Proposal Creation

Module 4
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.

<table>
<thead>
<tr>
<th>Opportunity Number</th>
<th>Title</th>
<th>Comp. ID</th>
<th>Agency</th>
<th>CFDA #</th>
<th>Opens</th>
<th>Closes</th>
<th>Retrieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>PA-BB-C05</td>
<td>G.g AT07 and NIH Ext-UAT Test FOA</td>
<td>ADOBE-FORMS-B</td>
<td>National Institutes of Health Stage</td>
<td>93.838</td>
<td>2009-10-05</td>
<td>2012-10-05</td>
<td>2010-02-13</td>
</tr>
<tr>
<td>PA-BB-D43</td>
<td>G.g AT07 and NIH Ext-UAT Test FOA</td>
<td>ADOBE-FORMS-B</td>
<td>National Institutes of Health Stage</td>
<td>93.838</td>
<td>2009-12-09</td>
<td>2012-12-09</td>
<td>2010-02-13</td>
</tr>
<tr>
<td>PA-BB-D71</td>
<td>G.g AT07 and NIH Ext-UAT Test FOA</td>
<td>ADOBE-FORMS-B</td>
<td>National Institutes of Health Stage</td>
<td>93.838</td>
<td>2009-12-09</td>
<td>2012-12-09</td>
<td>2010-02-13</td>
</tr>
</tbody>
</table>
Creating a New Proposal

2. Enter a **Proposal Name**.

3. Select a **Principal Investigator** using the provided list and search.

4. Choose the **# of Budget Periods**.

5. Choose a **Validation Type**.
   - Determines which agency validations will be used.

6. Click **Create Proposal**.

7. Cayuse S2S creates a proposal using the forms required by the opportunity.
Proposal Name

- Enter proposal name in this format:
- Due Date xx/xx/xx_PI Last namePI First Initial_Sponsor Initials_Short Title (first 3 characters are funding mechanism if applicable)
- Example: 07/05/14_TrojanT_NIH_R01_Studies on xyz
- You can rename the proposal later by clicking in the name field and entering a new/corrected name.
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 S2S 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**.
Adding Permissions

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

– Permissions are mostly independent, so be sure to give each user every permission they will need.
<table>
<thead>
<tr>
<th>Permission</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>List</td>
<td>Can see the proposal in lists, but cannot view or modify the details of the proposal.</td>
</tr>
<tr>
<td>Read</td>
<td>Can view the details of the proposal.</td>
</tr>
<tr>
<td>Write</td>
<td>Can modify all data within the proposal and run Final Review.</td>
</tr>
<tr>
<td>Attach</td>
<td>Can attach documents to the proposal.</td>
</tr>
<tr>
<td>Break Lock</td>
<td>Can take write access while another user is in the proposal.</td>
</tr>
<tr>
<td>Permission</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------------------------------------------------</td>
</tr>
<tr>
<td>Delete</td>
<td>Can delete the proposal.</td>
</tr>
<tr>
<td>Print</td>
<td>Can print the proposal.</td>
</tr>
<tr>
<td>Change Permissions</td>
<td>Can change security permissions for the proposal.</td>
</tr>
<tr>
<td>Add/Remove User</td>
<td>Can add or remove other users from the profile permissions.</td>
</tr>
<tr>
<td>Submit</td>
<td>Can submit the proposal to Grants.gov.</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Username</th>
<th>Person</th>
<th>Action</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012-07-19 13:06</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>Save Proposal</td>
<td></td>
</tr>
<tr>
<td>2012-07-19 13:06</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>View Proposal</td>
<td>Opened for edit</td>
</tr>
<tr>
<td>2012-07-19 12:05</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>Save Proposal</td>
<td>RR_OtherProjectInfo</td>
</tr>
<tr>
<td>2012-07-19 12:04</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>Upload Attachment</td>
<td>RR Other Project Information: MentoringPlan (PDF)</td>
</tr>
<tr>
<td>2012-07-19 12:04</td>
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<td>Cayuse Admin</td>
<td>Save Proposal</td>
<td>RR_OtherProjectInfo</td>
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<tr>
<td>2012-07-19 12:04</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>Upload Attachment</td>
<td>RR Other Project Information: DataManagementPlan (PDF)</td>
</tr>
<tr>
<td>2012-07-19 12:04</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>Save Proposal</td>
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<tr>
<td>2012-07-19 12:04</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>Upload Attachment</td>
<td>RR Other Project Information: DataManagementplan (PDF)</td>
</tr>
<tr>
<td>2012-07-19 12:03</td>
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<td>Cayuse Admin</td>
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<td></td>
</tr>
<tr>
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<td>Cayuse Admin</td>
<td>View Proposal</td>
<td>Opened for edit</td>
</tr>
<tr>
<td>2012-07-19 11:56</td>
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<td>Cayuse Admin</td>
<td>Save Proposal</td>
<td>RR_OtherProjectInfo</td>
</tr>
<tr>
<td>2012-07-19 11:55</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>Delete Attachment</td>
<td>RR Other Project Information: DataManagementPlan</td>
</tr>
</tbody>
</table>
Proposal Validation

• Cayuse S2S 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.

• Proposals should be submitted to DCG with NO Validation Errors.
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 S2S will take you directly to the field that is causing the message to appear.
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.
Copy Proposal

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

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.
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.
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.