

# Cayuse SP – UC Davis

## Handbook for Role Managers

### Contents

Tips for Role Management.....	2
Role Definitions.....	2
Access Role Management.....	3
View Unit Role Assignments.....	4
Managing User Roles.....	5
Adding a Research Contact.....	5
Adding and Deleting Roles.....	6

## Tips for Role Management

1. Use Mozilla Firefox for best results.
2. Login to <https://ucdavis.cayuse424.com/> with Kerberos ID and Password.

Role Definitions - Following are the **only** Cayuse SP roles used at UC Davis.

Roles	Description
IPF Approver	<p><b>An individual designated with signing authority to review and approve proposals on behalf of his or her department.</b> Although all IPF Approvers for a given department receive an email notifying them when a proposal requires review, only one IPF Approver is required to approve the proposal to fulfill the departmental approval requirement.</p> <ul style="list-style-type: none"> <li>• Once an IPF Approver has reviewed the proposal and is satisfied with all aspects of it, he or she may electronically approve or reject the proposal. There is an opportunity as part of the approval process to mention any concerns or questions in a "note" attached to the proposal, which may be viewed by others reviewing the proposal.</li> <li>• IPF Approvers access proposals for review from the Department Approval Inbox in Cayuse SP.</li> <li>• If anyone other than the Department Chair/Center Director or Dean is established as an IPF Approver, the Department Chair/Center Director or Dean must return the signed <a href="#">Cayuse SP Role Delegation Authorization form</a> to <a href="mailto:ORCayuseHelp@ucdavis.edu">ORCayuseHelp@ucdavis.edu</a>.</li> </ul>
Role Manager	<p><b>An individual designated by the Dean or Department Head to add and remove roles for departmental personnel within Research Contacts.</b></p> <ul style="list-style-type: none"> <li>• Department Chairs/Center Directors and/or Deans may request a Role Manager be added to their unit by emailing <a href="mailto:ORCayuseHelp@ucdavis.edu">ORCayuseHelp@ucdavis.edu</a>.</li> <li>• The Role Manager has the ability to add and remove roles at any time on his or her department's behalf. The Role Manager maintains his or her department's Research Contacts listing, including updating it as department personnel or job responsibilities change.</li> <li>• It is up to each department to make the determination as to how many Role Managers it should have; for backup purposes, we recommend at least two.</li> </ul>
Pre-Award Spending Approver	<p><b>An individual designated with signing authority to review and approve Pre-Award Spending Requests.</b> Pre-Award Spending Requests for a proposal can be prepared and submitted electronically in Cayuse SP. Once submitted, all departmental Pre-Award Spending Approvers receive an email notifying them there is a Pre-Award Spending Request requiring review, which they can access through their Pre-Award Spending Inbox. Only one approver needs to approve the request in order to fulfill the departmental approval requirement. Pre-Award Spending Approvers should also be provided Proposal Data Access in order to view the Proposal Attachments tab.</p> <ul style="list-style-type: none"> <li>• If anyone other than the Department Chair/Center Director or Dean is established as a Pre-Award Spending Approver, the Department Chair/Center Director or Dean must return the signed <a href="#">Cayuse SP Role Delegation Authorization form</a> to <a href="mailto:ORCayuseHelp@ucdavis.edu">ORCayuseHelp@ucdavis.edu</a>.</li> </ul>
Research Account Manager	<p><b>An individual designated as the departmental contact person to receive research-related correspondence via email for dissemination to appropriate departmental personnel.</b></p>
Award Data Access	<p><b>View departmental award data contained in Cayuse SP through the Awards in My Department dashboard.</b></p>
Proposal Data Access	<p><b>View proposals in a given Admin Award Department, as well as access those proposals where that department is named, through the Proposals in My Department dashboard.</b> The user can perform the following tasks: view the proposal, its IPF and associated attachments; copy the proposal; and prepare a Pre-Award Spending Request for the proposal.</p>

**Option 1: From Research Contacts**

The screenshot shows the Cayuse Research Suite main page. At the top is the logo with the text "cayuse Research Suite". Below the logo, the text "Cayuse Research Suite" and "3.8.0" are displayed. Under the heading "Research Administration Modules", the link "Cayuse SP (Sponsored Projects)" is highlighted with a blue box, and "Cayuse 424" is listed below it. Under "System Administration Applications", the links "Backbone", "Research Contacts", and "Workflow" are listed. Under "Application Help", the link "Research Suite Support Center" is listed.

**Option 2: From Cayuse SP**

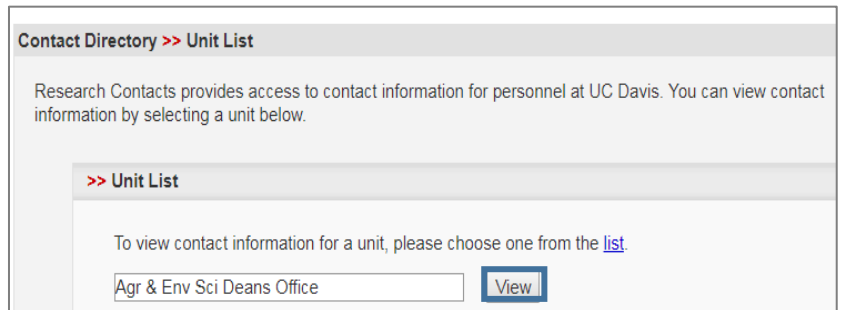
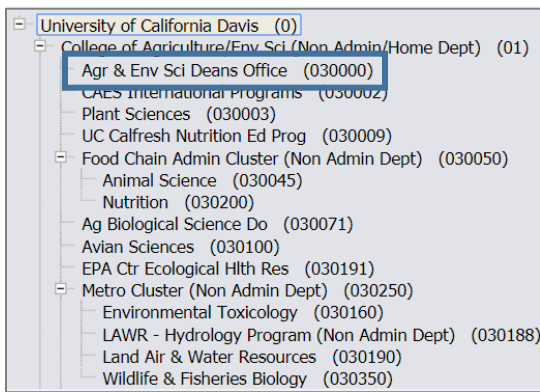
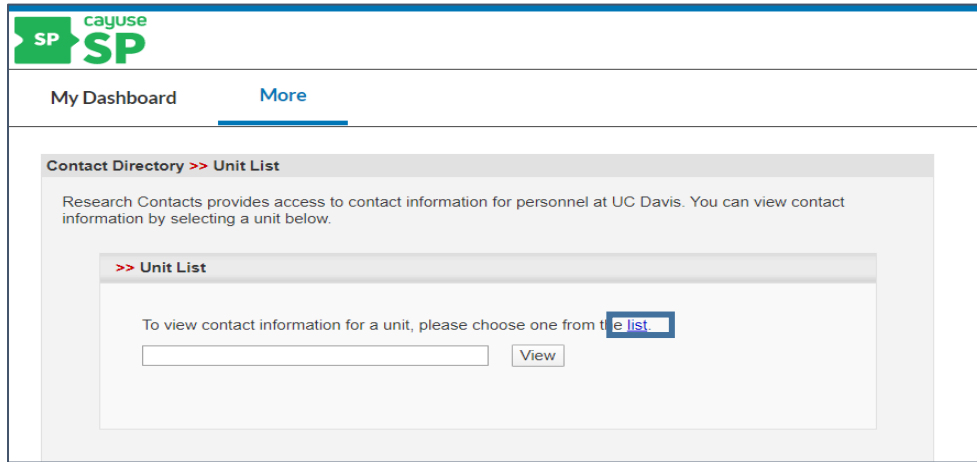
The screenshot shows the Cayuse Research Suite main page. At the top is the logo with the text "cayuse Research Suite". Below the logo, the text "Cayuse Research Suite" and "3.8.0" are displayed. Under the heading "Research Administration Modules", the links "Cayuse SP (Sponsored Projects)" and "Cayuse 424" are listed. Under "System Administration Applications", the links "Backbone", "Research Contacts", and "Workflow" are listed, with "Research Contacts" highlighted by a blue box. Under "Application Help", the link "Research Suite Support Center" is listed.

The screenshot shows the Cayuse SP dashboard. At the top left is the "SP" logo. Below it are "My Dashboard" and a "More" button highlighted with a blue box. A dropdown menu is open from the "More" button, showing "Research Contacts" highlighted with a blue box. Below "Research Contacts" are the options "View Roles By Unit" and "Manage Roles". The background shows a "Proposal Dashboard" with links like "Start New Proposal" and "My Proposals".

## View Unit Role Assignments

A one-minute video on viewing/identifying role assignments is available at [https://youtu.be/6s3bTeVbW\\_4](https://youtu.be/6s3bTeVbW_4)

Find the unit.



Users are listed on the left and the Roles on the right (Note: See [Role Definitions](#) for definitions)

>> OVCR - Sponsored Programs						
Administrator	Title	Email	Phone	Fax	Campus Box	Roles
Admin, Amie					Davis CA 95618-6153	Role Manager, Proposal Data Access, IPF Approver
Apple, Charlie					Davis CA 95618-6153	IPF Approver, Pre-Award Spending Approver

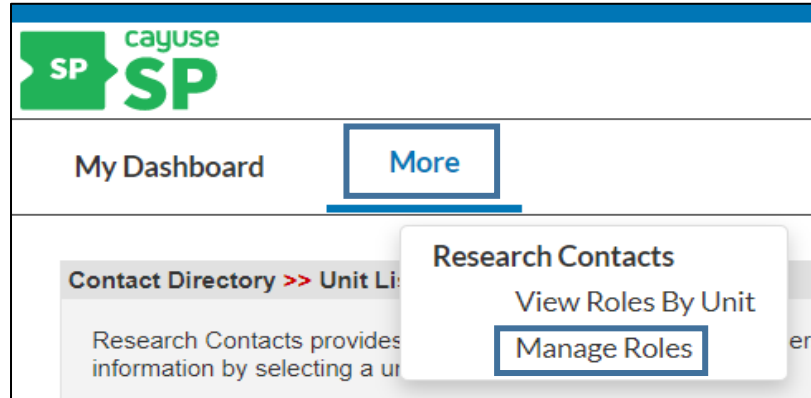
## Managing User Roles

A three-minute video on managing user roles (content of next 3 pages) is available at <https://youtu.be/KcpSCQKuufw>

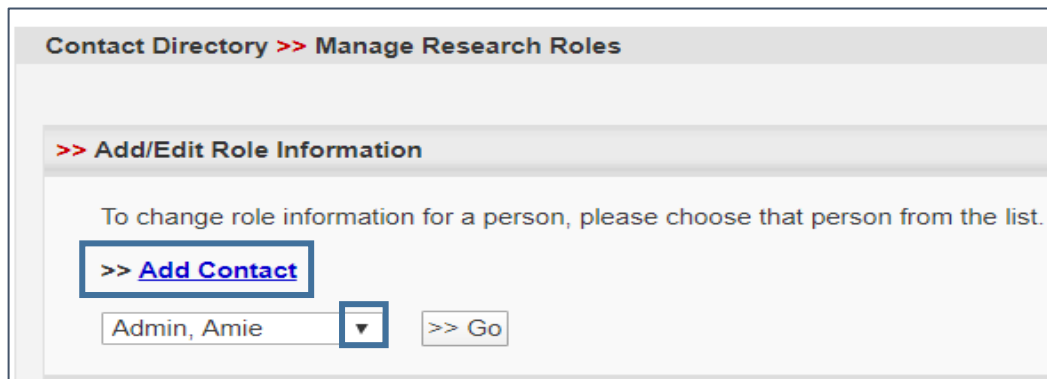
### Adding a Research Contact

ROLE MANAGERS MUST FIRST ADD AN EXISTING USER AS A RESEARCH CONTACT TO ASSIGN DEPARTMENTAL ROLES.

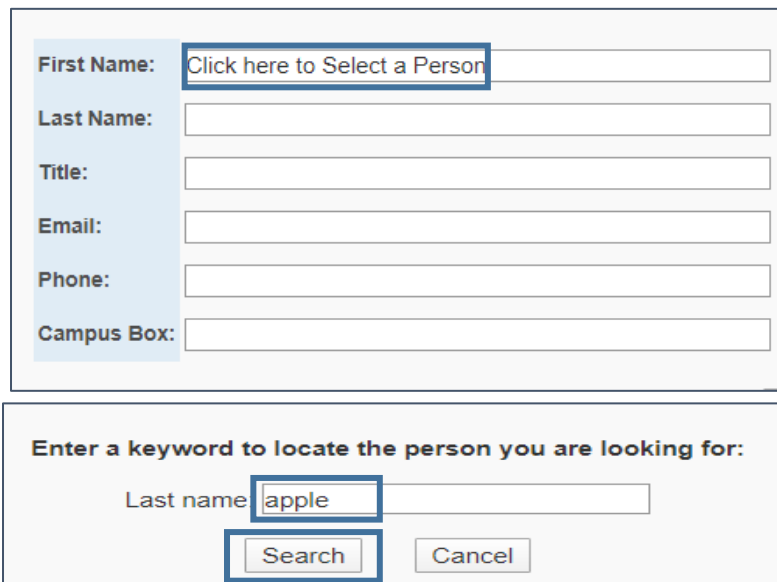
From either Cayuse SP or the Research Contacts page, select “More” then “Manage Roles”.



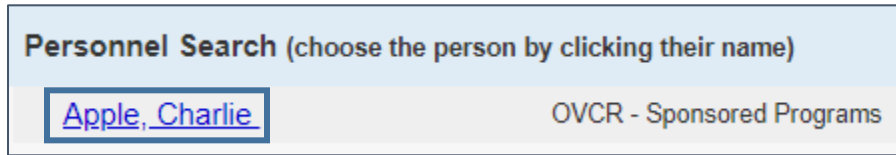
If the user is not on the list, select “Add Contact”.



Search for the person to add:

A form for adding a research contact. It has several input fields: 'First Name', 'Last Name', 'Title', 'Email', 'Phone', and 'Campus Box'. The 'First Name' field has a placeholder text 'Click here to Select a Person' and is highlighted with a blue box. Below these fields is a search section titled 'Enter a keyword to locate the person you are looking for:'. It has a text input field with 'Last name' and the word 'apple' entered. Below the search field are 'Search' and 'Cancel' buttons. The 'Search' button is highlighted with a blue box.

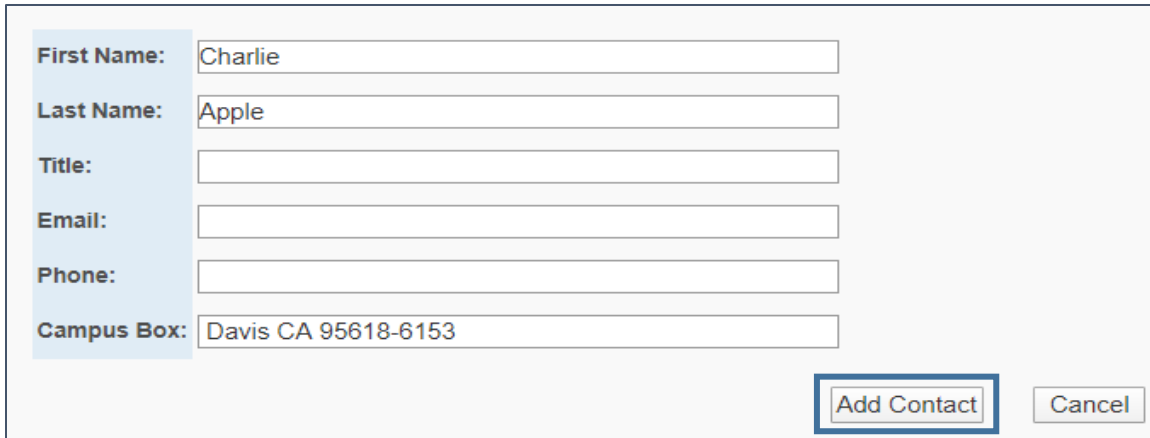
Select the person's name you want to add in the search results.



**Personnel Search** (choose the person by clicking their name)

[Apple, Charlie](#) OVCR - Sponsored Programs

Select "Add Contact".



**First Name:**

**Last Name:**

**Title:**

**Email:**

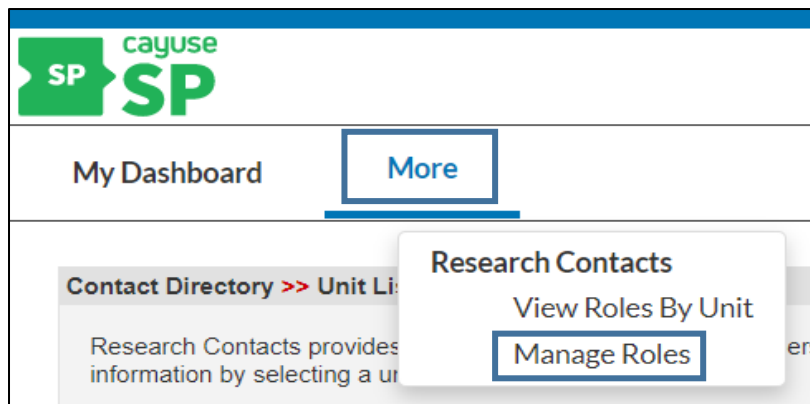
**Phone:**

**Campus Box:**

### Adding and Deleting Roles

ONCE A USER IS ON THE RESEARCH CONTACTS LIST, THE ASSOCIATED ROLES MAY BE VIEWED AND EDITED.

From either Cayuse SP or the Research Contacts page, select "More" then "Manage Roles".



**cayuse SP**

My Dashboard **More**

Contact Directory >> Unit Li

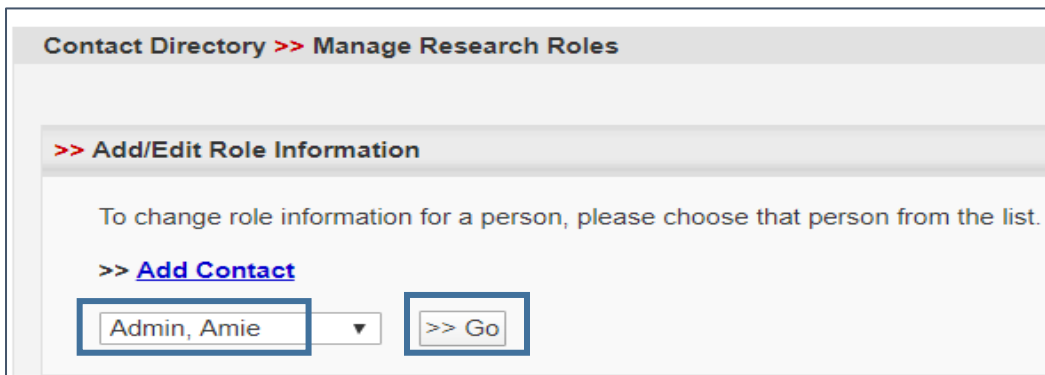
Research Contacts provides information by selecting a u

**Research Contacts**

View Roles By Unit

**Manage Roles**

Select the relevant person's name and then select "Go".



**Contact Directory >> Manage Research Roles**

**>> Add/Edit Role Information**

To change role information for a person, please choose that person from the list.

**>> Add Contact**

### Add a Role

If you are a Role Manager for multiple units, select the relevant unit.

Select the Role to add.

Role Department:  
**OVCR - Sponsored Programs**

Select Role Below:

Award Data Access ▼ Add Role

Please Make A Selection

Award Data Access

IPF Approver ( OVCR - Sponsored Programs )

Pre-Award Spending Approver ( OVCR - Sponsored Programs )

Proposal Data Access ( OVCR - Sponsored Programs )

Research Account Manager ( OVCR - Sponsored Programs )

Select "Add Role".

Role Department:  
**OVCR - Sponsored Programs**

Select Role Below:

Award Data Access ▼ Add Role

### Delete a Role

Select "Remove Role" next to the relevant role.

Role Department:  
**OVCR - Sponsored Programs**

Select Role Below:  
Award Data Access ▼ Add Role

**Current Roles:**

Role Manager ( OVCR - Sponsored Programs ) Remove Role

Proposal Data Access ( OVCR - Sponsored Programs ) Remove Role

IPF Approver ( OVCR - Sponsored Programs ) Remove Role