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# Introduction to Cayuse424

# Objectives

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- In this training you will learn:
  - ▣ The features and benefits of Cayuse424
  - ▣ How to:
    - Sign in
    - Change your password
    - Recover your username or password
    - Creating/Editing your professional profile
    - Proposal creation
  - ▣ User Tips

# C424 Features/Benefits

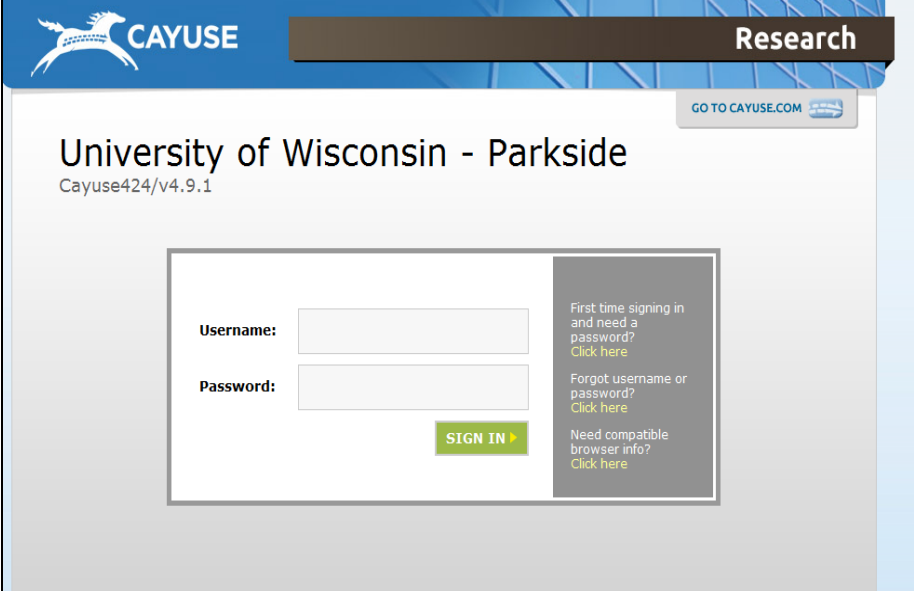
3

- ❑ Downloads funding opportunities directly from Grants.gov
- ❑ Provides autofill and data reuse capability
- ❑ Automatically tracks errors and warnings
- ❑ Electronic routing
- ❑ Easy navigation between forms
- ❑ Stores proposal documents and attachments
- ❑ Tracks proposal submission status

# Signing in to Cayuse424

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- To sign in to Cayuse424:
  1. Type in your `uwp.cayuse424.com`
  2. Enter your username (same as UWP email username) and password (the default username is “parkside”)
  3. Click ‘Sign In’

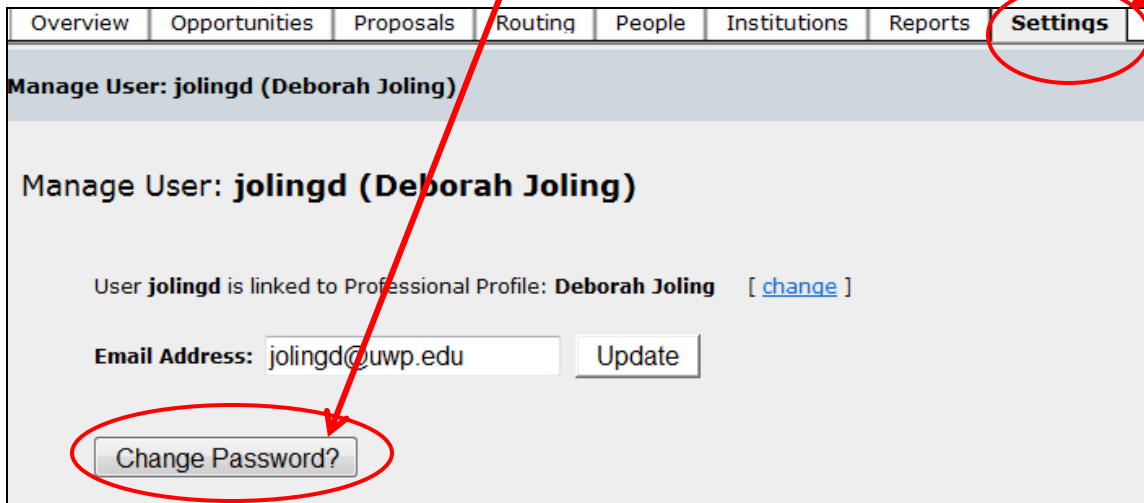


The screenshot shows the Cayuse424 login interface. At the top left is the CAYUSE logo with a horse icon. To the right is a dark navigation bar with the word "Research" in white. Below the navigation bar is a "GO TO CAYUSE.COM" button with a small icon. The main heading is "University of Wisconsin - Parkside" with the version "Cayuse424/v4.9.1" below it. The login form contains two input fields: "Username:" and "Password:". To the right of the form is a grey box with three links: "First time signing in and need a password? Click here", "Forgot username or password? Click here", and "Need compatible browser info? Click here". A green "SIGN IN" button is located below the password field.

# Changing Your Password

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- ❑ To change your password, click on the 'settings' tab.
- ❑ Then, click the 'change password' button.



The screenshot displays a web application interface for user management. At the top, there is a navigation bar with tabs: Overview, Opportunities, Proposals, Routing, People, Institutions, Reports, and Settings. The 'Settings' tab is selected and circled in red. Below the navigation bar, the page title is 'Manage User: jolingd (Deborah Joling)'. The main content area shows the user's details: 'User jolingd is linked to Professional Profile: Deborah Joling [change]'. Below this, there is an 'Email Address' field containing 'jolingd@uwp.edu' and an 'Update' button. At the bottom of the form, there is a 'Change Password?' button, which is also circled in red. Two red arrows point from the text in the list above to the 'Settings' tab and the 'Change Password?' button.

# Changing Your Password

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- Enter your new password,
- Click 'Update Password'
- The next screen will verify that your password was successfully updated.

Overview Opportunities Proposals Routing People Institutions Reports **Settings**

Cayuse424 Preferences » Change Password

Change Password for User **jolingd (Deborah Joling)**

New password

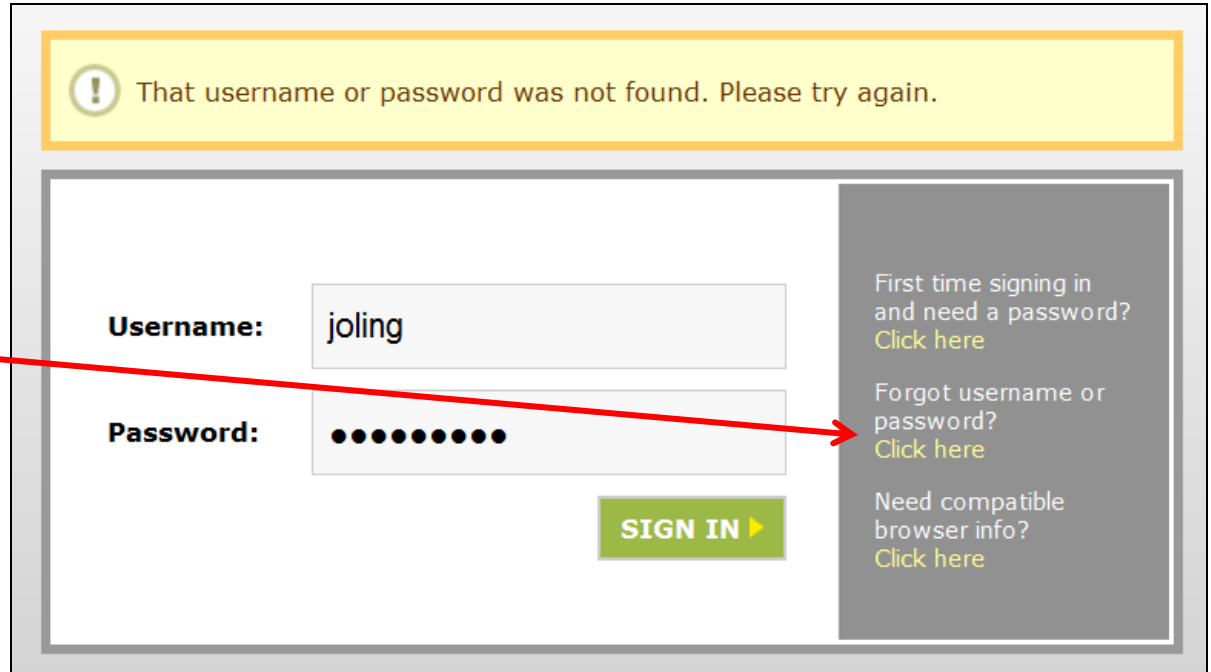
New password (verify)

Return to:  
> [User: jolingd](#)

# Recover your Username or Password

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- If you have forgotten your username or password click on the 'Forgot username or password?' link to the right of the sign in box.



The screenshot shows a login interface with a yellow error banner at the top that reads: "That username or password was not found. Please try again." Below the banner are two input fields: "Username:" containing the text "joling" and "Password:" containing ten black dots. A green "SIGN IN" button with a right-pointing arrow is positioned below the password field. To the right of the sign-in area is a grey sidebar with three links: "First time signing in and need a password? Click here", "Forgot username or password? Click here", and "Need compatible browser info? Click here". A red arrow points from the text "Forgot username or password?" in the sidebar to the "Forgot username or password?" link in the sidebar.

# Recover your Username or Password

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## Forgot your password?

Enter your username to reset your password.

**Username:**

**RESET PASSWORD**

## Forgot your username?

Enter your email address, and your username will be sent to you.

**Email:**

**SEND REMINDER**

Back to sign in?  
[Click here](#)

Problems or  
questions?  
[Contact support](#)



# Recover your Username

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- The following page will confirm that your username was sent to your email associated with the account.
  - ▣ If you are trying to reset your password, you must click the link in the email within 1 hour of receipt, otherwise it will expire.
  - ▣ If the link expires, you can repeat the process to request another password reset email.

# Creating/Editing Your Professional Profile

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- To create or edit your professional profile, click on the 'people' tab.

Overview Opportunities Proposals Routing **People** Institutions Reports Settings

People > Joling, Deborah

Professional Profile: **Joling, Deborah** ✖

**General Personal Information**

- [Name ▶](#)
- [Degrees](#)
- [Demographics](#)
- [Biosketches](#)

**0 Institutional Associations** +

**Name**

**Prefix:**

**First:** Deborah

**Middle:**

**Last:** Joling

**Suffix:**

NIH Commons ID:

NASA NSPIRES ID:

# Proposal Creation

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## Find funding opportunities

- Click on the 'opportunities' tab to download the most recent funding opportunities, then click on 'retrieve opportunities'.

Overview **Opportunities** Proposals Routing People Institutions Reports Settings

Opportunities 📄 Retrieve Opportunities

5 Opportunities / Showing 5  Search Show closed opportunities:

↑ Opportunity Number	Title	Comp. ID	Agency	CFDA #	Opens	Closes	Retrieved	
2012NEA01CAFT	NEA Challenge America Fast-Track, FY2013	NONE	National Endowment for the Arts	45.024	2012-01-04	2012-05-24	2012-04-10	
2012NEA01TEST	NEA Test Application, FY2012	NONE	National Endowment for the Arts	45.024	2011-11-16	2012-09-30	2012-04-10	
2012NEAAEAC	NEA Arts Education in American Communities, FY 2012	NONE	National Endowment for the Arts	45.024	2012-01-12	2012-09-30	2012-04-10	
OJJDP-2012-3244	OJJDP FY 2012 National Mentoring Programs		Office of Juvenile Justice Delinquency Prevention	16.726	2012-03-15	2012-05-02	2012-04-10	
PA-11-260	Research Project Grant (Parent R01)	ADOBE-FORMS-B2	National Institutes of Health	-none-	2011-08-12	2014-09-07	2012-04-10	












# Proposal Creation

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- The  icon indicates an unsupported opportunity. 98% of all federal opportunities are supported by Cayuse.



No opportunities updated. Must provide opportunity number and/or cfda number filter to retrieve

5 Opportunities / Showing 5  Search  Show closed opportunities:

	↑ Opportunity Number	Title	Comp. ID	Agency	CFDA #	Opens	Closes	Retrieved	
	 2012NEA01CAFT	NEA Challenge	NONE	National Endowment	45.024	2012-01-04	2012-05-24	2012-04-10	
	<b>Unsupported Opportunity</b>								
	Cayuse424 does not support this opportunity at this time.								
	▪ unsupported form: <a href="http://apply.grants.gov/forms/NEAOrganization_2_1-V2.1">http://apply.grants.gov/forms/NEAOrganization_2_1-V2.1</a>								
	 OJJDP-2012-3244	OJJDP FY 2012 National Mentoring Programs		Office of Juvenile Justice Delinquency Prevention	16.726	2012-03-15	2012-05-02	2012-04-10	
	 PA-11-260	Research Project Grant (Parent R01)	ADOBE-FORMS-B2	National Institutes of Health	-none-	2011-08-12	2014-09-07	2012-04-10	
















# Proposal Creation

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- The  icon indicates a Cayuse supported opportunity. To create a proposal, click on the  icon.

No opportunities updated. Must provide opportunity number and/or cfda number filter to retrieve

5 Opportunities / Showing 5  Search  Show closed opportunities:

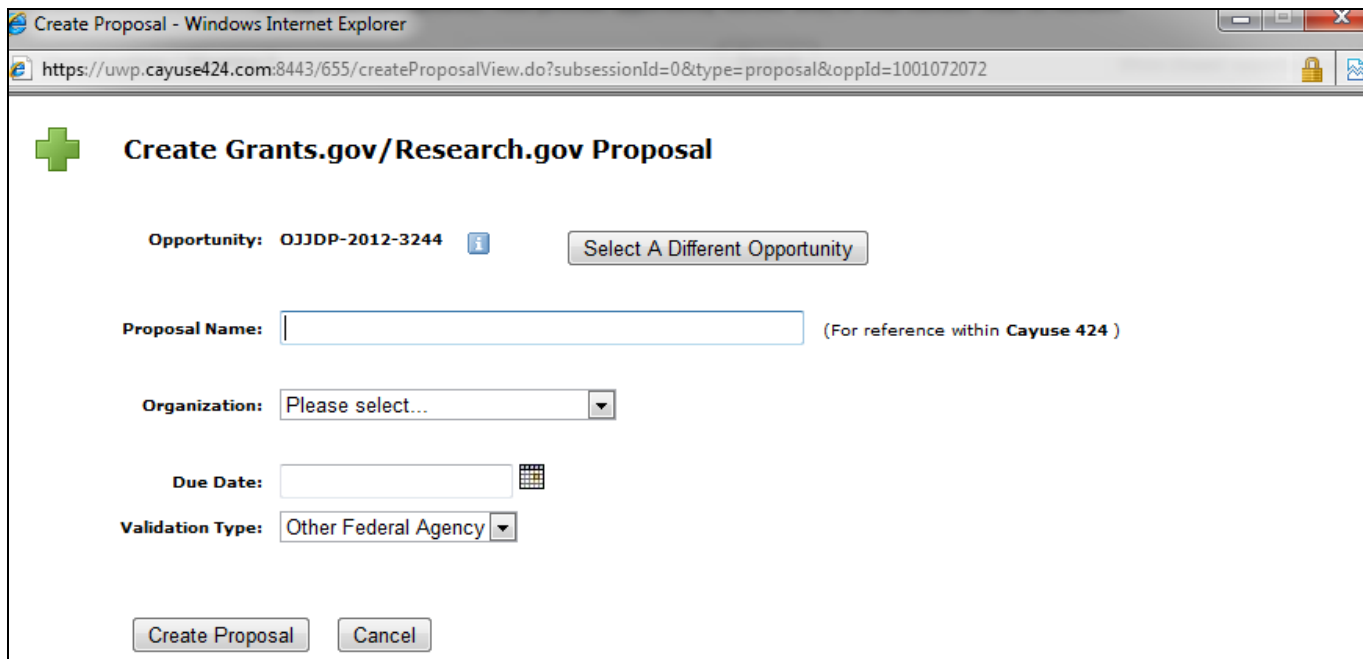
	↑Opportunity Number	Title	Comp. ID	Agency	CFDA #	Opens	Closes	Retrieved	
	 2012NEA01CAFT	NEA Challenge America Fast-Track, FY2013	NONE	National Endowment for the Arts	45.024	2012-01-04	2012-05-24	2012-04-10	
	 2012NEA01TEST	NEA Test Application, FY2012	NONE	National Endowment for the Arts	45.024	2011-11-16	2012-09-30	2012-04-10	
		NEA Arts Education in American Communities, FY 2012	NONE	National Endowment for the Arts	45.024	2012-01-12	2012-09-30	2012-04-10	
	 OJJDP-2012-3244	OJJDP FY 2012 National Mentoring Programs		Office of Juvenile Justice Delinquency Prevention	16.726	2012-03-15	2012-05-02	2012-04-10	
	 PA-11-260	Research Project Grant (Parent R01)	ADOBE-FORMS-B2	National Institutes of Health	-none-	2011-08-12	2014-09-07	2012-04-10	

**Create Proposal**  
Create a proposal using this Opportunity.

# Proposal Creation

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- A new screen will appear as demonstrated below.



The screenshot shows a web browser window titled "Create Proposal - Windows Internet Explorer". The address bar contains the URL: <https://uwp.cayuse424.com:8443/655/createProposalView.do?subsessionId=0&type=proposal&oppId=1001072072>. The main content area features a green plus icon and the heading "Create Grants.gov/Research.gov Proposal". Below the heading, the "Opportunity" field is set to "OJJDP-2012-3244" with an information icon and a "Select A Different Opportunity" button. The "Proposal Name" field is an empty text box with the note "(For reference within Cayuse 424)". The "Organization" field is a dropdown menu currently showing "Please select...". The "Due Date" field is an empty text box with a calendar icon. The "Validation Type" field is a dropdown menu currently showing "Other Federal Agency". At the bottom of the form are two buttons: "Create Proposal" and "Cancel".

# Proposal Creation

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1. Type internal **Proposal Name**
2. Select **Principal Investigator** using the text menu
3. Choose **# of Budget Periods**
4. Choose **Validation Type**
  - ▣ This setting determines which agency validations will be used on the form set
5. Click **Create Proposal**
  - ▣ Cayuse424 creates the SF424 form set required by the opportunity

Overview	Opportunities	<b>Proposals</b>	Routing	People	Institutions	Reports	Settings
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Proposals List > Test Proposals List

SF424

1

2

3

SF424B

1

2

Budget Narrative Attachment

1

Project Narrative Attachment

1

Other Attachments

1

Lobbying Activities Disclosure

1

Faith-Based EEO Survey

1

**Proposal Summary**

Summary

Documents

**Proposal Management**

Permissions

Routing & Approval

Electronic Submission

**Test**

**Application for Federal Assistance SF-424**

* 1. Type of Submission:	* 2. Type of Application:	* If Revision, select appropriate letter(s):
<input type="radio"/> Preapplication	<input type="radio"/> New	<input type="text" value=""/>
<input type="radio"/> Application	<input type="radio"/> Continuation	* Other (Specify)
<input type="radio"/> Changed/Corrected Application	<input type="radio"/> Revision	<input type="text" value=""/>

* 3. Date Received:	4. Applicant Identifier:
<input type="text" value=""/>	<input type="text" value=""/>

5a. Federal Entity Identifier:	5b. Federal Award Identifier:
<input type="text" value=""/>	<input type="text" value=""/>

**State Use Only:**

6. Date Received by State:	7. State Application Identifier:
<input type="text" value=""/>	<input type="text" value=""/>

**8. APPLICANT INFORMATION**

\* a. Legal Name:

* b. Employer/Taxpayer Identification Number (EIN/TIN):	* c. Organizational DUNS:
<input type="text" value="391805963"/>	<input type="text" value="020454666"/>

**d. Address:**

* Street1:	<input type="text" value="900 Wood Road"/>
Street2:	<input type="text" value=""/>
* City:	<input type="text" value="Kenosha"/>
County/Parish:	<input type="text" value=""/>
* State/Province:	<input type="text" value="Wisconsin"/>
* Country:	<input type="text" value="United States of America"/>
* Zip / Postal Code:	<input type="text" value="53141"/>



# Uploading Documents

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All of your proposal attachments are uploading clicking on the links in the 'Proposal List'.

**SF424**  
1  
2  
3

**SF424B**  
1  
2

**Budget Narrative Attachment**  
1

**Project Narrative Attachment**  
1




**Other Attachments**  
1

**Lobbying Activities Disclosure**  
1

**Faith-Based EEO Survey**  
1

**Proposal Summary**  
Summary  
Documents

**Proposal Management**

-  Permissions
-  Routing & Approval
-  Electronic Submission

# Routing

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Next, click on the 'Routing & Approval' tab to create the routing chain. You must include in order:

College Dean

Department Chair

Beth Frederick (Assistant Controller)

Terry Brown (Provost)

Julie Dresen (Director of Research Administration)

The screenshot shows a list of items with checkboxes and sub-items:

- SF424
  - 1
  - 2
  - 3
- SF424B
  - 1
  - 2
- Budget Narrative Attachment
  - 1
- Project Narrative Attachment
  - 1
- Other Attachments
  - 1
- Lobbying Activities Disclosure
  - 1
- Faith-Based EEO Survey
  - 1

**Proposal Summary**


- Summary
- Documents

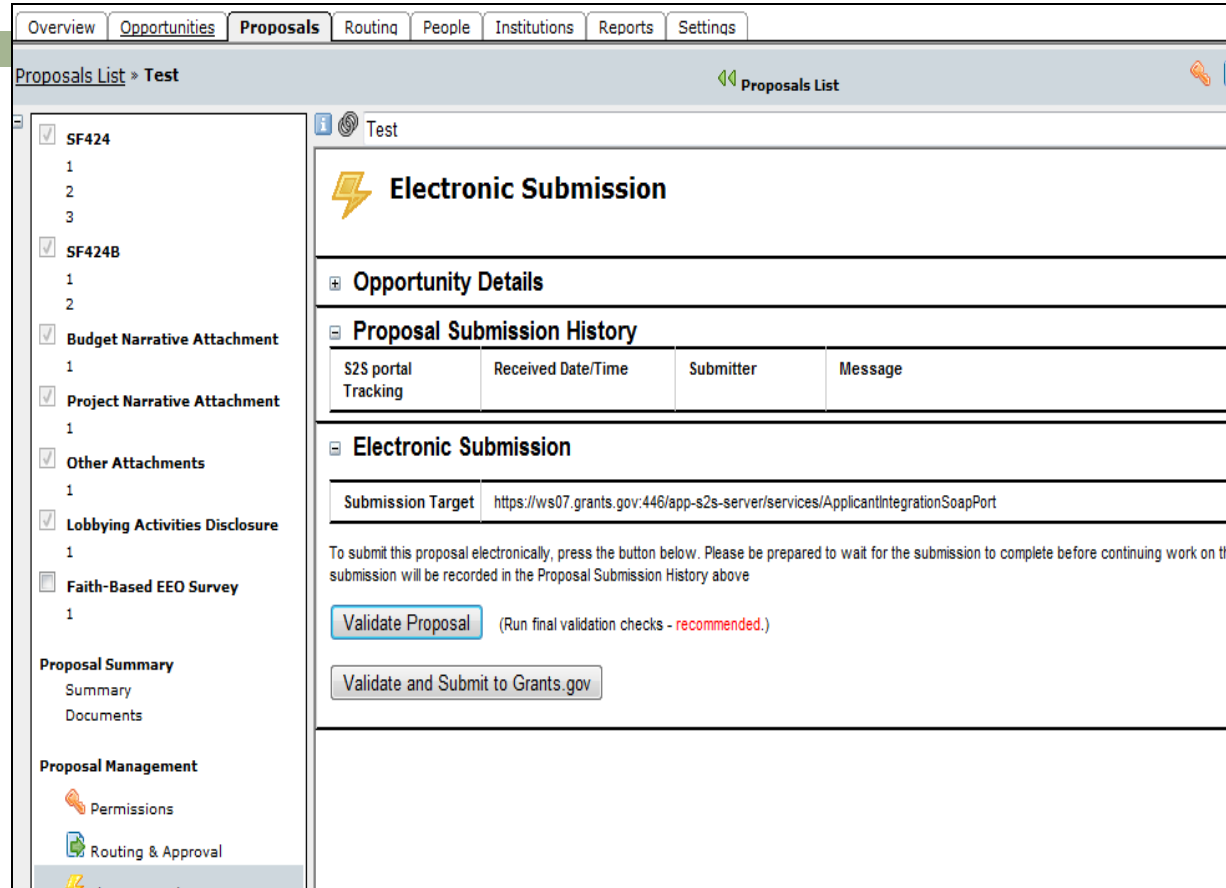
**Proposal Management**

- Permissions
- Routing & Approval
- Electronic Submission

# Electronic Submission

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After you've received all of the necessary approvals, you are ready to submit your proposal. Click on the  icon. The following page will appear.



The screenshot shows the Grants.gov interface with the 'Proposals' tab selected. The left sidebar contains a list of proposal sections: SF424 (1, 2, 3), SF424B (1, 2), Budget Narrative Attachment (1), Project Narrative Attachment (1), Other Attachments (1), Lobbying Activities Disclosure (1), and Faith-Based EEO Survey (1). Below this are sections for 'Proposal Summary' (Summary, Documents) and 'Proposal Management' (Permissions, Routing & Approval).

The main content area is titled 'Proposals List » Test' and features a 'Proposals List' button. The 'Test' proposal is selected, and the 'Electronic Submission' page is displayed. This page includes a lightning bolt icon and the title 'Electronic Submission'. It contains sections for 'Opportunity Details', 'Proposal Submission History', and 'Electronic Submission'. The 'Proposal Submission History' section is a table with the following data:

S2S portal Tracking	Received Date/Time	Submitter	Message
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The 'Electronic Submission' section shows the 'Submission Target' as `https://ws07.grants.gov:446/app-s2s-server/services/ApplicantIntegrationSoapPort`. Below this, there is a message: 'To submit this proposal electronically, press the button below. Please be prepared to wait for the submission to complete before continuing work on the submission will be recorded in the Proposal Submission History above'. Two buttons are present: 'Validate Proposal' (with a note '(Run final validation checks - recommended.)') and 'Validate and Submit to Grants.gov'.

# Cayuse424 Tips

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- When exiting pop-up windows always click the **Close** button; don't use your browser's "back" function
- Be careful when copying and pasting to your proposal -special characters (e.g., umlauts) will cause funding agencies to reject your proposal
- Don't leave Cayuse424 running overnight

# Conclusion

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- In this module you learned:
  - ▣ The features and benefits of Cayuse424
  - ▣ How to:
    - Sign in
    - Change your password
    - Recover your username or password
    - Creating a proposal
    - Uploading documents
    - Routing
    - Electronic Submission
  - ▣ User Tips