Understanding Roles and Permissions

Cayuse SP has a variety of user and administrative roles, allowing people to have access to the appropriate records. Understanding the user roles will assist you in understanding how Cayuse SP function.

Ordinary users, such as PIs and the Research Team, have access to individual Cayuse SP Proposal and Award records where they are named, or Proposal records that they have created.

Being named on a proposal record implies (part of the Investigative Research Team):

- **Write** access to the proposal record before routing.
- **Read** access to the proposal record during and after routing.

Being named on an Award implies:

- **Read** access to the award, project (grant), account (fund), subcontract, and proposal record.

The creator of a particular proposal has enhanced rights, such as the ability to delete the proposal.

Roles & Permissions in SP

Unit (Department) Admins such as the Department Head, Dean, VPR, Center Directors, or their delegates can view unit records and take actions based on their specific role.

- IPF Approver
- Pre-Award Spending Approver
- Award Data Access
- Proposal Data Access
- Research Account Manager

**IPF Approver** (Dean/VPR/Department Head/Center Directors)

An IPF Approver is an individual designated with signing authority to review and approve proposals on behalf of his or her department. 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 Unit Approval Inbox in Cayuse SP.

**Research Account Manager (Financial/Business Managers)**

A Research Account Manager is an individual designated as the departmental contact person to receive research-related correspondence via email regarding Award.

**Pre-Award Spending Approver (Dean/VPR/Department Head/Center Directors)**

A Bridge Funding Spending Approver is an individual designated with signing authority to review and approve Bridge Funding Spending Requests. Bridge Funding Spending Requests for a proposal can be prepared and submitted electronically in Cayuse SP.

Once submitted, all departmental Bridge 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. All Bridge Funding Spending Requests must be authorized by Pre-Award Spending Approvers at both the department level and the school level.

**Award Data Access (Dean/VPR/Department Head/Center Directors/Financial/Business Managers)**

View departmental award data contained in Cayuse SP through the Awards in My Unit dashboard.

**Proposal Data Access (Dean/VPR/Department Head/Center Directors/Financial/Business Managers)**

View proposals in a given Admin Award Department, as well as access those proposals where that department is named, through the Proposals in My Unit 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.

Role Manager