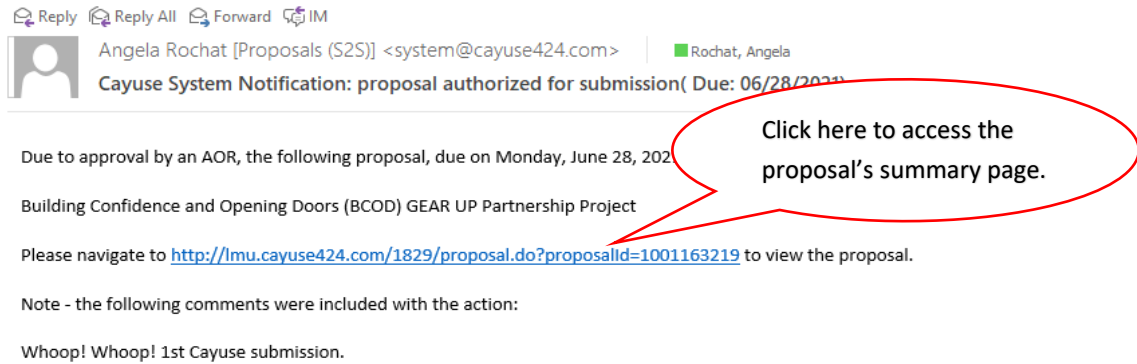


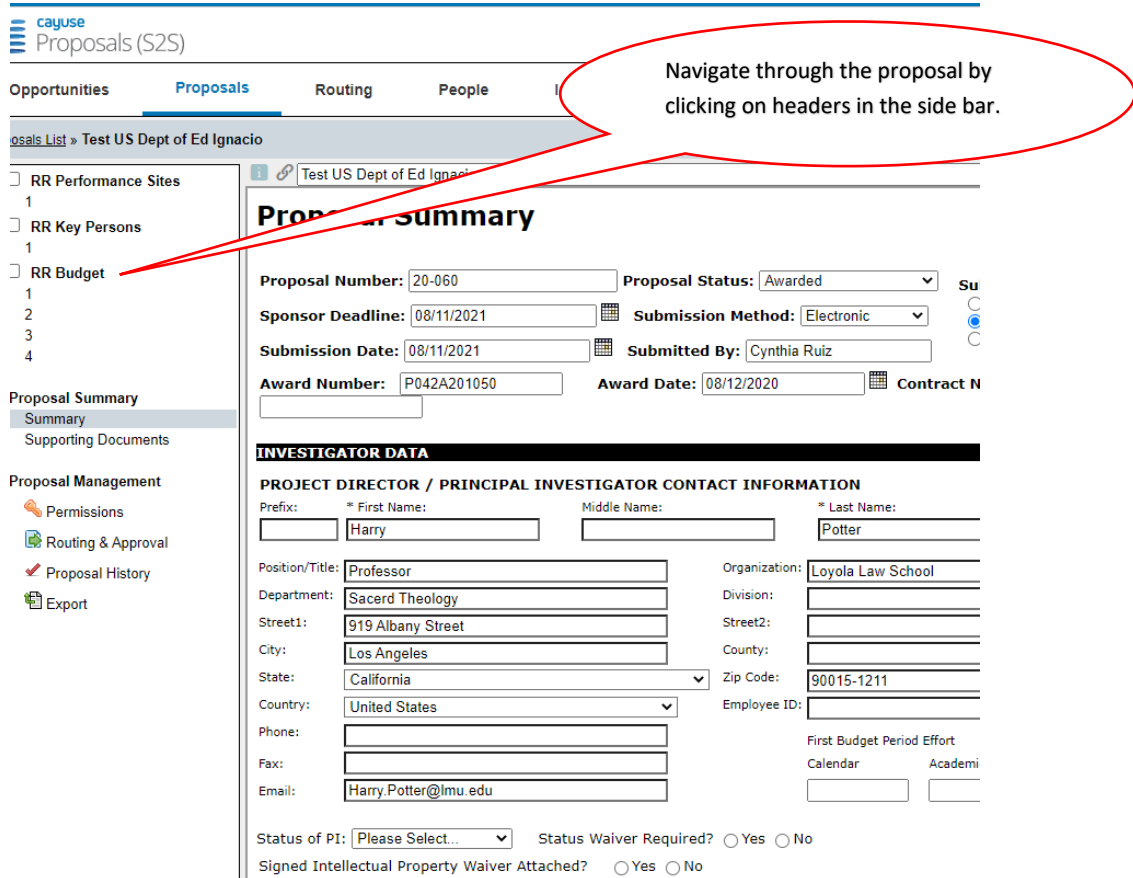
Picture Guide #1: Approving Proposals via Email

Approving Proposals via Email in Cayuse Proposals

- 1.) When you are next on a routing chain to approve a proposal, you will receive an email from Cayuse, such as the one below:

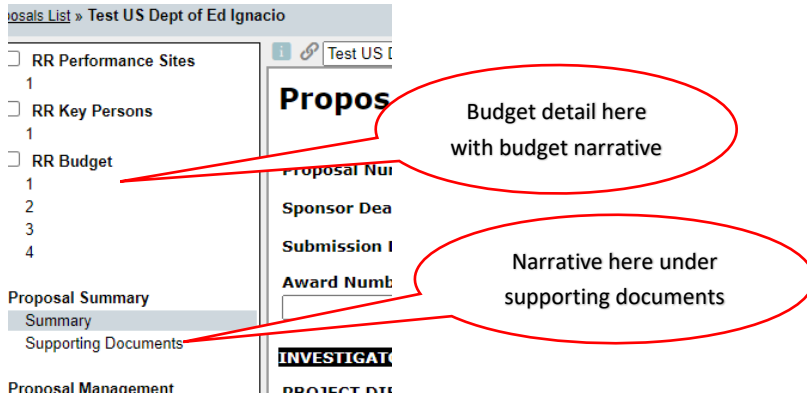


- 2.) After clicking the link, you are directed to the login to Cayuse Proposals via your LMU username and password.
- 3.) The Proposal Summary page opens. It gives you most of the information you will need about the proposal to approve it.

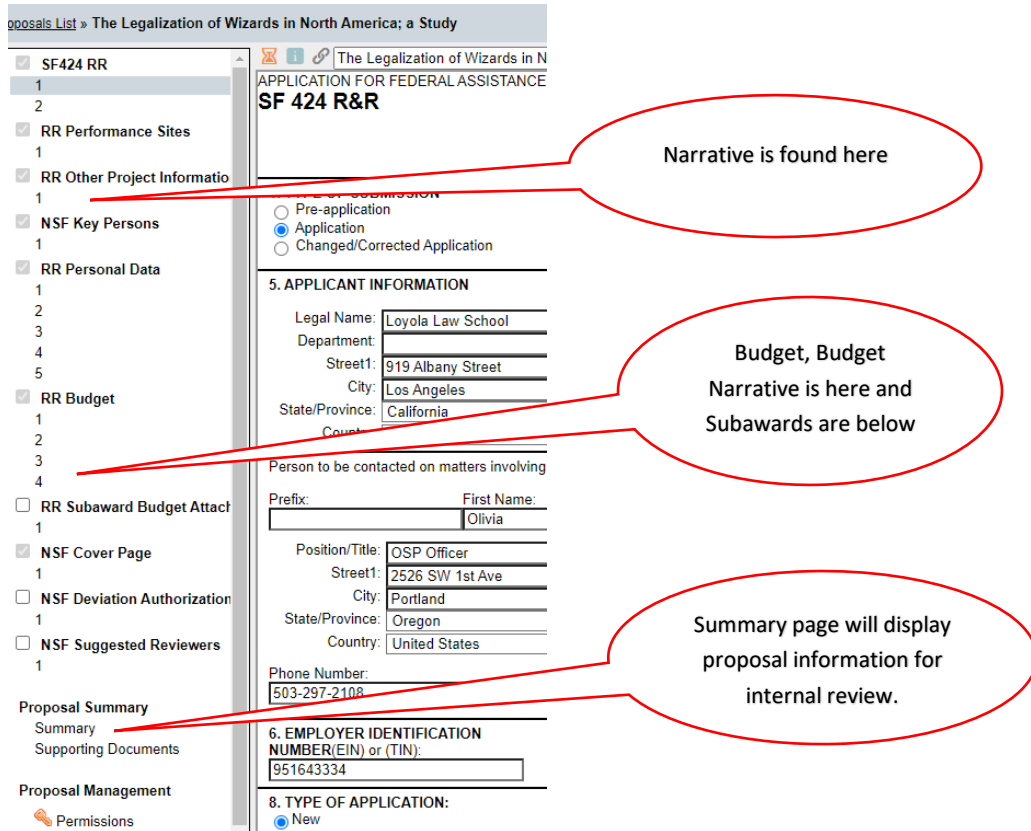


4.) Navigate through the proposal on the left side bar for details about the budget, proposal narrative (under supporting documents), key persons, and any other key documents that may be required for submission, such as cost share approval. Navigation for federal submissions varies from non-federal submission because of system-to-system functionality with Grants.Gov.

a. Non-Federal Proposal



b. Federal Proposal – All information will be embedded in the proposal and not in the supporting document section. ORSP will offer guidance assistance in the reviewers comments.



- 5.) To review the proposal and budget narrative either in documents or embedded in the proposal, click the pdf link to read the documents.

Supporting Documents Summary

Attach supporting documents here. Be sure to provide all documents with descriptive file names for easy ic attached.

Attachments Files uploaded here are for internal use and will not be submitted with the proposal.

| | Final | Draft |
|---|---|----------|
| 1 | Sections C-F DBO-E1007-2-20 final 9P PDF 331.49KB | no draft |

Click link to review narrative from Proposal Summary documents

- 6.) If ready to approve, click “Routing & Approval” in the right hand side bar under “Proposal Management.”

Proposal Summary

- Summary
- Supporting Documents

Proposal Management

- Permissions
- Routing & Approval
- Proposal History
- Export

Select Routing & Approval

- 7.) To approve the proposal and move it to the next reviewer, click on the box by your name. Click the “approve” button in the dialog box that appears.

Routing & Approval

Routing Chain Edit Chain?

Begin

- Officer-OSP, Olivia - LMU: Office of Spons Proj - SAMPLE
- Potter, Harry - LLS: Sacerd Theology

Click box by your name to approve.

- 8.) Any comments you make are added to the routing history box at the bottom of the Routing & Approvals. Everyone can see these comments.

An AOR has approved this proposal, so it is now submittable by a suitably authorized user.

Routing History

| username | person | type | date/time | comments |
|--------------|--------|--------|------------------|----------|
| osp-director | | Modify | 2021-08-09 14:32 | |
| osp-director | | Modify | 2021-08-09 14:32 | |
| osp-director | | Modify | 2021-08-09 14:32 | |
| osp-director | | Modify | 2021-08-09 14:32 | |
| osp-director | | Modify | 2021-06-03 14:59 | |
| osp-director | | Modify | 2021-06-03 14:48 | |
| osp-director | | Modify | 2021-06-03 14:48 | |

Approver comments appear here with date and time forming a complete record of everyone who touched the proposal during the review.

- 9.) To retract (reject) the proposal, uncheck (click) the box next to the name of the PI. The checkmark disappears. Cayuse sends it back with your comments. If you retract, communicate with the PI so s/he knows what needs to be fixed before you will approve it. The PI resends the proposal back through the routing chain with the changes/clarifications you requested.

Due to a retraction action, the following proposal now requires your attention:

Routing - NIH:3005 - Dr. Hopkins

Please navigate to [http://sales-](http://sales-jeff.cayuse424.com/proposal.do?proposalId=1001314314)

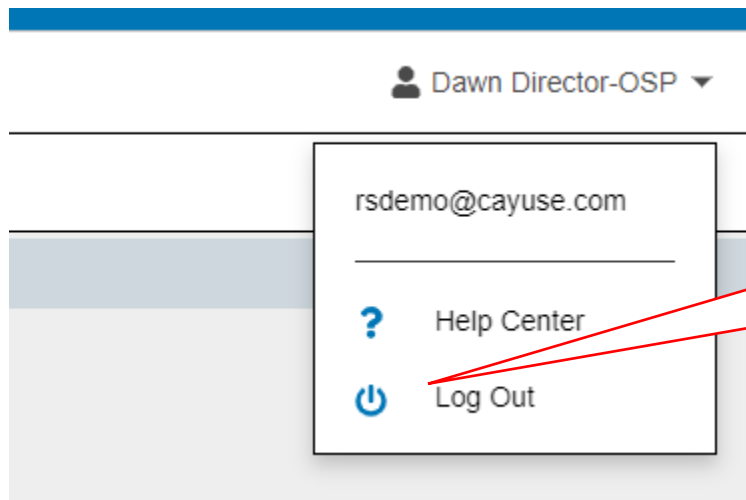
[jeff.cayuse424.com/proposal.do?proposalId=1001314314](http://sales-jeff.cayuse424.com/proposal.do?proposalId=1001314314) at your earliest convenience.

Note: The following comments were included with this action:

We cannot offer 100% release. Please revise.

An Email message like this means the proposal has been retracted and is need of attention.

- 10.) **ALWAYS SIGN OUT** of the proposal when finished. This allows the next user to access the proposal. If you close out of the screen without signing out it will lock the proposal.



Log Out in the upper right corner of the screen from the dropdown menu with your name.

- 11.) Cayuse will generate a final email to everyone in the chain once the proposal has been approved by all and is authorized for submission.

Due to approval by an AOR, the following proposal is now authorized for submission:

Routing - NIH:3005 - Dr. Hopkins

Please navigate to [http://sales-](http://sales-jeff.cayuse424.com/proposal.do?proposalId=1001314314)

[jeff.cayuse424.com/proposal.do?proposalId=1001314314](http://sales-jeff.cayuse424.com/proposal.do?proposalId=1001314314) to view the proposal.

Note - the following comments were included with the action:

Ready for submission.