

# Research CAYUSE Reminders & Tips for Department Administrators

- ✓ ACCOUNTS & ACCESS
  - Account set-up for **first-time PI(s)** must be done by the PI him/herself. If the account was created by someone else, please call your Contract & Grant Specialist.
  - Administrators may receive **delegate access** to approve proposals on behalf of their PIs. Each PI must request this in writing to the appropriate C&G Specialist.
  - **Permissions** are on a per-proposal basis and are updated using the permissions link on the left side of the proposal. The PI will need permission in order to edit/review/approve.
  
- ✓ STANDARD PROPOSAL INFORMATION
  - All **zip code** entries require the appropriate four-digit zip extension code.
  - **Authorized officials** are currently as follows for Year 1 budget totals up to
    - \$250,000 Assigned C&G
    - \$500,000 Portia C. Garvey
    - \$1,000,000 Trudy M. Riley
    - \$2,000,000 Tom Apple
    - Over \$2,000,000 Patrick Harker
  - Authorized official **email address** should always be [udelaware-awards@udel.edu](mailto:udelaware-awards@udel.edu)
  - **Internal proposal titles** should begin with the PeopleSoft proposal record number.
  
- ✓ ATTACHMENTS, BUDGETS & SUBCONTRACTS
  - All file attachments must be in **PDF format**.
  - **File names** must not contain spaces, hyphens, or special characters except underscore.
  - For relevant application packages, picking the appropriate number of budget periods at the time of proposal set-up will allow CAYUSE to **auto-build your budget periods**.
  - Sub-recipients should be listed in CAYUSE as an institution before sub-awards can be set up. Contact your C&G Specialist to add new institutions.
  
- ✓ CAYUSE FUNCTIONALITY
  - Mozilla Firefox is the **preferred web browser**.
  - The **lock icon** will appear when another user is editing the proposal.
  - The **yellow pencil icon** on the right of personnel fields allows you to auto-fill contact information.
  - A **red star icon** means that you have over-written an auto-populated field.
  - It is wise to click the **blue disk save icon** every time it appears.
  - Use the **grey printer icon** on the top right of the screen and select the forms you'd like printed.
  - The only forms that will be submitted with the proposal are those with a **checked box** on the left hand side of the proposal screen. Be sure all required forms are checked.
  - UD does not utilize the **Proposal Summary** section. Any information entered here will neither be reviewed nor maintained by the Research Office.
  
- ✓ ROUTING/APPROVAL CHAIN & SUBMISSION
  - **Required approvers** of the CAYUSE proposal package include the lead PI and the designated Contract & Grant Specialist. Both boxes must be checked for proposal to be submitted.
  - Once the PI has approved the proposal, all **documents are locked down** from editing except the scientific portion.