

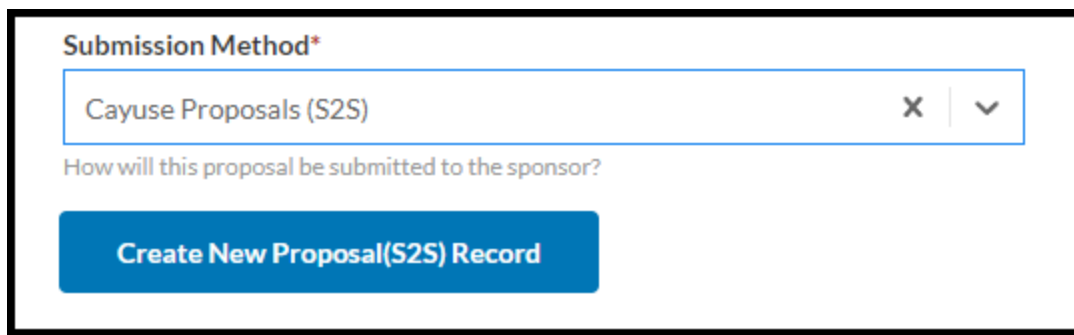
Cayuse S2S and Cayuse SP Resource Guide



Below is a helpful guide on how to create and link a Grants.gov proposal in Cayuse S2S to a Cayuse SP Proposal Record as well as important information regarding Cayuse S2S view/edit permissions:

How to Create a Cayuse S2S Proposal from Within Cayuse SP

1. Open the Proposal Record in Cayuse SP
2. Click the *Sponsor Section* of the Proposal Record
3. Select *Cayuse Proposals (S2S)* as Your Submission Method
4. Click "Create New Cayuse Proposal (S2S) Record"



The screenshot shows a web form titled "Submission Method*". It features a dropdown menu with "Cayuse Proposals (S2S)" selected. Below the dropdown is the text "How will this proposal be submitted to the sponsor?". At the bottom of the form is a blue button labeled "Create New Proposal(S2S) Record".

By clicking the "Create New Proposal (S2S) Record" button, the system will create and link the new Cayuse S2S proposal to the Cayuse SP Proposal Record. The record will display a hyperlink to the Cayuse S2S Proposal.

Permissions in Cayuse S2S

At this time, Cayuse SP proposal view and edit access will not be mirrored in Cayuse S2S (i.e., anyone who needs view or edit access to the Cayuse S2S proposal, including approvers, needs to *be given* access within the S2S module).

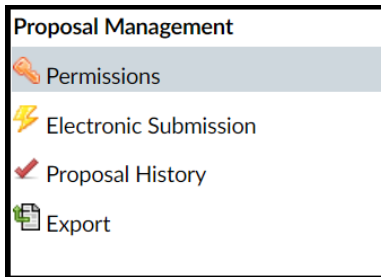
In order to provide access, the proposal initiator in Cayuse SP needs to:

- Manually add users (with view and/or edit access) to the Cayuse S2S proposal **OR**
- Upload the S2S proposal into the Cayuse SP Proposal Record as an Attachment.

How to Assign Permissions in Cayuse S2S

To assign view and/or edit permissions for a Cayuse S2S proposal:

1. Click the *Permissions* button within the Cayuse S2S proposal.



2. Under Proposal Permissions, click "Add User".



3. Enter the person's first and last name and select them from the dropdown.

The screenshot shows the "Add Security Principal" screen. It features a search input field, a "Search" button, and a "Show All" link. Below the search field, it says "Select Users below to provide access to this Proposal." Underneath, it says "Recently Used: 1 principal" and displays a table with one row. The "Profile Name" cell in the table is highlighted with a red box.

Type	User	Profile Name
U	congelli	Congelliere, Noah

4. Assign the appropriate permissions for the user.

The screenshot shows a permissions assignment screen with three columns: "List", "Read", and "Write". Each column has a blue checkmark icon below it, indicating that all three permissions are selected.

To Only View the Proposal:

- List
- Read

To View and Edit the Proposal:

- List
- Read

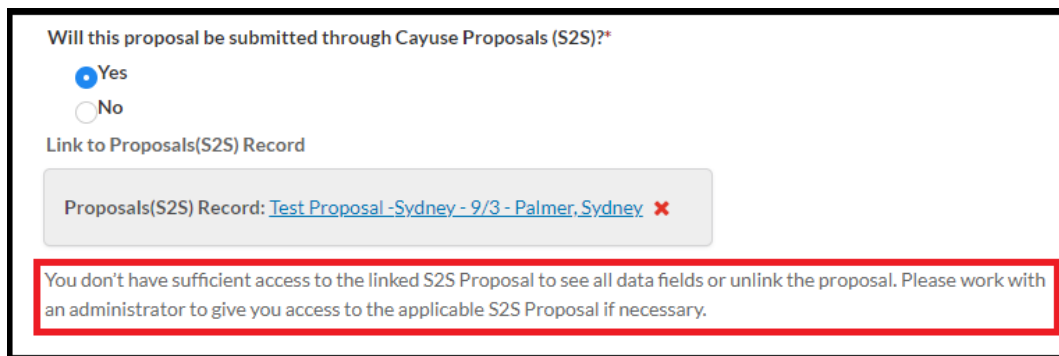
- Write

Department and/or School Approver Permissions in Cayuse S2S

Unfortunately, at this time, any approver will also need to be added to the Proposal Permissions section of the Cayuse S2S proposal -- including the PI, Co-PI(s), and School Approvers. If you are unaware of who the appropriate School Approver(s) are for your proposal, reach out to your DCG Officer for assistance.

Permissions Error Notice

If a user *without* the appropriate permissions clicks the link to open the Cayuse S2S proposal, the below error will appear. The user will need to reach out to the proposal preparer or their DCG Officer to request view/edit permissions.



Will this proposal be submitted through Cayuse Proposals (S2S)?*

Yes
 No

Link to Proposals(S2S) Record

Proposals(S2S) Record: [Test Proposal - Sydney - 9/3 - Palmer, Sydney](#) ✖

You don't have sufficient access to the linked S2S Proposal to see all data fields or unlink the proposal. Please work with an administrator to give you access to the applicable S2S Proposal if necessary.

How to Upload a Cayuse S2S Proposal to Cayuse SP

Rather than assigning permissions within Cayuse S2S, a proposal preparer also has the option to download a full PDF copy of the proposal from Cayuse S2S. The PDF copy of the proposal can then be uploaded to the Cayuse SP Proposal Record, thereby allowing all subsequent approvers in the routing chain the ability to review the proposal in its entirety without ever going into Cayuse S2S.

To upload a copy of the Cayuse S2S proposal to Cayuse SP:

1. Click the printer icon in the upper-right corner of the Cayuse S2S proposal.

The screenshot shows the 'Proposals List' interface for SF 424 R&R. The left sidebar contains a tree view with the following items checked: SF424 RR, RR Performance Sites, RR Other Project Information, RR Key Persons, RR Budget, PHS Human Subjects and Clinical Trials Information, PHS 398 Modular Budget, and RR Subaward Budget Attachment. The main form area is titled 'APPLICATION FOR FEDERAL ASSISTANCE SF 424 R&R' and includes the following sections:

- 2. DATE SUBMITTED:** 10/17/2022
- 3. DATE RECEIVED BY STATE:** (empty)
- 1. TYPE OF SUBMISSION:** Application (selected)
- 4. a. Federal Identifier:** (empty)
- b. Agency Routing Number:** (empty)
- c. Previous Grants.gov Tracking ID:** (empty)
- 5. APPLICANT INFORMATION:**
 - Legal Name: University of Southern California
 - Department: (empty)
 - Division: (empty)
 - Street1: Department of Contracts and Grants
 - Street2: 3720 South Flower Street
 - City: Los Angeles
 - State/Province: California
 - Country: United States
 - UEI: G88KLJR3KYT5
 - County/Parish: (empty)
 - Zip/Postal Code: 90089-0701

2. Ensure all options are selected (see below) and click "Generate PDF".













The screenshot shows the 'Print/PDF Options' dialog box in Google Chrome. The URL is <https://usc.cayuse.com/1007/print424Dialog.do?subsessionId=0&proposal...>. The dialog contains a list of items with checkboxes, all of which are checked:

- SF424 RR
- RR Performance Sites
- RR Other Project Information
- RR Key Persons
- RR Budget
- PHS Human Subjects and Clinical Trials Information
- PHS 398 Modular Budget
- RR Subaward Budget Attachment
- PHS 398 Cover Page Supplement
- PHS 398 Research Plan
- PHS Assignment Request
- Proposal Summary

At the bottom, there are links for [select all](#), [unselect all](#), and [select included forms](#). Below these links is a checked checkbox for 'Include any PDF attachments'. Two buttons are visible: 'Generate PDF' (highlighted with a red box) and 'Cancel'.

3. Download a copy of the Cayuse S2S proposal to your local PC.

4. Upload the Cayuse S2S proposal to the *Attachments* section of the Cayuse SP Proposal Record.

Proposal Sections	Attachments
General Information 	Final Proposal <u>Drag and drop</u> new files or <u>click</u> to select from file system...
Sponsor 	
USC Key Personnel 	
Performance Sites 	
Subawards 	
Summary Budget 	
KC Legacy Proposal Data 	
Regulatory Compliance 	
Export Control 	
Foreign Support & Collaboration 	
Route For Review 	
Attachments 	Draft Proposal <u>Drag and drop</u> new files or <u>click</u> to select from file system...

Questions? For any questions related to Cayuse S2S and Cayuse SP, please contact your DCG Officer or [click here](#) to submit your question to the Department of Contracts and Grants training team.