

# Role Managers Guide

Cayuse SP

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## Role Definitions

Roles	Description
<b>IPF Approver</b>	<p>Has signing authority to <b>review and approve proposals</b> on behalf of his or her department.</p> <ul style="list-style-type: none"> <li>• See the <a href="#">IPF Approvers Guide</a> for details on this role.</li> <li>• Although all IPF Approvers in a department receive an email when a proposal requires review, <b>only one IPF Approver is required to approve/reject the proposal.</b></li> <li>• If anyone other than a unit lead (Dept Chair, Center Director or Dean) is established as an <b>IPF Approver</b>, the unit lead 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>
<b>Role Manager</b>	<p>Designated by the Dean or Department Head to <b>add and remove roles for departmental personnel</b> within <b>Research Contacts</b>.</p> <ul style="list-style-type: none"> <li>• Department Chairs/Center Directors and/or Deans may <b>request a Role Manager be added to their unit</b> by emailing <a href="mailto:ORCayuseHelp@ucdavis.edu">ORCayuseHelp@ucdavis.edu</a>.</li> <li>• The Role Manager updates his or her department's Research Contacts listings as personnel or job responsibilities change.</li> <li>• For backup purposes, the Sponsored Programs Office (SPO) recommends <b>each department have at least two Role Managers</b>.</li> </ul>
<b>Pre-Award Spending Approver</b>	<p>Has signing authority to <b>review and approve Pre-Award (Advance Account) spending requests</b>.</p> <ul style="list-style-type: none"> <li>• See the <a href="#">Pre-Award Spending Approvers Guide</a> for details on this role.</li> <li>• Pre-Award Spending Approvers should additionally be provided the <b>Proposal Data Access</b> role in order to view the <b>Proposal Attachments</b> tab.</li> <li>• Although all Pre-Award Spending Approvers in a department receive an email when a Pre-Award Spending Request requires review, <b>only one approver needs to approve/reject the request.</b></li> <li>• If anyone other than a unit lead (Dept Chair, Center Director or Dean) is established as a Pre-Award Spending Approver, the unit lead 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>
<b>Proposal Data Access</b>	<p>Can view a department's proposals and access proposals in which the department is named through the <b>Proposals in My Department</b> dashboard.</p> <ul style="list-style-type: none"> <li>• 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.</li> </ul>
<b>Award Data Access</b>	<p>Can view departmental award data contained in Cayuse SP through the <b>Awards in My Department</b> dashboard.</p>
<b>Research Account Manager</b>	<p>The departmental contact who receives research-related correspondence via email for dissemination to appropriate departmental personnel.</p>

**Option 1: From Research Contacts**



## Cayuse Research Suite

3.8.0

### Research Administration Modules

- [Cayuse SP \(Sponsored Projects\)](#)
- [Cayuse 424](#)

### System Administration Applications

- [Backbone](#)
- [Research Contacts](#)
- [workflow](#)

### Application Help

- [Research Suite Support Center](#)

**Option 2: From Cayuse SP**



## Cayuse Research Suite

3.8.0

### Research Administration Modules

- [Cayuse SP \(Sponsored Projects\)](#)
- [Cayuse 424](#)

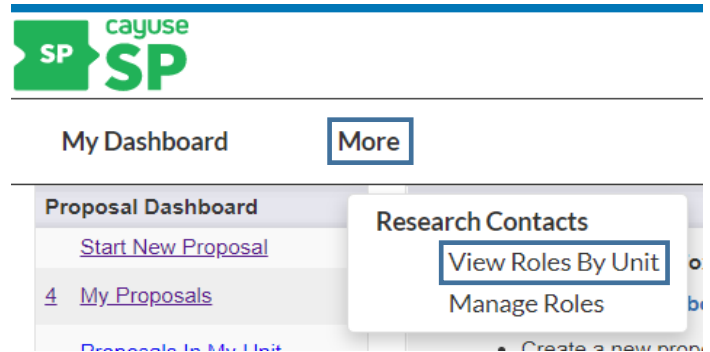
### System Administration Applications

- [Backbone](#)
- [Research Contacts](#)
- [Workflow](#)

### Application Help

- [Research Suite Support Center](#)

Then



## View Unit Role Assignments

A [one-minute video](#) on viewing/identifying role assignments is available. *If video doesn't start on first try, refresh and try again.*

Find the unit.

- You can either click in the **search box** or on **List**.

My Dashboard **More**

---

**Contact Directory >> Unit List**

Research Contacts provides access to contact information for personnel at UC Davis. You can view contact information by selecting a unit below.

**>> Unit List**

To view contact information for a unit, please choose one from the [list](#).

- University of California Davis (0)
  - College of Agriculture/Env Sci (Non Admin/Home Dept) (01)
    - Agr & Env Sci Deans Office (030000)**
    - CAES International Programs (030002)
    - Plant Sciences (030003)
    - UC CalFresh Nutrition Ed Prog (030009)
    - Food Chain Admin Cluster (Non Admin Dept) (030050)
      - Animal Science (030045)
      - Nutrition (030200)
    - Ag Biological Science Do (030071)
    - Avian Sciences (030100)
    - EPA Ctr Ecological Hlth Res (030191)
    - Metro Cluster (Non Admin Dept) (030250)
      - Environmental Toxicology (030160)
      - LAWR - Hydrology Program (Non Admin Dept) (030188)
      - Land Air & Water Resources (030190)
      - Wildlife & Fisheries Biology (030350)

**Contact Directory >> Unit List**

Research Contacts provides access to contact information for personnel at UC Davis. You can view contact information by selecting a unit below.

**>> Unit List**

To view contact information for a unit, please choose one from the [list](#).

**Users** are listed on the left and the **Roles** on the right.

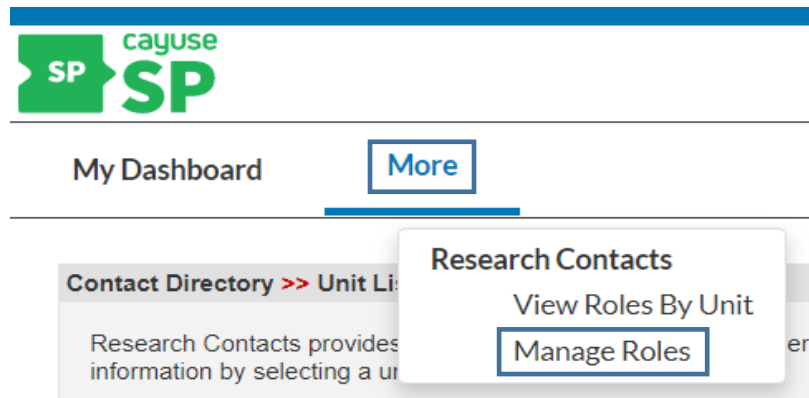
>> OVCR - Sponsored Programs						
Administrator	Title	Email	Phone	Fax	Campus Box	Roles
Admin, Amie					Davis CA 95618-6153	Role Manager, Proposal Data Access, IPF Approver
Apple, Charlie					Davis CA 95618-6153	IPF Approver, Pre-Award Spending Approver

## Managing User Roles

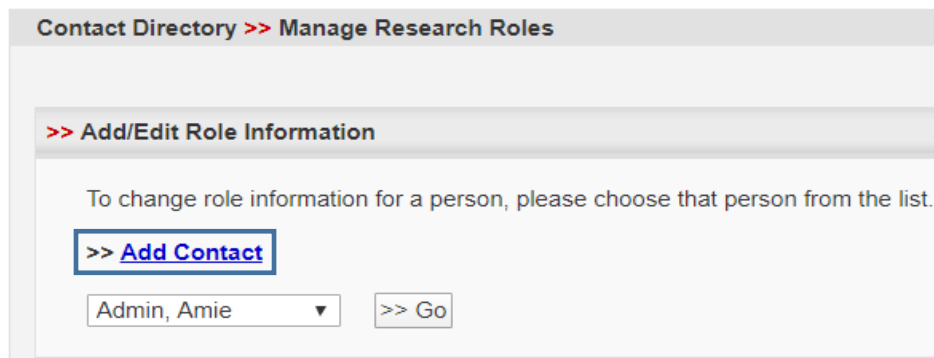
A [three-minute video](#) on how Role Managers add/remove roles in Cayuse is available. *If video doesn't start on first try, refresh and try again*

### Adding a Research Contact

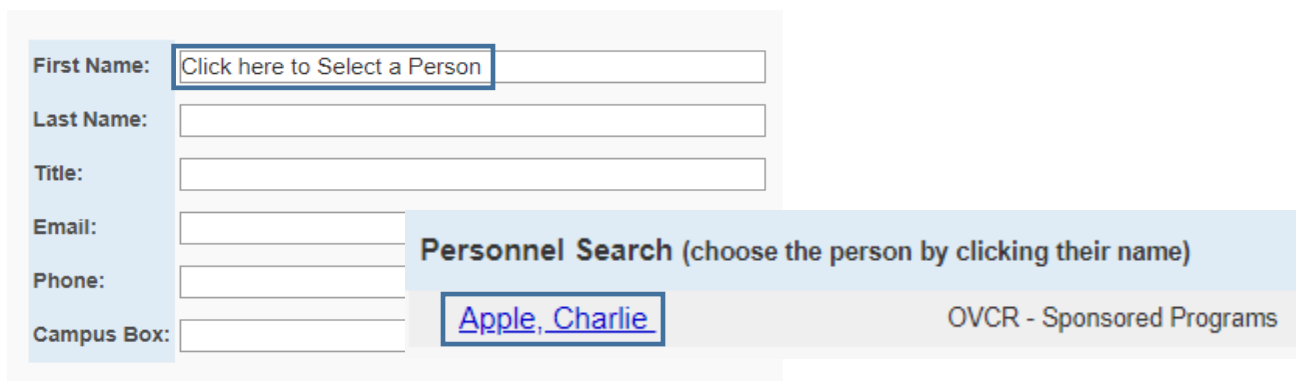
Role Managers must first add an existing user as a **Research Contact** to assign departmental roles. From either **Cayuse SP** or the **Research Contacts** page, select **More** then **Manage Roles**.



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



Search for the person to add:

A screenshot of a personnel search form. The form has several input fields: 'First Name:', 'Last Name:', 'Title:', 'Email:', 'Phone:', and 'Campus Box:'. The 'First Name' field contains the text 'Click here to Select a Person' and is highlighted with a blue box. Below the form is a blue banner with the text 'Personnel Search (choose the person by clicking their name)'. Below the banner is a search result for 'Apple, Charlie' which is highlighted with a blue box. To the right of the search result is the text 'OVCR - Sponsored Programs'.

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

Enter a keyword to locate the person you are looking for:

Last name

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**.

My Dashboard

**Research Contacts**

View Roles By Unit

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

## Delete a Role

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

Role Department:  
**OVCR - Sponsored Programs**

Select **Role** to add.

Role Department:  
**OVCR - Sponsored Programs**

Select Role Below:

Award Data Access	Add Role
Please Make A Selection	
<b>Award Data Access</b>	
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 **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 )	<b>Remove Role</b>

Select **Add Role**.

Role Department:  
**OVCR - Sponsored Programs**

Select Role Below:  
Award Data Access Add Role