Cayuse SP – UC Davis

Handbook for Role Managers

Contents

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

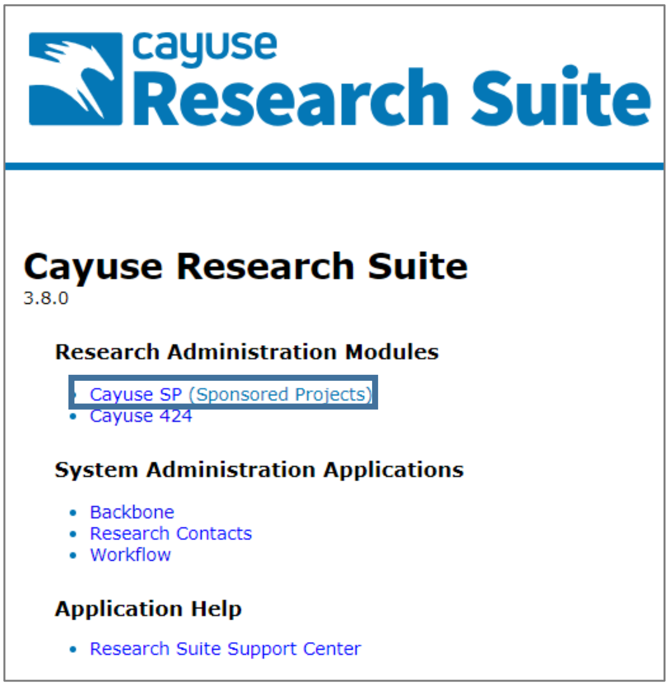
Following are the **only** Cayuse SP roles used at UC Davis.

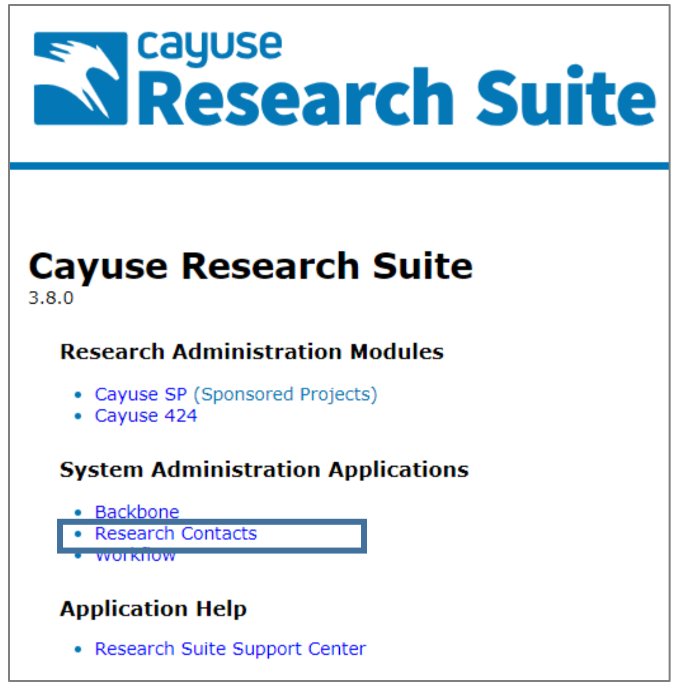
Roles	Description
IPF Approver	An individual designated with signing authority to review and approve proposals on behalf of his or her department. Although all IPF Approvers for a given department receive an email notifying them when a proposal requires review, only one IPF Approver is required to approve 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.
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 . ➢ 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.
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.

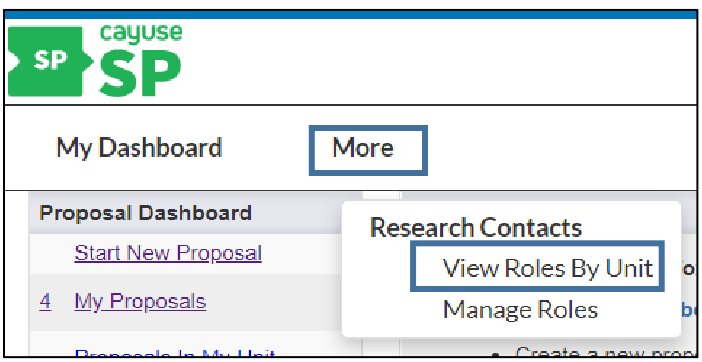
Access Role Management

Option 1: From Research Contacts

Option 2: From Cayuse SP

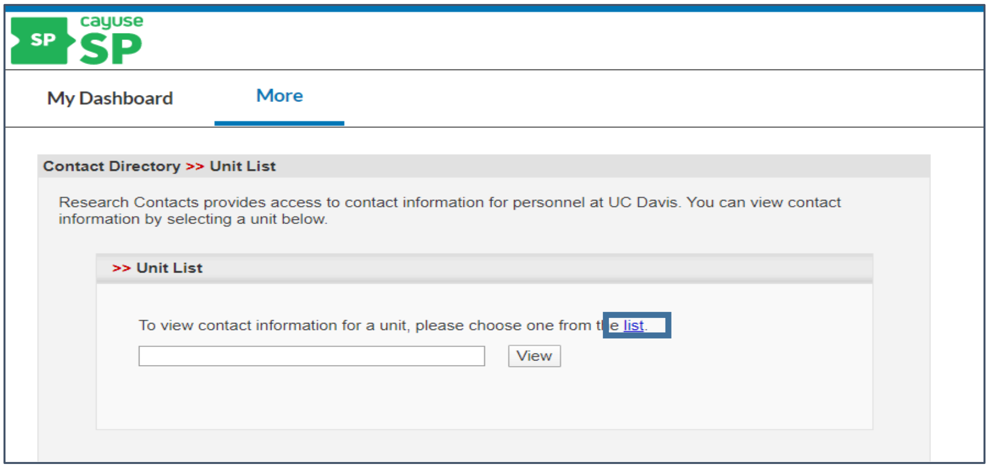


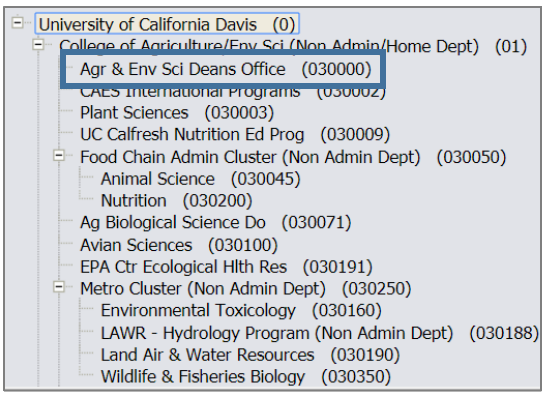


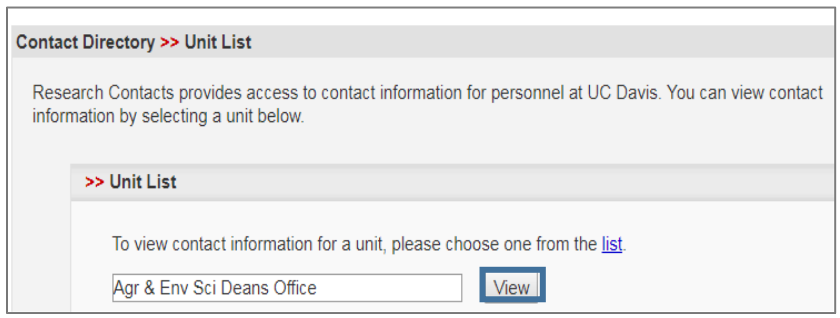


View Unit Role Assignments

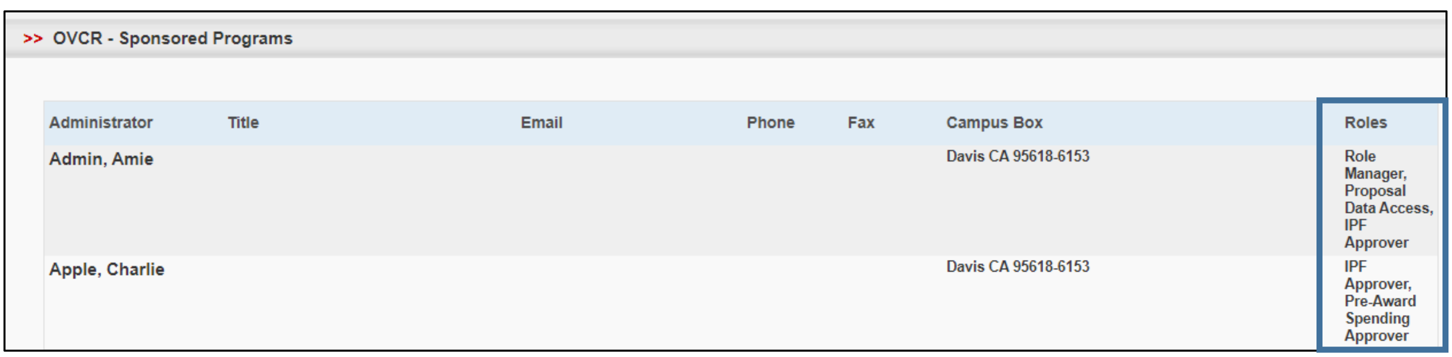
Find the unit.







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



>> OVCR - Sponsored Programs

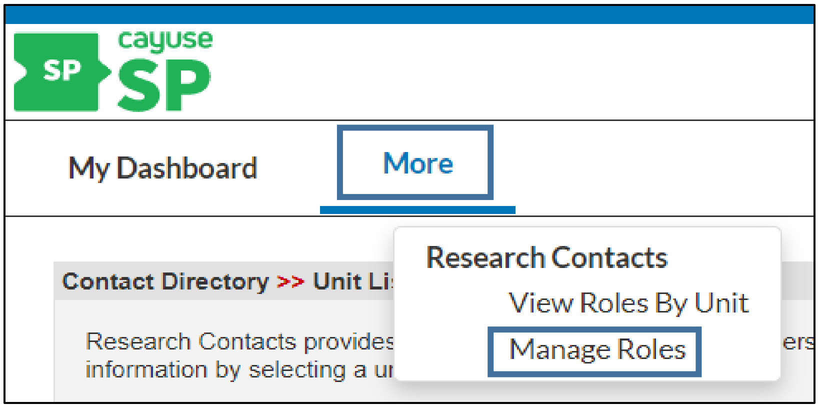
Administrator	Title	Email	Phone	Fax	Campus Box	Roles
Admin, Amie					Davis CA 95618-6153	Role Manager, Proposal Data Access, IPF Approver
Apple, Charlie					Davis CA 95618-6153	IPF Approver, Pre-Award Spending Approver

Managing User Roles

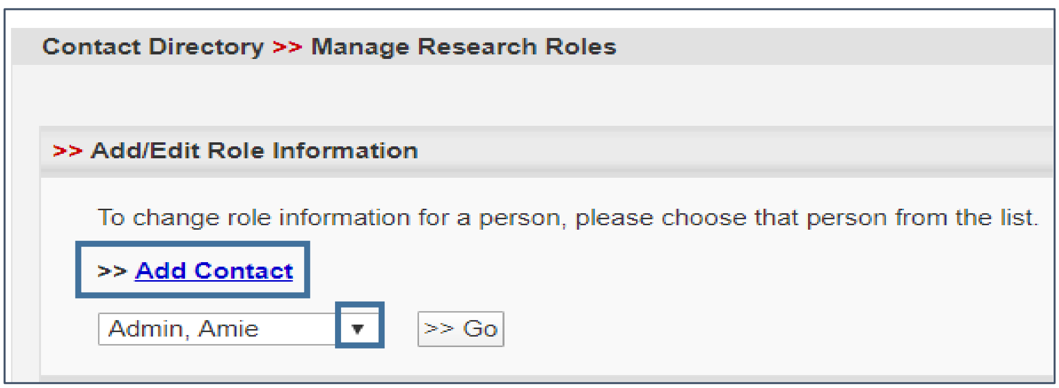
Adding a Research Contact

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

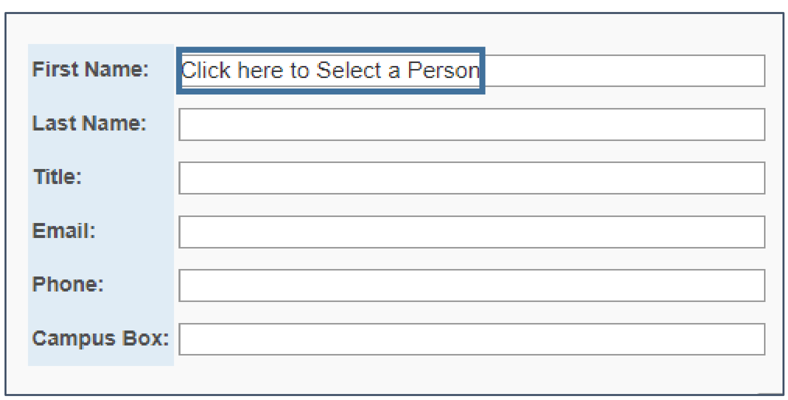
From either Cayuse SP or the Research Contacts page, select “More” then “Manage Roles”.

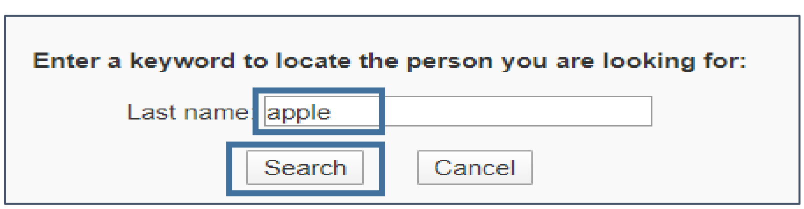


If the user is not on the list, select “Add Contact”.

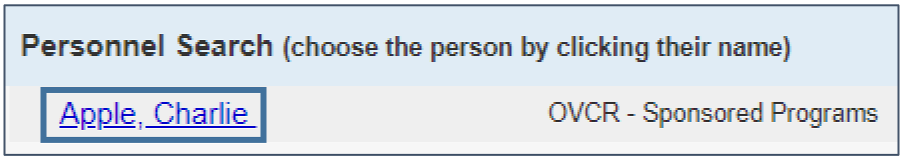


Search for the person to add:

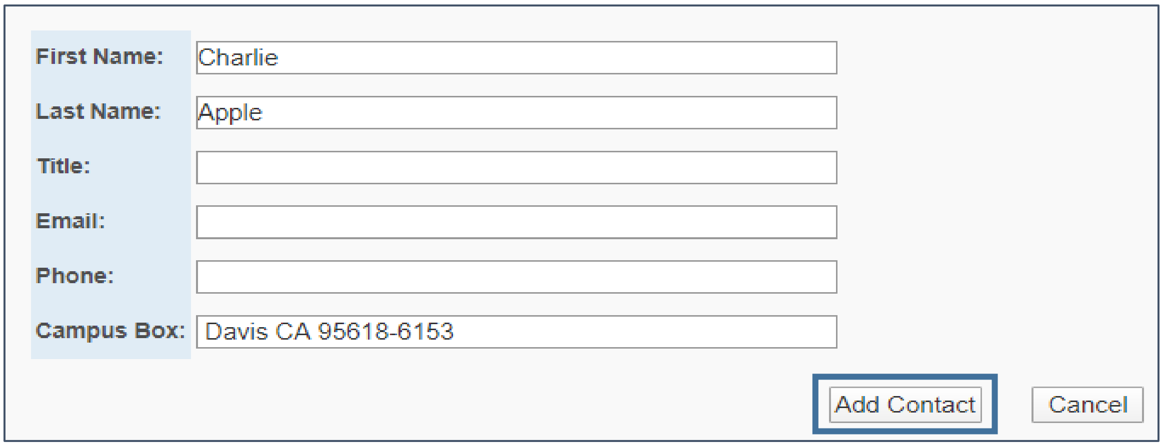




Select the person's name you want to add in the search results.



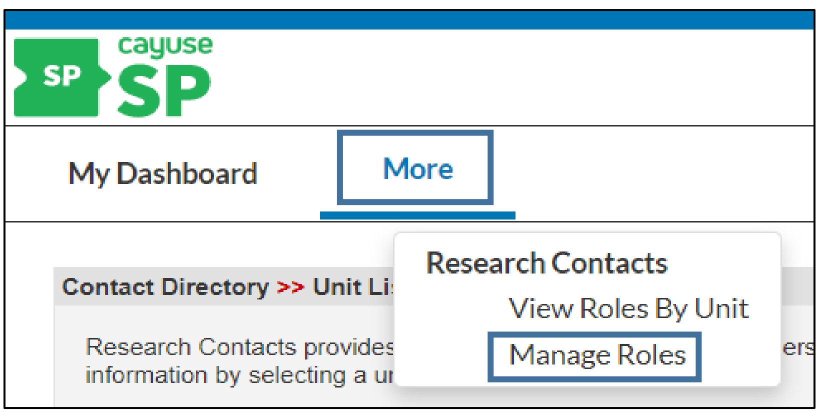
Select "Add Contact".



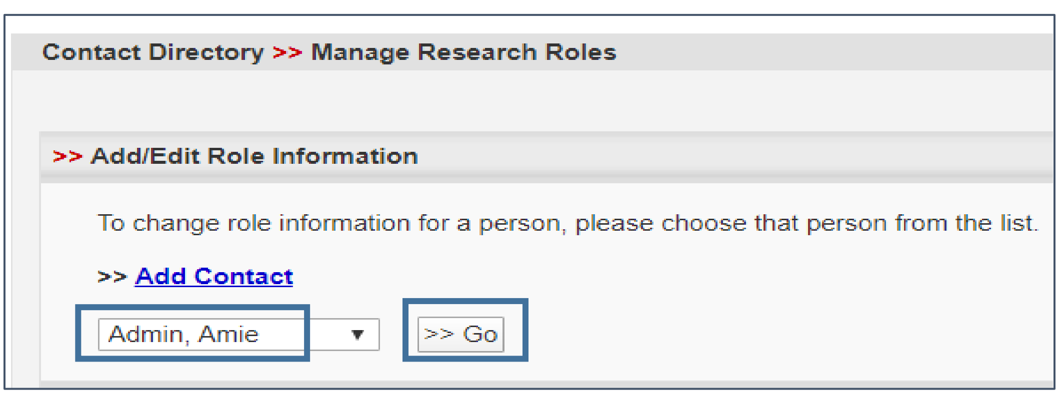
Adding and Deleting Roles

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”.



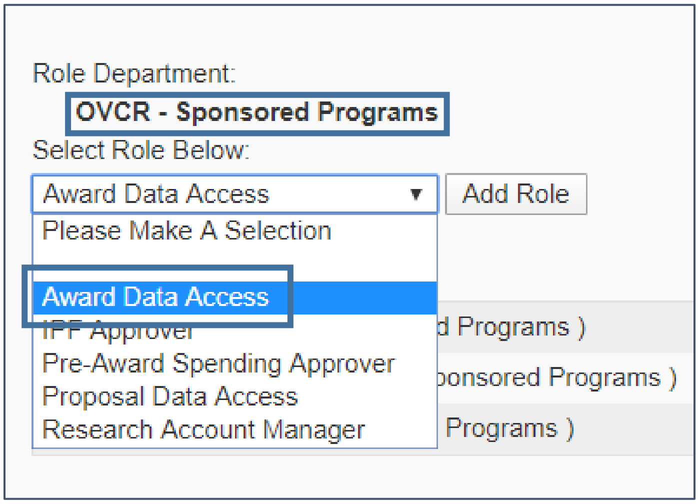
Select the relevant person’s name and then select “Go”.



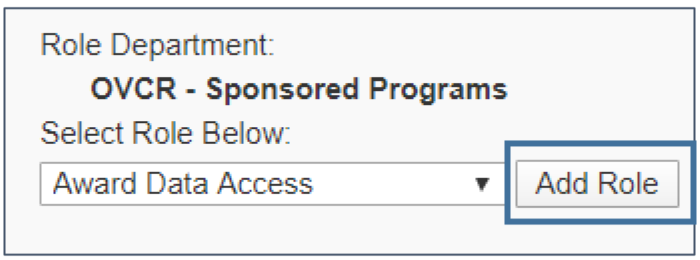
Add a Role

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

Select the Role to add.



Select “Add Role”.



Delete a Role

Select “Remove Role” next to the relevant role.