



The Research Foundation for the State University of New York Pre-Award and Compliance System (SUNY PACS)

User Management Guide

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| Date | Author | Change Reference |
|-----------|--------------|-----------------------------------------------------------------------------------------------------------------------------------|
| 10/1/2016 | Lisa Kelly | Created Document V1.0 |
| 1/26/2017 | Lisa Kelly | Revised based on Initial Review with team. V1.2 |
| 2/2/2017 | Lisa Kelly | Revised based on second review with team V1.3 |
| 4/12/2017 | Lisa Kelly | Added Section 4 |
| 5/1/2017 | Robin Powers | Updated Grants Roles section |
| 6/20/2017 | Lisa Kelly | Update based on the New PACS landing pages |
| 8/1/2017 | Lisa Kelly | Updated items for section 4 and revised landing pages |
| 10/23/17 | Lisa Kelly | Many Updates to Section 4, roles and Appendix B |
| 4/4/2018 | Chris Chen | Updated for Portal 8 |
| 5/16/2018 | Chris Chen | Updated per Kamakshi’s comments |
| 1/23/2020 | Chris Chen | Updated 3 new responsibilities for Campus Agreements Viewer, Central Office Agreements Viewer, and Research Project Administrator |

1. Introduction

This Guide is intended for use by the User Manager (UM) while processing the day to day activities of maintaining user records and processing user self-registrations.

The UM is responsible for carrying out the following tasks:

- Processing self-registrations
- Adding roles to users account
- Disable user accounts
- Maintaining user information such as address, email addresses and title
- Maintaining module specific user data

Purpose:

Self-registration allows non-employees such as students and third party individual users to be entered into SUNY PACS system. Self-Registration process is used to authorize users who are not loaded through the people load to gain access to the SUNY PACS system. See Appendix B for information on users loaded thru the people load process. Below is an example (See Section 1: Figure 1) of a user requesting access using the Self-Registration form.

Section 1: Figure 1

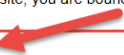
Local Login

User Name:

Password:

[Forgot password?](#) [Forgot user name?](#)

After signing into this site, you are bound by the terms and conditions set forth when you received your account.

Request Account 

If you need an account in this system, please apply by submitting your details using the following form. You will be contacted once your setup is complete.

Please complete the following details

* First Name:

* Last Name:

* Campus Email Address:

Phone Number:

Campus Login ID:

* Campus Affiliation:

* Department:

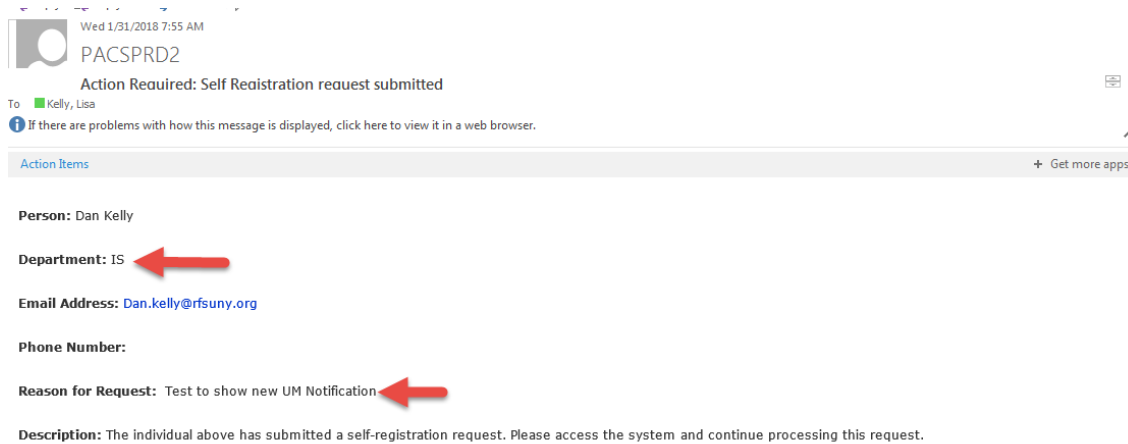
* Reason for Request:

Notification:

The notification will get sent to the UM at the location the new user selects in the field “Campus Affiliation” in the self- registration form. Below is a sample (See Section 1: Figure 2) of the email notification.

The notification from email (ie no-reply-dev-sp@rfsuny.org) is obtained from the “From email” field in the campus common properties section. This email is specific to each campus. See Campus Manager Guide for details.

Section 1: Figure 2



*Note we do not recommend campus is live with SUNY Federated Single Sign-on to have user self-register, unless the user record doesn't exist in campus HR (student, third party individual users, etc.).

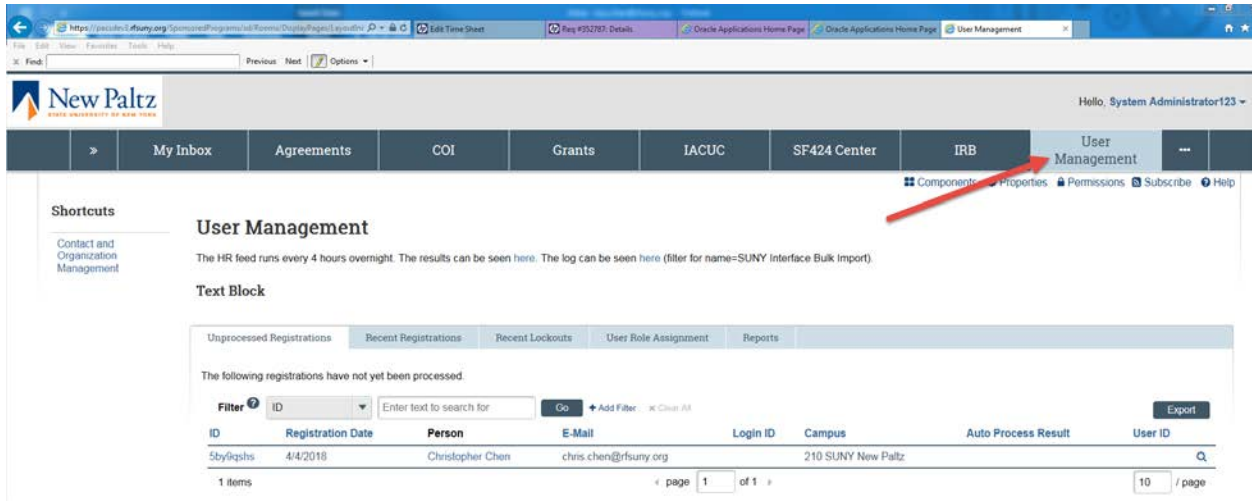
2. Process Self-Registration

Purpose:

The below steps outline the process to review, process or decline self-registration requests. The UM must have the role of User Manager in order to complete the steps listed below.

1. UM will receive notifications of any new request for their campus or the UM can review all requests within the SUNY PACS system.
2. Sign on and select User Management (See Section 2: Figure 1)

Section 2: Figure 1



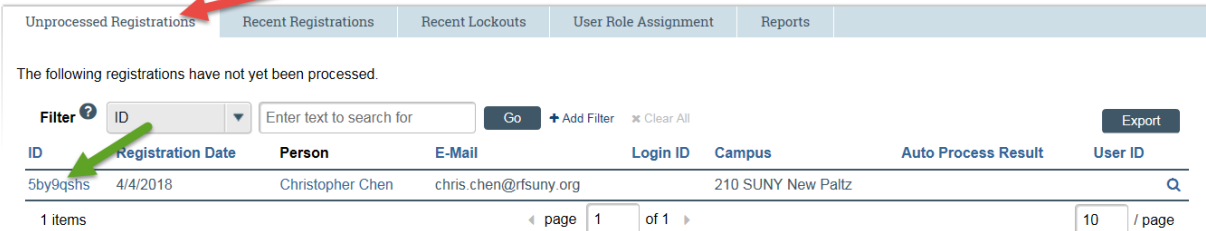
3. Click Unprocessed Registrations (See Section 2: Figure 2), this will display all of the requests for self-registration that have not been processed or declined.
4. Click on the name or ID to open up the specific request to review the data submitted.

Section 2: Figure 2

User Management

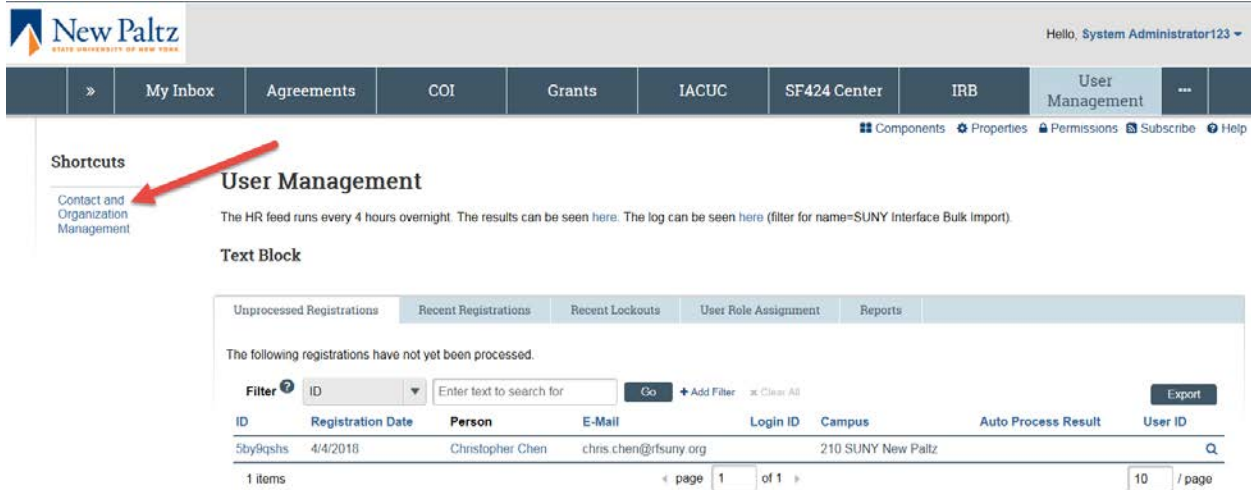
The HR feed runs every 4 hours overnight. The results can be seen [here](#). The log can be seen [here](#) (filter for name=SUNY Interface Bulk Import).

Text Block

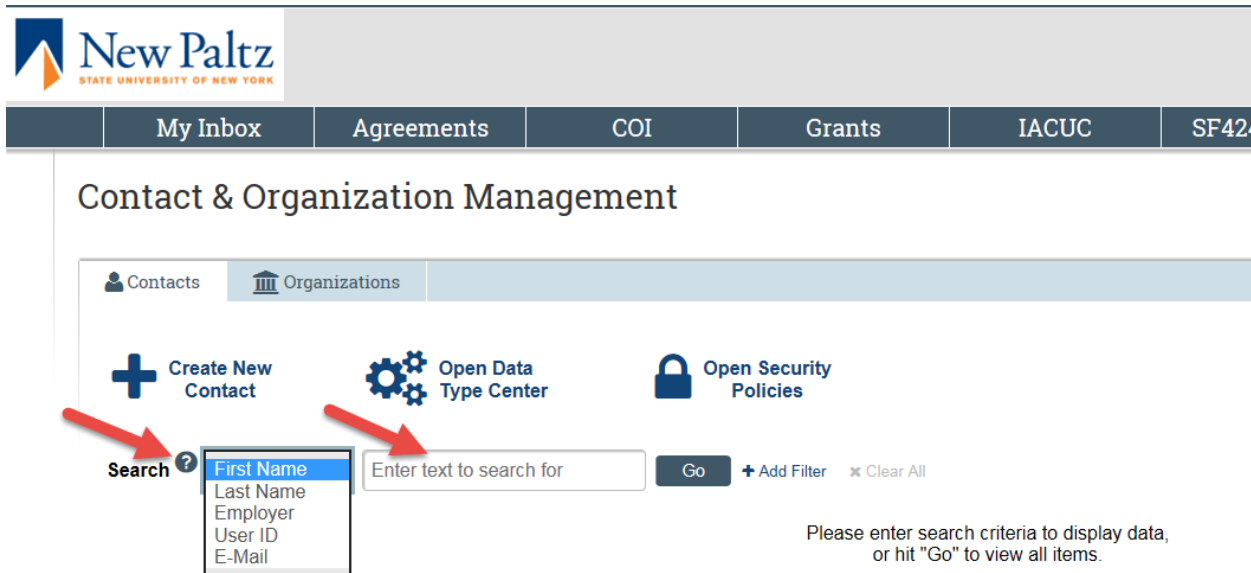


5. **IMPORTANT: Always verify the user doesn't already exist within the system to prevent duplicate records from being created.**
6. To query existing user, select Contact and Organization Management in the top left hand corner (See Section 2: Figure 3). Then in the Contact and Organization Management section (See Section 2: Figure 4), enter the users' information (choose from First Name, Last Name, Employer, User ID, and Email). Then select Go, this will display all existing users under the filter criteria.

Section 2: Figure 3



Section 2: Figure 4



If the user already exists within SUNY PACS, the request should be declined (See Section 2: Step # 12) and the UM must notify the requestor that an account already exists for them. The UM should also ensure the user has the roles needed to perform their job.

Important: When a user requests an account an initial user record will be created BUT they will NOT have an account (click on the account tab which will be blank) for this record. If you see 2 user records when you query then 1 will be the self-registration record and the other will be an existing account. Once the registration is declined because they already have an account the record created by the self-registration request will be removed.

7. If the user does not exist, proceed with creating the users account. Click on the user name under the Unprocessed Registrations tab, which brings user to the Workspace page. Then Select Detail

(SUNY) on the left-hand side (See Section 2: Figure 5), enter basic information such as phone numbers, address and email addresses. If needed there is also a field to put in an account expiration date.

Important: The address, phone, title and email are required if they will be key personnel or a principal investigator on a proposal. This information will come out on the SF424 person profile if the user is selected on the Grants proposal.

Section 2: Figure 5

The screenshot displays a user profile page. At the top, a navigation bar contains several tabs: 'My Inbox', 'Agreements', 'COI', 'Courses', 'Grants', 'SF424 Center', 'IACUC', and 'IRB'. Below the navigation bar, the page is divided into two main sections: 'Edit Details' on the left and 'Summary' on the right. The 'Edit Details' section contains a list of links: 'COI Properties Admin', 'Detail (SUNY)', 'Grants Properties (SUNY)', 'HR Interface Properties', 'Research Profile', and 'Restrictions'. The 'Detail (SUNY)' link is highlighted with a red arrow. The 'Summary' section has two tabs: 'Details' and 'Grants Info'. The 'Details' tab is selected, showing the following information:

- Name:** Christopher Chen **Title:**
- Person**
 - Honorific:
 - First:** Christopher
 - Middle:
 - Last:** Chen
 - Title:
- RF Employee Number:**


 On the right side of the 'Summary' section, there is a note: 'The fields that are bold italic may be maintained by the HR feed. If that is the case then that will reverse changes you might make here next time i'. Below this note are several fields:

- Employer (Campus):** 160 Buffalo State College
- Department:**
- Time Zone:
- Bulk Delivery Preference:
- Date Created: Monday, A
- Date Last Updated: Monday, A
- Date Last Imported:
- Date of Last Login:
- Date Self Reg Processed:
- Date Account Expires:

- To complete the process, click on Process Self Registration under the Activities section on the left-hand side (See Section 2: Figure 6).

Section 2: Figure 6

Edit Details

- COI Properties Admin
 - Detail (SUNY)
 - Grants Properties (SUNY)
 - HR Interface Properties
 - Research Profile
 - Restrictions
- ### Activities
- Request HR Refresh
 -  Process Self Registration
 - Decline Self Registration
 - Update COI Training Date from Training Integration
- Admin Staff Create Research Disclosure Certification
 - Email User Manager With Self Registration Request

Summary

Name: Christopher Chen Title:

Details

Grants Info

Person

Honorific:

First:
Christopher
Middle:

Last:
Chen
Title:

RF Employee Number:

Phone

Business:

Home:

Mobile:

The fields that are bold italic
if that is the case then that will reverse ct

Employer (Campus):
210 SUNY New Paltz
Department:

Time Zone:

Bulk Delivery Preference:

Date Created:
Date Last Updated:
Date Last Imported:
Date of Last Login:
Date Self Reg Processed:
Date Account Expires:
Expires On Notes:

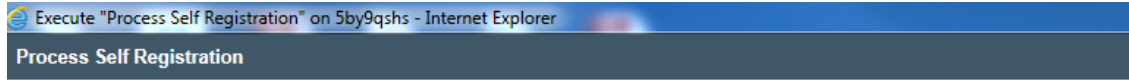
E-mail

Preferred E-mail:
chris.chen@rfsuny.org
E-mail 2 (supplied by I

9. Complete the Process Self-registration form (See Section 2: Figure 7), the below fields are required when filling out the form. Once complete select OK.
- ID - ID assigned by the system
 - User Name, Phone and email will default in from the self-registration form
 - Employer – Defaults from the field Campus affiliation on the self-registration form
 - Suggested Department – The value the user enters in the self-registration form
 - Department – The actual campus department based on the user suggested department
 - Reason for request – populated from self-registration form
 - Campus Login ID – Defaults from the self-registration form
 - Assigned User ID – UM should assign the user ID which should be either the individuals email or their Campus Login ID. This will be used for login purposes and is at the campuses discretion of which value to use
 - Roles – Every user must be given the Role of “**Registered User**”. Also assign any additional roles the user needs to perform their job. (Refer to Appendix A which outlines PACS user roles)
 - Protect from HR Feed - Yes

- Use Local Login – Select yes for users processed thru self-registration
- Account Expires On – Enter a date if you know the user is temporary

Section 2: Figure 7



User Information

ID:
The ID property is used by the HR feed to identify and update records. If this same user exists in the feed or is later added with a different ID then these records will exist in parallel and not be linked.

Registration Date:

First Name:

Last Name:

Phone Number:

Email:

Account Information

Employer:

Suggested Department:

Department:

Reason for Request:

Campus Login ID:

Assigned User ID:
* Used for login and generally in the format userID@campus.edu

Roles:

| ID | Parent User Role |
|-------------------------------|------------------|
| There are no items to display | |

Protect from HR Feed? Yes No [Clear](#)

Use Local Login? Yes No [Clear](#)

Account Expires On:
Will be set to expire after default interval if left blank.

Account Expires On Notes:

- The user will receive a notification indicating their request for an account has been completed. The notification will contain their username and the temporary password as well as the link for the local login page (See Section 2: Figure 8).

Section 2: Figure 8

You have successfully created an account in the SUNY PACS system. You can now access the system via the following link: [SUNY PACS Login](#)

Username: zeke.kelly@rfsuny.org

Password: Fb3Ps5Zb

The password must be changed after the first login.

- If the request needs to be declined because the user already exists or the users access is not approved, click on “Decline Self-registration” and then OK. (See Section 2: Figure 9)

Section 2: Figure9

The screenshot shows a web application interface with a top navigation bar containing 'My Inbox', 'Agreements', 'COI', 'Grants', 'IACUC', and 'S'. The main content area is divided into 'Edit Details' and 'Summary' sections. The 'Summary' section displays information for Christopher Chen, including Name, Title, ID (5by9qshs), Registration Date (4/4/2018), First Name (Christopher), Last Name (Chen), Phone Number, Email (chris.chen@rfsuny.org), Employer (210 SUNY New Paltz), Department (210 Nutrition), Reason for Request (Graduate Thesis), and Campus Login ID. A dialog box titled 'Decline Self Registration' is overlaid on the page, containing the text 'Decline this person' and 'This registration request will be declined.' The dialog box also lists the same user information as the summary. A red arrow points to the 'Decline Self Registration' button in the left sidebar, and another red arrow points to the 'OK' button in the dialog box.

3. Update and Maintain User Accounts

Purpose:

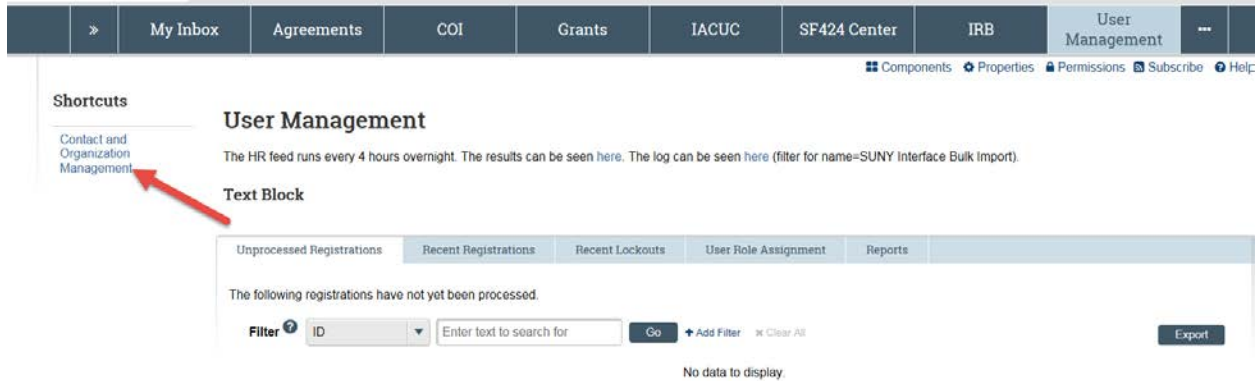
The below sections provide detail instructions on how to update user account information such as roles, address, disabling account, and module specific data.

A. Add or Remove Roles

To add or remove roles follow the below steps:

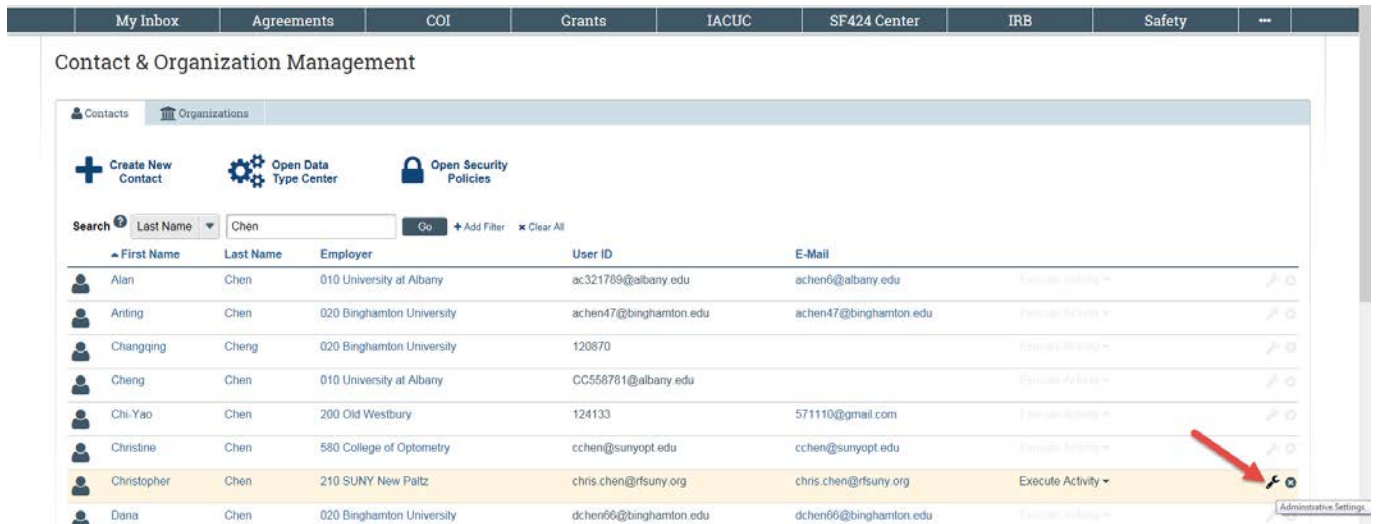
1. Query the user that needs updating. On the user management page, click on Contact and Organization Management on the top left hand corner. (See Section 3: A: Figure 1)

Section 3: A: Figure 1



2. Search for the user you wish to edit. Put your cursor on the far right side of the user you would like to edit. A “Wrench” icon will show up. Then click on it. (See Section 3: A: Figure 2)

Section 3: A: Figure 2



3. Make sure you are under the Account Tab, you can see User Roles section at the bottom. (See Section 3: A: Figure 3)

Section 3: A: Figure 3

My Inbox Agreements COI Grants IAC

Christopher Chen 210 SUNY New Paltz
Type Center Workspace Contact and Organization Management Type Center Workspace

Name: Christopher Chen Title:

Account Activities Properties Data Explorer

* User Id: chris.chen@rfsuny.org

Description:

Dashboard Template: [No Dashboard]

Default Page: Other

New Password:

Confirm Password:

Password Last Changed: 12/31/1969 3:00:00 AM

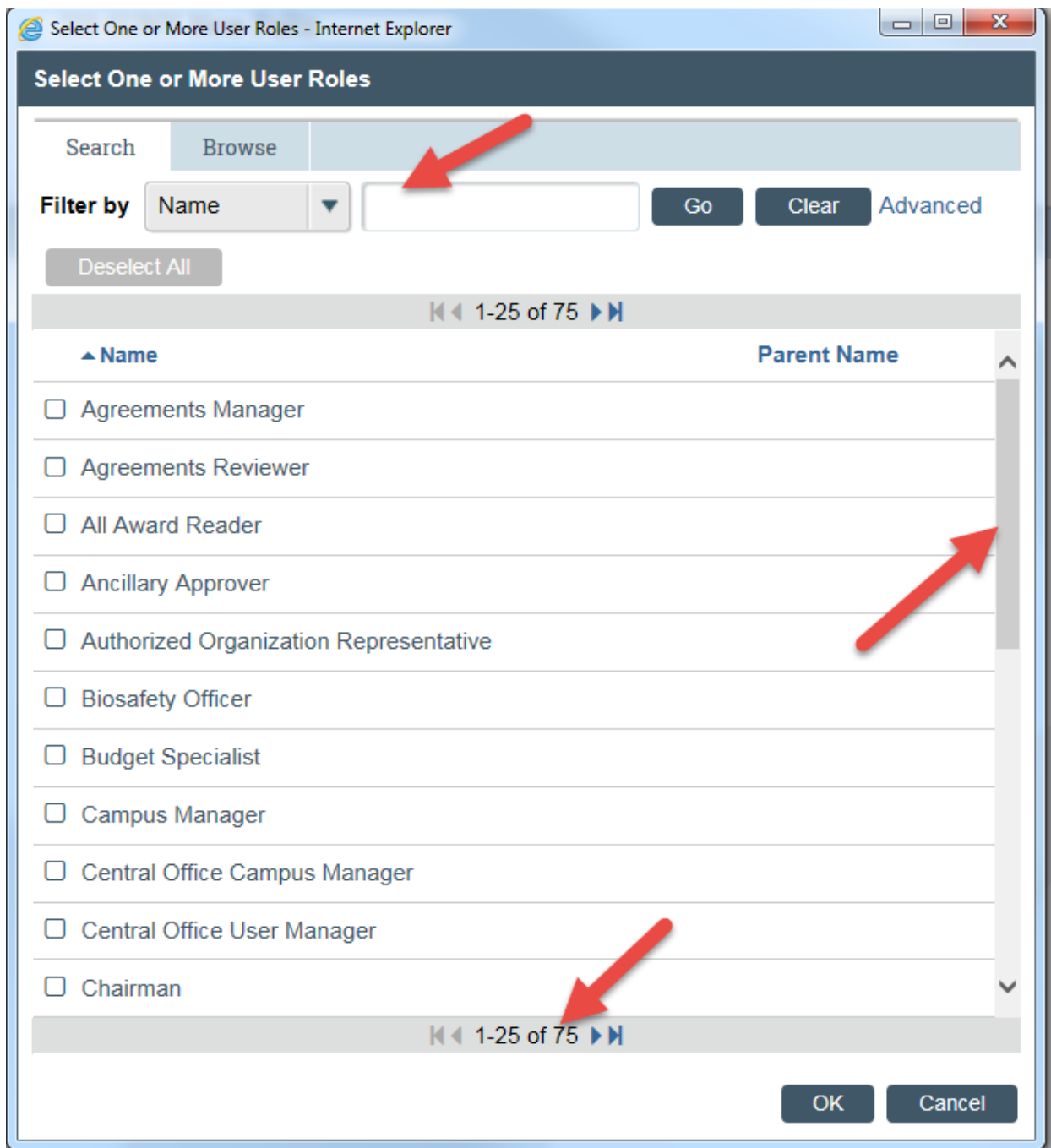
User Must Change Password At Next Login
 User Cannot Change Password
 Password Never Expires
 Account Disabled

User Roles +

Registered User
Study Staff

4. To add new roles, click on the “Plus” sign under User Roles section, showing on the screenshot above.
5. A new window will pop up. Simply search by Role Names, or browse by scrolling and page changing. select Role and OK (See Section 3: A: Figure 4)

Section 3: A: Figure 4



6. To remove a User Role, select the Role and click on Remove. (See Section 3: A: Figure 5)

Section 3: A: Figure 5

My Inbox **Agreements** **COI** **Grants**

Christopher Chen 210 SUNY New Paltz
Type Center Workspace Contact and Organization Management Type Center Workspace

Name: Christopher Chen **Title:**

Account Activities Properties Data Explorer

* User Id:

Description:

Dashboard Template: ▼

Default Page: ▼
 ...

New Password:

Confirm Password:

Password Last Changed: 12/31/1969 3:00:00 AM

User Must Change Password At Next Login
 User Cannot Change Password
 Password Never Expires
 Account Disabled

User Roles + -

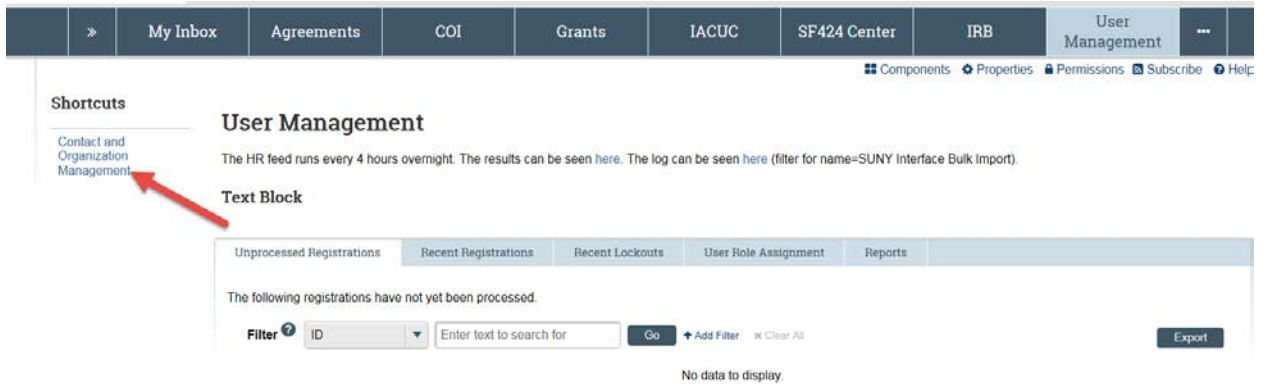
Registered User
Study Staff

B. Disable a User Account

To disable a user account, follow the below steps:

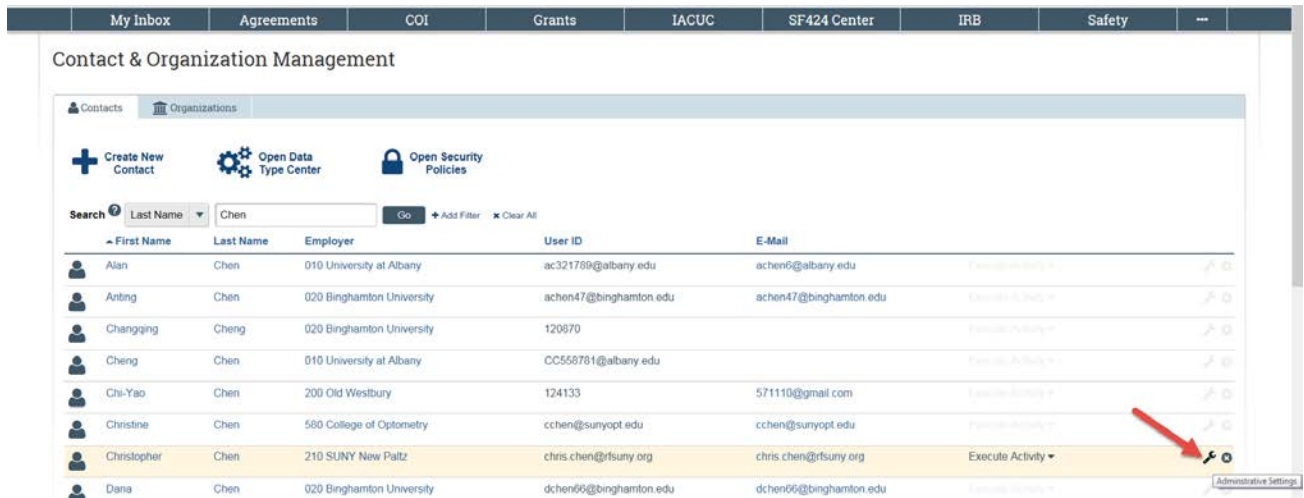
1. In the User Management page, click on Contact and Organization Management on the left hand side. (See Section 3: B: Figure 1)

Section 3: B: Figure 1



2. Search for the user you wish to disable.
3. Select the “Wrench” icon for the User you wish to disable. (See Section 3: B: Figure 2)

Section 3: B: Figure 2



4. Make sure you are in the Account tab. Click on the Account Disabled checkbox, then OK. (See Section 3: B: Figure 3)

Important: User will remain as a contact but will no longer have access.

Section 3: B: Figure 2



Christopher Chen

 Type Center
  Workspace
  Contact and Organization Management

210 SUNY New Paltz

 Type Center
  Workspace

Name: Christopher Chen **Title:**

| Account | Activities | Properties | Data Explorer |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|------------|---------------|
| * User Id: | <input type="text" value="chris.chen@rfsuny.org"/> | | |
| Description: | <input type="text"/> | | |
| Dashboard Template: | <input type="text" value="[No Dashboard]"/> ▼ | | |
| Default Page: | <input type="text" value="Other"/> ▼ <input type="text" value="Home"/> ... | | |
| New Password: | <input type="text"/> | | |
| Confirm Password: | <input type="text"/> | | |
| Password Last Changed: 12/31/1969 3:00:00 AM | | | |
| <input checked="" type="checkbox"/> User Must Change Password At Next Login <input type="checkbox"/> User Cannot Change Password <input type="checkbox"/> Password Never Expires <input type="checkbox"/> Account Disabled | | | |
| User Roles + × <div style="border: 1px solid gray; padding: 5px; width: fit-content;"> Registered User Study Staff </div> | | | |

C. Module Specific User Information

In addition to user access and roles, there are two additional settings that are maintained at the user level training records and Grants Properties. Listed below are settings that are maintained on users accounts that pertain to specific modules within SUNY PACS.

Training Records:

Purpose:

The training records are used in the Institutional Review Board, Institutional Animal Care and Use Committee, Safety, and Conflict of Interest modules. The below view allows the capability to maintain CITI Member Number. By loading a user's CITI member number, it will allow the automated CITI load to update the users training information more effectively. The CITI Training load process runs nightly to retrieve CITI Training information based on an individuals' CITI member id, or if CITI member id does not exist it matches on first name, last name and the users preferred email address.

NOTE: If you need assistance with obtaining an users CITI ID number please contact your CITI administrator at your campus.

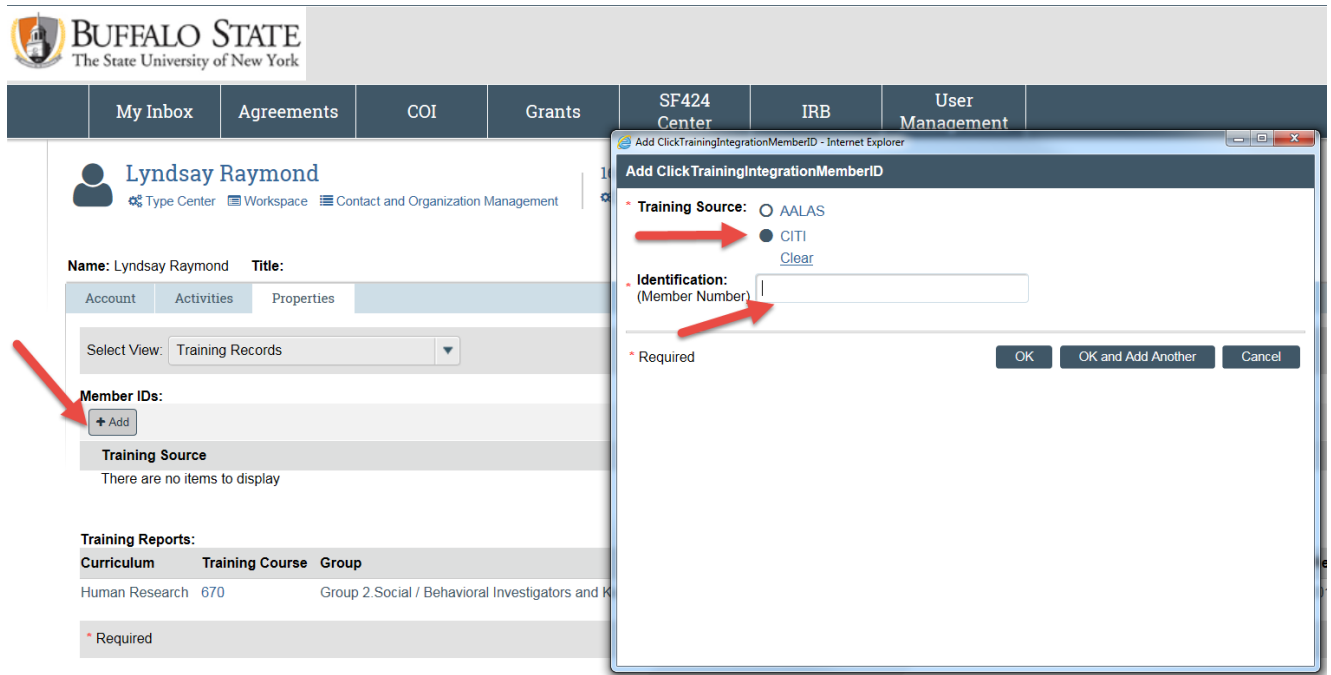
1. Search for the user you wish to enter their CITI member number. Select the "Wrench" icon for the User that need to be edited.
2. Once the user has been selected, under the Properties tab, select the view Training records under the Select View dropdown list. (see Section 3: C: Figure 1)

Section 3: C: Figure 1

The screenshot shows the user profile for Lyndsay Raymond. At the top, the user's name and title are displayed. Below this, there are tabs for Account, Activities, and Properties. The Properties tab is selected, and a dropdown menu for 'Select View' is open, showing options like Detail (SUNY), Creation, Summary, COI Properties Admin, etc. The 'Training Records' option is highlighted. A red arrow points to the 'Title' field, and another red arrow points to the 'Training Records' option in the dropdown. The page also displays fields for First, Middle, Last, and Title names, and a section for Employer (Campus) and Department.

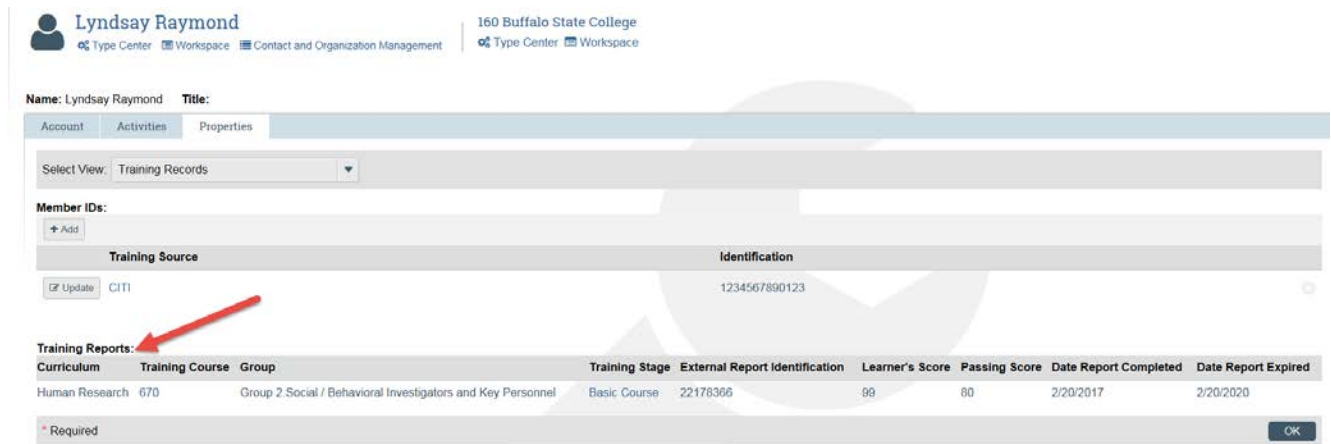
3. Under the Member ID section, click on Add button, a new window will pop up. Select CITI and enter the Identification Number for CITI. Then click OK (See Section 3: C: Figure 2).

Section 3: C: Figure 2



4. Below is a view with the training reports updated. (See Section 3: C: Figure 3)

Section 3: C: Figure 3



NOTE: On the Workspace page, under the Activities section, entitled "Update COI Training from training Integration" (Section 3: C: Figure 4) is specifically used for the COI module for each discloser. When a User Manager executes this activity, it will only update their training date information with the current data and will not delete or negatively alter the training dates.

Section 3: C: Figure 4

Edit Details

- COI Properties Admin
- Detail (SUNY)
- Grants Properties (SUNY)
- HR Interface Properties
- Research Profile
- Restrictions

Activities

- Request HR Refresh
- Process Self Registration
- Decline Self Registration
- Update COI Training Date from Training Integration
- Admin Staff Create Research Disclosure Certification
- Email User Manager With Self

Summary

Name: Christopher Chen **Title:**

Details Grants Info

Person
Honorific:

First:
Christopher
Middle:

Last:
Chen
Title:

RF Employee Number:

Phone
Business:

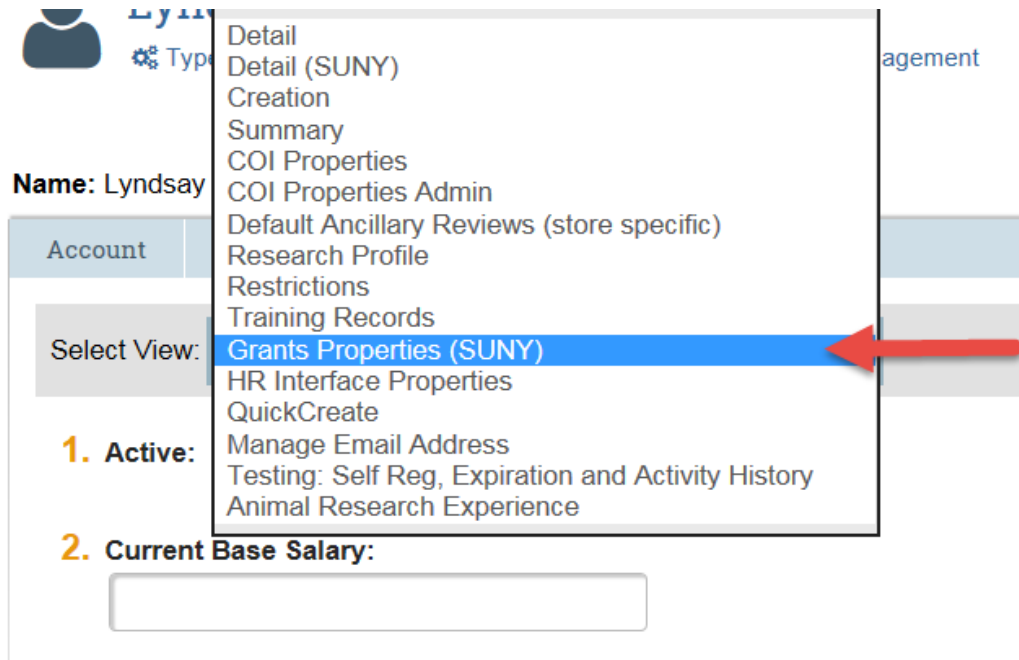
Grants Properties (SUNY):

Purpose:

The below fields are specifically related to the use within the Grants Module for proposals.

1. In the User Management section. Click on the Contact and Organization Management link on the left-hand side.
2. Search for the user you wish to update the grants properties.
3. Select the “Wrench” icon for the user that need to be edited. Go to Properties tab, then select the Grants Properties (SUNY) under the Selection View dropdown list. (see Section 3: C: Figure 5)

Section 3: C: Figure 5



4. Complete the following fields listed below on the Grants Properties (SUNY) form. Once completed, select OK (see Section 3: C: Figure 6).

see Section 3: C: Figure 6



Name: Lyndsay Raymond Title:

Account Activities Properties

Select View: Grants Properties (SUNY)

1. Active: Yes No [Clear](#)

2. Current Base Salary:

3. Employer:

160 Buffalo State College

4. Department:

160 Higher Education Administration Department

5. Division:

6. eRA Commons Username:

7. Fringe Benefit Category:

- Active – This field determines if the user is available for use within the grants module.
- Current Base Salary – NA
- Employer – Defaults from Detail view
- Department – Defaults from Detail view
- Division- NA
- eRA Commons Username- Username for the NIH Commons website. Required for PI for SF424 system to system submission
- Fringe Benefit Category-NA
- Credit Distribution Pre-Population- (optional)The below fields will default on the credit distribution on the proposal form in grants. These values can then be updated on the actual proposal.
 - Organization:
 - Financial Credit:
 - Recognition Credit:

4. Troubleshooting

Purpose:

The below sections provide different login questions and troubleshooting for certain scenarios.

A. Does the user sign in thru local or portal link?

A user created thru the people load will have a portal account and a user who was created thru self-registration will use the local login. To determine if a user was created thru self-registration or created thru the automated people load follow the below steps.

1. In the User Management section. Click on the Contact and Organization Management link on the left-hand side.
2. Search for the user you wish to review. Select the “Wrench” icon for the user that need to be edited.
3. In the properties tab select the Detail (SUNY) view, the field “Date Self Reg Processed” will be populated with a date if the user was created thru Self-registration. If this field is blank then the user was created thru the people load. (see Section 4: A: Figure 1)

Section 4: A: Figure 1

Lyndsay Raymond | 160 Buffalo State College

Type Center | Workspace | Contact and Organization Management | Type Center | Workspace

Name: Lyndsay Raymond Title:

Account | Activities | Properties

Select View: Detail (SUNY)

**The fields that are bold italic my be maintained by the HR feed.
If that is the case then that will reverse changes you might make here next time it runs.**

Person
Honorific: -- Select One --
First: Lyndsay
Middle:
Last: Raymond
Title:
RF Employee Number:

Employer (Campus): 160 Buffalo State College
Department: 160 Higher Education Administration Department
Time Zone:
Bulk Delivery Preference:

Date Created: Thursday, February 8, 2018 5:53:59 PM
Date Last Updated: Friday, April 6, 2018 1:34:05 PM
Date Last Imported:
Date of Last Login: Friday, April 6, 2018 10:21:11 AM
Date Self Reg Processed: 4/6/2018
Date Account Expires:
Expires On Notes:

B. What is the local link vs. the portal link?

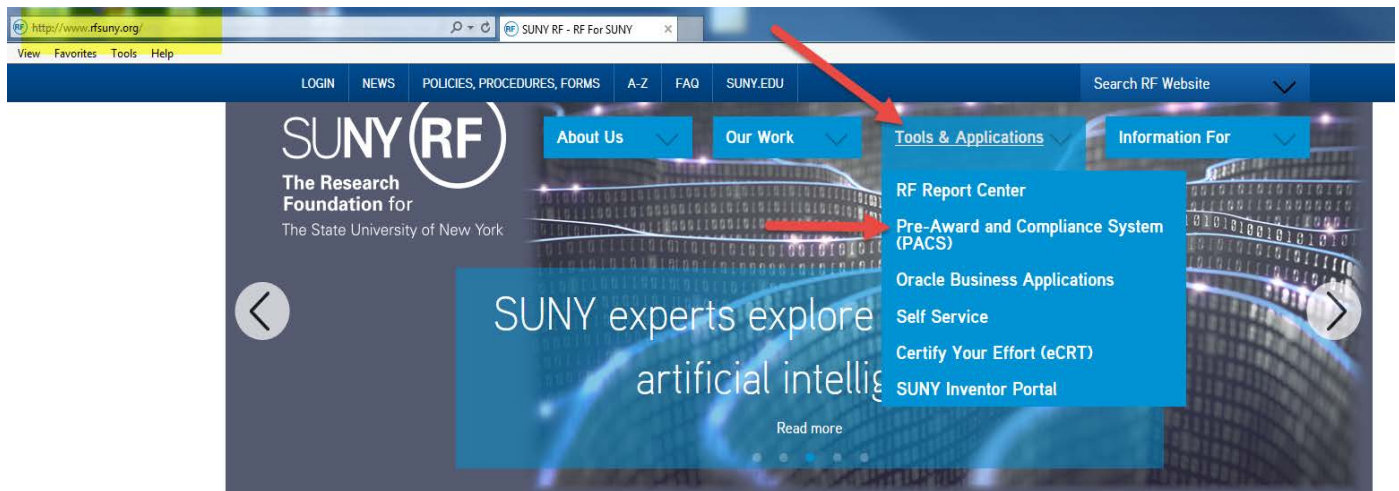
Users go to different locations to sign on depending on whether they have a portal account or if they were created thru self-registration. Once it is determined whether the user signs on thru the portal link or thru the local link below is how to access these links:

1. Go to the RF Website. (See Section 4:B:Figure 1)
2. Go to the Tools & Applications tab.(See Section 4:B:Figure 1)
3. Click on Pre-Award and Compliance System (PACS). (See Section 4:B:Figure 1)
4. On the SUNY PACS page the user selects the campus they are associated with.(See Section 4: B: Figure 2)

Important: The SUNY RF LOGO links are for all campuses except the University at Buffalo, Binghamton University and University at Albany.

5. Once the users location is selected then the determination is made whether to sign on using campus account, local login or requesting a new account (See Section 4:B:Figure 3)
6. See Section 4: B: Figure 4 for an image of the campus account sign on page.
7. See Section 4: B: Figure 5 for an image of the local sign on page.

Section 4: B: Figure 1



Section 4: B: Figure 2


SUNY PACS Login

- All Other Locations PACS Login
- UB PACS Login
- U Albany PACS Login
- Binghamton PACS Login

SUNY PACS Stage Login

- User Help
- Check Your Browser
- Frequently Asked Questions
- Release Notes

Participating Campuses



SUNY Pre-Award and Compliance System Login

Choose ONE of the login methods below for SUNY Pre-Award and Compliance System (PACS).

Using Campus Login

Select your Campus



Have a SUNY PACS account but not a campus account? (all except University at Buffalo)

[Click here to log in](#) with your SUNY PACS account.

Don't have a SUNY PACS account? (all except University at Buffalo)

[Click here to register](#). Registration is open to:

- SUNY campus faculty, staff and students.
- External SUNY campus partners who need access to the campus site in PACS, including collaborators from other SUNY campuses.

Section 4: B: Figure 3

SUNY PACS Login

- U Albany PACS Login
- Binghamton PACS Login
- UB PACS Login

SUNY PACS Sandbox Login

Enhancements

User Help

User and Campus Manager Guides

Check Your Browser

Frequently Asked Questions

Release Notes

Participating Campuses

Alfred State
SUNY College of Technology

BINGHAMTON UNIVERSITY
STATE UNIVERSITY OF NEW YORK

The College at BROCKPORT
State University of New York

BUFFALO STATE
The State University of New York

SUNY CANTON

SUNY Cobleskill

SUNY RF / Information For / Online Tools / SUNY PACS / SUNY PACS Login

SUNY Pre-Award and Compliance System Login

Choose ONE of the login methods below to access the Pre-Award and Compliance System (PACS).

Using Campus Login

Select your Campus

SUNY RF
All other locations

RF Account

UNIVERSITY AT ALBANY
State University of New York

BINGHAMTON UNIVERSITY

University at Buffalo

Local

Register

Have a SUNY PACS account but not a campus account? (all except University at Buffalo)

Don't have a SUNY PACS account? (all except University at Buffalo)

Click here to log in with your SUNY PACS account.

Click here to register. Registration is open to:

- SUNY campus faculty, staff and students.
- External SUNY campus partners who need access to the campus site in PACS, including

Section 4: B: Figure 4

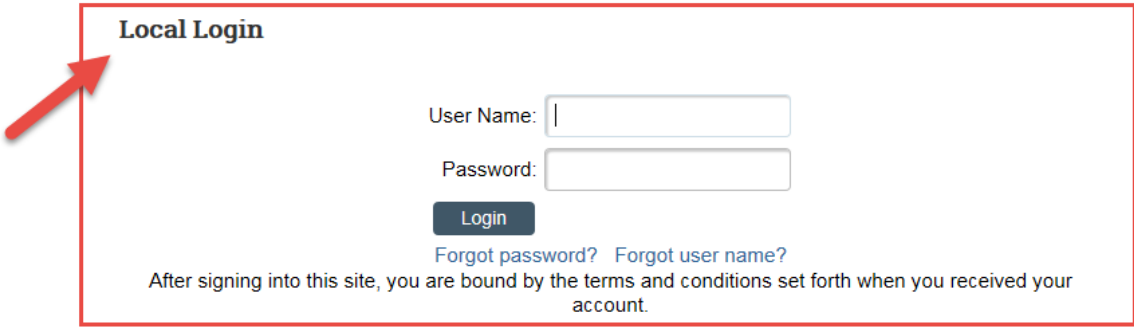
SUNY RF
The Research Foundation for
The State University of New York

To access **RFSUNY Applications**, enter your RF website user name and password below. If you do not have a user account, request one here.

Login

- > Forgot your password?
- > Problems logging in? Contact Customer Services at (518) 434-7222.

Section 4: B: Figure 5



Local Login

User Name:

Password:

[Forgot password?](#) [Forgot user name?](#)

After signing into this site, you are bound by the terms and conditions set forth when you received your account.

Request Account

If you need an account in this system, please apply by submitting your details using the following form. You will be contacted once your setup is complete.

Please complete the following details

* **First Name:**

* **Last Name:**

* **Campus Email Address:**

Phone Number:

Campus Login ID:

* **Campus Affiliation:**

* **Department:**

* **Reason for Request:**

* Required

C. What if the user does not know their Account password?

Many SUNY PACS users have a RF or Campus account but since they do not sign into oracle or the report center often they forget or do not know their password. Once it is determined that a SUNY PACS user exists and has a portal account the UM can provide the user their user name and they can follow the steps below to obtain their password;

1. User Manager provides the user with their user name if unknown, this information is located on the users account detail. (See Section 4:C: Figure 1)
2. The user would then go to the portal sign on page and click "Forgot your password?". (Section 4:C: Figure 2)

3. On the “forgot password help” screen the user would enter their username and then select password and a new password will be emailed to them. (See Section 4: C: Figure 3)

Section 4: C: Figure 1

Lyndsay Raymond | 160 Buffalo State College

Type Center Workspace Contact and Organization Management | Type Center Workspace

Name: Lyndsay Raymond **Title:**

Account Activities Properties

* User Id: raymonlm01@mail.buffalosta

Description:

Dashboard Template: My Inbox Dual Store

Default Page: Dashboard

New Password:

Confirm Password:

Password Last Changed: 4/6/2018 10:21:10 AM

Last Login: 4/6/2018 10:21:10 AM

User Must Change Password At Next Login

User Cannot Change Password


Password Never Expires

Account Disabled

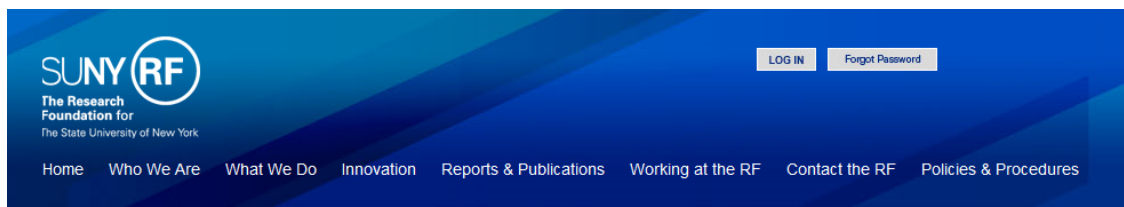
Section 4: C: Figure 2



To access **RFSUNY Applications**, enter your RF website user name and password below. If you do not have a user account, request one here.

- > [Forgot your password?](#) 
- > [Problems logging in? Contact Customer Services at \(518\) 434-7222.](#)


Section 4: C: Figure 3




RF Web Site Forgot Password Help

Enter your user name (your e-mail address or your Research Foundation ID Number). A new password will be e-mailed to this address in a few moments.

Forgot Password

User Name : [Click here to mail your Password](#) 



Your RF website user name is:
Your e-mail address - if you established your user account before November 21, 2010.
Your RF ID number - if you established your account November 21, 2010 or later. Locate your RF ID number on your pay stub, or contact your campus HR representative.

When you receive your new password:
1. Go to www.rfsuny.org and log in to the RF Web site in the upper right hand area of the screen. Enter your user name then cut and paste the new password from the e-mail into the password field.
2. Change your password to something you can easily remember. In the "Your RF Web site" area of the internal site, click "Change Password."

Need assistance? Contact [Customer Services](#) at (518) 434-7222.

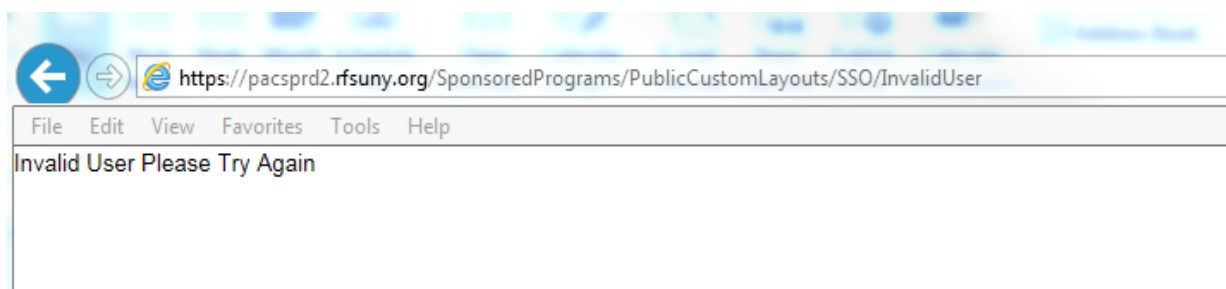
D. Error “Invalid User Please Try Again”

If a user receives the error “Invalid user please try again” after they sign on with either their campus credentials or RF website account, this indicates that the Authentication worked but the user id within PACS is different than the ID they are signing in with. (See Section 4: D: Figure 1 for an example of the error)

To correct the issue the User Manager Should change the SUNY PACS user ID to match the login credentials. For example, the user ID for a campus using LDAP should ensure the user ID is their LDAP ID.

Therefore, for federated users, the PACS user ID should match their LDAP ID, instead of their Employee Number, etc.

Section 4: D: Figure 1



E. User Switches from one campus location to another

If a user switches from one location to another location they can still use their existing PACS account after a few updates are made.

- An email should be sent to customer services requesting the users account be updated to reflect the new location; CO will then update the users employer, HR Interface record, department, email, address and user ID.
- Note: User may also need to contact customer services to update their RF Website account to reflect the new location.

F. User performs work at more than one location

If a user performs duties at two different locations they will have two different PACS accounts and therefore two different logins.

- The first account using the RF Website login will be for the location the user has their primary HR assignment. This record will be managed by the HR Feed.

- The second account will be created thru the self-registration process.

G. Additional User Account got automatically created

Sometimes, user might get loaded to HR after they self-register their account. Therefore, a new account will be automatically created. To troubleshoot, 1) Make sure the additional account got created from the HR feed (the ID field under User Information section is LocationNumber-EmployeeNumber, e.g. 650-107086), and there is no activity involved in it, 2) Then delete the additional account, 3) In the existing account, updated the ID field to user's LocationNumber-EmployeeNumber, so that the account will be maintain through HR feed.

Note that to perform this troubleshoot, Site Administration responsibility is required.

Appendix A – SUNY PACS Module User Roles

| PACS Module | Campus Role | PACS User Roles | Activities |
|-------------|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Agreements | Decentralized Administrator Agreements | Registered User Agreements Reviewer (User(s) must be added to Campus Agreements office. Submit service request to customer service for RF Central Office Resource to complete) | This role enables users to: <ul style="list-style-type: none"> • View all agreements assigned to your Agreements office • Create, Edit and Submit Agreements • Create, Edit and Submit Amendments • Assign/Un-assign Owners • Manage Ancillary Reviews • Submit Ancillary Review Reminders • Request Clarifications • Revise an agreement • Terminate active Agreements • Void an agreement • Copy Agreement • Log Correspondence • View public and private correspondence |
| Agreements | Decentralized Administrator Manager | Registered User Agreements Manager (User(s) must be added to Campus Agreements office. Submit service request to customer service for RF Central Office Resource to complete) | This role enables users to: <ul style="list-style-type: none"> • View all Agreements assigned to your Agreements office • Create, Edit and Submit Agreements • Create, Edit and Submit Amendments • Assign/Un-assign Owners • Approve Agreement language • Activate Agreements |

| PACS Module | Campus Role | PACS User Roles | Activities |
|-------------|--------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | | <ul style="list-style-type: none"> • Approve Amendments • Request clarification • Revise an agreement document • Finalize agreements • Terminate active agreements • Manager Ancillary Review • Notify Ancillary Reviewers • Void an agreement • Copy Agreement • Log Correspondence • View public and private correspondence |
| Agreements | Centralized Administrator Agreements | Registered User Principle Investigator Agreements Reviewer <i>(If Principal Investigator role is not provided to user with Agreements Reviewer role – user will not be able to Submit Agreements)</i> | This role enables users to: <ul style="list-style-type: none"> • Create, Edit and Submit Agreements • Create, Edit and Submit Amendments • Assign a PI Proxy • Withdraw Agreement • Submit Ancillary Review • Submit Clarifications |
| Agreements | Principal Investigator | Registered User Principal Investigator | This role enables users to: <ul style="list-style-type: none"> • Create, Edit and Submit Agreements • Create, Edit and Submit Amendments • Assign PI Proxies • Withdraw Agreement • Submit Clarifications • Submit Ancillary Reviews • View Public Correspondence |

| PACS Module | Campus Role | PACS User Roles | Activities |
|-------------|----------------------------------|---------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Agreements | Study Teams | Registered User Study Staff | This role enables users to: <ul style="list-style-type: none"> • Create Agreements • Create Amendments • Submit Ancillary Reviews • Submit Clarifications • Assign PI Proxies • View Public Correspondence |
| Agreements | Registered User | Registered User | This role enables users to: <ul style="list-style-type: none"> • Create Agreements • Create Amendments • Submit Ancillary Reviews • Submit Clarifications • Assign PI Proxies • View Public Correspondence |
| Agreements | Campus Agreements Viewer | Registered User Study Staff | This role enables users to: <ul style="list-style-type: none"> • View only rights to all agreements/amendments at a campus location • View only rights to any attachments uploaded |
| Agreements | Central Office Agreements Viewer | Registered User Study Staff | This role enables users to: <ul style="list-style-type: none"> • View only rights to all agreements/amendments utilizing central office • View only rights to any attachments uploaded |
| COI | Discloser | Study Staff Registered User Discloser | This role enables users to: <ul style="list-style-type: none"> • Complete and submit a COI annual, updates and research |

| PACS Module | Campus Role | PACS User Roles | Activities |
|-------------|--------------------------------|----------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | | disclosures <ul style="list-style-type: none"> • Respond to Clarifications requested • Respond to Management Plans |
| COI | COI Administrator | COI Administrator Registered User | This role enables users to: <ul style="list-style-type: none"> • Administer COI submissions • Request clarifications requested • Create Management Plans • Create Annual and Research certifications |
| COI | COI Committee Member | COI Committee Member Registered User | This role enables users to: <ul style="list-style-type: none"> • View disclosures assigned to the committee • Participate in the committee meetings • Be assigned as the committee reviewer |
| COI | COI Monitor | COI Monitor Registered User | This role enables users to: <ul style="list-style-type: none"> • Monitor management plans • File reports on management plans |
| COI | Research Project Administrator | Registered User Study Staff | This role enables users to: <ul style="list-style-type: none"> • View only rights to any disclosure in the system regardless of disclosure type |
| Grants | Principal Investigator | Study Staff Registered User Principal Investigator | This role enables users to: <ul style="list-style-type: none"> • Create proposals • Edit existing proposals • Withdraw a proposal and select a reason (the opportunity was withdrawn by the sponsor, your institution decided to withdraw |

| PACS Module | Campus Role | PACS User Roles | Activities |
|-------------|--------------------------|-----------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | | <p>the proposal, or the proposal did not win funding)</p> <ul style="list-style-type: none"> • Create and update the SF424 Form • Update SF424 Research Plan. (documents attached to the SF424 form) • Update the research plan (on non- Grants.gov submissions) • Create and update budgets • Attach supporting documents to a proposal • Add a personal comment to a proposal • Export Proposal Budgets to a MS Excel spreadsheet format • Submit for Department Review • Send a proposal back to the Department with requested changes and optionally require the Department to re-approve the proposal • Record that an award letter has been received from a sponsor • Send the study staff a request for Just-In-Time information for the sponsor |
| Grants | Project PI Administrator | Study Staff Registered User Department Administrator SF424 Administrator | <ul style="list-style-type: none"> • Same Access as the Principal Investigator for creating a proposal on their behalf. |
| Grants | Department Approver | Study Staff Registered User | <p>This role enables users to:</p> <ul style="list-style-type: none"> • Review and approve a funding |

| PACS Module | Campus Role | PACS User Roles | Activities |
|-------------|--------------------------------------|------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | SF424 Reader | proposal <ul style="list-style-type: none"> Disapprove a funding proposal which will send it back to the PI |
| Grants | Campus Read Only Access to Proposals | Study Staff Registered User Contract Specialist | This role enables users to: <ul style="list-style-type: none"> Read only access to proposals at a campus level. |
| Grants | Pre-Award Specialist | Study Staff Registered User SF 424 Administrator Specialists Finance/Grant Contract Specialist | This role enables users to: <ul style="list-style-type: none"> Create and Edit a Funding Proposals Designate some other Specialist to review a proposal for final approval Send an email message to the proposal team Edit existing proposals Withdraw a proposal and select a reason (the opportunity was withdrawn by the sponsor, your institution decided to withdraw the proposal, or the proposal did not win funding) Create and update the SF424 Form Update SF424 Research Plan. (documents attached to the SF424 form) Update the research plan (on non- Grants.gov submissions) Submit the proposal to grants.gov Update information about the Sponsored Programs Office Attach supporting documents to |

| PACS Module | Campus Role | PACS User Roles | Activities |
|-------------|------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | | <ul style="list-style-type: none"> a proposal • Add a personal comment to a proposal • Export Proposal Budgets to a MS Excel spreadsheet format • Perform the Final Review for a proposal • Send a proposal back to the Department or PI with requested changes and optionally require the Department to re-approve the proposal • Record that an award letter has been received from a sponsor • Ability to View Proposals |
| Grants | Authorized Organization Representative | Study Staff Registered User SF 424 Administrator Authorized Organization Representative | <p>This role enables users to:</p> <ul style="list-style-type: none"> • Review and edit funding proposal • review and edit SF424 • submit proposal to grants.gov |
| Grants | Proposal Team Member | Study Staff Registered User (Note must be listed on the proposal for either read or edit access) | <p>This role enables users to:</p> <ul style="list-style-type: none"> • if read only view the proposal • if edit access granted can edit the proposal |
| Grants | RFCO Finance/Grants Specialist (central office only) | Study Staff Registered User RFCO Finance/Grants Specialist Specialists Finance/Grant SF424 Reader Contract Specialist | <p>This role is for central office only and enables the following:</p> <ul style="list-style-type: none"> • Ability to award and create funding allocations on a proposal. • Ability to view proposals |

| PACS Module | Campus Role | PACS User Roles | Activities |
|-------------|------------------------|----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| IRB | Principal Investigator | Study Staff Registered User Principal Investigator | This role enables users to: <ul style="list-style-type: none"> • Create and submit IRB Studies |
| IRB | IRB Committee Member | Study Staff Registered User IRB Committee Member | This role enables users to: <ul style="list-style-type: none"> • Be included as a committee member • View all submissions assigned to the same IRB office as your committee • Comment on all submissions assigned to your committee • Request clarification during committee reviews |
| IRB | IRB Coordinator | Study Staff Registered User IRB Coordinator | This role enables users to: <ul style="list-style-type: none"> • View all submissions assigned to IRB office • Assign Coordinator • Create meetings • Submit Pre-Review • Edit Pre-Review • Request Clarification • Assign Reviewers • Assign to Meeting • Submit Committee Review • Remove from Agenda • Finalize Documents • Prepare Letter • Send Letter • Terminate studies |
| IRB | IRB Director | Study Staff Registered User | This role enables users to: <ul style="list-style-type: none"> • Create Committee |

| PACS Module | Campus Role | PACS User Roles | Activities |
|-------------|------------------------|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | IRB Director | <ul style="list-style-type: none"> • Correct errors by resubmitting review decisions in Post- • Review and final states • -Suspend studies • Terminate studies • Close studies administratively • View all submissions assigned to IRB office • Assign Coordinator • Create meetings • Submit Pre-Review • Edit Pre-Review • Request Clarification • Assign Reviewers • Assign to Meeting • Submit Committee Review • Remove from Agenda • Finalize Documents • Prepare Letter • Send Letter • Terminate studies |
| IRB | Registered User | Registered User | <ul style="list-style-type: none"> • Allows user to login • User is selectable on certain LOVs |
| IRB | Study Staff | Study Staff Registered User | <ul style="list-style-type: none"> • Create a submission • Be listed as a submission's PI • Be assigned to a study team • Be listed as a submission's primary contact |
| IACUC | Principal Investigator | Study Staff | This role enables users to: |

| PACS Module | Campus Role | PACS User Roles | Activities |
|-------------|----------------------------|-----------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | Registered User Principal Investigator | <ul style="list-style-type: none"> • Create and submit IACUC Protocols |
| IACUC | Facility Manager | Facility Manager Registered User | This role enables users to: <ul style="list-style-type: none"> • Create and edit buildings and rooms • Deactivate and activate buildings and rooms |
| IACUC | IACUC Coordinator | IACUC Coordinator Registered User | This role enables users to: <ul style="list-style-type: none"> • Administer and approve IACUC Protocols administratively • Record Committee determinations of Protocols |
| IACUC | IACUC Director | IACUC Coordinator Registered User | This role enables users to: <ul style="list-style-type: none"> • Administer and approve IACUC Protocols administratively • Record Committee determinations of Protocols • Assign IACUC Coordinator |
| IACUC | IACUC Committee Member | IACUC Committee Member Registered User | This role enables users to: <ul style="list-style-type: none"> • View disclosures assigned to the committee • Participate in the committee meetings • Be assigned as the committee reviewer |
| IACUC | IACUC Inspection Officer | IACUC Inspection Officer Registered User | This role enables users to: <ul style="list-style-type: none"> • Schedule and conduct inspections |
| IACUC | IACUC Training Coordinator | IACUC Training Coordinator Registered User | This role enables users to: <ul style="list-style-type: none"> • Create Training courses • Select users who passed Training course |
| IACUC | PAM Coordinator | PAM Coordinator | This role enables users to: |

| PACS Module | Campus Role | PACS User Roles | Activities |
|-------------|------------------------|----------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | Registered User | <ul style="list-style-type: none"> • Submit a full-detail concern about animal use and care • Assign responsible parties for corrective action related to a deficiency • Create and edit an inspection • Record findings from an inspection • Complete an inspection by assigning it to a meeting |
| IACUC | Global IACUC Viewer | Global IACUC Viewer Registered User | This role enables users to: <ul style="list-style-type: none"> • View all submissions across all IACUC offices |
| IACUC | Registered User | Registered User | <ul style="list-style-type: none"> • Allows user to login • Allows user to be selectable on certain LOVs |
| IACUC | Study Staff | Study Staff Registered User | <ul style="list-style-type: none"> • Be listed as a submission's Principal Investigator • Create and modify research teams, team procedures, and team substances |
| IACUC | Veterinarian | Vet Registered User | This role enables users to: <ul style="list-style-type: none"> • View all submissions assigned to you • Request clarification • Submit the vet consult • View inspections for any IACUC administrative office |
| Safety | Principal Investigator | Study Staff Registered User Principal Investigator | This role enables users to: <ul style="list-style-type: none"> • Create and submit Safety Protocols |
| Safety | Safety Specialist | Safety Specialist Registered User | This role enables users to: <ul style="list-style-type: none"> • Administer and approve Safety Protocols administratively |

| PACS Module | Campus Role | PACS User Roles | Activities |
|-------------|-------------------------|--------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | | <ul style="list-style-type: none"> Record Committee determinations of Protocols |
| Safety | Safety Administrator | Safety Administrator Registered User | This role enables users to: <ul style="list-style-type: none"> Administer and approve Safety Protocols administratively Record Committee determinations of Protocols Assign Safety Specialist |
| Safety | Safety Committee Member | Safety Committee Member Registered User | This role enables users to: <ul style="list-style-type: none"> View disclosures assigned to the committee Participate in the committee meetings Be assigned as the committee reviewer |
| Safety | Bio Safety Officer | Bio Safety Officer Registered User | This role enables users to: <ul style="list-style-type: none"> Complete a Biosafety review |

Appendix B – SUNY PACS People Load

Purpose

As each campus goes live with SUNY PACS the users are uploaded into PACS from the source system indicated below. RF Central Office will continue to update SUNY PACS with New or Changed data from the source system every MWF.

Important: If user data is updated in PACS; ie. an email address added or a name updated, the record will get overridden the next time the people load is run if the user is managed by the people load. It is imperative to update the source system (Oracle EBS Human Resources) with the correct data.

| <u>Campus</u> | <u>Source of People Data</u> |
|-----------------------------------------------|------------------------------|
| 010 University at Albany | Oracle EBS Human Resources |
| 011 SUNY Poly | Oracle EBS Human Resources |
| 020 Binghamton University | Oracle EBS Human Resources |
| 030 University at Buffalo | Oracle EBS Human Resources |
| 100 Downstate Medical Center | Oracle EBS Human Resources |
| 110 Upstate Medical Center | Oracle EBS Human Resources |
| 150 College at Brockport | Oracle EBS Human Resources |
| 160 Buffalo State College | Oracle EBS Human Resources |
| 170 College at Cortland | Oracle EBS Human Resources |
| 180 College at Fredonia | Oracle EBS Human Resources |
| 190 College at Geneseo | Oracle EBS Human Resources |
| 200 College at Old Westbury | Oracle EBS Human Resources |
| 210 College at New Paltz | Oracle EBS Human Resources |
| 220 College at Oneonta | Oracle EBS Human Resources |
| 230 College at Oswego | Oracle EBS Human Resources |
| 240 College at Plattsburgh | Oracle EBS Human Resources |
| 250 College at Potsdam | Oracle EBS Human Resources |
| 260 College at Purchase | Oracle EBS Human Resources |
| 280 Empire State College | Oracle EBS Human Resources |
| 350 College of Technology at Alfred | Oracle EBS Human Resources |
| 360 College of Technology at Canton | Oracle EBS Human Resources |
| 370 College of Ag. And Tech. at Cobleskill | Oracle EBS Human Resources |
| 380 College of Technology at Delhi | Oracle EBS Human Resources |
| 390 College of Technology at Farmingdale | Oracle EBS Human Resources |
| 400 College of Ag. And Tech. at Morrisville | Oracle EBS Human Resources |
| 550 College of Environment Science & Forestry | Oracle EBS Human Resources |
| 570 Maritime College | Oracle EBS Human Resources |
| 580 College of Optometry | Oracle EBS Human Resources |

| | |
|--------------------------------------|----------------------------|
| 655 System Admin. Sponsored Programs | Oracle EBS Human Resources |
|--------------------------------------|----------------------------|

Oracle EBS Human Resources – This includes all active people with Primary Assignment status Active Assignment, Paid Leave, SUNY, SUNY Extra Service, Unpaid Leave, Unpaid Grad Summer, Terminated - Processes Pending.