Cayuse SP – UC Davis
Handbook for Role Managers

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## Role Definitions

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<th>Roles</th>
<th>Description</th>
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| **IPF Approver**                   | An individual designated with signing authority to review and approve proposals on behalf of his or her department. 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.  
  ➢ 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.  
  ➢ IPF Approvers access proposals for review from the Department Approval Inbox in Cayuse SP.  
  ➢ 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 **Cayuse SP Role Delegation Authorization form** to [ORCayuseHelp@ucdavis.edu](mailto:ORCayuseHelp@ucdavis.edu). |
| **Role Manager**                   | An individual designated by the Dean or Department Head to add and remove roles for departmental personnel within Research Contacts.  
  ➢ Department Chairs/Center Directors and/or Deans may request a Role Manager be added to their unit by emailing [ORCayuseHelp@ucdavis.edu](mailto:ORCayuseHelp@ucdavis.edu).  
  ➢ 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.  
  ➢ 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. |
| **Pre-Award Spending Approver**    | An individual designated with signing authority to review and approve Pre-Award Spending Requests. 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.  
  ➢ 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 **Cayuse SP Role Delegation Authorization form** to [ORCayuseHelp@ucdavis.edu](mailto:ORCayuseHelp@ucdavis.edu). |
| **Award Data Access**              | View departmental award data contained in Cayuse SP through the Awards in My Department dashboard.                                                                                                                                                                                                                                        |
| **Proposal Data Access**           | 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. 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.                                                                                     |
View Department Role Assignments

All users may view Role Assignments for any department/unit by following the instructions below.

1. Use Mozilla Firefox for best results
2. Login to https://ucdavis.cayuse424.com/ with Kerberos ID and Password
3. Select **Research Contacts** from the main Cayuse Research Suite landing page, under System Administration Applications

4. Under the Unit List subheading, select **List**.

    a. Select the appropriate department form the Organizational pop-up window
5. Select **View**
   a. Users will be listed on the left and the Roles on the right (Note: See [Role Definitions](#) for definitions)
Managing User Roles

Adding a Research Contact

Role Managers must first add an existing user as a Research Contact to assign departmental roles.

1. From the Research Contacts page, select Manage Research Roles in the upper navigation bar

2. Select Add Contact under Add/Edit Role Information

3. Search for the person to add
   a. Put the cursor in the First Name field
   b. Enter the first part of the person’s last name in the search field
   c. Select Search

4. Select the person’s name you want to add in the search results. This will populate the First Name, Last Name, Title, Email, Phone, and Campus Box,
5. Select **Add Contact**

Viewing and Managing Assigned Roles

Once a user has been added a Research Contact, the associated roles may be viewed and edited.

1. If the person has not previously had any roles assigned, add that person as contact, otherwise skip to step 2
2. From the Research Contacts page, select Manage Research Roles in the upper navigation bar

3. Select the **relevant user** by using the drop-down menu select the person you wish to manage
   a. Select Go
4. Revise the role:
   a. To add Role:
      i. Select the relevant Unit
      ii. Select the role from the drop-down
      iii. Select Add Role

   b. To remove a role, select **Remove Role** to the right of the role(s) you wish to remove from the contact