



I. General FAQ

- ❖ **What is the difference between the Cayuse Training Server and the Cayuse Production Server?**
 - The Cayuse training website provides first time users with an opportunity to get familiar with the Cayuse web application and to practice completing the form set in a “test” environment. Proposals can be built; functionality can be “tested”. However these “practice” proposals are not submitted to Grants.gov, nor is data saved or migrated into the production system.
 - A production server is used to create real proposals that are intended for submission to the NIH, AHRQ or CDC through the Grants.gov electronic portal.
- ❖ **Can I access the Cayuse server from home or on the road?**
 - Yes. Because Cayuse is a web-based application it can be accessed anywhere as long as you have a compatible browser. Currently Cayuse424 supports Firefox 1.4-2.0, and Internet Explorer versions 6 & 7.
- ❖ **How do I change my password from the default?**
 - Select the “Preferences” link or tab. Choose “Change User Password.”

II. Professional Profiles

- ❖ **Who should I create professional profiles for?**
 - Create a professional profile for everyone one who is named in your grant application; the principal investigator, key persons and other significant contributors. You may want to see if a Professional Profile exists in your Institutions Cayuse424 system so you don’t duplicate an already existing profile.
- ❖ **Why should I create a professional profile?**
 - Creating a professional profile allows you to quickly autofill any of the above mentioned personnel involved in your grant. Additionally, if updates ever need to be made regarding application personnel, re-autofilling the personnel becomes a simplified process as little to no data will be lost.
- ❖ **Can I autofill information from a Professional Profile that I did not create?**
 - You can only autofill a Professional Profile you did not create if you have been given permission to see and use the Professional Profile in a proposal. If you need to autofill and cannot do so, contact the professional profile originator. The originator is typically first person listed on the profile permissions list. This cuts down on the number of profiles that exist in the system.
- ❖ **I want to autofill someone but I do not see a professional profile for them; what should I do?**
 - In some cases this is because you do not have permission to see the professional profile. If you are unsure as to whether or not a person has a professional profile it is recommended that you contact them first. Chances are they will have access to their

own profile and can grant you access; or at least tell you who can. If no profile exists, create one.

❖ **Does salary information reside in the Professional Profile?**

- Yes. Salary information is located in the Salary and Fringe Worksheet section of the Professional Profile. The information entered here is invaluable when creating and editing budgets; but is optional. You can also enter salary data directly into the proposal.

❖ **How do I upload a Biosketch?**

- Biosketches are required for all Key Personnel and Other Significant Contributors. Biosketches can be created on your desktop using the Cayuse Biosketches template or your normal Word template.
- Go to the Professional Profile for the person for whom you are attaching the Biosketch. Click on the Biosketch Link. You will only be allowed to upload Biosketches on profiles that you have access to. Refer to Module 2, Slide 14 of the Grants.gov Cayuse training for step by step directions.

❖ **How many BioSketches can be stored in a Professional Profile?**

- You can upload as many biosketches to a Professional Profile as needed. Make sure you name your Biosketches appropriately so you can select the correct biosketch for the proposal.

❖ **A profile is no longer needed/there are duplicate profiles in the system. How do I delete a Professional Profile?**

- You may only delete Professional Profiles that you have created or that you have the permission to delete. Click on the professional profile that you wish to delete. Select the trash can icon to delete the profile.

❖ **I deleted a profile that I needed! Can I get it back?**

- Yes. Contact your system's help desk or your system administrator. They will be able to recover the deleted profile using their system privileges.

III. Proposals

❖ **How do I create a proposal?**

- Click on the "Proposal" link of the proposal tab. Select the opportunity that you wish to apply for. Enter the Proposal's Name for reference within Cayuse424. Choose a PI from the Dropdown Menu for SF424RR proposals or an Institution for SF424 proposals. Next, choose the number of budget periods for this proposal. Choose the validation type to match the agency you are applying to. If validation type does not list your agency, choose "Other Federal Agency". Click on "Create Proposal".

❖ **Can I share my proposal with others?**

- Yes. Just like Profiles, Proposals have permissions that can be granted. The department/academic unit or Principal Investigator should determine who should have access to the proposal. Personnel who will be working on the proposal need to have access.

❖ **Can two or more people work on a proposal simultaneously?**

- No. Cayuse424 only allows one user to work on the proposal at a time. Once you enter a proposal it becomes “locked”. However, others may view the proposal and see your changes as you work on it.
- ❖ **You mentioned “locking”. Can someone take my lock and start working on the proposal?**
 - Yes, but only if they are a SysAdmin user, or have “Breaklock” permission granted to them for that proposal. Persons without the break lock authority can still open up the proposal in read-only format; but they will not be able to enter data or add attachments.
- ❖ **I just logged in and my proposal is still locked! Why did this happen, and what should I do?**
 - Proposals remain locked if someone closes the browser or turns off their computer and does not properly exit a proposal by clicking on “All Proposals” or signing out of Cayuse424. Because it is your own lock, you should have permission to break it.
- ❖ **Is my proposal automatically saved as I create it?**
 - Yes, Cayuse424 automatically saves your proposal every time you click in and out of a page, whenever you change functions (e.g., from Profiles to Proposal) and when you close out of the proposal.
- ❖ **Can I print my proposal?**
 - Yes. In fact this is a good way to make sure that all of the PDFs you have attached to the proposal are displaying properly.
 - To do so, locate the proposal you wish to print and display it on the screen. Click on the printer icon in the upper right corner of the screen. Check the sections that you wish to print, and select “OK”. A PDF of the proposal will be generated that you can save to your computer.

IV. Templates (Please note: Templates are only provided for NIH applications)

- ❖ **What is the difference between ResearchPlan1_1.dot and the ResearchPlanAddin1_1.dot?**
 - The ResearchPlan1_1.dot is used for a newly begun Research Plan where there is no text and all the subsequent development takes place within that template.
 - The "AddIn" version takes a document that has already been started and developed outside the template and does a sophisticated search and replace action based upon the expected section headings. Once this is done, Cayuse Word templates can make the PDF version for upload to all the Research Plan sections, bibliography, etc. in a single step.
- ❖ **Can I change the font size, margins, etc., on the templates?**
 - The templates are set up to meet NIH requirements. The auto-default for font is Arial 11. The margins are set to one-half inch. All pages are set to print in portrait, not landscape. If you change any of the defaults, make sure those changes will be accepted by NIH.
- ❖ **Can I copy and paste into the Word Templates?**
 - Yes.
- ❖ **How do I download the Templates?**
 - You can download them yourself by selecting the “Resources” link on the “Overview” page of the Cayuse web application.

- ❖ **I am unsure as to the version of the Word Templates I have. Do I have to I remove the old templates before running the installer?**
 - Removal of the old templates is recommended but not necessary. Any Cayuse templates that you have will be replaced by running the installer (PC only). Mac users have to manually copy the templates into the correct Project Gallery folder.
- ❖ **After installing the templates, how do I find them in Word?**
 - On Windows: Open Microsoft Word. Click "File"; click "New." In the dialogue box on the right side of your screen, click "on my computer"; then click the Cayuse folder and select the desired template.
 - On Macintosh OS X: Open Microsoft Word. Click "File"; click "Project Gallery." Click "Cayuse" in "My Templates." Select the desired template.
- ❖ **When working on the research plan and using the templates, is there any way for the document to indicate when a specific page limit has been hit?**
 - Clicking on "Preview for PDF" will provide you with a view of the proposal that mimics the final copy. You can then check to see if Word's page count has changed, and adjust from within Word. It is good practice to go through the entire document to make sure Word hasn't changed something.
 - Additionally, the validation engine in Cayuse424 counts pages when a PDF has been uploaded. This will tell you if you are over any limits, and will assist you in double checking your work.

V. Budgets

- ❖ **How do I create a Subaward Budget?**
 - Creating a subaward proposal is much like creating a normal proposal; First, click on the "Subaward" link. Next, enter the Proposal's Name for reference within Cayuse424. Choose a Institution from the dropdown menu. Choose a number of budget periods. Choose the validation type to match the agency you are applying to. Finally, click on "Create Proposal".
- ❖ **I have a modular budget, but want to include detailed budget information for informational purposes only as a convenience to Institutional reviewers and Contracts & Grants. What should I do?**
 - Enter all appropriate budget information on the detailed budget pages. Make sure those budget pages are unchecked for submission on the proposal navigation page. The budget information will be available, but will not be converted into the PDF that is submitted to the NIH.
- ❖ **Does Cayuse424 calculate the fringe rate automatically?**
 - Yes; but only if the correct fringe rates are entered into the Institutional Profile and selected in the Professional Profile.

VI. Submission

- ❖ **How does Cayuse424 Submit to Grants.gov?**
- ❖ Cayuse424 acts as an AOR for your institution; when a proposal is submitted by Cayuse424, Grants.gov recognizes the certificate that was set up when your server was configured, thus allowing a successful submission.
- ❖ **Can proposals be submitted at the last minute?**
 - Yes, Cayuse proposals can be submitted up until the cutoff time of the opportunity. However it is recommended that proposals are submitted well before the deadline in case the Grants.gov servers are overwhelmed with other applications. Your Institution will have recommended guidelines for these submission activities.
- ❖ **Which agencies are using Cayuse424 to submit proposals?**
 - Cayuse424 (Version 3.1.3) currently supports the NIH, CDC and AHRQ.

VII. General Support

- ❖ **What browsers can I use to access Cayuse424?**
 - Cayuse currently supports Internet Explorer versions 6 & 7, as well as Firefox 2.0. Due to browser security and overall performance, Firefox 2.0 is recommended for an optimal user experience.
- ❖ **What should I do if I get a message in Firefox that says “Script has timed out. Do you want to continue or stop script?”**
 - This is a slight issue that incorrectly configured versions of Firefox may experience. When you are in the Firefox browser, follow these steps: First, type “about:config” into the web browser address bar. In the “Filter” field, type “max”. Find “dom.max_script_run_time” in the “Preference Name” list. Change the number under “Value” to 60. Finally, close & reopen the browser
- ❖ **Who can I contact for support?**
 - Your institution will have a Help Desk available for general support issues. Should an issue arise that they are unable to assist you with, they have access to Cayuse Technical Support Monday-Friday, from 7am-5pm PST.