



Proposal Creation

Module 5

Research Suite Product Support
ResearchSuiteSupport@Evisions.com

cayuse 424
Electronic Proposal
Development and Submission












Objectives

In this module you will learn how to:

- Create a new proposal
- Navigate the proposal
- Assign proposal permissions
- Track proposal history
- Validate the proposal
- Use the proposal lock and break the lock
- Copy and transform proposals

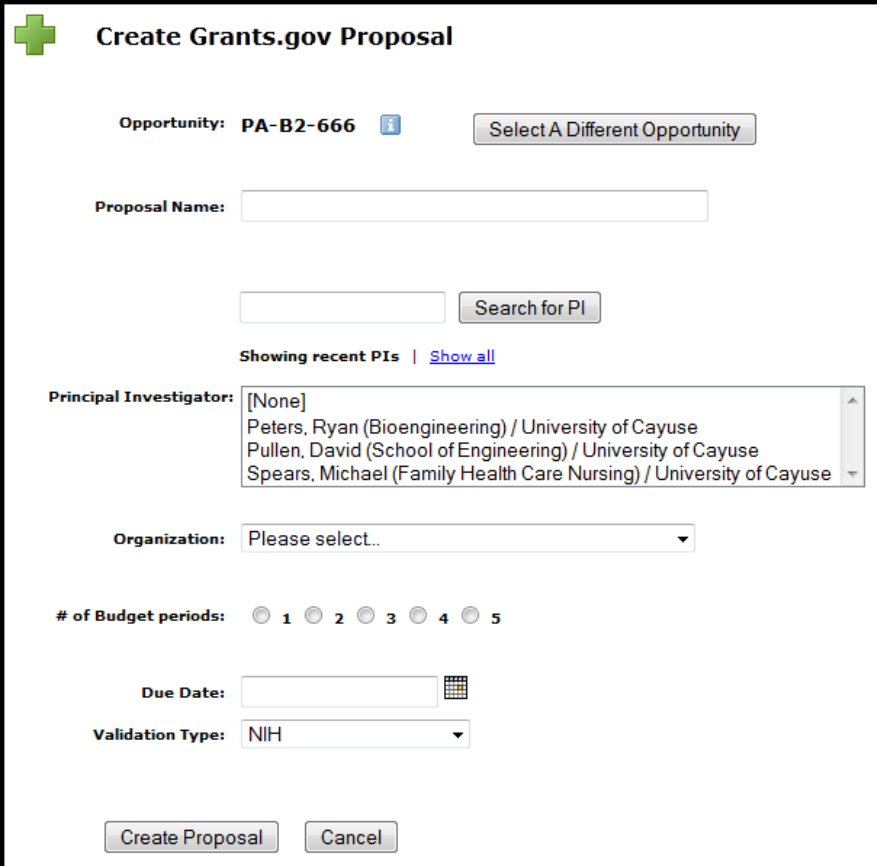
Creating a New Proposal

1. In the opportunities list, click the green plus button next to the opportunity you want to use.

	↑Opportunity Number	Title	Comp. ID	Agency	CFDA #	Opens	Closes	Retrieved	
	 PA-BB-C06	G.g AT07 and NIH Ext-UAT Test FOA (C06)	ADOBE-FORMS-B	National Institutes of Health Stage	93.838	2009-10-05	2012-10-05	2010-02-18	
	 PA-BB-D43	G.g AT07 and NIH Ext-UAT Test FOA (D43)	ADOBE-FORMS-B	National Institutes of Health Stage	93.838	2009-12-09	2012-12-09	2010-02-18	
	 PA-BB-D71	G.g AT07 and NIH Ext-UAT Test FOA (D71)	ADOBE-FORMS-B	National Institutes of Health Stage	93.838	2009-12-09	2012-12-09	2010-02-18	

Creating a New Proposal

2. Enter a **Proposal Name**.
3. Select a **Principal Investigator** using the provided list and search.
4. Select the organization.
5. Choose the **# of Budget Periods**.
6. Choose a **Validation Type**.
 - Determines which agency validations will be used.
7. Click **Create Proposal**.
8. Cayuse 424 creates a proposal using the forms required by the opportunity.





The screenshot shows the 'Create Grants.gov Proposal' form. At the top, there is a green plus icon and the title 'Create Grants.gov Proposal'. Below this, the 'Opportunity' field is set to 'PA-B2-666' with an information icon and a button 'Select A Different Opportunity'. The 'Proposal Name' field is empty. Below it is a search bar and a 'Search for PI' button. A link 'Showing recent PIs | Show all' is present. The 'Principal Investigator' dropdown menu is open, showing three options: '[None]', 'Peters, Ryan (Bioengineering) / University of Cayuse', 'Pullen, David (School of Engineering) / University of Cayuse', and 'Spears, Michael (Family Health Care Nursing) / University of Cayuse'. The 'Organization' dropdown menu is set to 'Please select..'. The '# of Budget periods' section has radio buttons for 1, 2, 3, 4, and 5, with '1' selected. The 'Due Date' field is empty with a calendar icon. The 'Validation Type' dropdown menu is set to 'NIH'. At the bottom, there are two buttons: 'Create Proposal' and 'Cancel'.

Proposal Name

When naming your proposal, use the following format:

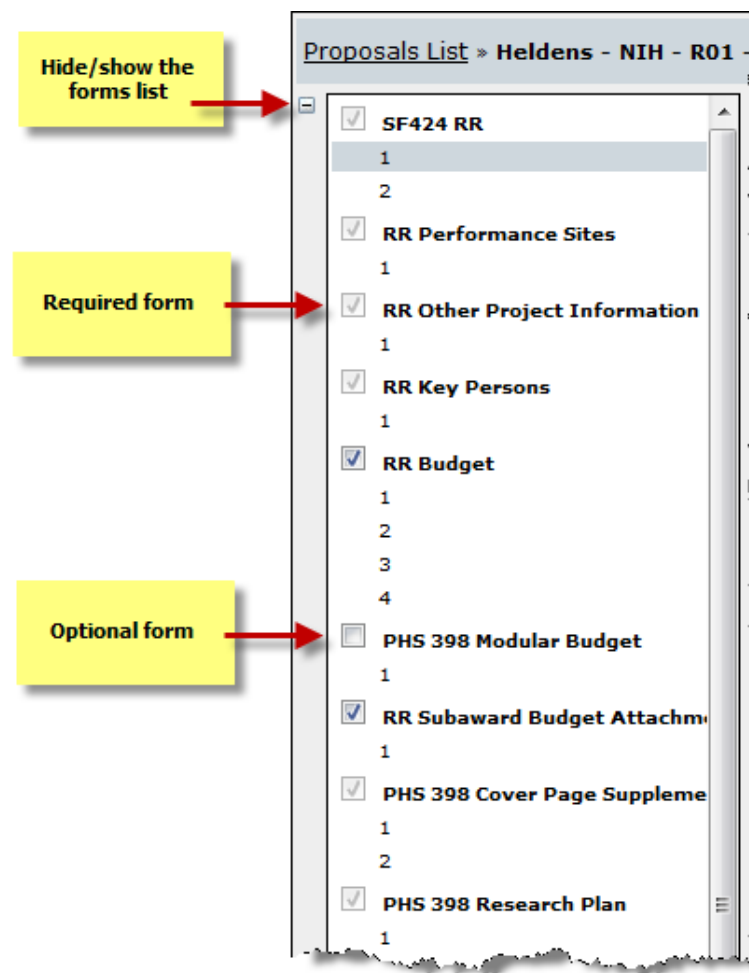
- Department Acronym/OR record number/PI last name.

Example: ISBER20120001Thomas

  Heldens, John 4/24/15		
APPLICATION FOR FEDERAL ASSISTANCE SF 424 (R&R)	2. DATE SUBMITTED <input type="text"/>	Applicant Identifier <input type="text"/>
	3. DATE RECEIVED BY STATE <input type="text"/>	State Application Identifier <input type="text"/>
1. * TYPE OF SUBMISSION <input type="radio"/> Pre-application <input type="radio"/> Application <input type="radio"/> Changed/Corrected Application	4. a. Federal Identifier <input type="text"/>	b. Agency Routing Number <input type="text"/>

Navigating the Proposal

- Forms are listed in the left-side navigation bar.
- Checkboxes control which forms are submitted to the agency.
 - Mandatory forms are automatically checked and cannot be unchecked.
 - Optional forms can be checked to include them in the submission.
- Page numbers take you to each form page.



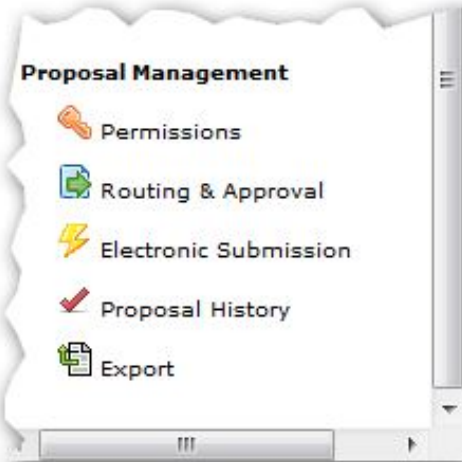
Navigating the Proposal

The Proposal Management areas have special icons to manage your proposal:

- Upper right corner




- Lower left sidebar



Proposal Permissions

- Proposal permissions are different from professional profile permissions.
- The proposal creator is given full permissions.
- Proposal permissions must be given to other users who need access to the proposal, such as:
 - Principal Investigators
 - Research Administrators
 - Reviewers

Adding Permissions

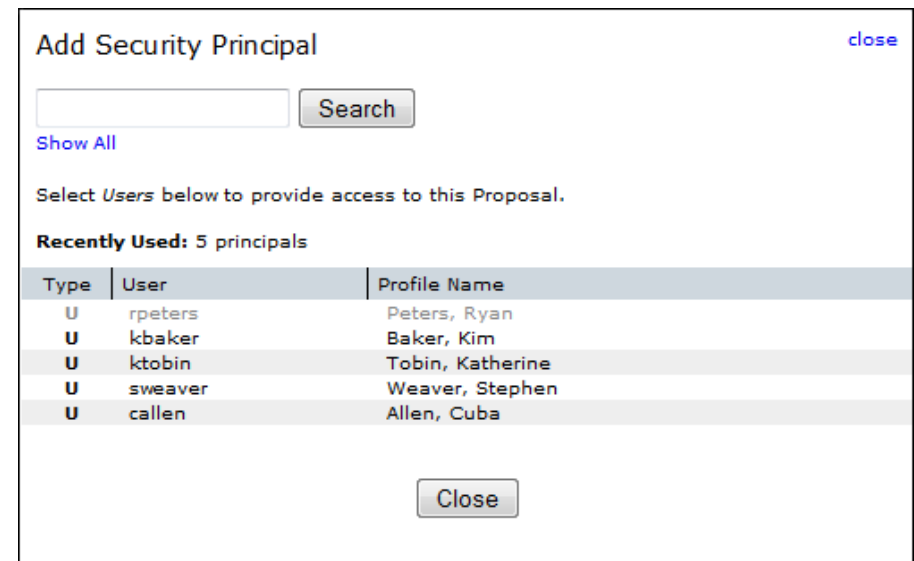
1. To give permissions to other Cayuse 424 users, click the **permissions key**: 
2. Click **Add user**.
3. Select a user from the list, or search by **first name**, **last name** or **username**.
4. Click the username in your search results to add the user to the permissions.
5. Click **Close**.



Proposal Permissions

 **Add user**

	List	Read	Write	Attach	Break Lock	Delete	Print
 Peters, Ryan (rpeters)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>



Add Security Principal [close](#)

Search

[Show All](#)

Select *Users* below to provide access to this Proposal.



Recently Used: 5 principals

Type	User	Profile Name
U	rpeters	Peters, Ryan
U	kbaker	Baker, Kim
U	ktobin	Tobin, Katherine
U	sweaver	Weaver, Stephen
U	callen	Allen, Cuba

Close

Adding Permissions

- Once the user is added, check or uncheck specific permission(s) as needed:

		List	Read	Write	Attach	Break Lock	Delete	Print	Change Permissions	Add User	Remove User	Submit
	PI, PI (PI)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Spears, Michael (mspears)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Permissions are mostly independent, so be sure to give each user every permission they will need.

Permission Definitions

List

Can see the proposal in lists, but cannot view or modify the details of the proposal.

Read

Can view the details of the proposal.

Write

Can modify all data within the proposal and run Final Review.

Attach

Can attach documents to the proposal.

Break Lock

Can take write access while another user is in the proposal.

Permission Definitions

Delete

Can delete the proposal.

Print

Can print the proposal.

Change
Permissions

Can change security permissions for the proposal.

Add/Remove
User

Can add or remove other users from the profile permissions.

Submit

Can submit the proposal to Grants.gov.

Proposal History

Proposal History logs include the date and time, username, and a summary for the following actions:

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

The Proposal History can be filtered by date and/or exported as a Comma Separated Values (CSV) file.

Proposal History

Proposal History

Show activity from: to:

[Show All](#)

Page: 1 2 3 4 5 (showing results 1 - 30)

↓ Date/Time:	Username:	Person:	Action:	Summary:
2012-07-19 13:06	cayuseadmin	Cayuse Admin	Save Proposal	
2012-07-19 13:06	cayuseadmin	Cayuse Admin	View Proposal	Opened for edit
2012-07-19 12:05	cayuseadmin	Cayuse Admin	Save Proposal	RR_OtherProjectInfo
2012-07-19 12:04	cayuseadmin	Cayuse Admin	Upload Attachment	RR Other Project Information: MentoringPlan (PDF)
2012-07-19 12:04	cayuseadmin	Cayuse Admin	Save Proposal	RR_OtherProjectInfo
2012-07-19 12:04	cayuseadmin	Cayuse Admin	Upload Attachment	RR Other Project Information: DataManagementPlan (PDF)
2012-07-19 12:04	cayuseadmin	Cayuse Admin	Save Proposal	RR_OtherProjectInfo
2012-07-19 12:04	cayuseadmin	Cayuse Admin	Upload Attachment	RR Other Project Information: Datamanagementplan (PDF)
2012-07-19 12:03	cayuseadmin	Cayuse Admin	Save Proposal	
2012-07-19 12:03	cayuseadmin	Cayuse Admin	View Proposal	Opened for edit
2012-07-19 11:56	cayuseadmin	Cayuse Admin	Save Proposal	RR_OtherProjectInfo
2012-07-19 11:55	cayuseadmin	Cayuse Admin	Delete Attachment	RR Other Project Information: DataManagementPlan

Proposal Validation


- Cayuse 424 keeps a running total of all errors and warnings.
- As you correct errors and warnings, the running total decreases.
- Proposals that are submitted with errors will be rejected by Grants.gov or the granting agency unless your opportunity specifically instructs you to the contrary.
- Be sure if you are submitting a proposal with warnings that you have determined the warning will not cause the proposal to be rejected or delayed by the granting agency.
- Info items offer advice for successful application completion and submission.

Proposal Validation


- Click the **Error/Warning/Info** button at the bottom of the proposal page to display more details.
- If you click the [linked text](#), Cayuse 424 will take you directly to the field that is causing the message to appear.

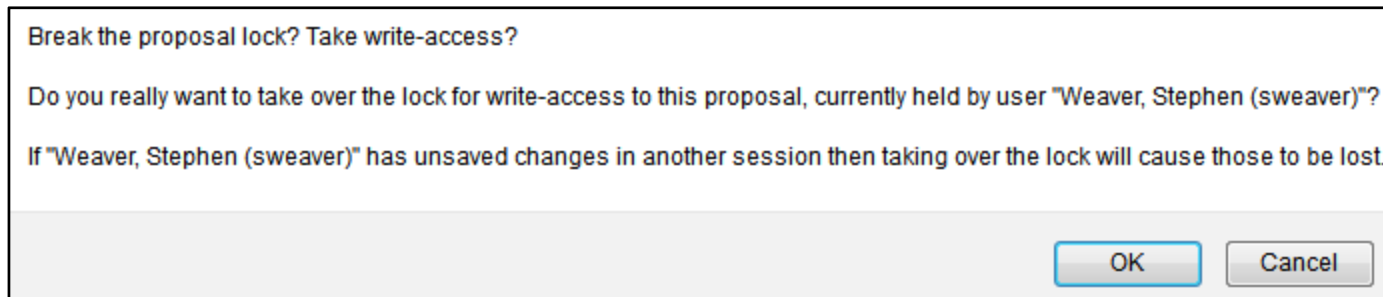
Error (52) / Warning (6) / Info (2)	NIH
Error: [Cover Page Supplement 1.3] Applicant Organization Contact's Title is required	
Error: [Cover Page Supplement 2.4] Answer HESC involved question	
Error: [Research Plan 2.2][NIH] The Specific Aims is required	
Error: [Research Plan 2.3][NIH]	Research Strategy attachment is required.
Error: [PHS 398 Checklist 2.4] Answer to Program Income question is required	
Error: [PHS 398 Checklist 2.5] Answer to Disclosure Permission question is required	

Proposal Locking

- When you are working in a proposal, other users who can see that proposal will see the lock icon next to it in the Proposals List,  followed by your username.
 - This indicates that the proposal is locked and you are working in the proposal.
- Only users with the “Break Lock” permission for the proposal can open the proposal for editing when it is locked by another user.
- Others can open the proposal in read-only mode.
 - They will not be able to enter data or add attachments.

Breaking the Lock

- If you have “break lock” permissions, you can “take the lock” from another user working in the proposal.
 - This will cause them to lose any unsaved data.
 - Contact the user first if possible to ensure they have saved their work.
- 1. Open the proposal from the list using the read-only icon .
- 2. Click the lock icon at the top of the proposal.
- 3. Click OK in the dialog.








Copying or Transforming a Proposal

- Copying creates a duplicate copy of an existing proposal.
- Transforming pulls data from an existing proposal into a new proposal for a different opportunity.

To begin the process:

1. Click on the **Proposals** tab and locate the proposal you would like to copy or transform.
2. Click the **Copy/Transform** icon to the right of the proposal.

Proposal	Title	PI	Modified	Type	Deadline	
 Heldens, John 4/24/15		Heldens, John	04-26-2015	Effects of Adolescent Binge	04-30-2015	 
 Mushu Pork		PI, PI	04-24-2015	NLM Grants for Scholarly Wc	02-11-2015	 
 reproduce FTF-8638 in Chrome 40, Cayu	reproduce FTF-8638 in Chrome 40, Cayu	Connet, Carlee	04-24-2015	08212013-KV-CO-AFRI-TITI		 

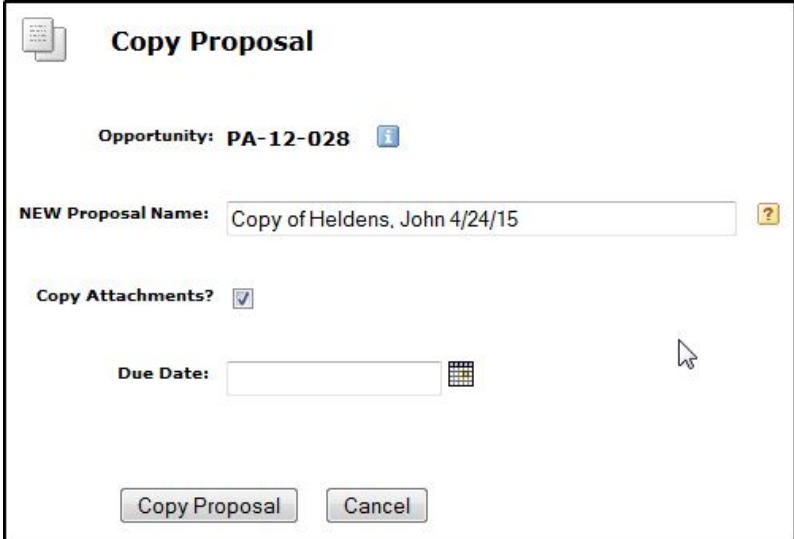
Copy Proposal

3. To copy the proposal, click **Copy Proposal** in the dialog.



A dialog box titled "Proposal Copy/Transform" with a yellow question mark icon. The text inside asks, "Copy the current proposal, or 'transform' it to a different Opportunity?". At the bottom, there are three buttons: "Copy Proposal", "Transform Proposal", and "Cancel".

4. Give the proposal a new name and due date.
5. Click **Copy Proposal**.
6. You'll see both the original and the copy in the Proposals List.



A dialog box titled "Copy Proposal" with a document icon. It displays "Opportunity: PA-12-028" with an information icon. Below is a text field for "NEW Proposal Name:" containing "Copy of Heldens, John 4/24/15" and a yellow question mark icon. There is a checkbox for "Copy Attachments?" which is checked. Below that is a "Due Date:" field with a calendar icon. At the bottom are "Copy Proposal" and "Cancel" buttons.

Transform Proposal

3. To transform the proposal, click **Transform Proposal**.



4. Select a new opportunity from the list using the green plus icon.

- You can search for the new opportunity.
- Or download a new one.

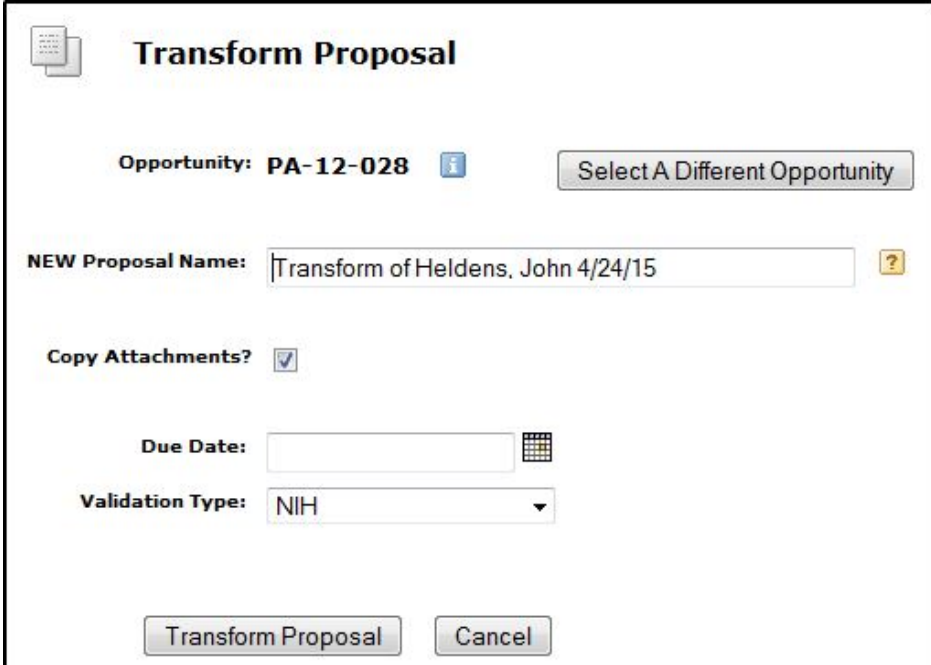
The "Transform Proposal..." window displays a table of opportunities. It includes a search bar, a "Download Opportunities" button, and a table with columns: Opportunity Number, Title, Comp. ID, and Agency. The table shows 13 opportunities, with the 8th row (PA-B2A-R01) highlighted in blue.

Opportunity Number	Title	Comp. ID	Agency
PA-12-028	Effects of Adolescent Binge Drinking on Brain Develop	ADOBE-FORMS-B2	National I
DHS-14-GPD-067-000-03	Grants.gov Test Solicitation Do Not Use for ND Grants		Departme
PA-B2A-R01	G.g AT07 and NIH Ext-UAT Test FOA (R01)	ADOBE-FORMS-B2A	National I
PA-B2A-R03	G.g AT07 and NIH Ext-UAT Test FOA (R03)	ADOBE-FORMS-B2A	National I
PA-B2A-R15	G.g AT07 and NIH Ext-UAT Test FOA (R15)	ADOBE-FORMS-B2A	National I
PA-B2A-R21	G.g AT07 and NIH Ext-UAT Test FOA (R21)	ADOBE-FORMS-B2A	National I
PA-B2A-R01	G.g AT07 and NIH Ext-UAT Test FOA (R01)	ADOBE-FORMS-B2A	National I
PA-B2A-R03	G.g AT07 and NIH Ext-UAT Test FOA (R03)	ADOBE-FORMS-B2A	National I
PA-B2A-R15	G.g AT07 and NIH Ext-UAT Test FOA (R15)	ADOBE-FORMS-B2A	National I
PA-B2A-R21	G.g AT07 and NIH Ext-UAT Test FOA (R21)	ADOBE-FORMS-B2A	National I
PA-B2-U44	G.g. AT07 and NIH Ext-UAT Test FOA (U44)	ADOBE-FORMS-B2	National I

Transform Proposal


5. Give the proposal a new name and due date.
6. Click **Transform Proposal**.
7. You'll see both the original and the transformed proposal in the Proposals List.


The transformed proposal will contain data from any forms that the opportunities have in common.




The image shows a 'Transform Proposal' dialog box. It has a title bar with a document icon and the text 'Transform Proposal'. Inside, there is a section for 'Opportunity: PA-12-028' with an information icon and a button 'Select A Different Opportunity'. Below this is a text field for 'NEW Proposal Name:' containing 'Transform of Heldens, John 4/24/15' and a help icon. There is a checkbox for 'Copy Attachments?' which is checked. Below that is a 'Due Date:' field with a calendar icon. At the bottom is a 'Validation Type:' dropdown menu set to 'NIH'. At the very bottom are two buttons: 'Transform Proposal' and 'Cancel'.

Transform Proposal

Opportunity: PA-12-028  [Select A Different Opportunity](#)

NEW Proposal Name: 

Copy Attachments? ☒

Due Date: 

Validation Type:

[Transform Proposal](#) [Cancel](#)

Conclusion

In this module you learned how to:

- Create a new proposal
- Navigate the proposal
- Assign proposal permissions
- Track proposal history
- Validate the proposal
- Use the proposal lock and break the lock
- Copy and transform proposals