CAYUSE 424 Reminders & Tips for Department Administrators

ACCOUNTS & ACCESS

- ✓
  - ○ Account set-up for **first-time users** <u>must be completed by the user</u>, using their Kerberos password and login at the Cayuse url.
  - ○ Administrators may receive **delegate access** to work on proposals on behalf of their PIs.
  - ○ **Permissions** are on an individual basis and are updated using the permissions link on the drop down menu on left side of the proposal under Proposal Management.

STANDARD PROPOSAL INFORMATION

- ○ All **zip code** entries require the appropriate four-digit zip extension code.

✓ ATTACHMENTS, BUDGETS & SUBCONTRACTS

- ○ All file attachments must be in PDF format.

- ○ File names must not contain hyphens, or special characters except underscore. It is also recommended that spaces not be used.

- ○ Sub-recipients should be listed in CAYUSE as an institution before sub-awards can be set up. Contact your C&G Analyst to add new institutions and establish escalation rates.

✓ CAYUSE FUNCTIONALITY

- ○ Mozilla Firefox, Internet Explorer, and Safari are the **preferred web browsers**.
- ○ The **lock icon** will appear when another user is editing the proposal. It is important that proper exiting features be followed per the Cayuse User Manual -- http://support.cayuse.com/docs/cayuse-424-support/user-reference-manual
- ○ The **yellow pencil icon** on the right of personnel fields allows you to auto-fill contact information.
- ○ A **red star icon** means that you have over-written an auto-populated field.
- ○ Use the **grey printer icon** on the top right of the screen and select the forms you'd like printed.
- ○ Your proposal is saved every time you click in and out of a page, whenever you change functions (tabs), and when you close the proposal.
- ○ The only forms that will be submitted with the proposal are those with a **checked box** on the left hand side of the proposal screen. Be sure all required forms are checked.

✓ ROUTING/APPROVAL CHAIN & SUBMISSION

- ○ **Required approvers** of the CAYUSE proposal package include the lead PI, their department chair and the designated Contracts & Grants Analyst. Both boxes must be checked for proposal to be submitted.
- ○ Once the PI has approved the proposal, all **documents are locked down** from editing except the scientific portion.