information for your submission. You can also upload the original format of the file, if there is one, to facilitate changes to the attachment within the process, if necessary. These source files will not be submitted.

Attaching a PDF Document

Each area where a file can be attached to a proposal form in Cayuse 424 will show the name of the attachment point on the left, and show two button on the right: **Add** and **Delete**. **Delete** will be disabled unless an attachment has been added.

To add an attachment:

1. Click Add to launch the Upload Attachment dialog.



Subawards

In Cayuse 424, a subaward is essentially a simplified proposal which contains only a detailed budget, a Performance Site form, and a simplified Key Persons form (with no slot for PI). Like a prime proposal, subawards can use professional profiles, institutional profiles and indirect cost rates specific to the proposing organization if they are available.

Subawards in Cayuse 424 may be standalone, or they may be linked to a prime proposal. Standalone subawards can be viewed in the Proposals tab, while linked subawards are displayed in the Subawards tab.

The Subawards tab appears at the top of Cayuse 424 just to the right of the Proposals tab whenever you are viewing a prime proposal that has at least one linked Subaward.

The tab shows all the subawards for the currently-open proposal.

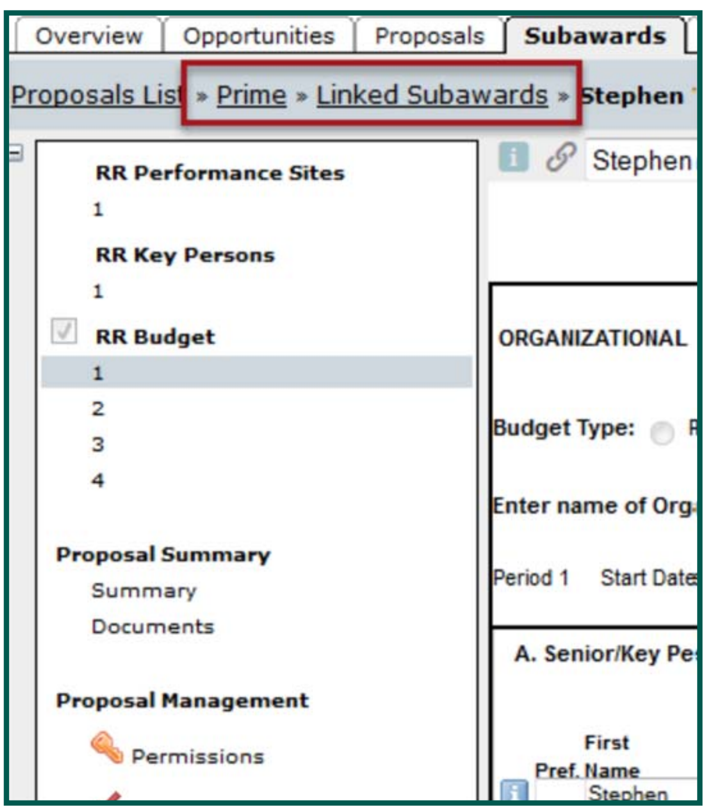
In both cases, you'll see similar forms when you access the subaward.

Most Cayuse 424 customers can also import subawards that were created in another system (either Subawards.com, Adobe, or another instance of Cayuse 424) and export subawards for use by other Cayuse 424 customers.

Navigating Subawards

Navigating a subaward proposal is essentially the same as navigating any other federal proposal. Refer to the links in that section for information on editing Key Persons, Performance Sites, and the budget. The primary difference is that the PD/PI slot is not available in a subaward (since that role is occupied by a person on the prime proposal).

When you open a standalone (unlinked) Subaward, it opens in the Proposals tab and behaves like any other proposal. When you open a linked subaward, you will see the highlighted connection in the navigation "breadcrumbs."



Creating Subawards

There are two ways to create subawards in Cayuse 424: one from the Proposals tab, which creates a standalone subaward that is not linked to any prime proposals, and one from within a prime proposal, which creates a subaward linked to that prime.

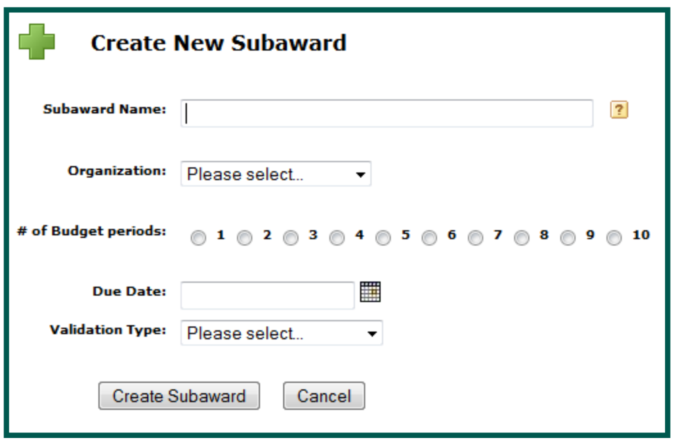
To facilitate creation of a subawards, it's best if there is already an institutional profile for the subcontractor and professional profiles for the subcontract Key Persons with institutional associations to the institutional profile. If you can't create an institutional profile, you should contact your local administrators to have one created. At a minimum, the profile should have an Organization Name, a DUNS number, and at least one named IDC rate with a start date established for the rate.

Creating a Linked Subaward

If you already have access to the prime proposal you want to link a subaward to, then it is easier to create your new subaward from within the prime, where it will be automatically linked and will inherit the prime's budget period structure and validation type.

1. Access the prime proposal.
2. Navigate to the **Subaward Budget Attachment** form.
3. Click the **Create Subaward** button.

4. This will bring you to the following dialog:



Modular Budgets

Most opportunities require a detailed budget that provides specific information on the allocation of the budget to different categories of spending. However, NIH opportunities may also provide a Modular Budget form (PHS 398 Modular Budget) for proposals with up to $250,000 in direct costs (less Consortium F&A) for certain mechanisms. More information can be found on NIH's Modular Research Grant Applications page.

In Cayuse 424, opportunity packages with a modular budget will also have a detailed budget attached. Both budgets will be labeled optional, but you must select one to submit.

Although the modular budget is a replacement for the detailed budget at NIH, **you need to prepare a detailed budget for yourself or Sponsored Program Administration**. In Cayuse 424, you can fill out the detailed budget, which includes many helpful calculation tools, and the numbers will automatically flow into the modular budget form. If this is not necessary, you can also manually calculate and enter the modular budget figures directly into the modular budget form. Be sure to separate out any Subaward Indirect Costs and enter them in the appropriate field.

You cannot submit detailed Subaward budgets with a Modular budget. If you check the subaward inclusion checkbox when you are using a modular budget, Cayuse 424 will display an error:

Error: [Subawards][NIH] A Subaward Budget Attachment Form may not be included if a modular budget has been submitted. (uncheck one of the inclusion checkboxes)

Proposals using a modular budget usually have a certain dollar amount introduced by the rounding up process from the actual to the module.

2. Select **Choose Final**, which takes you to your system file explorer to search and select the pertinent document. Select **Open** to complete the action.
3. It is recommended that you name your file for its corresponding attachment point: e.g. Research Strategy = Research Strategy.pdf

File Formats

Cayuse 424 can submit only PDF documents as attachments. You can upload and attach a source file for your records, but on the attached PDFs will be submitted. PDFs containing active form fields cannot be uploaded to avoid errors when the proposal is submitted through Grants.gov.

Grants.gov and Agency PDF Requirements

Grants.gov and certain agencies, particularly NIH, have guidelines for attachment format and certain PDF-specific requirements. SPA recommends complying with Grants.gov and agency guidelines whenever possible, and always verifying the content of your proposal after submission to ensure that is was transmitted correctly.

People

Users can create new professional profiles for **NON-WSU PERSONNEL**. The People tab in Cayuse 424 represents the professional information of all people in the system: their professional profiles.

Professional profiles contain the information that funding agencies require from Principal Investigators, Key Persons, Other Significant Contributors and Authorized Representatives. This information is added to the appropriate forms in a proposal when the person is autofilled into the proposal.

By default, the People tab shows profiles you have viewed recently. Depending on your user permissions, you may be able to see everyone in the system, or just people within your unit.

Standard users cannot create professional profiles for WSU PERSONNEL. This information is pulled into Cayuse from WSU HR via Cayuse DataConnect.

To search for a profile, **enter** the person's name into the search box at the top of the screen. You can enter the full name, first or last name, or the first few letters of the first or last name.

To limit the search to a particular institution, if you know which institution the person is associated with, select one in the second box.

Institution short names are included in the drop-down to help distinguish between institutions that have similar long names.

People Search

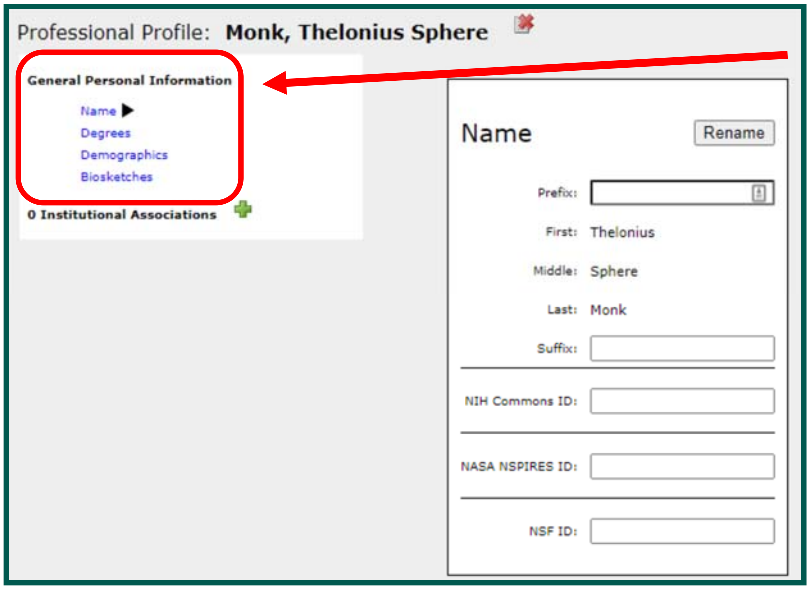
You can enter more than one name into the search box - separated by a space. Unlike when searching for an institution, this is an OR search, and the results will include people whose first or last names begin with either of the name fragments you entered.

The People search only searches for names that start with the search string. For example, searching for "Jane Cooper: will also return results for "Mark Coopering" and "Janeine Jones" but, not "MaryJane Reynolds".

To show all profiles you have access to, click **Show All**. (If you can see many profiles, this may take a few moments.) You can navigate to the right part of the longer list by clicking the first letter of the person's last name.

1. To create a new profile, click the Person button. 

2. Enter prefix, suffix information, and ID information, if available.*



*It is not necessary to provide Degree, Demographic, Biosketch, or ID information. However, if provided in the Professional Profile, this information populates within the application (Personnel Roster).

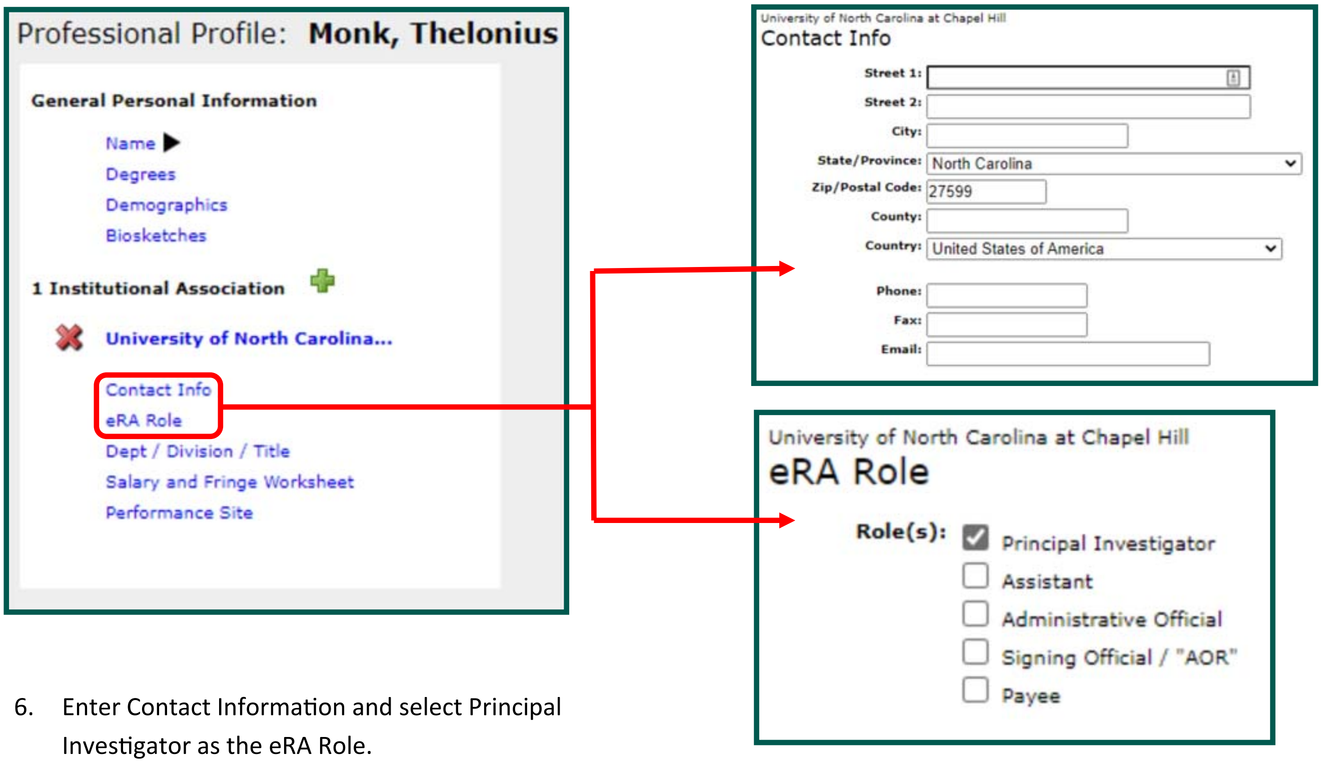
This is beneficial if the personnel applies often or as a placeholder for this information as users can update and store data as needed.

The more information you enter here, the more fields will be auto-filled within a proposal, making the process easier and faster.

3. Create an Institutional Association with the Professional Profile.

4. Select the institution from the drop-down menu. If the institution is not listed, contact SPA for assistance 577-3726.

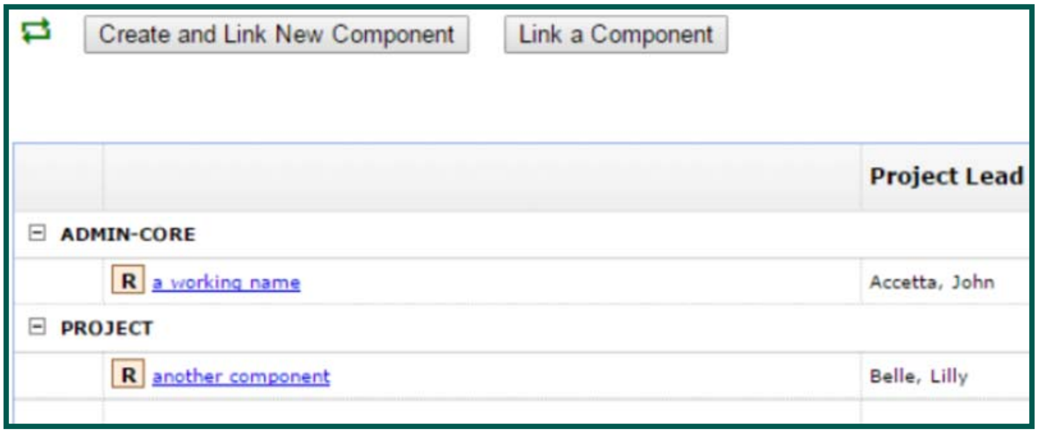
5. Select Create Institutional Association.



6. Enter Contact Information and select Principal Investigator as the eRA Role.
7. Select the Save icon when completed.

Multi-Project Proposals

Multi-project proposals involve collaboration and interaction among projects and investigators to achieve a common goal. Within Cayuse 424, Multi-Project Components are treated like individual proposals. Within Multi-Project Opportunities, components can be linked together to an "overall" or core component. The proposal, in its entirety, can then be submitted to Grants.gov via Cayuse 424.



When beginning work with a Multi-Project, Opportunity Information may be the first place to visit. Creating a Multi-Project Proposal may also be useful. Once you have created the Proposal, navigating the new fields will be key.

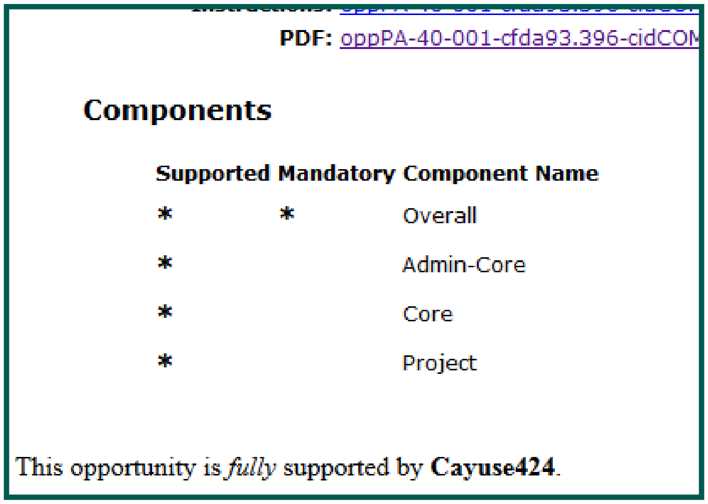
Within a Multi-Project Proposal, you can Create and Link New Components as necessary. You'll also be able to Link Existing Components, Import Components from Other Cayuse 424 Institutions, and Export Components for use by other Cayuse 424 Customers.

In Cayuse 424, each component can be treated as a separate Proposal, even when they are linked to an Overall Component. This means:

- Each component can have its own routing chain, however, currently the individual components do not have to complete routing to be submittable. Only the Overall component must have routing completed. To learn more about Routing in Cayuse 424, see our Routing page.
- Permissions flow down to each individual component. If you have access to the Overall Proposal, you will have access to all linked Components and any subawards linked to them. You can also grant access to specific components as necessary. To learn more about Permissions in Cayuse 424, see our Permissions page.
- Individual components can be edited simultaneously, even if another linked component has been locked by a different user. For example, the Overall component can be edited by one user while another user is editing another linked component. To learn more about Opening and Locking Proposals, see our Opening a Proposal page.
- Multi-Project Proposals have to be Copied/Transformed one component at a time. Selecting Copy/Transform on the Overall Component **will not** Copy/Transform the entire Proposal, just the Overall Component. To learn more about the Copy/Transform process, see our Copying and Transforming page.

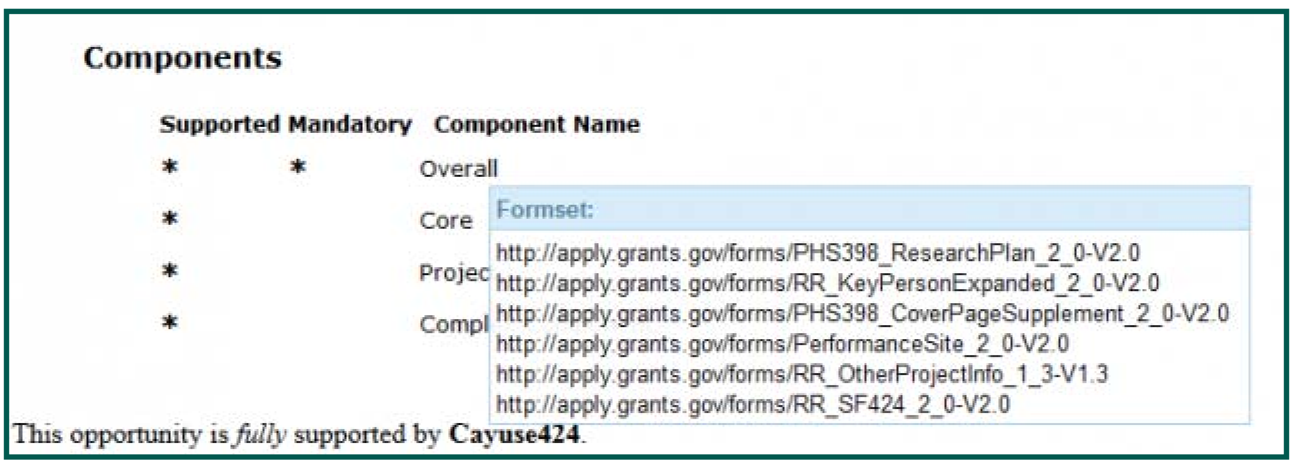
Multi-Project Opportunity Information

When looking at the Opportunity Information pertaining to a Multi-Project (Complex) Grant, most of the information will be identical to other Opportunity Information found within Cayuse 424. However, you will notice that the bottom section is now titled 'Components' and contains additional information.



In this section, you will see a list of each component associated to this Opportunity. Beside it, there will be information on whether it is supported, and whether it is mandatory.

Moving your mouse cursor above the component's name will provide additional information about the forms that are included with the associated component.

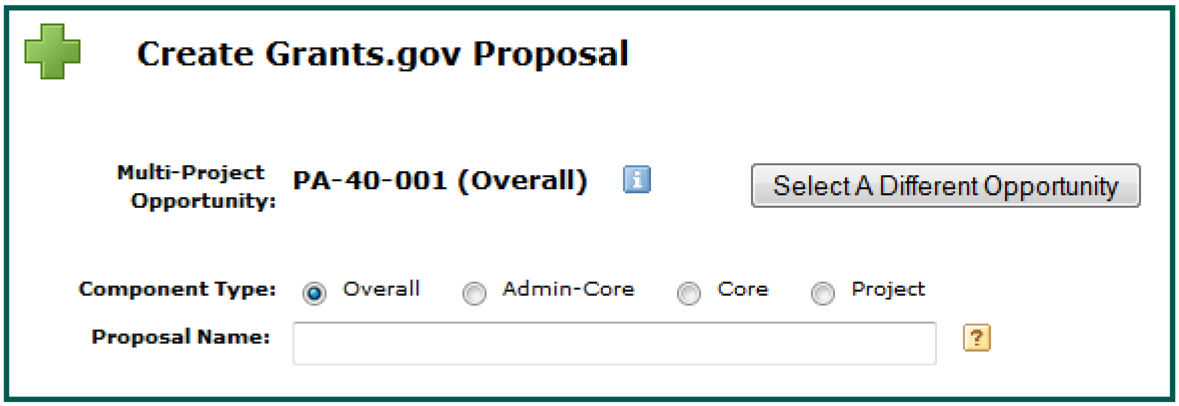


This information can be useful in determining what information you may need prior to starting work on a Multi-Project Proposal.

Creating a Multi-Project Proposal

You can find multi-project opportunities in the Opportunities list. Multi-Project Opportunities have children in the Opportunities list, unlike other opportunities.

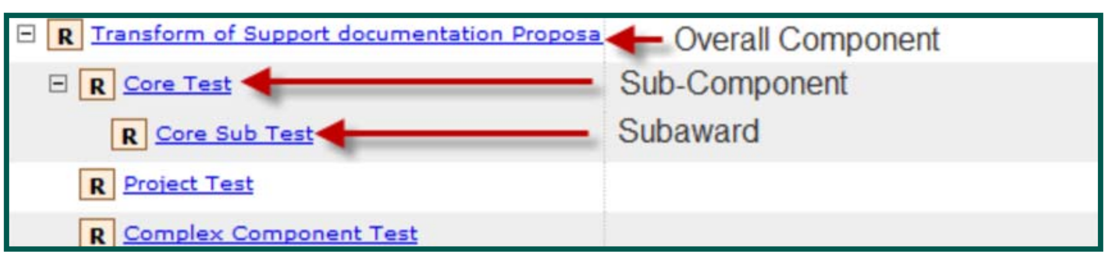
Creating a Multi-Project (Complex) Proposal in Cayuse 424 is very similar to creating any other Proposal in Cayuse 424. The only difference is the selection of a 'Component Type' during creation.



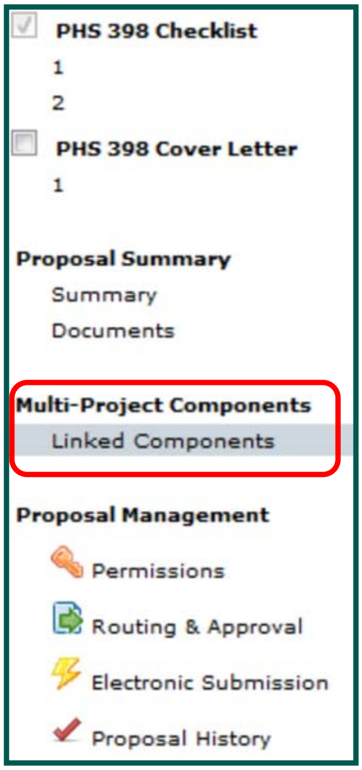
The 'Overall' component represents a Proposal that other components can be linked to. It is generally used to summarize the rest of the MP application and identifies the PD/PI and the applicant Organization for the entire MP proposal. The other components will be created as separate proposals that can be linked to an Overall component at any time. These components can also be exported and sent to other Cayuse 424 customers.

Navigating a Multi-Project Proposal

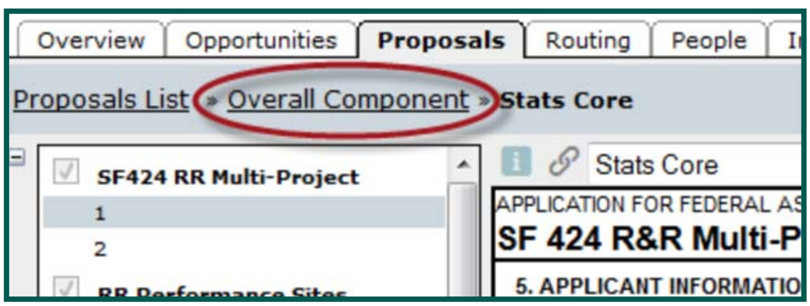
Navigating a Multi-Project (Complex) Proposal is much like navigating any other Proposal in Cayuse 424. On the Proposals List, you'll be able to expand or collapse Multi-Project Proposals by clicking the + or - button beside the Proposal, respectively. If you have a subaward attached to one of your components, you will also be able to expand that in the same fashion.



When you enter an Overall component, you will notice that there is a new section on the left side of the screen entitled 'Multi-Project Components'.

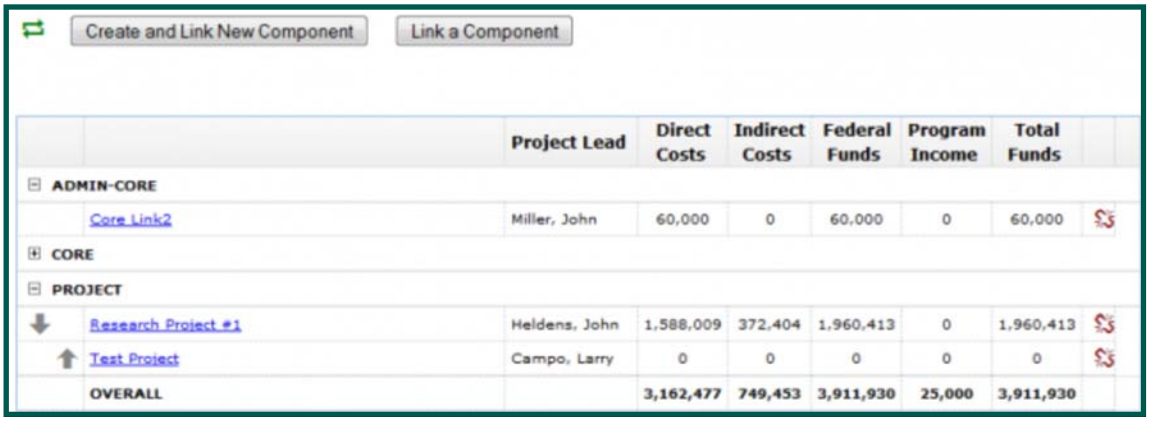


Selecting 'Linked Components' will take you to a new page where you can Create New Components and Link Existing Components. Clicking on the name of a component will take you into that component. From a component, go back to the Overall Component by selecting **Overall Component** in the breadcrumb trail at the top left.



You may notice that some forms appear abridged and/or uneditable on subcomponents. In accordance with Multi-Project guidelines, some sections may only be editable on the 'Overall' section, and some may only be editable on specific Components. Be sure to look closely at the guidelines provided by the Agency.

On the 'Linked Components' page, you will see some information about each component you have associated to your Multi-Project Proposal. This includes the associated Lead Principal Investigator, as well some budget information from the individual component. At the bottom of the table, you will see Overall totals for all of the components.



		Project Lead	Direct Costs	Indirect Costs	Federal Funds	Program Income	Total Funds
⊟	ADMIN-CORE						
	Core Link2	Miller, John	60,000	0	60,000	0	60,000
⊞	CORE						
⊟	PROJECT						
	Research Project #1	Heldens, John	1,588,009	372,404	1,960,413	0	1,960,413
	Test Project	Campo, Larry	0	0	0	0	0
	OVERALL		3,162,477	749,453	3,911,930	25,000	3,911,930

Hovering the mouse over the borders of each individual header will allow you to expand or collapse the section as you see fit.

Interacting with Linked Components

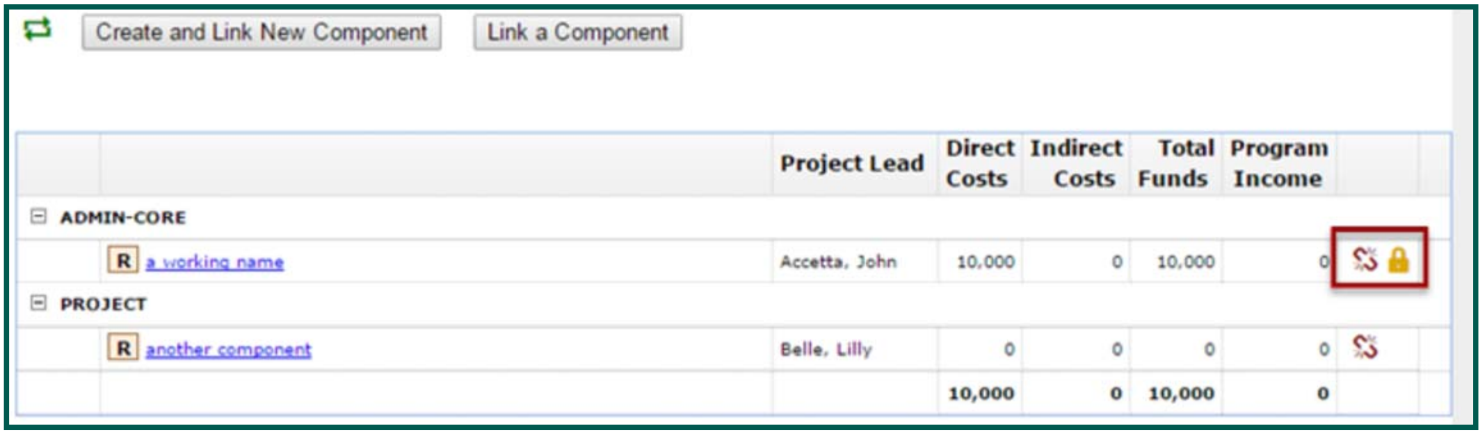
On the 'Linked Components' screen, clicking the icon at the top left will refresh the components and their associated information.

Clicking the ⊞ or ⊟ beside each section will expand or collapse the individual components within that section. If you have two or more components in one section, you will see arrows appear beside each component. These arrows can be used to change the order of the components in any particular section.

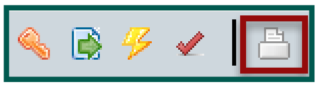
⊟	CORE						
	The Training Core	Miller, John	1,514,468	377,049	1,891,517	25,000	1,891,517
	Stats Core	Heldens, John	0	0	0	0	0

Finally, each component will have an associated icon. Clicking this button will prompt you to unlink the associated component. However, this does not delete the component. It will still appear as an unlinked component on the Proposal List. You can easily relink it by pressing the **Link a Component** button.

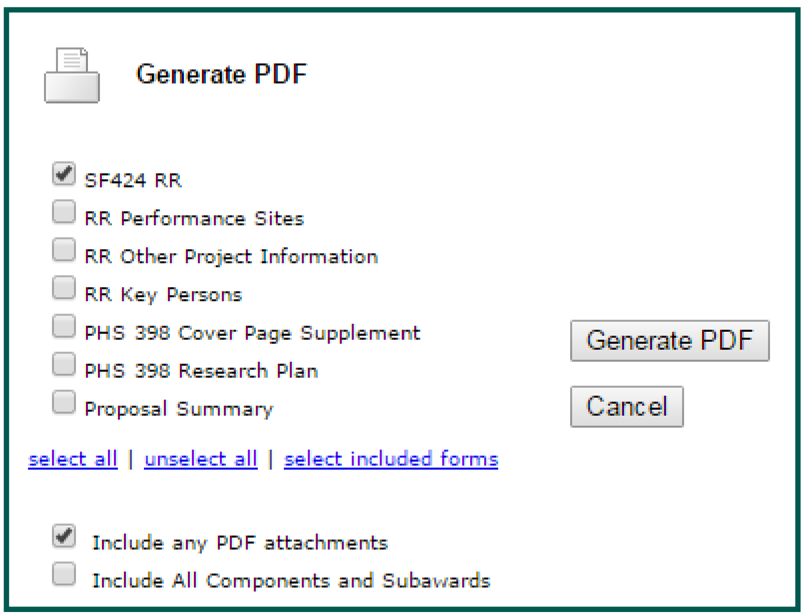
Opening the linked components is the same as opening a proposal from the proposal tab. You can open the component in Read-Only mode, and if another user is working on the component, it will show as 'locked.' The lock icon to show a locked component is to the right of the unlink button. Hovering over the lock icon will show you who has locked the component.



You can also print the entire proposal by clicking the print icon in the proposal management toolbar at the top of the proposal.



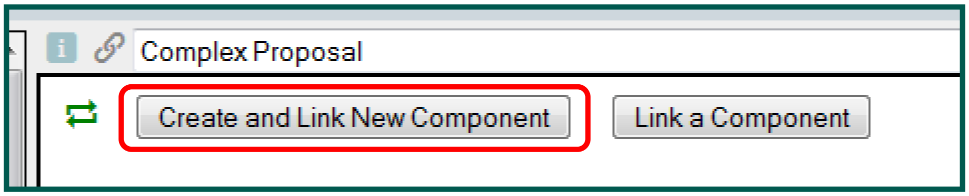
This will launch the print dialog, which has a number of options for printing. Select "Include All Components and Subawards" along with all other forms on the dialog to print all components of you multi-project proposal.

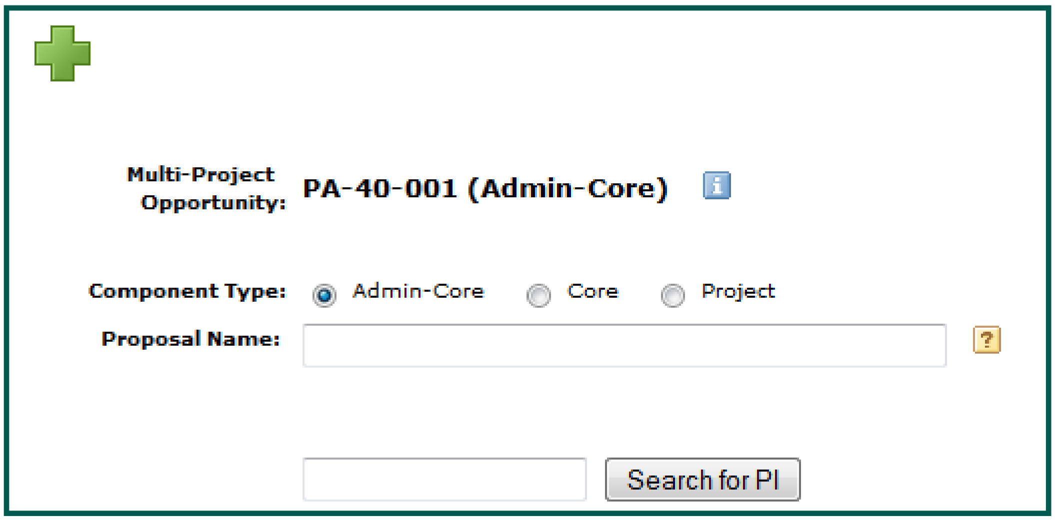


Creating New Linked Components

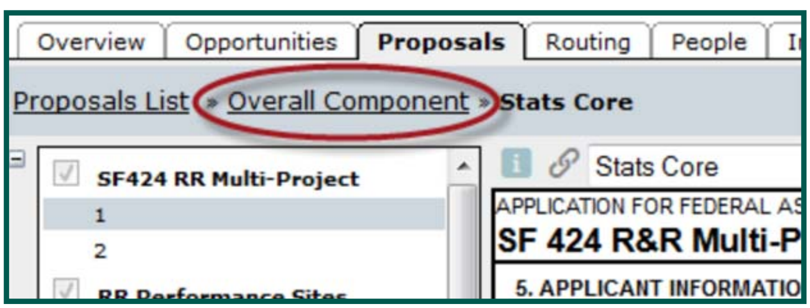
When working in a Multi-Project (Complex) Proposal, you can Create and Link Components on the Linked Components screen. To do so, select **Create and Link New Component**.

Clicking that button will cause a **Create Proposal** window to appear. In this window, you'll need to set the Component Type, in addition to standard information you would input when setting up any other proposal.



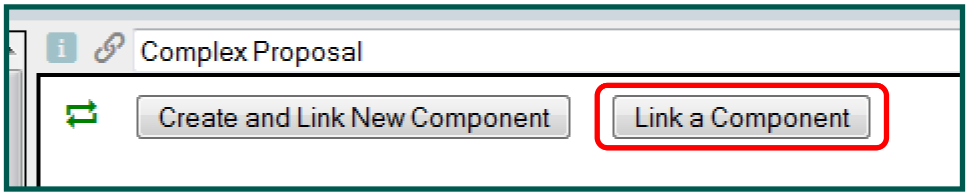


When finished, click **Create Proposal** and you will be taken into the now linked component. To head back to the Overall component, click **Overall Component** in the breadcrumb trail at the top left of the screen.



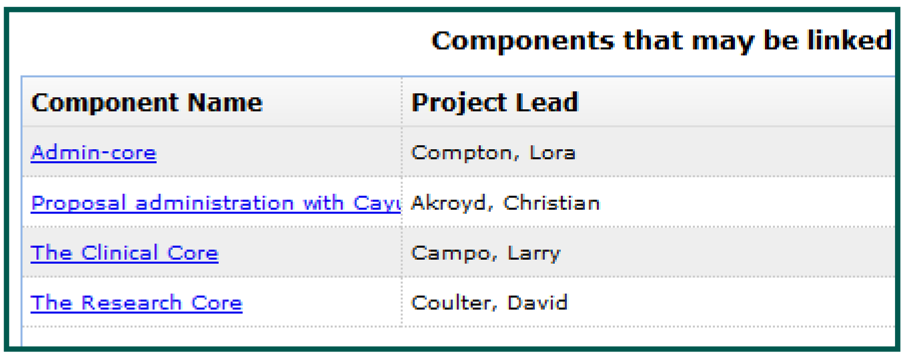
Linking an Existing Component

In addition to Creating and Linking New Components, you can also Link an Existing Component in a Multi-Project (Complex) Proposal. To link a previously created component, just click the **Link a Component** button.

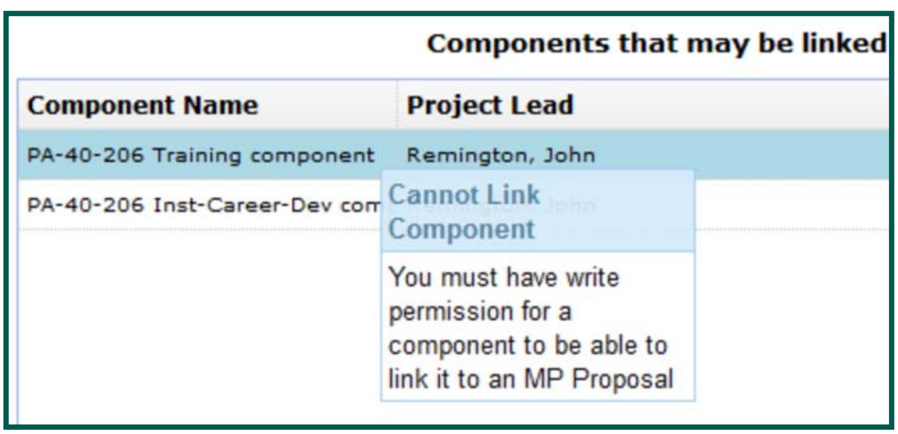


A prompt will then appear listing all of the Proposals and Components that can be linked to this Multi-Project Proposal. Note that the Link a Component button will only present you with a list of components that are eligible to be linked to the Overall component you are working in. The list will not show you components derived from other opportunities or components already linked to this Overall.

Upon selecting the desired Proposal, you'll be taken back to the Linked Components page, where the selected Component will now be listed.



To link a component, you need to have write access to the component. If you don't have access to the necessary component, you'll encounter a message like the one below.

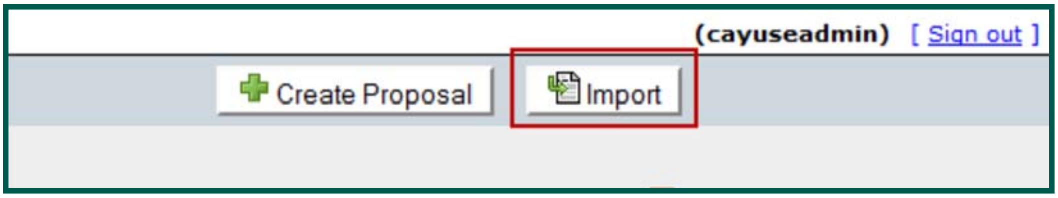


Importing and Exporting Multi-Project Components

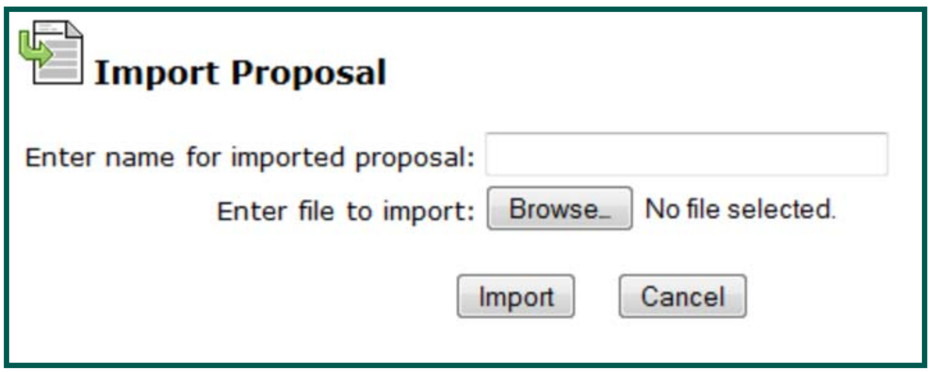
When working with Multi-Project (Complex) Proposals in Cayuse 424, you'll have the ability to Import Components from other institutions, in addition to Exporting Components for other Cayuse 424 customers.

Importing a Component

- On the Proposals List, select the **Import** button at the top right of the screen.



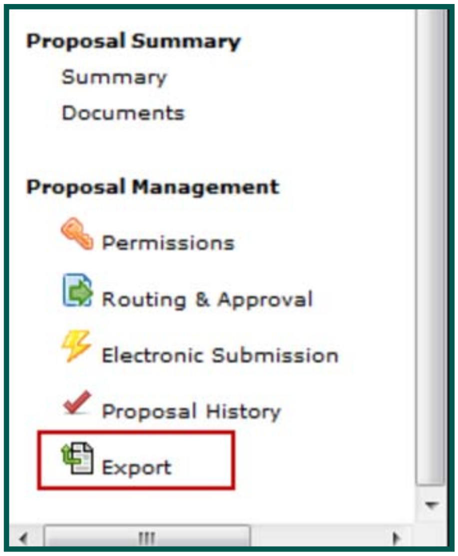
- You'll then see the Import Proposal window, which will prompt you to find the file you wish to import, and name the Proposal you are importing.



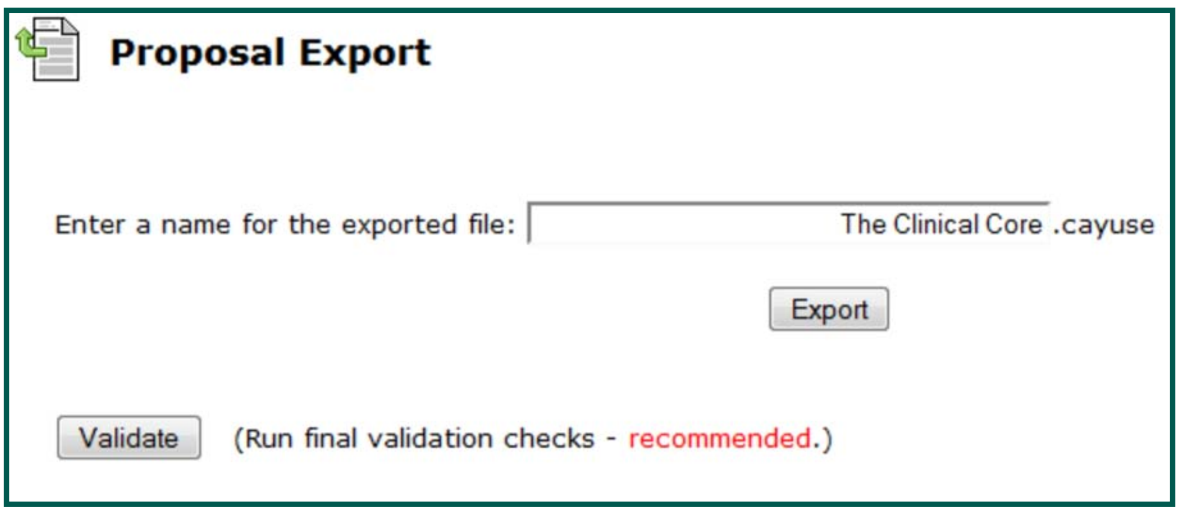
Upon clicking **Import**, the file will imported into Cayuse 424 as an unlinked Component. To link the component to an existing Multi-Project Proposal, you'll want to follow the instructions on the page Linking a Component.

Exporting a Component

- From the Proposals List, select an unlinked, individual component.
- Click the **Export** option on the left side of the screen. There is also an icon located at the top right of the page.



- You can came the component as well as run a validation check prior to export



Upon clicking **Export**, you will be prompted to save the file to your computer.. You'll then be able to send the file to other customers for import into their Cayuse 424 environment. Attachments and any associated Subawards will be included in the exported file.

Finally, note that this file uses a .cayuse file extension. This file cannot be opened by clicking on it like other computer files. It can only be opened by first importing it into Cayuse 424.

Permissions

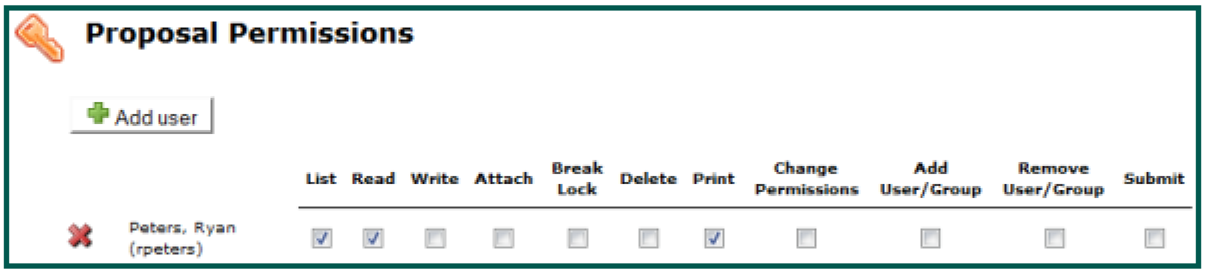
Proposal permissions in Cayuse 424 allow you to control access to your proposals. By default, the creator of a proposal and the System Administrators have access to the proposal. Depending on your institution's Cayuse 424 configuration, the Pre-Award Admins may also have automatic access to your proposal. Some institutions also make use of the Read-only Reviewer role. People with this role can see and review all proposals in the system, but cannot make any changes.

Other users cannot see or edit a proposal unless they are given permissions to do so.

To grant someone particular permissions to a proposal, there are two permission types that you need to have yourself.

Viewing Current Permissions

1. Open the proposal.
2. Click the icon in the upper right corner, or in the left sidebar under Proposal Management, to go to the Proposal Permissions.

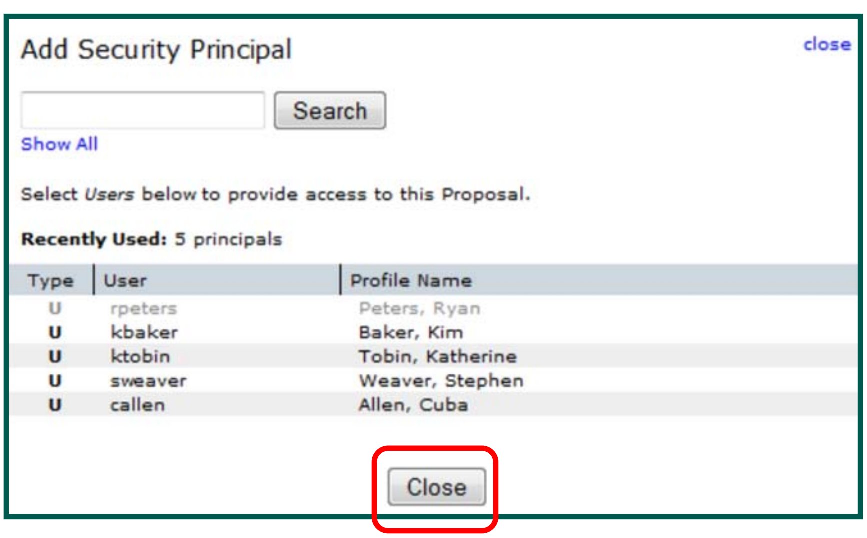


The Proposal Permissions screen lists users who have access to the proposal, and indicates what type of access they have. This list only includes users who have been given access through this screen, not all the users who can see the proposal because of their Administrator or Reviewer status or their presence in the routing chain.

In order to edit the list, you need to have Administrator permissions, or you must appear in the list with the **Change Permissions**, **Add User/Group**, or **Remove User/Group** boxes checked. If you don't have these permissions, you won't be able to add or remove people from the permissions, or change which permissions they have.

Adding a User

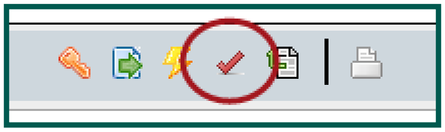
1. Click the **Add user** button.
2. Select a user from the list, or search for another user by their name or username. Use **Show All** to show all users. The user is added to the Proposal Permissions. If the user is grayed out, they have already been added to the permissions.

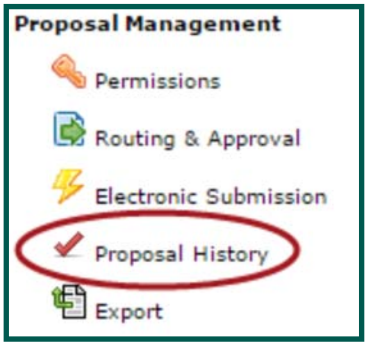


3. Close the selection window by clicking Close.

Proposal History

To access the Proposal History from any proposal screen, find the icon at the top right corner of the proposal, or click Proposal History at the bottom of the left side proposal forms list.





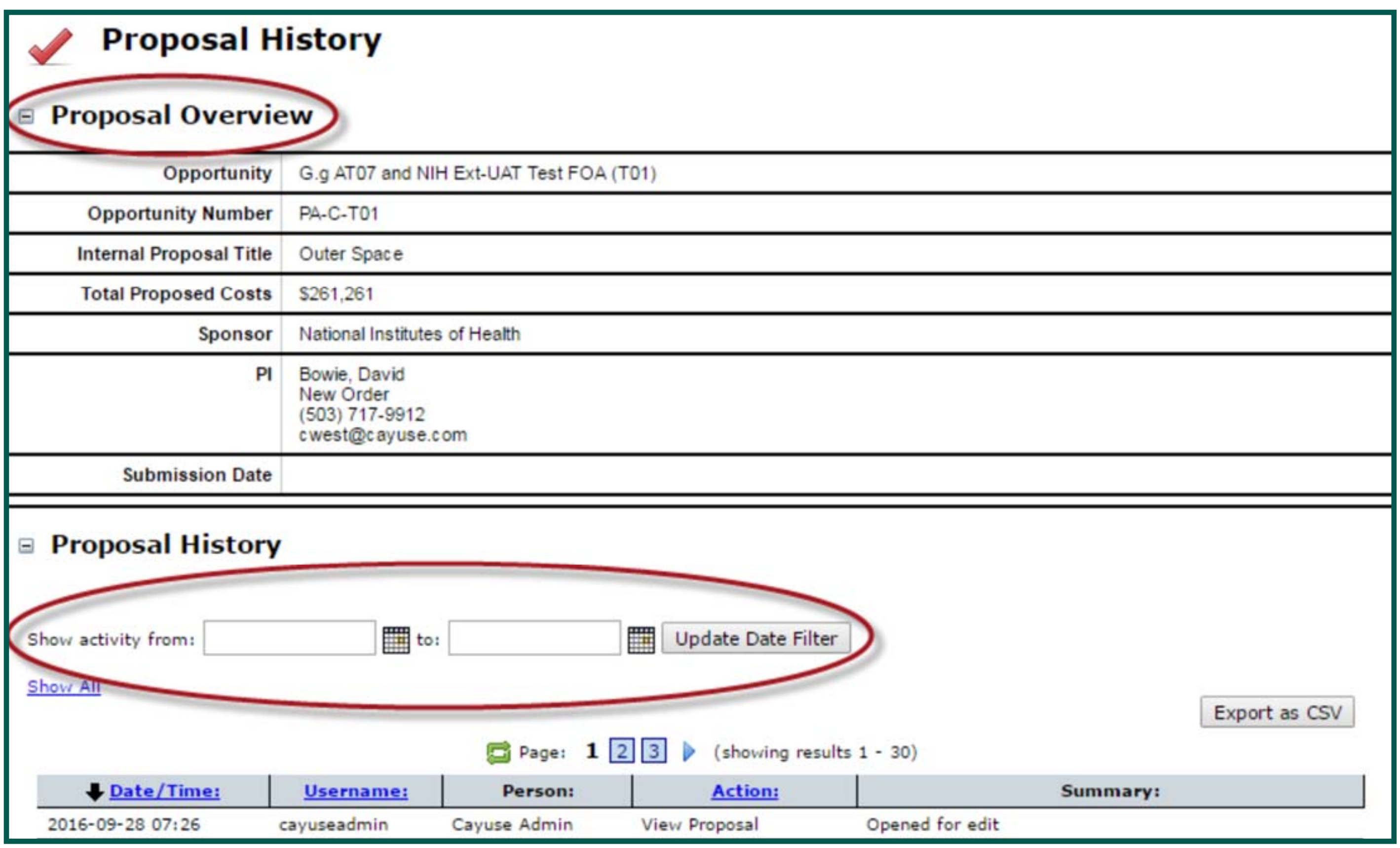
NOTE: Any user with view access to the proposal can see the Proposal History

The proposal activity logged includes the Date/Time, username and a summary for the following actions:

- Create Proposal
- Upload Attachment
- Delete Attachment
- Save Proposal (which includes form changes)
- Approve/Retract Proposal (routing comments are logged)
- Validate Proposal

This change history can filtered or exported as a .csv file.

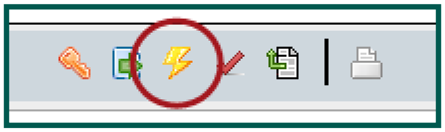
The Proposal History can be filtered by date to narrow the shown results and locate a particular entry. This page also contains a Proposal Overview that summarizes identifying information about the proposal.



Submission

To successfully submit a proposal from Cayuse 424 to Grants.gov, the proposal must be complete and must conform to Grants.gov and agency requirements, including the form data and attachments.

To access the Electronic Submission area of the proposal, open the proposal and click the  icon along the top or in the left sidebar.



The Electronic Submission information has three sections: Opportunity Details, Proposal Submission History, and Electronic Submission.

Opportunity Details

By default, the Opportunity Details are hidden. To show them, click the plus sign next to Opportunity Details. This is a quick way to verify which opportunity the proposal was created with, and get information such as the Agency Contact and Closing Date.

Opportunity Details

Opportunity	G.g AT07 and NIH Ext-UAT
Opportunity Number	PA-B2-R01
Competition ID	ADOBE-FORMS-B2
CFDA #	93.838
CFDA Description	Lung Diseases Research
Offering Agency	National Institutes of Health

Proposal Submission History

If the proposal is in development and has not been submitted previously, the Submission History will be empty:

Proposal Submission History

S2S portal Tracking	Received Date/Time	Submitter	Message

Once a proposal has been submitted, the tracking number, submission date, and who submitted it will appear here:

Proposal Submission History

S2S portal Tracking	Received Date/Time	Submitter	Message
GRANT00566396	2013-04-19 08:53:35 PDT	gsutraining8	Successfully received by S2S port

If you click on the tracking number, the status of the proposal in the portal will be retrieved, and you can find out whether it has been validated and whether the agency has retrieved it. Once the agency has retrieved the proposal, if the agency has its own electronic portal, such as the NIH eRA Commons or NSF Research.gov, the proposal should appear there, and the PI will be able to review and/or edit them to ensure that the transmission was successful and accurate.

If the status that is returned is **Rejected with Errors**, the proposal was received, but the portal rejected it for some reason, commonly that it was past the deadline, or did not pass validations (see below). If you have any questions about this, especially if you may need to resubmit to meet your deadline, please contact Sponsored Program Administration immediately.

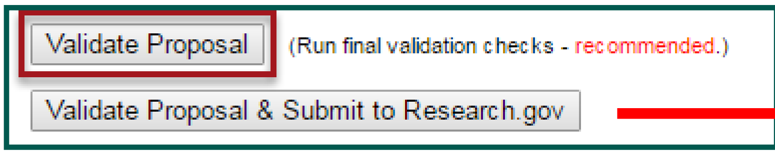
If the message field indicates that the submission was not successful, and/or it does not have a GRANT tracking number, then there was probably an error of some sort in transmission. See Troubleshooting below.

Electronic Submission

This is where you submit a proposal that has been fully and correctly prepared. The proposal must also be successfully routed and approved by SPA. Be sure you are familiar with WSU's processes before proceeding with submission.

The target for the submission is shown (usually Grants.gov).

Before submitting, we strongly recommend that you verify that there are no errors shown in the Errors/Warnings/Info section, then click **Validate Proposal**.



ONLY SPA ASSIGNED PERSONNEL CAN SUBMIT PROPOSALS ON BEHALF OF THE UNIVERSITY