Access Guide for UC Davis Systems

Office of Research — Security Liaisons

- **Primary Contact:** Hijab Chaudhry — hzchaudhry@ucdavis.edu
- **Backup Contact:** Nina Weaver — nweaver@ucdavis.edu

A list of all active Security Liaisons at UC Davis is available on the Aggie Enterprise Security and Access webpage.

Table of Contents

Back to Table of Contents

Aggie Enterprise (Oracle)

Requesting Access for New Employees

1. **Requesting unit** (preferably the hiring manager) should email the OR Security Liaison to request system access for a new employee.
2. **Required information** in the email:
   - Employee’s Name
   - Employee ID
   - Unit Financial Department Code
   - Access needed in AE
     - Refer to the Job Roles and Access Levels to determine appropriate access based on the individual's job responsibilities.
     - For assistance in identifying the correct roles, contact your department’s Chief Administrative Officer (CAO) or fiscal officer.
3. The Security Liaison will review the request and follow up if necessary.
4. Once confirmed, the OR Security Liaison will create an Aggie Enterprise ticket and tag the requester for updates.

Helpful Links

- Aggie Enterprise Login
- Knowledge Base Guides

Important Access Information

- **Available to**: Active employees with a primary job in UCPath (Business Units DVCMP or UCANR) and FTE greater than 0.
- **Not available to**:
  - Business Unit DVMED
  - Contingent Workers (Job Code beginning with CWR or Pay Group CWR)

- Temporary Affiliates (non-employees)
- Without Salary (WOS) jobs

Removing Access for Existing Employees

1. **Requesting unit** (preferably the hiring manager) should email the OR Security Liaison to request removal of access for an existing employee.
2. **Required information** in the email:
   - Employee's Name
   - Employee ID
   - Unit Financial Department Code
   - Last day with the department (to remove access)
3. The Security Liaison will review the request and follow up as necessary.
4. Once confirmed, the Security Liaison will create an Aggie Enterprise ticket and tag the requester for updates.

Updating Project Managers

- Updating Project Manager for Non-Sponsored Projects
- Updating Project Manager for Sponsored Projects

For any questions, please email the OR Security Liaison.

Back to Table of Contents

Pre-Purchasing System (OPP)

Requesting Access for New Employees

1. **Requesting unit** (preferably the hiring manager) should email the OR Security Liaison to request system access for a new employee.
2. **Required information** in the email:
   - Employee's Name
   - Employee's Email or Kerberos ID
   - Unit Name
   - Access needed in OPP (Refer to the Roles guide for details)
3. The Security Liaison will review the request and confirm access updates.

Helpful Links

- OPP Login
- Knowledge Base Guides

Removing Access for Existing Employees

1. **Requesting unit** (preferably the hiring manager) should email the OR Security Liaison to request removal of access for an existing employee.
2. **Required information** in the email:
   - Employee's Name
   - Employee ID
   - Unit Name
   - Last day with the department (to remove access)
3. The Security Liaison will review the request and follow up as necessary.

Back to Table of Contents

UCPath/Cognos Access

Requesting Access for New Employees

1. **Requesting unit** (preferably the hiring manager) should email the OR Security Liaison to request access for a new employee.
2. **Required information** in the email:
   - Employee's Name
   - Employee's Email Address
   - Unit Name
   - Unit HR Department Code
   - Business Justification for access being requested
3. The Security Liaison will complete the UCPath access form.
4. This form will be reviewed by the UCPath Security Team. Once approved, the OR Security Liaison will notify the requester about access provisioning.

Important Notes:

- UCPath requests usually take a few business days for review and approval by the UCPath Security team.
- Cognos report access will be provisioned along with UCPath access by the OR Security Liaison.

Helpful Tip: Mirroring Access

If you're unsure of the access roles to select, provide the name and email of a similar employee, and the OR Security Liaison can mirror their access.

Removing Access for Existing Employees

1. **Requesting unit** (preferably the hiring manager) should email the OR Security Liaison to remove access for an existing employee.
2. **Required information** in the email:
   - Employee's Name
   - Employee's Email Address

Back to Table of Contents

    - Unit Name
    - Unit HR Department Code
    - Business Justification for removal.

3. The Security Liaison will complete the UCPath access form.
4. This form will be reviewed by the UCPath Security Team. Once approved, the OR Security Liaison will notify the requester about access removal.

Helpful Links

- UCPath Login
- Cognos Login
    - List of Cognos Reports
- Training Resources

Back to Table of Contents

Contracts and Grants Platforms Access

Cayuse

The **requesting unit** (preferably the hiring manager) should follow the information on the links below to establish access/remove for the employee:

- Information about Cayuse
- Getting Started in Cayuse

Effort Reporting System (ERS)

To request/remove access, the **requesting unit** (preferably the hiring manager) should email ERSHelp@ucdavis.edu.

- ***Helpful Links***
  - ERS FAQs
  - ERS Training Resources
  - ERS Help Request Form

Back to Table of Contents

AggieExpense / Travel Approvers

1. New fiscal or department approvers must complete the AggieExpense Approvals eCourse.
2. If the approver doesn't appear automatically, email expensehelp@ucdavis.edu with:
    - Home Department Code (6-digits)
    - Financial Department Code
    - Current approver and approval type
    - New approver and approval type
    - Additional supporting information
        - PPM Projects (or other accounts information) to add as an approver

To **remove** an approver no longer with the department, email expensehelp@ucdavis.edu with the same information listed above.

Note: Department Travel Reconciliation Approvers

Department Approver:

Each department has a designated Department Approver (e.g., Program Director/Manager) who must approve all AggieExpense transactions for their department.

Reports to Run on Cognos to view your Department Approvers:

- *AEE-318 AggieExpense Department Approvers Report*
    - *Department approvers can be different from Fiscal Approvers*

Fiscal Officer Approver: Expense reports and cash advance requests with account allocations require approval from the Fiscal Officer assigned to those accounts.

For information on who the fiscal approvers are for your unit, please contact OR Security Liaison

Aggie Planning

Requesting Access for New Employees

1. **Requesting unit** (preferably the hiring manager) should email the OR Security Liaison to request system access for a new employee.
2. **Required information** in the email:

    - Request Type (New Access or Update Access)
    - First Name
    - Last Name
    - Employee ID
    - UCD Email
    - Kerberos ID
    - Group (Role)
        - For more information about user groups (roles), see User Groups and Access Levels
    - Level C Financial Department

3. The Security Liaison will review the request and follow up if necessary.

Once confirmed, the OR Security Liaison will create an Aggie Enterprise ticket and tag the requester for updates.

Helpful Links

- Aggie Planning Log-In
- Knowledge Base Guides

Removing Access for Existing Employees

1. **Requesting unit** (preferably the hiring manager) should email the OR Security Liaison to request removal of access for an existing employee.
2. **Required information** in the email:

    - Request Type (Deactivate Access)
    - First Name
    - Last Name
    - Employee ID
    - UCD Email
    - Kerberos ID

Back to Table of Contents

  - Level C Financial Department
  - Last day with the department (to remove access)
3. The Security Liaison will review the request and follow up as necessary.
    - Once confirmed, the Security Liaison will create an Aggie Enterprise ticket and tag the requester for updates.

QUESTIONS?

For any questions or clarifications about any of these processes, please contact the OR Security Liaison