Routing & Approvals in Cayuse 424

Guide for Approvers & Proxies

Minimum software requirements:
Mozilla Firefox v. 3.0-16
Microsoft Internet Explorer IE7-IE9
Acrobat Reader
A Note on Approvals

Please note that in giving your approval for a specific external proposal submission you are certifying that:

The effort proposed is in keeping with Department/College/University educational objectives and is appropriate to our mission. I am aware of the requirements of this project (including financial commitment from my area) and am committed to providing them.
Logging on to Cayuse 424

- You will receive an email notification that you have a proposal to review and approve:

  Due to an approval action, the following proposal now requires your attention:

  Routing – Proposal name would be here

  Please navigate to “link” at your earliest convenience.

  Note - the following comments were included with the action: Approved!

- Click on the link in the body of the email, or

- Go to http://bsu.cayuse424.com/. Log on using your BSU username and password. If you need assistance logging in, please contact SPO. Proposals available for your review are under the “Routing” tab.
Logging on to Cayuse 424

Upon logging in, the asterisk next to “Routing & Approval” indicates you have proposals pending your review and approval.
Please note that for chair/unit/college-level approvals, the system shows the name of the unit not the name of the approver.

This is so future Directors/Chairs/Deans will be able to view their area’s previous proposals.

Each unit will include the main approver and a proxy.
Reviewing the Proposal

- On Federal Proposals, each of the required forms can be selected from the left-hand menu.

- For all proposals, the “Proposal Summary” section contains a project summary for review as well as the BSU internal budget, draft narrative, and PI Assurances form as attachments.
Reviewing the Proposal

- The Summary link describes the basics of the proposal, including PI, sponsor, dates, and requested amount.
- The Documents link will include the PI Assurances document, BSU internal budget, and project narrative.
Reviewing the Proposal

- Click on the “pdf” link to view the narrative (ends in “N”), budget (ends in “B”) or additional internal attachments.
- The PI Assurances Form includes statements related to conflict of interest, intellectual property and other certifications.
Proposal approvals must follow the routing chain. Reviewers can look at a proposal once it hits their Routing List, but they cannot approve it until the previous reviewers on the routing chain have signified their approval.

Once a proposal is routed, Cayuse424 grants temporary permission to reviewers to access the proposal.

In case of an emergency, a reviewer may be deleted from the chain (or skipped). Please contact your Proposal Manager if you require this step.
Approving the Proposal

- Reviewers indicate their approval by checking the box adjacent to their name.
- Once approved, the next reviewer on the routing chain is notified via email.
- As soon as the SPO Director (or Delegate) checks their box an email is sent to everyone on the routing chain and electronic submission to Grants.gov by SPO can proceed.
Retracting the Proposal

- Once approval is given it can be retracted by un-checking the box next to the reviewers name. This will cause the proposal to be sent back for a second review and/or corrections.

- Once a routing chain is started, the PI can Recall (cancel) the whole process by un-checking their box.
Routing History

<table>
<thead>
<tr>
<th>username</th>
<th>person</th>
<th>type</th>
<th>date/time</th>
<th>comments</th>
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<tbody>
<tr>
<td>ahoff</td>
<td>Hoff, Andrew (U of C) / University of Cayuse</td>
<td>Approve</td>
<td>2008-08-25 13:53</td>
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<td>mspears</td>
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<td>jheldens</td>
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<td>jheldens</td>
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<td>Modify</td>
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</table>

All routing actions are logged in the proposal’s Routing History
After you check the box next to your name to approve, the next approver will be notified.

Note that under the “Routing” tab, you will be able to see all proposals requesting your approval.

- Each proposal will show how long it has been in the review process and how many steps away you are from being able to approve the proposal.
- Click on the link to be given access to the proposal for review purposes only.

<table>
<thead>
<tr>
<th>Proposal</th>
<th>Steps away</th>
<th>Days old</th>
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<tbody>
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<td>Copy of LaLonde, David R21</td>
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<tr>
<td>Heldens, John 2/5/09</td>
<td>2</td>
<td>0</td>
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</tbody>
</table>
What if... I have questions or concerns?

Contact your Proposal Manager or Brenda Ayers in SPO
(765-285-1602 or bsayers@bsu.edu)