*Overview*

This guide is for administrators managing users in the system for the following applications: *Animal Oversight, Hazard Safety, Training Records, Animal Procurement, Animal Inventory, Vet Care, Billing, Services, and Schedules*. Administrators must be assigned the RS Administrator role in platform to manage accounts. Section I details how to add a new user to the platform admin. Section II details how to assign or update user roles. Section III outlines how to manage PI groups in the Site Management tool.

*Sites Required – Reach out to your admin or Cayuse team if you need assistance with URLs*

Cayuse Platform site (Example: https://customer.app.cayuse.com/)

Cayuse Site Management tool site (Example: https://customer.app.cayuse.com/esAdminPage.wc?1)

*Supported Browsers*

Chrome, Safari, and Firefox

*Section I. Creating new users in Cayuse platform*

1.  Only users with the RS Administrator role will be able to create new accounts and manage existing accounts on Cayuse platform. Log into the Cayuse platform site. Select Admin from the Product dropdown menu.

2.  Click on Users. From this screen, you can use the search filters to locate an existing account or click 'New Person' to add a new account manually. Accounts can also be added or updated via the HR Connect tool. To add a new person, fill out the first and last name. If HR connect will be used by your institution, you must also include the person's Employee ID. This field is used to compare accounts during the HR Connect process. Toggle the Active switch to Yes and click Save.

3.  Complete the relevant sections (outlined below) of the person profile. New accounts will need the email address to be filled in on the Contact Info Section. Internal Associations will feed into the Animal Oversight, Hazard Safety, and Vivarium Operations applications.

    -   **Profile:** Edit the person's name, academic degrees, and whether or not that person is <u>active in your system</u>.
    -   **Contact Info:** Edit the person's email, phone and fax numbers, and physical address.
    -   **Internal Associations:** Edit or add the person's unit(s) (generally an institutional department) and the title they have within the unit(s).
    -   **External Associations:** Edit or add the person's external associations and the title they have within the external association(s).
    -   **User Account & Roles:** <u>Edit or add the user account of the person</u>. The user account is how the individual will log in. You can also assign the user roles on this screen, which will grant them additional permissions within the Cayuse products.
    -   **Trainings & Certifications:** Edit or add trainings and certifications to the person's profile.

4.  Under User Account & Roles, click + New Account. Update the email and username as needed. If this Cayuse platform site has Single Sign On enabled, please use the SSO account username for this user. If SSO is not enabled, you will need to send an activation email to the user. This will send them a temporary password for account creation.
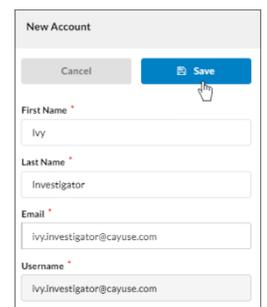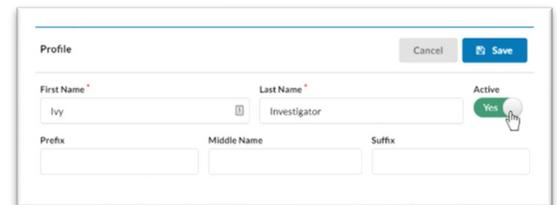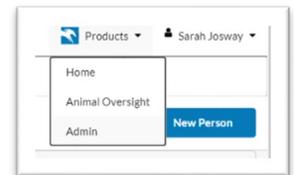
*Section II. Adding or updating user roles in the Cayuse Platform site*

1. Users will automatically be assigned the role of Cayuse Product User by default. You can assign the user additional roles, which will grant them extra permissions within their Cayuse product. Roles are defined in the at the end of this section.

2. To update the roles of an existing user, first search for the account under Users in Cayuse Platform admin. Then open the Account & User Roles section in the person profile. Add or manage the existing roles. Unit-based roles allow admins to assign users a role for a certain unit or units.

   • Note: For the Cayuse Product User and Cayuse Application Link Viewer roles, the units default to All Units. Other roles will need to have the Unit defined. It is important to assign the correct unit to access the applications. Please refer to your admin or Cayuse team if you need assistance with this selection.

3. After roles have been managed in a person's account, the user may need to log out and log back into the system to see the role updates.



| Role | Description | Units | Sub-units | |
|------|-------------|-------|-----------|--|
| Animal Facility Staff Veterinarians | | Institution Root | Yes | 🗑 |
| Animal Oversight and Hazard Safety Researcher Staff Members | | Institution Root | Yes | 🗑 |
| Animal Oversight Committee Member | | Institution Root | Yes | 🗑 |
| Animal Oversight Office | | Institution Root | Yes | 🗑 |
| Cayuse IACUC Link Viewer | | All Units | Yes | 🗑 |
| Cayuse Product User | | All Units | Yes | 🗑 |
| Hazard Safety Member | | Institution Root | Yes | 🗑 |

## Cayuse Roles

| Role | Application(s) | Permissions |
|------|----------------|-------------|
| Cayuse Product User | All | Default role. Can access the Cayuse landing page. Every active user should have this role. |
| RS Admin Administrator | Platform Admin | Maintains system settings within the Admin module on the Cayuse Platform. |
| RS Admin Viewer | Platform Admin | Can access a read-only view of the Admin module on the Cayuse Platform. |
| HR Connect Administrator | Platform Admin | Manages the HR connect updates |
| Animal Buyer Staff | Animal Procurement | Manage ordering and Receiving Workflow for entire facility |
| Animal Care Staff | Vet Care | Manage Animal Care activities |
| Animal Census Coordinator | Animal Inventory | Manages animal inventory activities |
| Animal Facility Billing Contact | Billing | Financial and Invoicing workflow for accounts they are listed as Billing Contact on |
| Animal Facility Business Office Staff | Billing/Services | Manage financial aspects |
| Animal Facility Diagnostic Lab | Vet Care | Perform Vet Care Activities |
| Animal Facility Global Access | Vet Care | Global view only access to all applications - Can perform reports and searches |
| Animal Facility IT Staff | Animal Oversight, Hazard Safety, Animal Procurement, Animal Inventory, Vet Care, Billing, & Services | Allows user to access the Site Administration to manage role permissions - currently not working. (anyone with the URL can access the Administration site) |
| Animal Facility Staff Veterinarian | Vet Care | Manages all aspects of Vet Care |
| Animal Facility Supervisor | Animal Procurement, Animal Inventory, Vet Care, and Schedules | Manage Housing requirements as well as define the schedule in the Schedules application |
| Animal Health Technician | Vet Care | Manage workflow for animal health related activities |
| Animal Husbandry Staff | Vet Care | Manage Husbandry activities for respective housing facilities |
| Animal Oversight Committee Member | Animal Oversight | Participates in protocol reviews and commitee meetings |
| Animal Oversight Office | Animal Oversight | Manages protocol workflow; builds set up dictionaries; manages committee meetings etc. |
| Animal Receiving Technician | Animal Procurement | Manage animal receipt workflow |
| Animal Research Grants & Admin Staff | Animal Oversight and Hazard Safety | View only access to protocol funding |
| Cayuse Animal Inventory Link Viewer | Animal Inventory | Allows access to see Inventory module |
| Cayuse Animal Procurement Link Viewer | Animal Procurement | Allows access to see Procurement module |
| Cayuse Animal IACUC Link Viewer | Animal Oversight | Allows access to see Animal Oversight module |
| Cayuse Resource Scheduling Link Viewer | Schedules | Allows access to see Scheduling module |
| Cayuse Veterinary Care Link Viewer | Vet Care | Allows access to see Veterinary Care module |
| Animal Oversight & Hazard Safety Researcher Accounting Staff | Animal Procurement | Manage the researcher's accounts |
| Animal Oversight & Hazard Safety Research Staff Member | Animal Oversight, Hazard Safety, Animal Procurement, Animal Inventory, Vet Care, Billing, & Services | Protocol Creation; Ordering, Census, Vet Care, and Invoicing workflow (PI can submit/PI member cannot) |
| Animal Oversight & Hazard Safety Training Coordinator | Animal Oversight & Hazard Safety | Responsible for setting up training events and managing personnel training records |
| Biosafety Officer | Hazard Safety | Participate in IBC protocol reviews; assist PIs with protocols |
| Cayuse Animal IBC Link Viewer | Hazard Safety | Allows access to see Hazard Safety module |
| Cayuse Training Management Link Viewer | Training Records in Animal Oversight & Hazard Safety | Allows access to see Training module |
| Hazard Safety Member | Hazard Safety | Participates in protocol reviews and commitee meetings |
| Hazard Safety Occupational Health | Hazard Safety | View protocols in draft and in review |
| Hazard Safety Office | Hazard Safety | Manages protocol workflow; builds set up dictionaries; manages committee meetings etc. |

*Section III. Setting up PI user groups in Site Management (Note: this is a different URL in this format https://customer.app.cayuse.com/esAdminPage.wc?1 Reach out to your admin or Cayuse team for assistance.)*

Members assigned to a PI group will be able to create drafts for the PI to review and submit. When the PI group member clicks Submit from a protocol or amendment draft, the PI will receive an email notifying them a submission is ready for review.

1. Navigate to the Cayuse Admin site and click on **Site Management.**
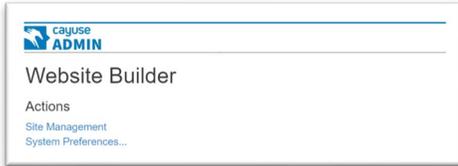
    

2. Select your site in the grid to highlight it in yellow. Click on the new tab that with the site name. A  list of users will be displayed. Use the magnifying glass tool to search for the user.
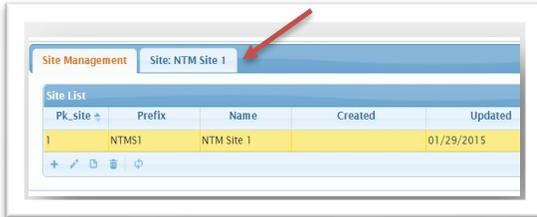
    

3. Select the name of the PI and click the new tab that opens to the right. Click **+Members** from the actions.
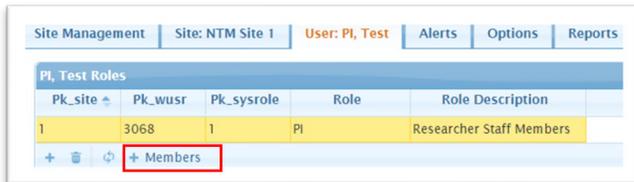
    

4. Click the **+** next to the name of the user(s) you wish to add to the group. The name will move from the right-hand column to the left-hand column. Use the **–** to delete users from the PI group. Click **Save**.

    

5. When the PI group member logs into the applications, they will be able to select the PI's name from a dropdown menu to access their submission

    

*For more support, please review the guides at https://support.cayuse.com.*