Pre-Check List

Pre-Check List

Prior to Proposal Creation, users should check Browser settings, verify access, validate/update Professional Profile, obtain opportunity number, inform OGCA of Intent to submit, and collect a short list of data points needed to start the Proposal. Visit ==__unt_video page__== or http://support.cayuse.com/ for more training and information.

☐ **Browser Settings & Configuration***

☐ **User Access***

☐ **Professional Profile***

☐ **Collect Data Points~**

☐ **Opportunity Number~**

☐ **Grants & Contracts Specialist (GCS) Request Form~**

☐ **Decision Point; starting path in Cayuse SP and/or Cayuse 424~**

***** Browser settings/configuration and user access need to be checked upon first use or device (computer) updates/changes. PIs are responsible for maintaining their Professional Profile data so that correct and current profile data populates into every Proposal.

~ Remaining items are required for every Proposal.

Visit OGCA's Cayuse page or Evisions' Cayuse Support page for more details.

Browser Settings & Configuration

Browser Settings & Configuration

☐   **Browser Settings & Configuration**
Firefox is the recommended Browser for Cayuse. To install the latest version of Firefox visit https://www.mozilla.org/en-US/firefox/new/ and click on "Free Download" box.
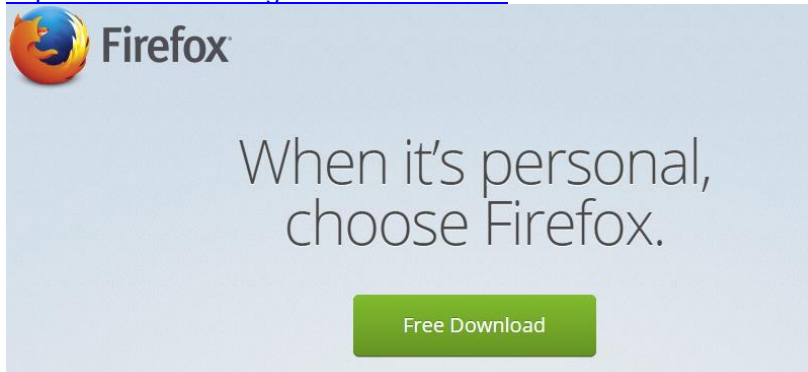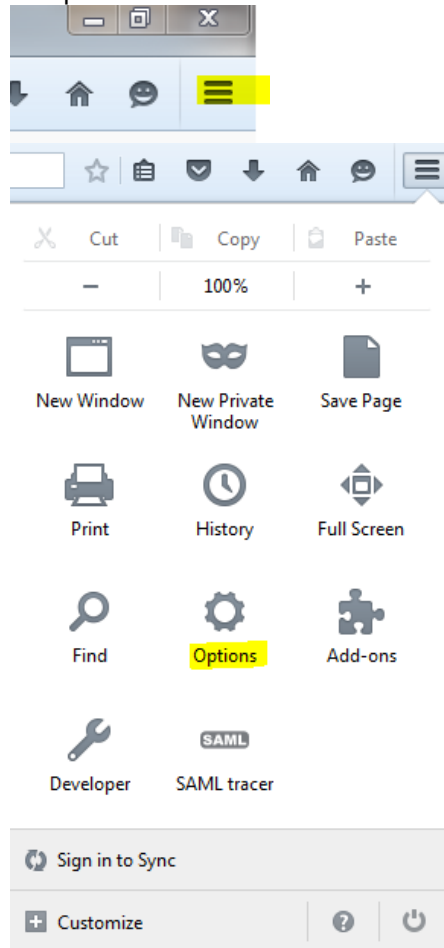

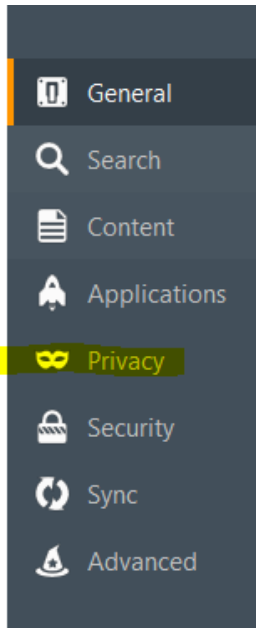Cookies and pop-ups are required for Cayuse functionality.
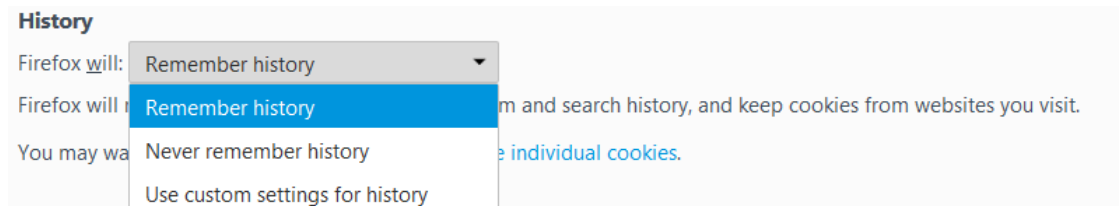
☐ **Accept Cookies**

At the top left of your Firefox window, click the icon with three dashes (updated FF icon) and select Options.
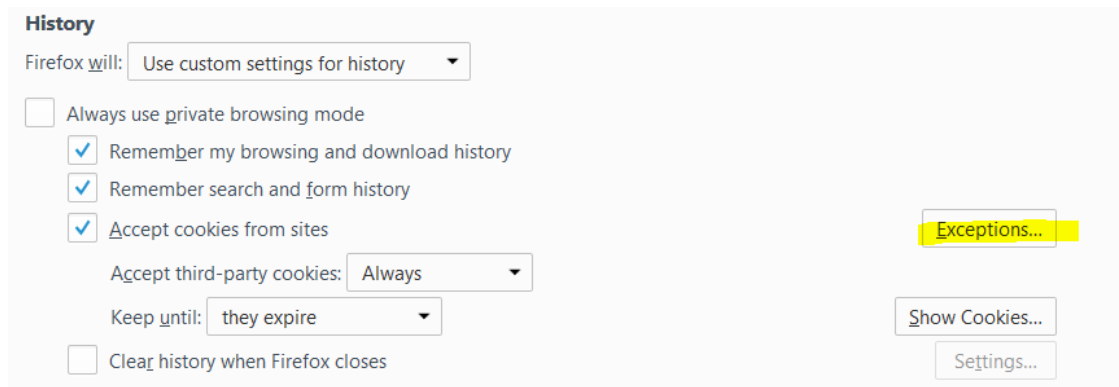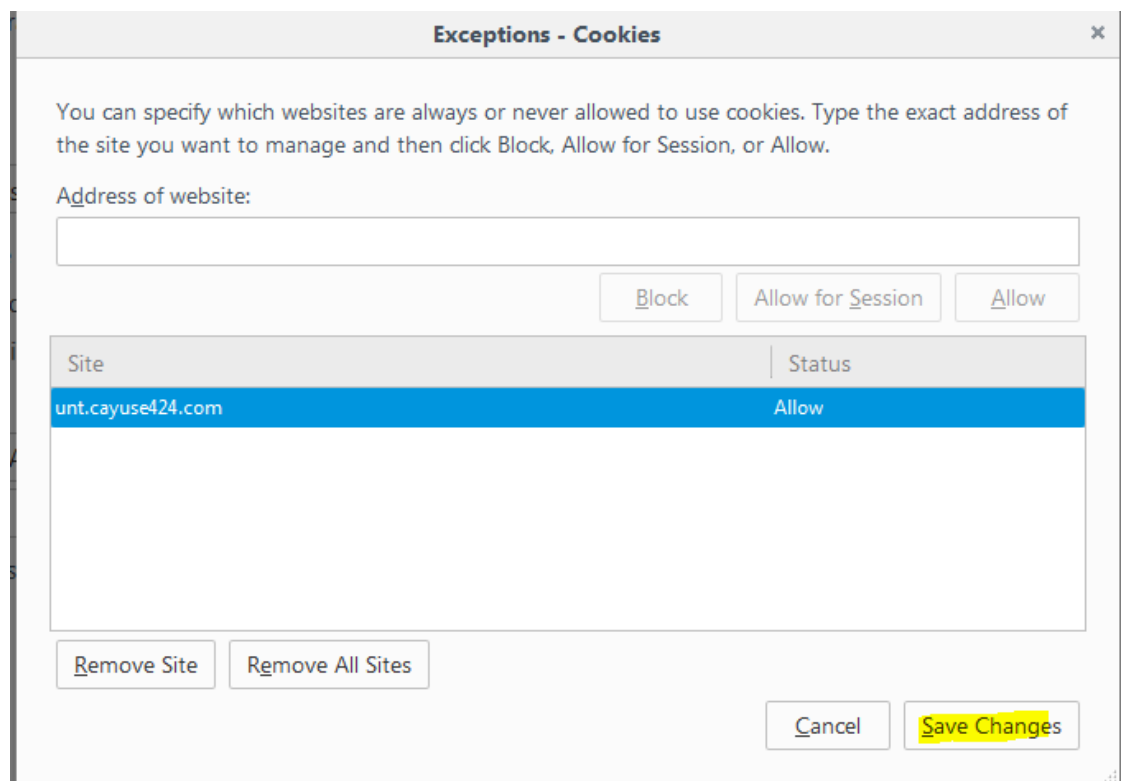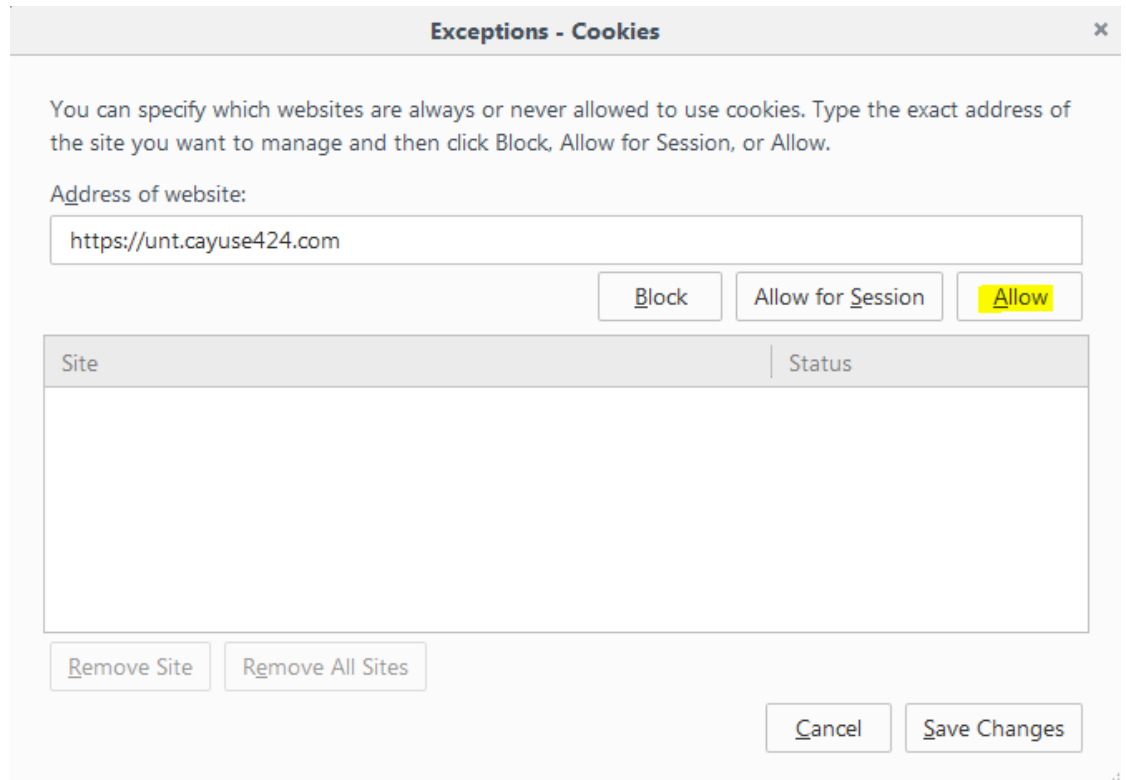

On the left of Firefox, click Privacy icon.

On the Privacy page, under History, choose Remember History.

Alternatively, you can select 'Use custom settings for history' and then add https://unt.cayuse424.com as an exception.

Exceptions - Cookies ✕

You can specify which websites are always or never allowed to use cookies. Type the exact address of the site you want to manage and then click Block, Allow for Session, or Allow.

Address of website:

https://unt.cayuse424.com

Block | Allow for Session | Allow

Site	Status

Remove Site | Remove All Sites

Cancel | Save Changes

Exceptions - Cookies ✕

You can specify which websites are always or never allowed to use cookies. Type the exact address of the site you want to manage and then click Block, Allow for Session, or Allow.

Address of website:

Block | Allow for Session | Allow

Site	Status
unt.cayuse424.com	Allow

Remove Site | Remove All Sites

Cancel | Save Changes

☐ **Allow Pop-Ups**

On the left of Firefox, click Content icon.
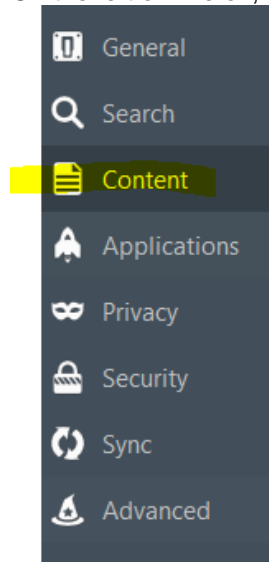
On the Content page, under Pop-ups, un-check Block pop-up windows.
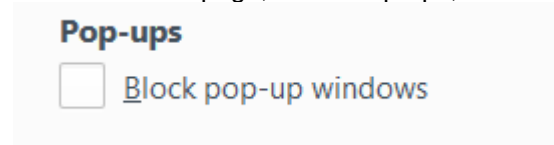
Alternatively, you can leave the 'Block pop-up windows' checked and add https://unt.cayuse424.com as an exception.
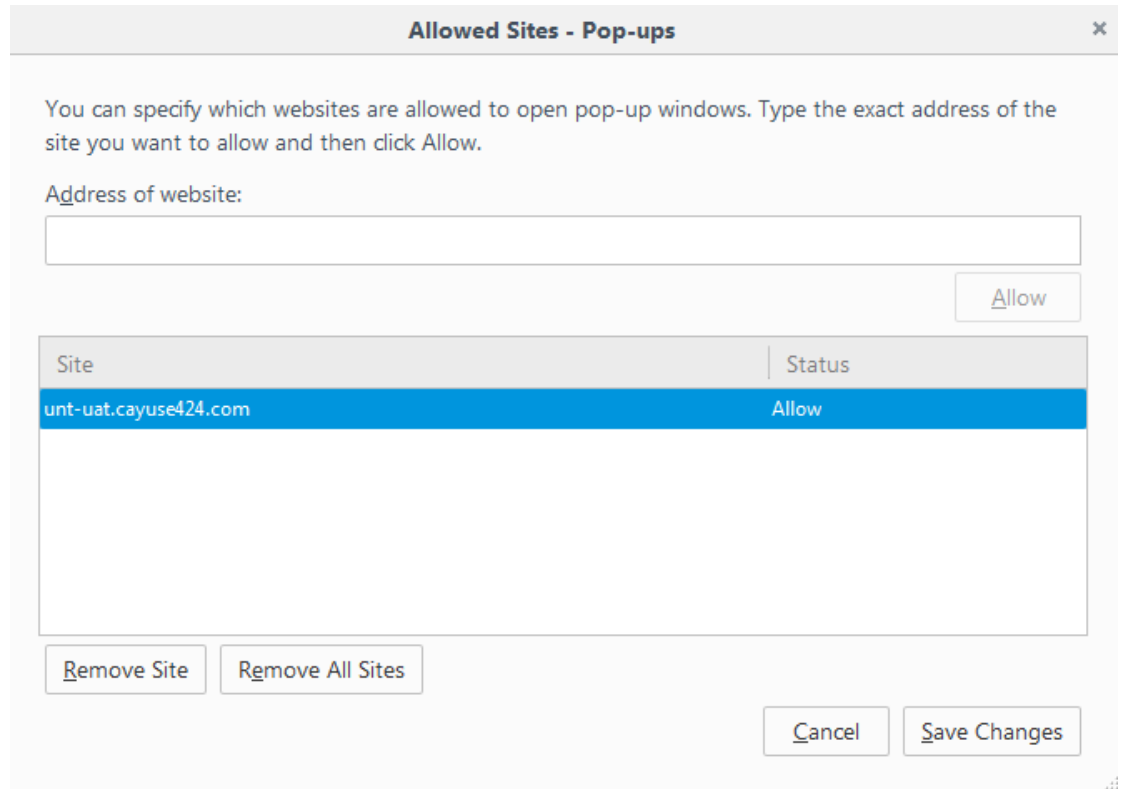
☐ **Enable Javascript**
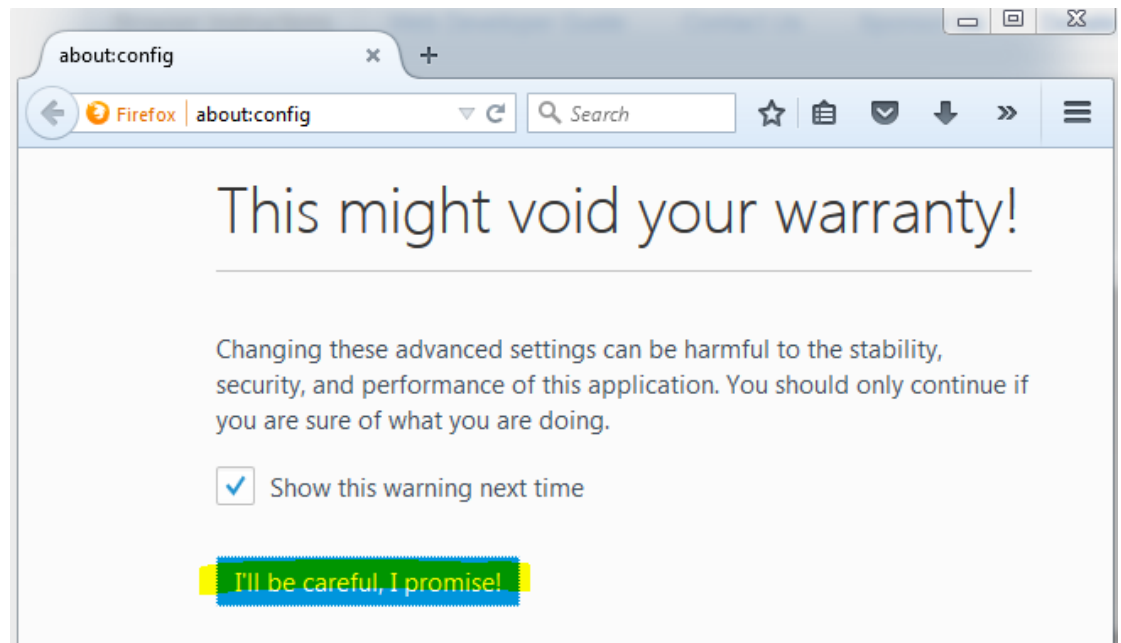Follow these instructions to activate and enable JavaScript in Firefox.
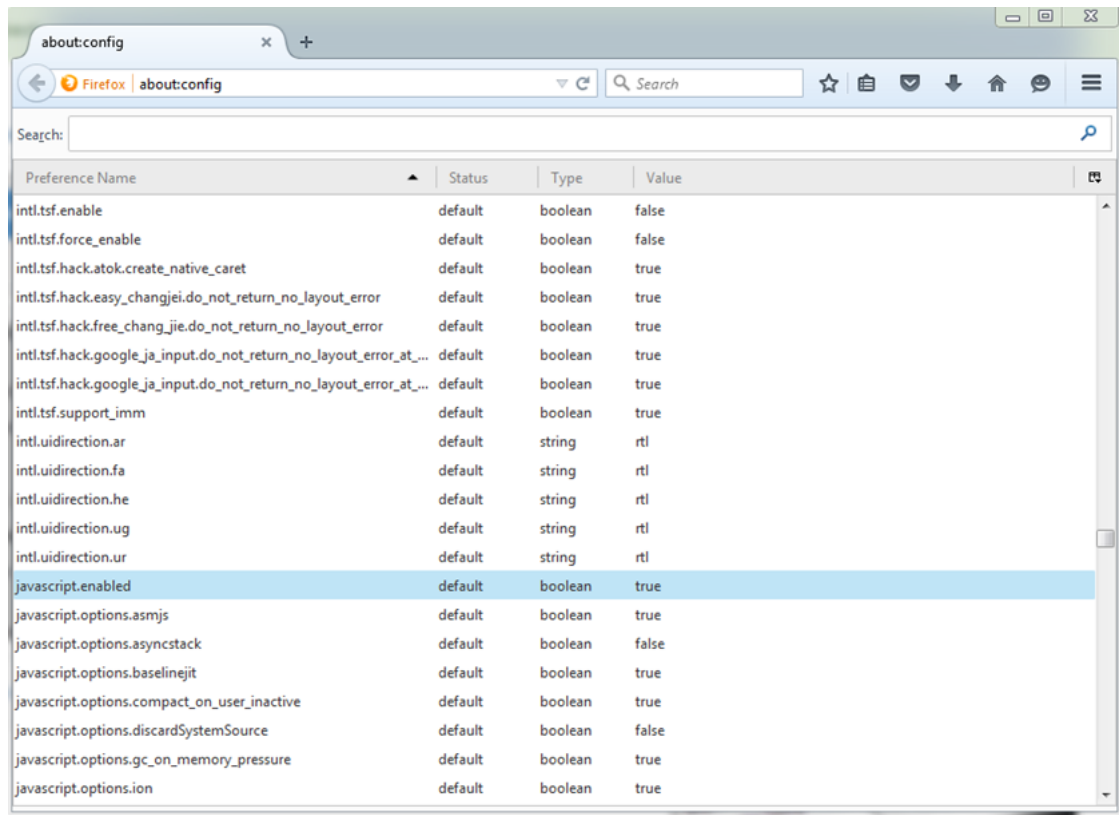PC & MAC
Open a new Firefox browser window or tab.
Copy the following then paste it into the Firefox address bar: about:config
Hit the Enter key.
On the following page, click the button: "I'll be careful, I promise!"

Find the javascript.enabled row under the Preference Name heading (listed in alpha order).

Value of javascript.enabled should be true. If it is, close the browser.

If not, then you can double-click anywhere within the javascript.enabled row to toggle the value from "False" to "True".

Finally, refresh your browser.

For further help and instructions, see http://support.cayuse.com/docs/browser-support-configuration and click on "Firefox Settings".

Next Pre-Check List item

Visit OGCA's Cayuse page or Evisions' Cayuse Support page for more details.

User Access

User Access

☐　**User Access**

Users should request access and test access. Log in and test links. After logging in, the landing page should have both Cayuse 424 and Cayuse SP links under Research Administration Modules.

☐ **Verify Access**

Verify access to Cayuse by logging into https://unt.cayuse424.com with your UNT EUID and password.

The page redirects to a UNT authentication page (you MUST be VPNd in or on a UNT network with a UNT device).
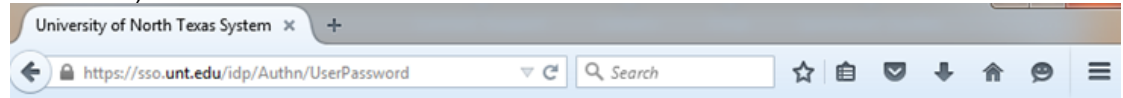
☐ **or Request Access**

If access denied, request access. If you do not have access, request profile and access by completing an online request at https://forms.unt.edu/cayuse-request-form

Visit OGCA's Cayuse page or Evisions' Cayuse Support page for more details.

Professional Profile

Professional Profile

☐ **Professional Profile**

Personnel must update his or her own Profile in the system. Professional Profiles have been set up under the People tab for all current PIs. It is your responsibility to keep your profile updated. Only you have access to change your profile information, unless you grant permission to others. You may upload and store multiple biosketches in your Professional Profile. Any PI without a Professional Profile must create one prior to starting a grant application. Key persons and other significant contributors must have a Professional Profile as well.

☐ **Navigation**

When logged in, select Cayuse 424 link under Research Administration Modules. Then go to People menu bar tab at the top or click on blue hyperlink to Professional Profiles to find your profile.

☐ **Verify/Update**

Update all information including the following *at a minimum*:

☐   **Contact Information**

☐   **Dept/Division/Title.** Contact OGCA if not available.

☐   **Salary & Fringe Worksheet.** TIP: Always use 9 mo salary for academic months & 3 months for summer.

☐   **Performance Site**

[Next Pre-Check List item](#)

Visit [OGCA's Cayuse page](#) or [Evisions' Cayuse Support](#) page for more details.

Collect Data Points

Collect Data Points

☐   **Collect Data Points**

Collect a Short List of the minimum Data Points required for STARTING/SAVING draft of Proposal in Cayuse.

	Cayuse SP	Cayuse 424	Items required to save drafts in each module
☐			EUID
☐			Name of Proposal / Short Project Name (use Lead PI name) -this is NOT the T
☐			Lead PI
☐			Proposal Due Date / Sponsor Deadline
☐		▓	Sponsor
☐		▓	Project Start Date
☐		▓	Project End Date
☐		▓	Activity Code
☐		▓	Proposal Type
☐		▓	Instrument Type
☐		▓	Submission Method (Cayuse 424, FastLane, etc.)
☐		▓	Award Admin Dept
☐		▓	Primary Administrative Contact
☐		▓	Title of Project
☐		▓	If Pairing with Cayuse at time of creation
☐	▓		Opportunity Number
☐	▓		Default IDC Rate
☐	▓		Budget Periods
☐	▓		Validation Type

Visit OGCA's Cayuse page or Evisions' Cayuse Support page for more details.

Opportunity Number

Opportunity Number

OGCA requires a Cayuse 424 packet for Grants.gov opportunities that are fully supported by Cayuse. If submitting to NSF, you may use FASTLANE instead of Cayuse 424.

The Cayuse 424 Opportunities tab displays a list of federal funding Opportunities that have been downloaded into Cayuse 424 from Grants.gov. To retrieve an Opportunity from Grants.gov into Cayuse 424, you must know the Opportunity Number or CFDA Number.

☐ **Opportunity Number**

You may use http://www.grants.gov/web/grants/search-grants.html or other resources to find out about opportunities.

Once you have an Opportunity Number (or CFDA#) you can log into Cayuse, open the Cayuse 424 module, and then search for the opportunity or download it into Cayuse 424. Opportunities are used to create Proposal Packages in Cayuse 424 (see Cayuse 424 Quick Start Find an Opportunity or detailed Opportunity instructions for further details).

Next Pre-Check List item

Visit OGCA's Cayuse page or Evisions' Cayuse Support page for more details.

Grants & Contracts Specialist (GCS) Request Form

Grants & Contracts Specialist (GCS) Request Form

☐ **Grants & Contracts Specialist (GCS) Request Form**

Fill out a GCS request form informing OGCA of your intent to submit a proposal. Be sure to indicate the correct submission mechanism. Grants & Contracts Specialist (GCS) Request Form is available at https://forms.unt.edu/request-grant-officer-assignment.

Visit OGCA's Cayuse page or Evisions' Cayuse Support page for more details.

Decision Point; starting path in Cayuse SP and/or Cayuse 424

Decision Point; starting path in Cayuse SP and/or Cayuse 424

☐ **Decision Point; starting path in Cayuse SP and/or Cayuse 424**
Submission for <mark>Grants.gov</mark> proposals are to be handled in Cayuse 424 (NSF .gov submissions NSF will be handled in FastLane). If you do not know whether a proposal is a <mark>Grants.gov</mark> submission that will be handled in Cayuse 424, contact your GCS.

Pick one of two routes below.

Option 1; Grants.gov through Cayuse 424

○ ☐ **If submission is a <mark>Grants.gov</mark> proposal and will go through <u>Cayuse 424</u>, then**
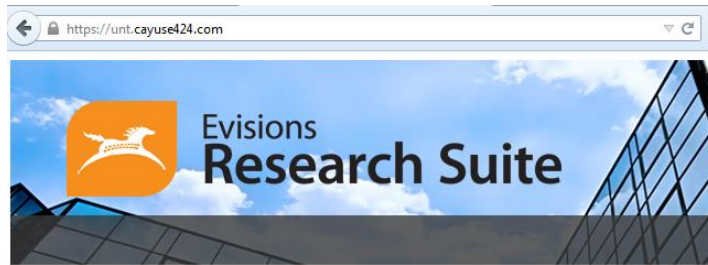
    ☐ **Start in Cayuse SP**

        ☐ <u>Login</u>

        ☐ Complete General Information page (see <u>Cayuse SP</u> instructions for further details).

        ☐ Click Save at bottom of page

        ☐ Click choice at bottom of page to 'Create a Paired Proposal' (this opens Cayuse 424)

    ☐ **In Cayuse 424 a pop-up window shows options to Create Proposal**

        ☐ Select first option, Grants.gov/Research.gov

        ☐ Click Create button at bottom of window

        ☐ Pop-up window changes to Opportunities

            ☐ Locate (or download and locate) and select correct Opportunity

        ☐ Pop-up window changes to Create Grants.gov/Research.gov Proposal

            ☐ Enter Proposal Name (Lead PI)

            ☐ Search and select Lead PI

            ☐ Enter due date and other entries, which vary by Opportunity

            ☐ Let system assign Validation Type

            ☐ Click Create Proposal at bottom of window

        ☐ Pop-up window closes and current browser for Cayuse 424 changes page to your newly created (and paired**) Proposal

            ☐ At this point you may <u>log out of SP</u> and <u>sign out of 424</u> or continue editing in Cayuse 424 and/or Cayuse SP.

    ☐ **Proceed with completing Cayuse 424 package** (see <u>Cayuse 424</u> instructions for further details).

    ☐ **Proceed with completing Cayuse SP Routing** (see <u>Cayuse SP</u> instructions for further details).

Option 2; Cayuse SP only - NOT through Cayuse 424

- ☐ **or If submission is NOT a** <mark>Grants.gov</mark> **proposal and will NOT go through Cayuse 424, then**

  - ☐ **Start in Cayuse SP**

    - ☐ Login

    - ☐ Complete General Information page (see Cayuse SP instructions for further details).

    - ☐ Click Save at bottom of page

  - ☐ **Proceed with completing package outside of Cayuse 424**

  - ☐ **Proceed with completing Cayuse SP Routing** (see Cayuse SP instructions for further details).

**Users may pair Proposals in many sequences, but the most efficient steps are shared here. For other options to pair Proposals, see Evisions' Cayuse Support page.

Back to beginning of Pre-Check List

Visit OGCA's Cayuse page or Evisions' Cayuse Support page for more details.

Option 1; Grants.gov through Cayuse 424

Option 1; Grants.gov through Cayuse 424

If submission is a Grants.gov **proposal and will go through** Cayuse 424**, then**

1 **Start in Cayuse SP**

   A Login

B Complete General Information page (see Cayuse SP instructions for further details).

C Click Save at bottom of page

E Click choice at bottom of page to 'Create a Paired Proposal' (this opens Cayuse 424)

2 **In Cayuse 424 a pop-up window shows options to Create Proposal**

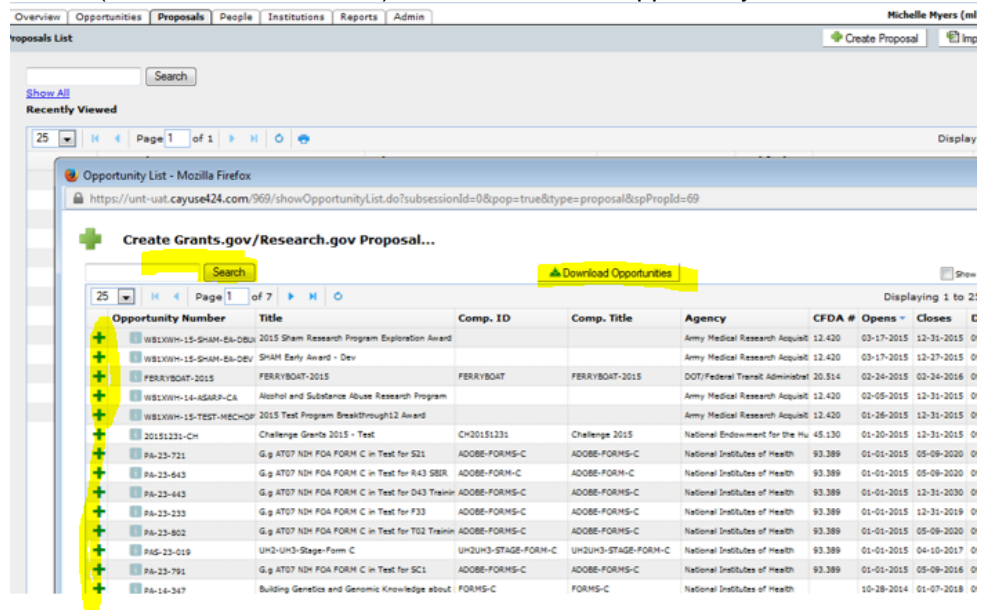 A Select first option, Grants.gov/Research.gov

 B Click Create button at bottom of window

C Pop-up window changes to Opportunities

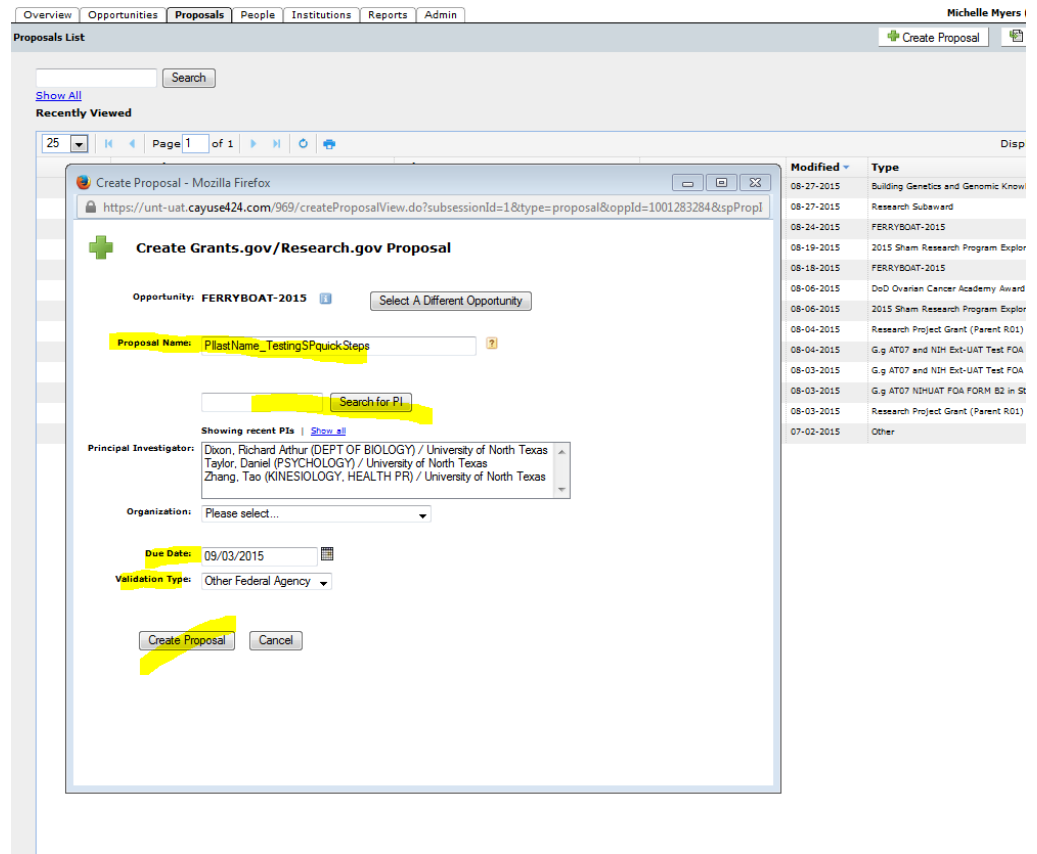   **1 Locate (or download and locate) and select correct Opportunity**

**D Pop-up window changes to Create Grants.gov/Research.gov Proposal**

      1 Enter Proposal Name (Lead PI) (will pull from Cayuse SP entry-edit as needed)
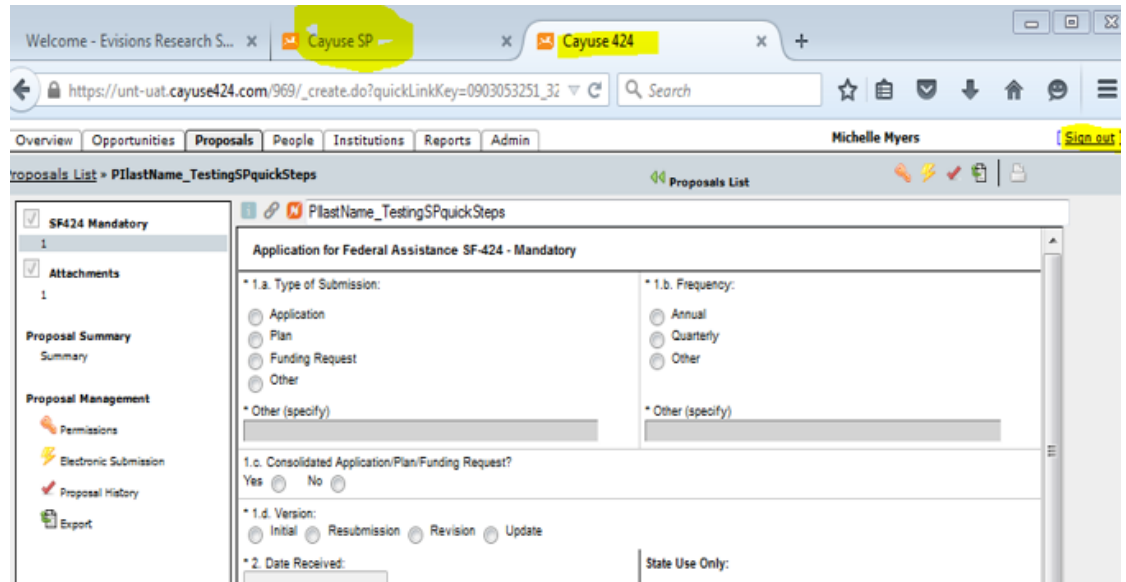
      2 Search and select Lead PI

3 Enter due date and other entries, which vary by Opportunity

4 Click Create Proposal at bottom of window

E Pop-up window closes and current browser for Cayuse 424 changes page to your newly created (and paired**) Proposal
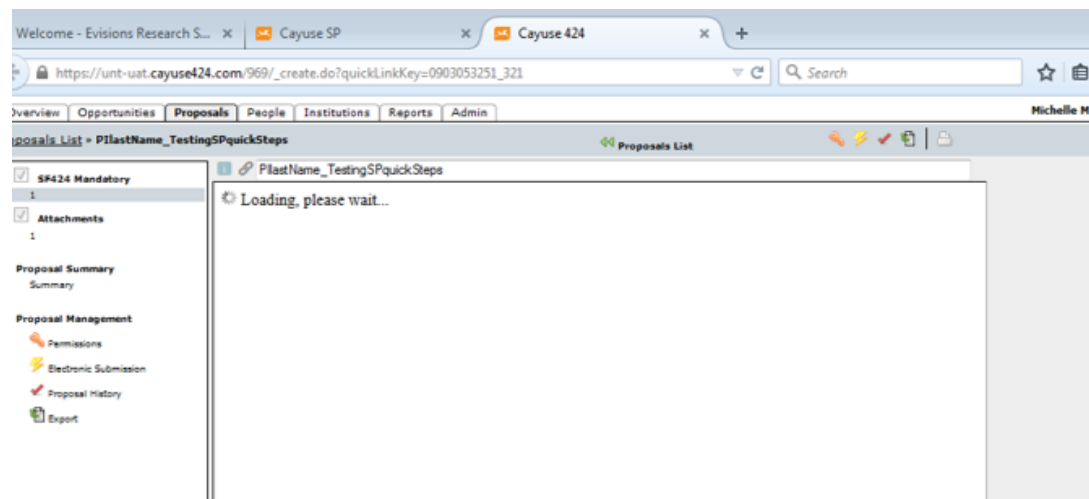
3 At this point you may log out of Cayuse SP and sign out of Cayuse 424 or continue editing in Cayuse 424 and/or Cayuse SP.

A **Proceed with completing Cayuse 424 package** (see Cayuse 424 instructions for further details).

B **Proceed with completing Cayuse SP Routing** (see Cayuse SP instructions for further details).

Option 2; Cayuse SP only - NOT through Cayuse 424

Option 2; Cayuse SP only - NOT through Cayuse 424

If submission is NOT a Grants.gov proposal and will NOT go through Cayuse 424, then

1 **Start in Cayuse SP**

A Login

UNT|SYSTEM™

EU_ID:
Password:

LOGIN   CLEAR

Account Management

unt.cayuse424.com
You have asked to login to unt.cayuse424.com

https://unt.cayuse424.com

Evisions Research Suite

Evisions Research Suite
3.1

Research Administration Modules

Cayuse SP (Sponsored Projects)
Cayuse 424

System Administration Applications

Backbone
Research Contacts
Workflow

Application Help ?

Research Suite Support Center
Browser Support & Configuration

B Complete General Information page (see Cayuse SP instructions for further details).

C Click Save at bottom of page

Proposal Dashboard	
Start New Proposal	>>
My Proposals	
Proposals in My Dept	
At-Risk Account Inbox	

Award Dashboard
My Awards
Awards in My Dept

Certifications/Approvals

1 PI Certification Inbox

Dept Approval Inbox

Office of Grants and
Contracts Administration
1155 Union Circle #305250
Denton, TX 76203-5017
Phone: (940) 565-3940
Fax: (940) 565-4277

>> **Start New Proposal**

Please remember, per VPR's "Best Business Practices" memo, a complete and final proposal package ready for external submission must be received by OGCA at least 4 full business days prior to sponsor's due date. This includes necessary College and Department level approvals, complete internal forms and other required sponsor documents.

All information must be uploaded into agency electronic proposal systems (Cayuse 424/FastLane), if required.

Please make sure to complete all required responses on each page. A partially completed page cannot be saved.

* Indicates Required Fields

Sponsor Information

* Sponsor:	Zyvex Labs, LLC
Funding Opportunity/ Sponsor Application No:	
Sponsor Program Name:	
Proposal Guideline URL:	
Prime Funding Agency:	

General Proposal Information

* Short Project Name:	PI_LAST_NAME_testNO424	(internal reference name)
* Project Start Date:	01/01/2016 clear	
* Project End Date:	12/31/2018 clear	
Activity Code:	Click Here to Choose Activity Code	
	Research - Basic	
Proposal Type:	Proposal: New	
Parent Project:	clear	
Instrument Type:	Grant	

How will this proposal be submitted?

Select Submission Method: Sponsor website

* Award Admin Dept:	OGCA - OFFICE OF GRANTS &
* Primary Administrative Contact:	Katherine Schmitz

Affiliated Dept(s)/Centers (if applicable): Click Here to Choose Affiliated Dept(s)/Centers

* Sponsor Deadline:	clear Time: Eastern
	Postmark: ● Receipt: ○

* Title of Project:

PI_LAST_NAME_testNO424 creating Proposal only in Cayuse SP and not in Cayuse 424

Create a Paired Proposal ○   Pair with a 424 Proposal ○   Un-Pair with 424 Proposal ○

Save

E From the Proposal's General page, review and complete all sections of the Item List for your Proposal *prior* to Submitting for Routing.

2 **Proceed with completing package outside of Cayuse 424 and attaching complete proposal packages in the [Cayuse SP Attachments](#) section of your proposal.**

3 **Proceed with completing Cayuse SP Routing** (see [Cayuse SP](#) instructions for further details).