

Cayuse424 Overview

- In this module you will learn:
 - How Cayuse424 supports online development and submission of grant applications to Grants.gov
 - How to:
 - Log-on
 - Personalize your password
 - Set user preferences

Features/Benefits

□ Cayuse424:

- Is a web-based application used to submit electronic proposals to various Federal agencies through Grants.gov.
- Displays the SF424 form set where users can “build” the application in an online, easy to use environment.
- Easy to navigate between forms on the proposal
- The system provides an autofill capability that eliminates the need to enter data multiple times.
- Cayuse424 automatically tracks errors and provides users with the ability to correct them quickly and easily.



Features/Benefits (cont'd)

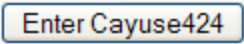
- ❑ Proposal documents are stored within the system; authorized users share proposal access.
- ❑ Routing and approval capability, allows for the PI to submit proposal.
- ❑ Provides ability to track proposal submission status.



Quick Tour

- In the remaining slides we will go on a quick tour of the Cayuse424 system and learn about:
 - Logging-in to Cayuse424
 - Cayuse424 Key Functions
 - Navigation Features
 - Icons
 - Changing Your Password
 - Setting Your User Preferences
 - Cayuse424 Tips

Logging into Cayuse424

- ❑ Obtain your user name and password from the Research Foundation Helpdesk, rfhelpdesk@osu.edu or 688-8288
- ❑ Type <https://cayuse.rf.ohio-state.edu:8443/V8/> in the URL
- ❑ Click the  button



The Ohio State University Research Foundation
v3.2.7_release


Username:

Password:








Cayuse424 Overview

- ❑ The Cayuse 424 **Overview** page is displayed when you log in.
- ❑ This is your portal to the Cayuse424.
- ❑ Review the login message for important information and updates.

Overview Proposals Routing People Institutions Reports Preferences

 **CAYUSE**

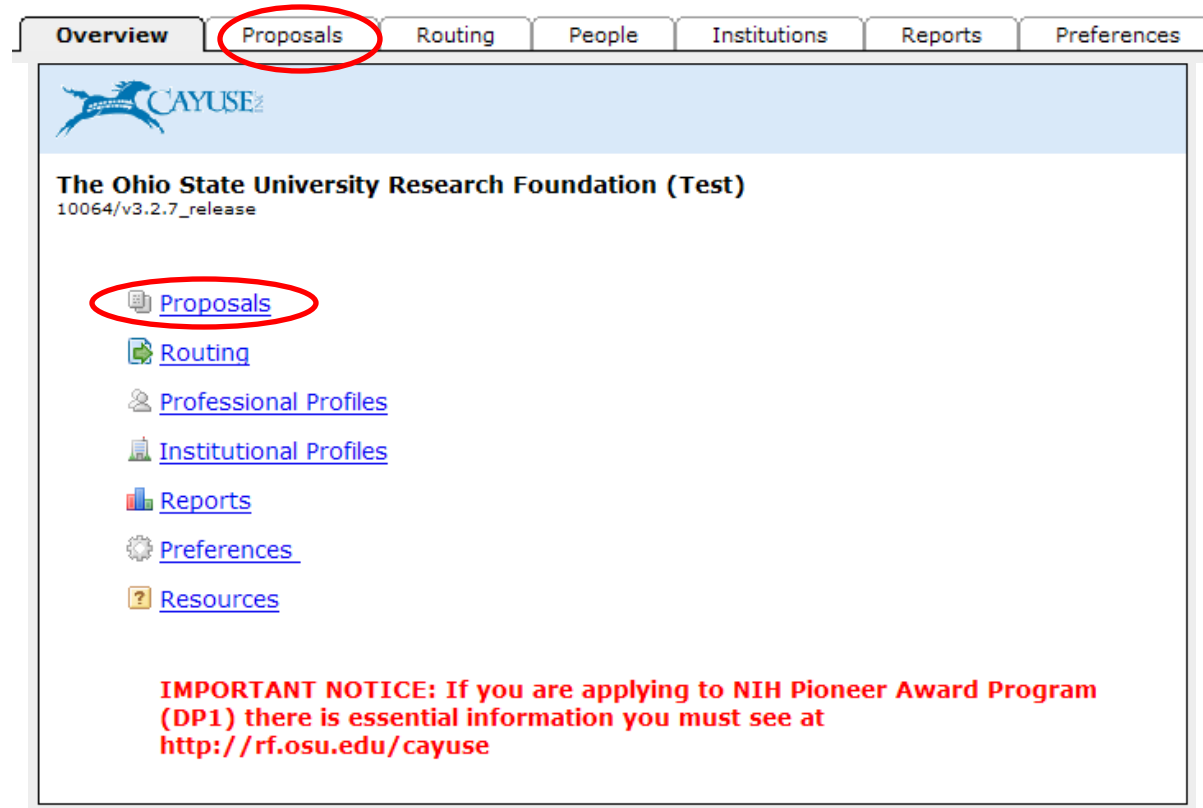
The Ohio State University Research Foundation (Test)
10064/v3.2.7_release

-  [Proposals](#)
-  [Routing](#)
-  [Professional Profiles](#)
-  [Institutional Profiles](#)
-  [Reports](#)
-  [Preferences](#)
-  [Resources](#)

IMPORTANT NOTICE: If you are applying to NIH Pioneer Award Program (DP1) there is essential information you must see at <http://rf.osu.edu/cayuse>

Cayuse424 Overview

- In **Proposals**, you can:
 - Create a new grant proposal
 - Edit an existing grant proposal
 - Route and approve proposals
 - Submit a proposal to Grants.gov

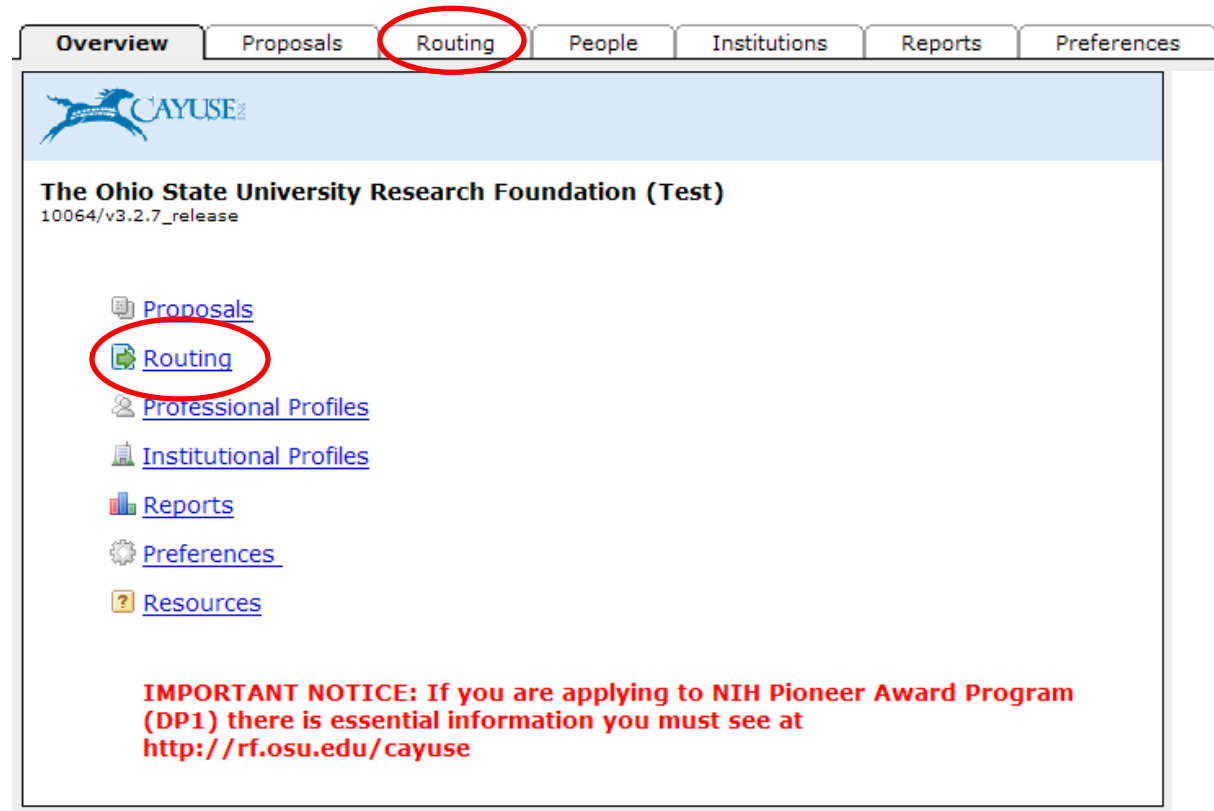


The screenshot shows the Cayuse424 web application interface. The navigation bar at the top includes tabs for Overview, Proposals, Routing, People, Institutions, Reports, and Preferences. The 'Proposals' tab is selected and circled in red. Below the navigation bar, the 'Proposals' link is also circled in red. The page title is 'The Ohio State University Research Foundation (Test)' and the version is '10064/v3.2.7_release'. A red notice is displayed at the bottom.

IMPORTANT NOTICE: If you are applying to NIH Pioneer Award Program (DP1) there is essential information you must see at <http://rf.osu.edu/cayuse>

Cayuse424 Overview

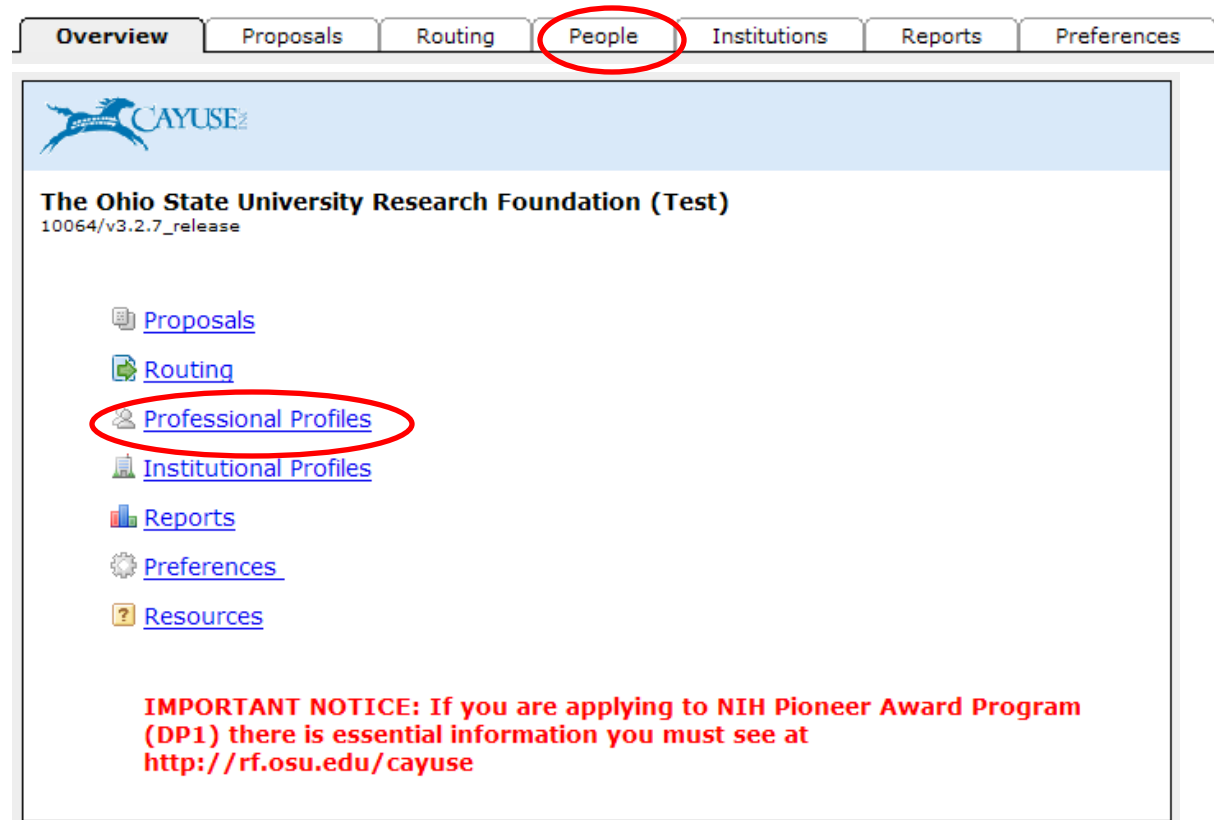
- In **Routing**, you can view and access proposals that require your review and approval




The screenshot displays the Cayuse424 web application interface. At the top, there is a navigation bar with tabs for Overview, Proposals, Routing, People, Institutions, Reports, and Preferences. The 'Routing' tab is highlighted with a red circle. Below the navigation bar, the page title is 'The Ohio State University Research Foundation (Test)' with the version number '10064/v3.2.7_release'. The main content area contains a list of links: Proposals, Routing, Professional Profiles, Institutional Profiles, Reports, Preferences, and Resources. The 'Routing' link is circled in red. At the bottom of the page, there is an important notice in red text: 'IMPORTANT NOTICE: If you are applying to NIH Pioneer Award Program (DP1) there is essential information you must see at http://rf.osu.edu/cayuse'.








Cayuse424 Overview

- In **People/Professional Profiles**, you can:
 - View professional profiles
 - Update your professional profile
 - Update the permission list for your profile



Overview Proposals Routing **People** Institutions Reports Preferences

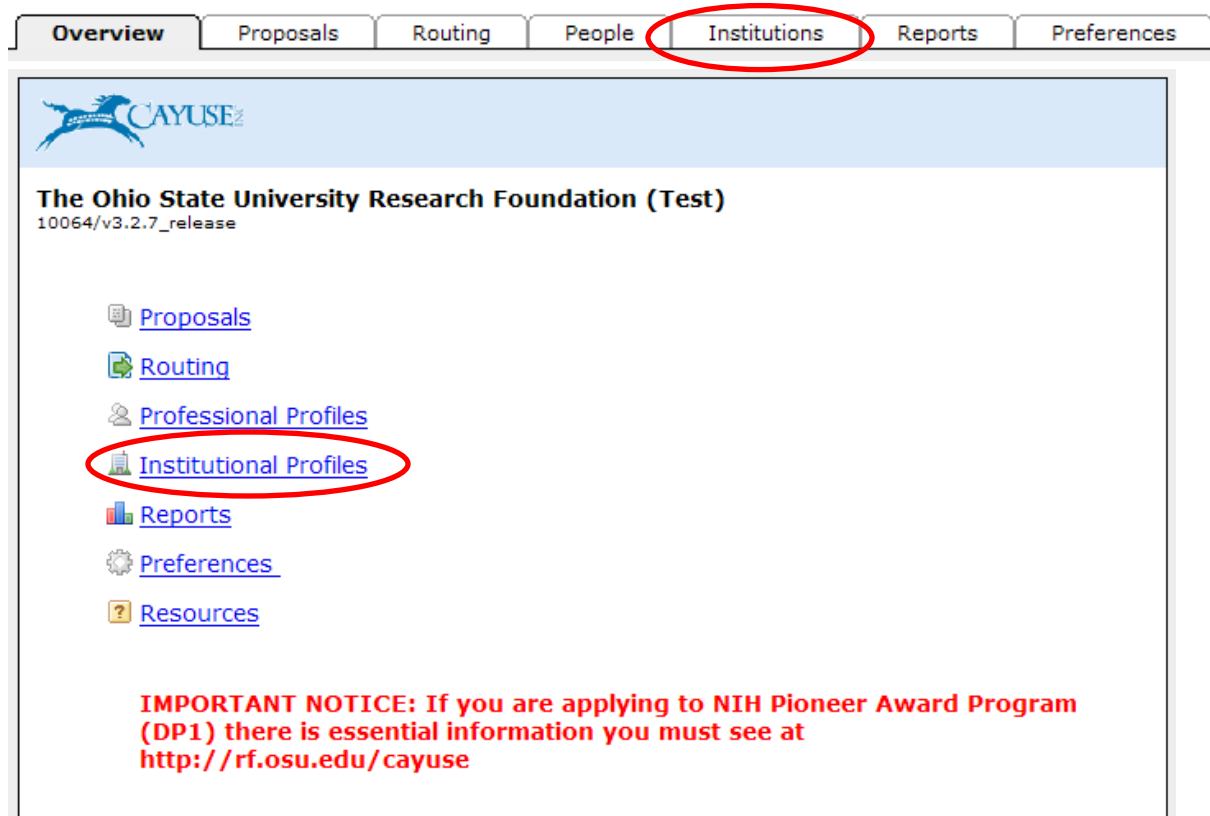
 **The Ohio State University Research Foundation (Test)**
10064/v3.2.7_release

-  [Proposals](#)
-  [Routing](#)
-  [Professional Profiles](#)
-  [Institutional Profiles](#)
-  [Reports](#)
-  [Preferences](#)
-  [Resources](#)

IMPORTANT NOTICE: If you are applying to NIH Pioneer Award Program (DP1) there is essential information you must see at <http://rf.osu.edu/cayuse>

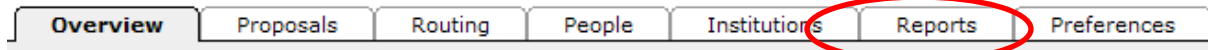
Cayuse424 Overview

- In **Institutions**, you can:
 - View information in an institutional profile



The screenshot displays the Cayuse424 web application interface. At the top, a navigation menu contains several tabs: Overview, Proposals, Routing, People, **Institutions** (circled in red), Reports, and Preferences. Below the navigation menu, the main content area features the Cayuse logo and the title "The Ohio State University Research Foundation (Test)" with the version number "10064/v3.2.7_release". A list of links is provided, each with a small icon: Proposals, Routing, Professional Profiles, **Institutional Profiles** (circled in red), Reports, Preferences, and Resources. At the bottom of the page, a red text block contains an important notice: "IMPORTANT NOTICE: If you are applying to NIH Pioneer Award Program (DP1) there is essential information you must see at <http://rf.osu.edu/cayuse>".

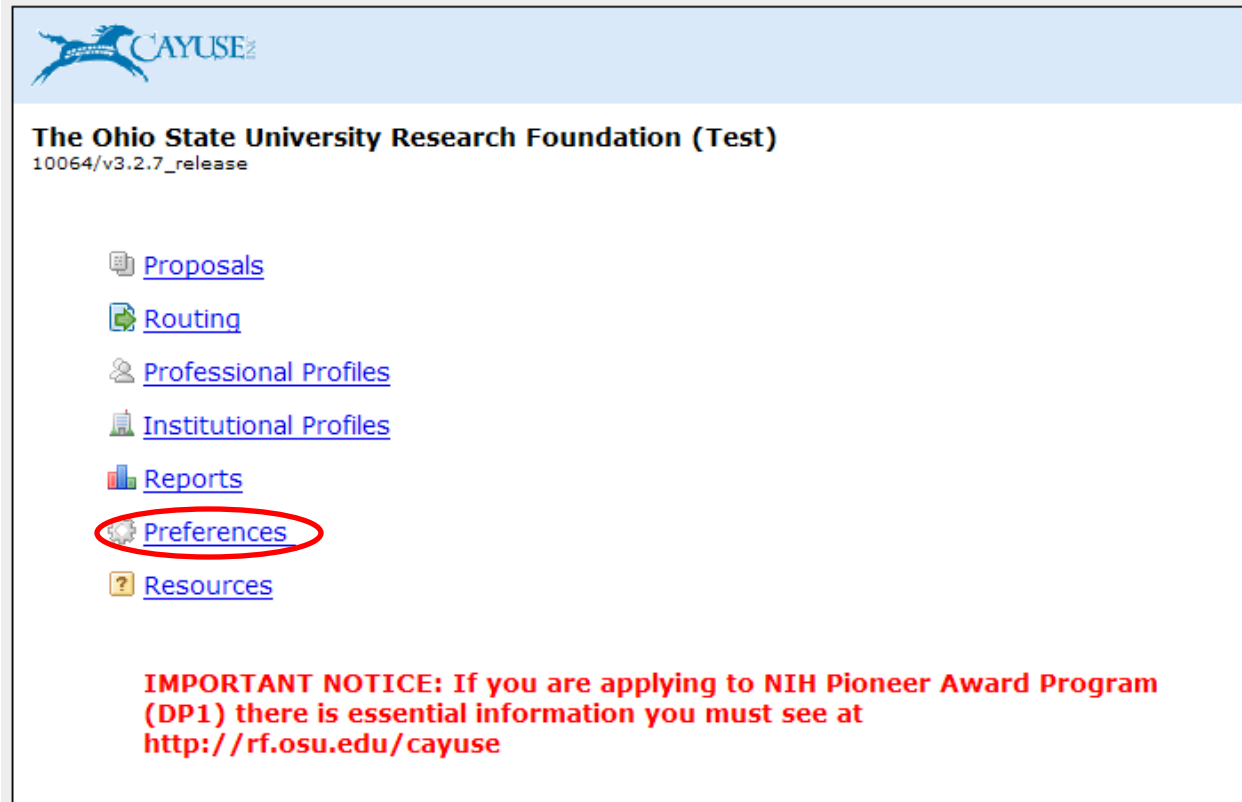
Cayuse424 Overview











- In **Reports**, you can run:
 - Submission Report
 - Unlinked Profiles Report
 - User Report
 - Awarded Subawards Report
 - Proposed Subaward Report
 - Awards By Agency Report
 - Submitted Proposals Report
 - Proposals By Dept. Report
 - Proposed Dollars Report
 - Awarded Proposal Report

Cayuse424 Overview

- In the **Preferences** page, you can:
 - Change your password.
 - Change your email address.
 - Edit your user preferences.



 **The Ohio State University Research Foundation (Test)**
10064/v3.2.7_release

-  [Proposals](#)
-  [Routing](#)
-  [Professional Profiles](#)
-  [Institutional Profiles](#)
-  [Reports](#)
-  [Preferences](#)
-  [Resources](#)

IMPORTANT NOTICE: If you are applying to NIH Pioneer Award Program (DP1) there is essential information you must see at <http://rf.osu.edu/cayuse>

Cayuse424 Overview

□ From the **Resources** hyperlink you can access the Cayuse424 webpage, <http://rf.osu.edu/cayuse424> where you will find:

- Latest Documentation
- Browser Configuration tips
- Templates and Add-ins
- Cayuse PDF Print Installer

 [Resources](#)



The screenshot shows the Cayuse424 website interface. At the top left is the Ohio State University logo. To its right is the text 'Cayuse424'. In the top right corner, there is a button labeled 'Log onto Cayuse424'. Below the header, the main content area starts with the heading 'What is Cayuse424?' followed by a welcome message and a list of links. Below that is the heading 'Steps for Success with Cayuse424' followed by a bulleted list of steps. At the bottom, there is a section titled 'Resources' which contains a table with two columns: 'Title' and 'Description'.

Title	Description
Complete Resources Manual (.pdf)	Cayuse424 resource manual
Introduction to Cayuse424 (.pdf)	Presentation used in training
Cayuse424 Training	

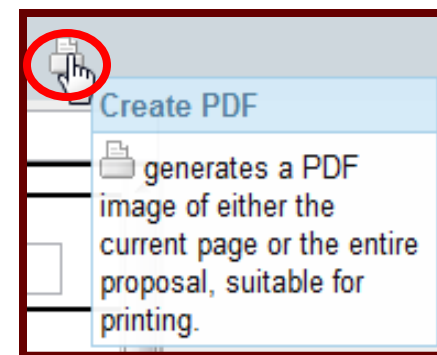
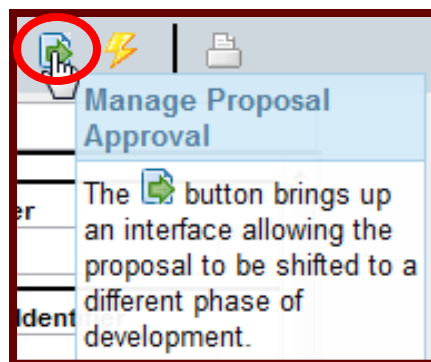
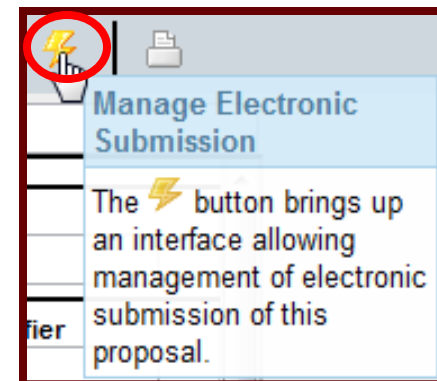
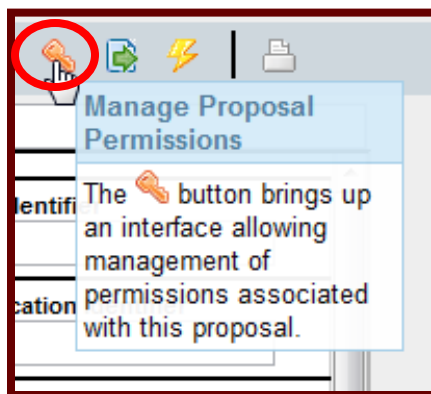
Navigation Features



- ❑ **Tabs** allow you to quickly move to other areas of the system. When you click back to a tab, Cayuse424 displays the last screen you were working on in that tab.
- ❑ **Breadcrumb trail** provides a quick way to navigate between screens within a tab.
- ❑ The **profiles** drop down menu allows you to quickly access other profiles stored in the database.

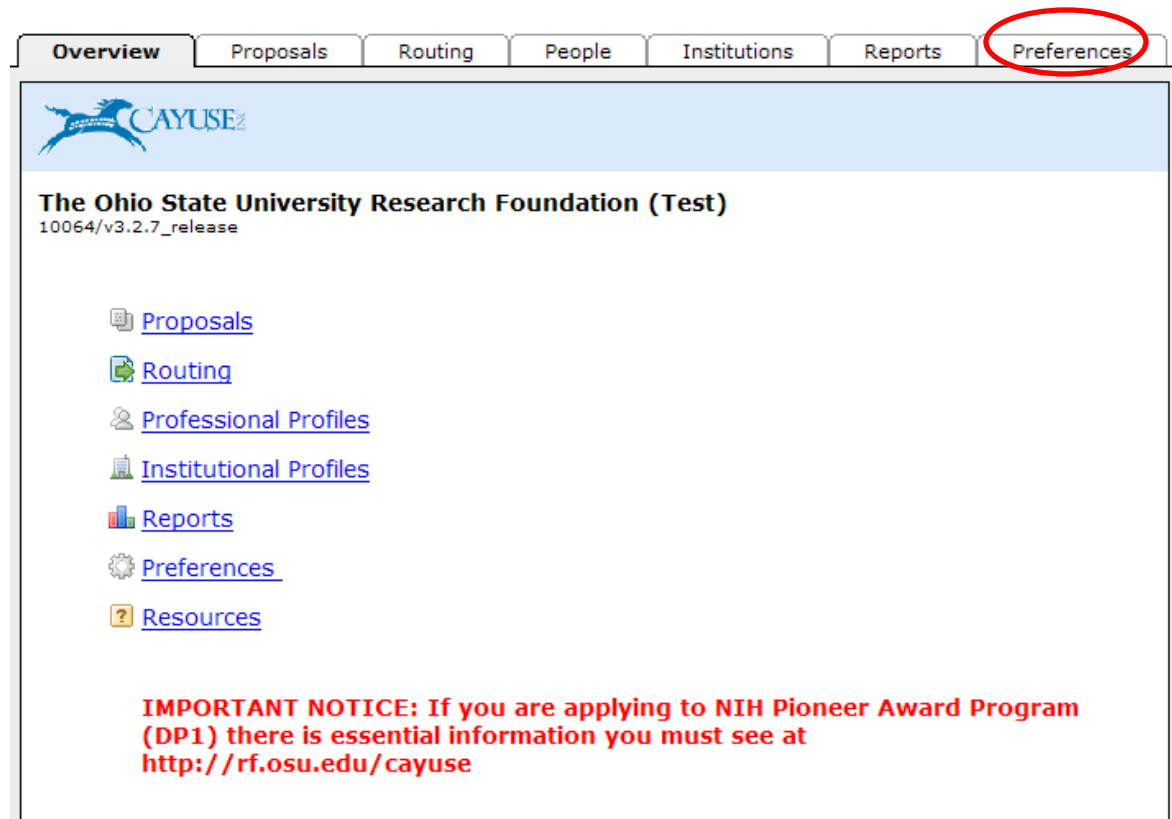
Icons

- ❑ Various icons appear throughout the Cayuse424 web application.
- ❑ Hover your cursor over an icon to determine its function.
- ❑ Click on the icon and Cayuse424 will respond with prompts, forms changes, etc. to support performance of the activity.



Changing Your Password

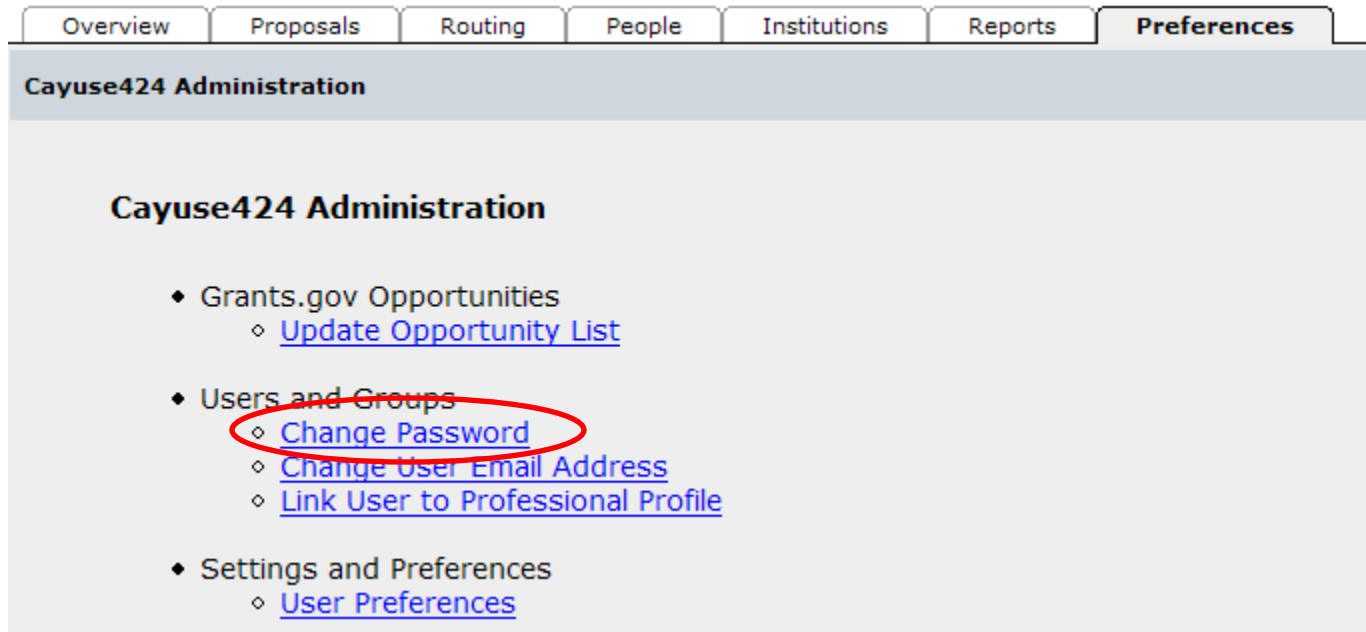
- After you log-on to Cayuse424 for the first time, you should personalize your password.
- To change your password click **Preferences**



The screenshot shows the Cayuse424 web application interface. The top navigation bar includes tabs for Overview, Proposals, Routing, People, Institutions, Reports, and Preferences. The 'Preferences' tab is circled in red. Below the navigation bar, the main content area displays the Cayuse logo and the text 'The Ohio State University Research Foundation (Test) 10064/v3.2.7_release'. A list of menu items is shown, including Proposals, Routing, Professional Profiles, Institutional Profiles, Reports, Preferences, and Resources. At the bottom, an important notice is displayed in red text: 'IMPORTANT NOTICE: If you are applying to NIH Pioneer Award Program (DP1) there is essential information you must see at http://rf.osu.edu/cayuse'.

Changing Your Password (cont'd)

- ❑ Click **Change Password**



The screenshot displays the Cayuse424 Administration web interface. At the top, there is a navigation bar with tabs for Overview, Proposals, Routing, People, Institutions, Reports, and Preferences. Below this, the main content area is titled "Cayuse424 Administration" and contains a list of administrative tasks:

- ◆ Grants.gov Opportunities
 - ◇ [Update Opportunity List](#)
- ◆ Users and Groups
 - ◇ [Change Password](#)
 - ◇ [Change User Email Address](#)
 - ◇ [Link User to Professional Profile](#)
- ◆ Settings and Preferences
 - ◇ [User Preferences](#)

The "Change Password" link is circled in red, indicating the next step in the process.

Changing Your Password (cont'd)

- ❑ Enter New password.
- ❑ Re-enter New password to **verify**.
- ❑ Click **Change Password**.

Overview Proposals Routing People Institutions Reports Preferences

[Cayuse424 Administration](#) > **Change Password for User 'wakely.2'**

Change Password for User **wakely.2**

New password

New password (verify)

Return to:
> [Admin top](#)

Setting User Preferences

- User Preferences control how often you will be prompted to save your changes as you navigate between tabs.
- All three boxes are checked by default, which ensures that your work is optimally auto-saved.

Overview Proposals Routing People Institutions Reports **Preferences**

[Cayuse424 Administration](#) » **User Preferences for wakely.2**

The preferences-set below determine how often you will be prompted to save your changes when navigating Proposals and Profiles in **Cayuse424**.

- Check for unsaved changes when switching form pages
- Check for changes when switching tabs
- Save changes without prompting



Additional Tips for Working in the Cayuse424 System

- When exiting pop-up windows always click **Close**; don't use your browser's "back" function.
- Be careful when copying and pasting to the application -- special characters (e.g., umlauts) will cause Grants.gov to reject your proposal.
- Don't leave Cayuse424 running overnight.
 - Browser times out after 4 hours of inactivity. When it does, you run the risk of losing your last page of work.