



Evisions Research Suite

Users Guide

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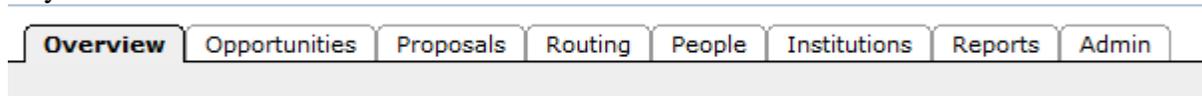
ORGS Cayuse Training – Introduction

Please note: Cayuse can only be accessed through Firefox and Internet Explorer browsers

1. Cayuse is a web application designed to streamline proposal development and submission via grants.gov. Cayuse was integrated campus-wide in 2011 and provides:
 - a. System-to-system federal grant proposal development and submission
 - b. Electronic routing for necessary signatures and approvals for all proposals

2. Logging onto Cayuse
 - a. Go to <https://cmich.cayuse424.com> (Central Link can also be accessed from the public site)
 - b. Enter your username and password on the CMU Single Sign-On Gateway (this will be the same as your global id and current CMU password)
 - c. Click “Log On”
 - d. Click on “Research”
 - e. Click on “Office of Research and Graduate Studies”
 - f. Click on “Office of Sponsored Programs”
 - g. Click on “Cayuse” (on the right side of the page)
 - h. Click on” Link to Cayuse” (link is on the left side of the screen)

3. Cayuse Tabs



- a. Overview tab
 - i. Link to important proposal items
 - ii. Use the Support Link (lower left side) for additional Cayuse support/training materials
- b. Opportunities tab
 - i. Browse downloaded opportunities
 - ii. Download new opportunities (ORGS Program Officers only)
 - iii. Create new proposals (ORGS Program Officers only)
- c. Proposals tab
 - i. Create/edit a grant proposal
 - ii. Create/edit a sub-award proposal
 - iii. Import a sub-award proposal (ORGS Program Officers only)
- d. Routing tab
 - i. View and access proposals that require your review and approval
- e. People tab
 - i. Create/edit your professional profile

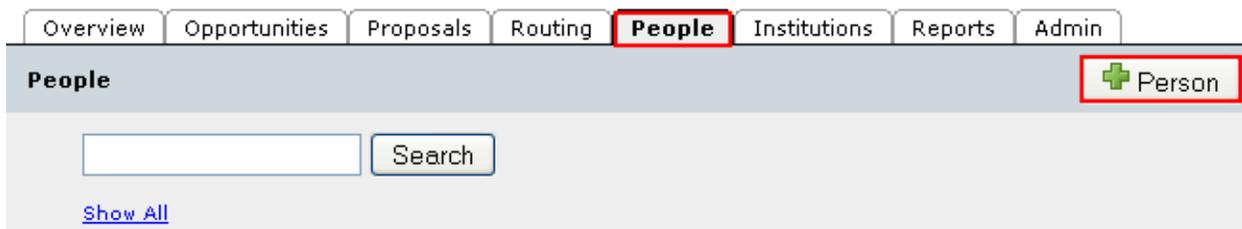
- ii. View your professional profile
- f. Institutions tab
 - i. View the primary institutional profile
 - ii. Create profiles for subcontracting institutions (ORGS Program Officers only)
- g. Reports tab (ORGS Program Officers and some Senior Officers only)
- h. Admin tab (ORGS Program Officers only and some Senior Officers only)

4. Lock Feature

- a. While you are working within a proposal, it will be locked-meaning that no one else can make any changes to the data within the proposal.
- b. To take control of a locked proposal, simply click on the  icon.

5. Updating your **Professional Profile** (Your professional profile captures and stores general personal information about you which is used when a proposal is developed)

- a. Navigate to the *People* tab



- b. If your profile does not automatically pop up, enter your last name in the *Search* box
 - i. Next, click “Search”
 - ii. Select your name on the list of names that is populated



- c. Next, select “Contact Information” on lower left side of the screen
 - i. Verify and/or update your contact information as necessary

- d. Select “Performance Site” on the lower left side of the screen (this is the location of your research/project or your CMU address if your research occurs within your office or you are a senior officer such as a Dean/Chair, etc.)
 - i. Verify/update your performance site information as necessary
- e. It is optional to update other relevant information in your profile as well including:
 - i. Degrees
 - ii. Demographics
 - iii. Downloading biosketches
 - iv. Department/Division/Title

ORGS Cayuse Training – Proposal Development

Each proposal is unique and its creation in Cayuse will vary depending on the requirements and needs of the funding agency and CMU staff and faculty. The following steps should be used as flexible guidelines noting that ORGS Program Officers will assist all PIs in their proposal development.

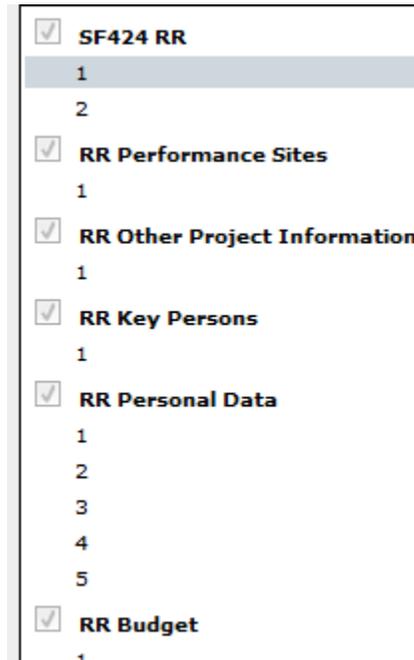
1. Once you identify a funding opportunity (corporate, federal, foundation, state, etc.), you will want to contact your ORGS Program Officer so the opportunity can be downloaded.
2. In order for the Program Officer to download a federal government funding opportunity, you will need to provide:
 - a. A federal opportunity number (FOA) (an example of an NSF opportunity number is 10-615) *or*
 - b. The federal CFDA number (an example of a CFDA number for the above opportunity is 47.076)
 - c. Both of these can be found on www.grants.gov, www.research.gov, or the specific government agencies website

↑ 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 

3. Your ORGS Program Officer will then create the proposal for you in Cayuse
 - a. Once the proposal is created, your program officer will send you an email notifying you of the proposal creation with required internal documents attached
 - b. Once you receive your email, you will navigate to the **Proposal** tab
 - i. If the proposal does not automatically appear, type your last name in the *Search* box and click “Search”
 - ii. Click on your proposal

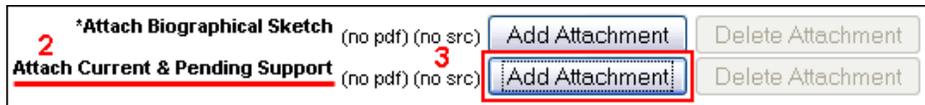
Federal Proposal Development (The example below is from a NSF grant proposal – each government agency requires various forms and the specific format may vary. Your ORGS Program Officer will assist you as you navigate through your proposal creation.):

1. Once you open your proposal (see section three on page five for directions on creating a proposal), you will:
 - a. Click on section 1 of the *SF424 RR* segment on the left side of the screen,

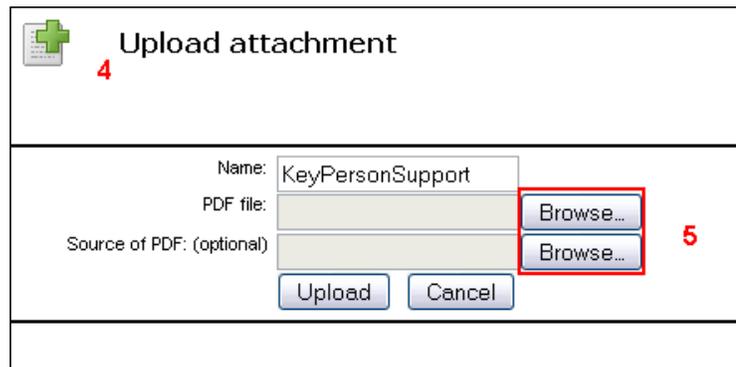


- i. Enter in the *Descriptive Title of Applicant’s Project* (#11)
 - ii. Enter in the *Proposed Project Start and End Dates* (#12) by:
 1. Clicking on the calendar to the right of the *Start Date* box
 2. Select the *Number of Periods*
 3. Select the *Period Length* using the drop down provided
 4. Select the *Start Date*
 5. Click on “Update Periods”
 - b. Next click on *RR Other Project Information* on the left side of the screen,
 - i. Complete questions 1 - 6
 - ii. In this section, there are documents that will be uploaded including: Project Summary/Abstract, Project Narrative, Bibliography and References Sited, Facilities and Other Resources, Equipment, and Other Attachments; **please work with your Program Officer to coordinate the downloading of those documents**
 - c. If an *RR Personal Data* section appears on the left side of the screen,
 - i. It is optional for you to complete information about key persons

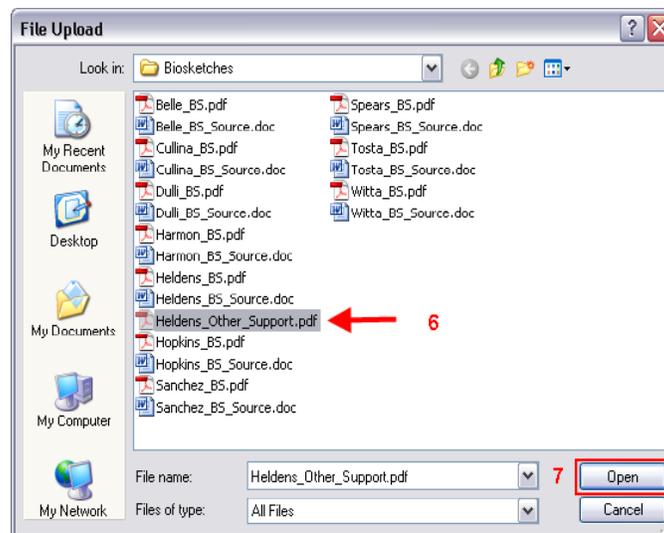
- d. Next, you will want to upload your completed required internal documents which your program officer emailed to you (see section three, page five). To do so, go to the *Documents section* under *Proposal Summary* on the left side of the screen
 - i. Click on “Add” to add an attachment



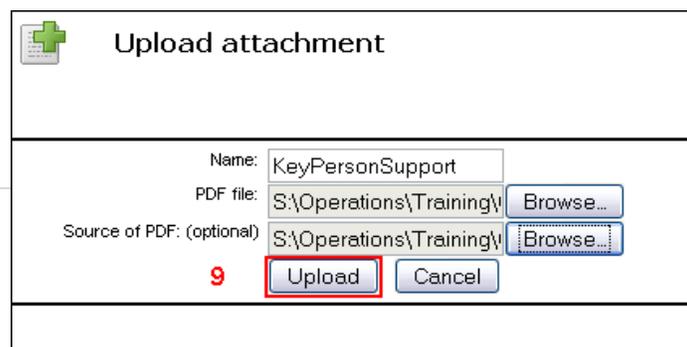
- ii. Browse using the *Source of PDF: (optional)* section to browse and locate the required internal documents



- iii. Click on “Open”



- iv. Click on “Upload”



- v. The files have been uploaded once you see *pdf* and *src* in blue

*Attach Biographical Sketch (no pdf) (no src)	Add Attachment	Delete Attachment
Attach Current & Pending Support KeyPersonSupport ¹⁰	pdf src Add Attachment	Delete Attachment

Non-Federal Proposal Development:

1. (see section three on page five for directions about proposal creation) Once you open your proposal direct yourself to the *Proposal Summary* form under the **Proposal** Tab
 - a. Go to the *Documents* section under *Proposal Summary* on the left side of the screen
 - i. Follow the procedures for uploading and completing the required internal documents as described under section iv of the Federal Proposal Development section outlined above.

ORGS Cayuse Training – Electronic Routing

Electronic routing is an efficient incremental web-based review and approval process for funding proposals.

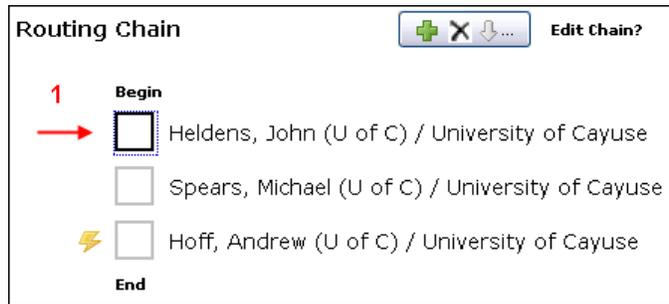
1. Your ORGS Program Officer will develop the routing chain for your funding proposal.
 - a. In general, a routing chain will be set in the following order:
 - i. Principal Investigator
 - ii. Co-Principal Investigators
 - iii. ORGS Program Officer
 - iv. Department Chair(s)
 - v. Dean(s)
 - vi. ORGS Program Officer
 - vii. Vice President for Research
 - viii. ORGS Program Officer
2. All routing actions will be logged in the proposal's *Routing History* found in the *Routing and Approval* section under *Proposal Management* on the left side of the screen:

username	person	type	date/time	comments
ahoff	Hoff, Andrew (U of C) / University of Cayuse	Approve	2008-08-25 13:53	
mspears	Spears, Michael (U of C) / University of Cayuse	Approve	2008-08-25 13:52	
jheldens	Heldens, John (U of C) / University of Cayuse	Approve	2008-08-25 13:52	
jheldens		Modify	2008-08-25 13:22	
jheldens		Modify	2008-08-25 13:22	

3. Once the proposal has been successfully routed, your Program Officer will submit the proposal to the funding agency.
 - a. If it is a federal proposal, using the *Error/Warning* tool found at the bottom of the proposal tab, your Program Officer will verify there are no errors that would hinder the proposal from being processed by the funding agency. To check the errors/warnings in a proposal prior to submission, the Program Officer will:
 - i. Click on the *Error/Warning* tool at the bottom of the proposal tab
 - ii. If any errors/warnings are shown, follow the links and make all necessary corrections
 - iii. Continue this process until the proposal is ready for submission

Initiating a Routing Chain

1. Once you are ready for your proposal to be reviewed, you will want to navigate to *Routing & Approval* section on the lower left side of your **Proposal** Tab under *Proposal Management*
 - a. You will check the box next to your name to begin the routing process.



- b. Once checked, a *Comments* box will appear for you to provide additional information about the approval to subsequent reviewers.

The screenshot shows a dialog box titled 'Action: Approve'. Below the title is a 'Comments:' label followed by a large empty text area. At the bottom, there is a red '2' above a red-bordered 'Approve' button. The text next to the 'Approve' button is '(as Heldens, John (U of C) / University of Cayuse)'. Below the 'Approve' button is a 'Cancel' button.

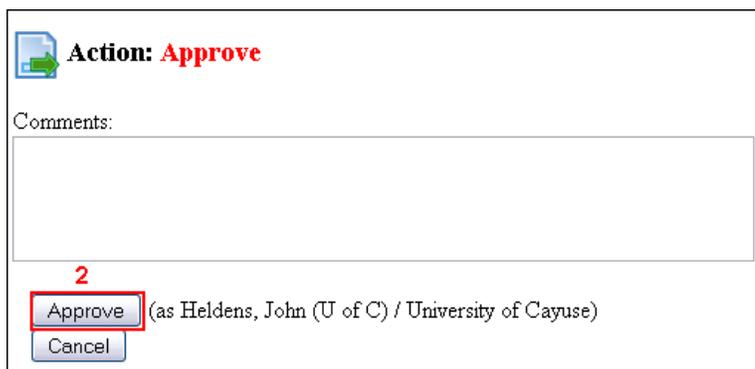
- c. At this time, two things will happen:
- i. An email will be sent to the next reviewer on the list notifying them of their turn to review the proposal. **At this point the budget will no longer be able to be edited.**
 - ii. The proposal will be added to the *Routing List* of all the reviewers on the chain (the *Routing List* is found in the **Routing** Tab).
 1. Each reviewer will receive an email when it is their turn to review and approve the proposal. *This process will continue until all reviewers on the routing chain have approved the proposal for submission.*

Reviewing/Approving a Proposal (when you receive notification that you are on a routing chain)

1. If you are part of a routing chain for someone's proposal and you have received an email notification that it is ready for your review and approval:
 - a. Select the **Routing** tab
 - b. Next, select the proposal that is in need of your review and approval
 - c. You will automatically be directed to the proposal
 - d. Once you have reviewed the proposal information, navigate to *Routing & Approval* section on the lower left side of the screen under *Proposal Management*
 - e. Check the box next to your name



- f. Once checked, a *Comments* box will appear for you to provide additional information about the approval to subsequent reviewers.



Retracting an Approval

1. To retract an approval:
 - a. Simply un-check the box next to your name. This will cause the proposal to be sent back for re-review and/or corrections.
 - b. Once a routing chain is started, the initiator can Recall (cancel) the whole process by un-checking their box.

