



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
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8/1/2017	Lisa Kelly	Updated items for section 4 and revised landing pages
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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
5/19/2020	Chris Chen	1. Update the entire document to clarify the processes for obtaining/creating local account, SSO, and portal account. 2. Added the coordination procedures with CO HR to create shell records. 3. Wording updates, screenshots, screenshot number updates.
5/1/2024	Justin Crockett	1. Updated Appendix A to remove ‘Campus Role’ column. 2. Edited Principal Investigator role to specify that this role does not provide permissions in the PACS IACUC and Safety modules. 3. Removed Campus table from Appendix B as all campus people data in PACS is sourced from Oracle EBS Human Resources.

Date	Author	Change Reference
		4. V3.0
6/12/2024	Justin Crockett	<ol style="list-style-type: none">1. Changed "Vet" user role to "Veterinarian"2. Added note to PAM Coordinator role specifying that it is currently not being used.

1. Introduction

This Guide is intended for use by the PACS 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
- Editing roles to users account
- Disable user accounts
- Maintaining user information such as address, email addresses and title
- Maintaining module specific user data

There are several situations for a user to obtain a PACS account:

1. For users that are not RF Employees (e.g. third-party, students, SUNY Employees that does not have an active RF assignment), a request must be submitted through self-registration, a local account will be created;
2. For users that are conducting studies at a campus different than the user's assignment (e.g. UAlbany researchers conducting IRB study at New Paltz), a request must be submitted through self-registration, a local account will be created;

Important: Local account is only intended for third party, non-RF employees, and cross campus studies.

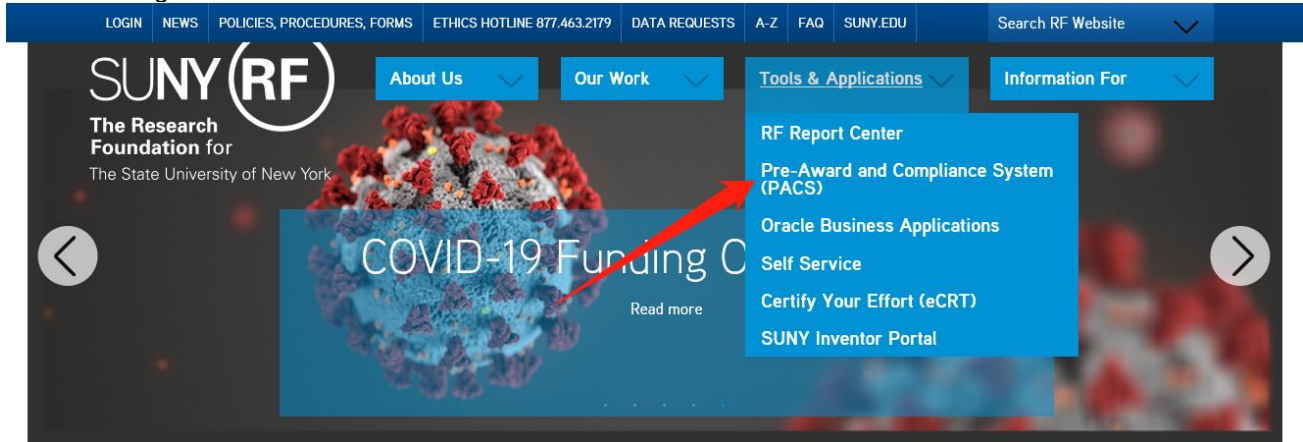
3. For campuses that uses In-Common login, a request must be submitted through self-registration, account will be processed for In-Common login;
4. For the campuses that enabled the SUNY Federated Single Sign-on Login, user profile will be automatically created through daily people bulk load after RF Employees assignment is created in Oracle HR (24-48 hours lag). No self-registration request needs to be submitted. User can login to PACS account through single sign-on. However, the exceptions below require account to be set up in PACS and coordination with Central Office HR office (follow the instruction in [section 3.A](#)):
 - a. If user is on SUNY IFR payroll;
 - b. If users have urgent need to access PACS before the HR profile is created in Oracle;

2. Submitting Self-Registration Requests

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 bulk load to gain access to the SUNY PACS system. See Appendix B for information on users loaded through the people load process. Below is an example of a user requesting access using the Self-Registration form.

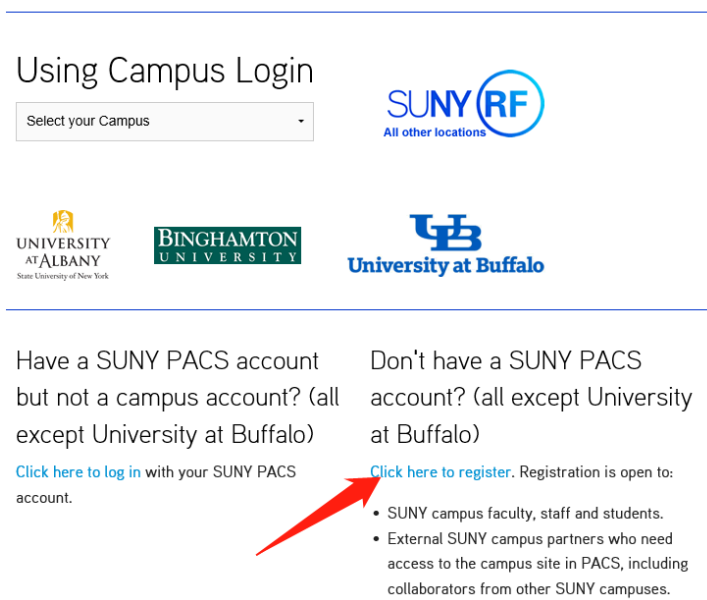
1. To submit a PACS account request, users go to rfsuny.org (See Section 2: Figure 1).

Section 2: Figure 1



2. Click on Tools and Applications. Under the “Don’t have a SUNY PACS account?” Section, click on “Click here to register” (See Section 2: Figure 2), then on the new page (See Section 2: Figure 3), fill out the information on the Request Account section.

Section 2: Figure 2



Section 2: Figure 3


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:**

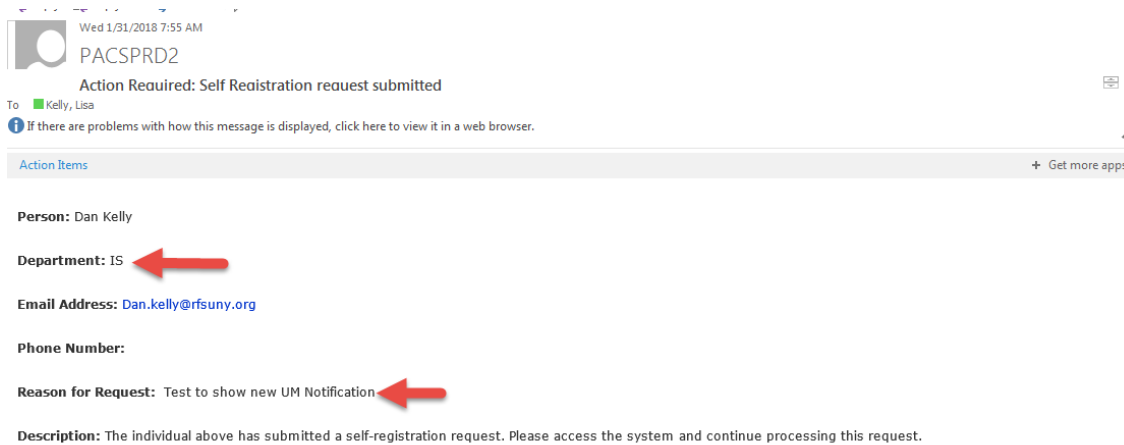
* **Department:**

* **Reason for Request:**

Notification:

After user submits the request, a notification will be sent to the User Manager at the requested location (where the new user selects in the field “Campus Affiliation” in the self- registration form). Below is an example (See Section 2: Figure 4) of the email notification. For more details, see Campus Manager Guide.

Section 2: Figure 4



Important: It is not recommended for campuses which are live with SUNY Federated Single Sign-on to

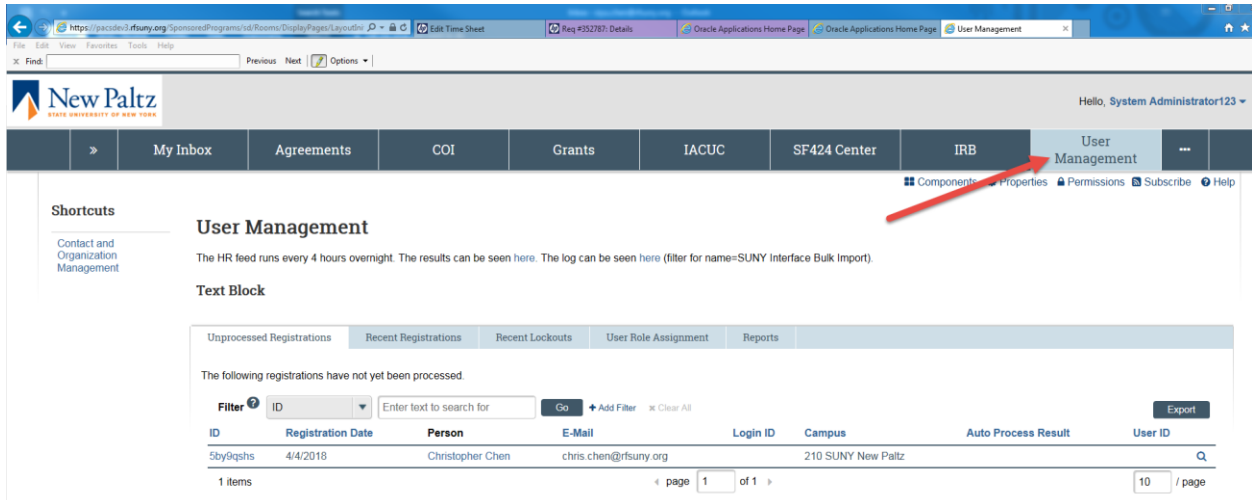
have user self-register, unless the user record doesn't exist in campus HR (student, third party individual users, etc.).

3. Process Self-Registration

Processing self-registration in a timely manner is crucial for the day-to-day operation of the SUNY PACS system. 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 tab (See Section 3: Figure 1)

Section 3: Figure 1



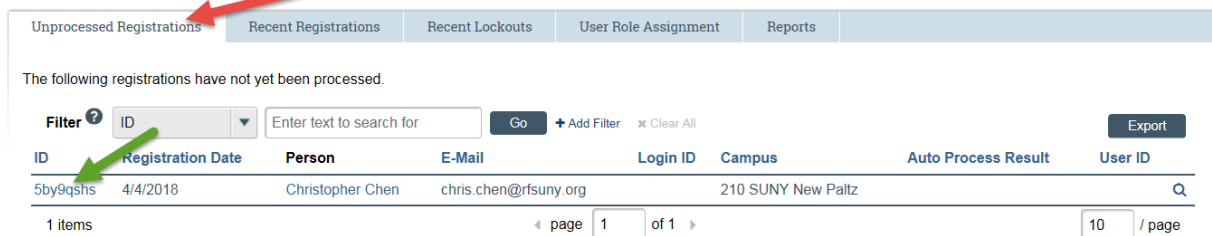
3. Click Unprocessed Registrations (See Section 3: Figure 2), this will display all of the requests for self-registration that have not been processed or declined.
4. Click on the name or ID to open up the specific request to review the data submitted.

Section 3: 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



Important: Always verify the user record doesn't already for the same employer/location exist within the system to prevent duplicate records from being created.

- To query existing user, select Contact and Organization Management in the top left-hand corner (See Section 3: Figure 3). Then in the Contact and Organization Management section (See Section 3: 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 3: Figure 3

Shortcuts

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

Unprocessed Registrations Recent Registrations Recent Lockouts User Role Assignment Reports

The following registrations have not yet been processed.

Filter [?] ID Enter text to search for + Add Filter

ID	Registration Date	Person	E-Mail	Login ID	Campus	Auto Process Result	User ID
5by9qshs	4/4/2018	Christopher Chen	chris.chen@rfsuny.org		210 SUNY New Paltz		

1 items < page 1 of 1 > 10 / page

Section 3: Figure 4

Contact & Organization Management

Contacts Organizations

+ Create New Contact ⚙ Open Data Type Center 🔒 Open Security Policies

Search [?] Enter text to search for + Add Filter

Please enter search criteria to display data, or hit "Go" to view all items.

If the user already exists within SUNY PACS, the request should be declined (See Section 3: 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 (contact record) will be created BUT it is NOT an account (Blank page on account tab under Admin View) until the request is processed. If there are two or more user records when you query up the user name, only one account should exist for each employer (campus location). If user account exists for the intended employer/campus, self-registration request will need to be declined. Once the registration is declined, the record created by the self-registration request will be removed.

6. 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 3: 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 3: Figure 5

The screenshot shows a web application interface with a top navigation bar containing tabs: My Inbox, Agreements, COI, Courses, Grants, SF424 Center, IACUC, and IRB. Below this is a sidebar menu with sections: Edit Details (containing COI Properties Admin, Detail (SUNY), Grants Properties (SUNY), HR Interface Properties, Research Profile, and Restrictions), and Activities (containing Request HR Refresh, Process Self Registration, Decline Self Registration, and Update COI Training Date from Training). The main content area is titled 'Summary' and shows user details for Christopher Chen. A red arrow points to the 'Detail (SUNY)' option in the sidebar. The user details are organized into sections: Person (Honoric, First: Christopher, Middle, Last: Chen, Title), RF Employee Number, Employer (Campus): 160 Buffalo State College, Department, Time Zone, Bulk Delivery Preference, and a list of dates (Date Created, Date Last Updated, Date Last Imported, Date of Last Login, Date Self Reg Processed, Date Account Expires) with corresponding values like Monday, A.

7. To complete the process, click on Process Self Registration under the Activities section on the left-hand side (See Section 3: Figure 6).

Section 3: 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:**

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

Details	Grants Info			
<p>Person</p> <p>Honorific:</p> <p><i>First:</i> Christopher</p> <p>Middle:</p> <p><i>Last:</i> Chen</p> <p>Title:</p> <p>RF Employee Number:</p>			<p><i>Employer (Campus):</i> 210 SUNY New Paltz</p> <p><i>Department:</i></p> <p>Time Zone:</p> <p>Bulk Delivery Preference:</p> <p>Date Created:</p> <p>Date Last Updated:</p> <p>Date Last Imported:</p> <p>Date of Last Login:</p> <p>Date Self Reg Process:</p> <p>Date Account Expires:</p> <p>Expires On Notes:</p>	
<hr/> <p>Phone</p> <p><i>Business:</i></p> <p>Home:</p> <p>Mobile:</p>			<p>E-mail</p> <p><i>Preferred E-mail:</i> chris.chen@rfsuny.org</p> <p><i>E-mail 2 (supplied by I</i></p>	

8. Complete the Process Self-registration form (See Section 3: 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 3: Figure 7

Execute "Process Self Registration" on 5by9qshs - Internet Explorer

Process Self Registration

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: 210 SUNY New Paltz

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:

9. The user will receive a notification indicating their request for an account has been successfully processed. The notification will contain their username and a temporary password as well as the link for the local login page (See Section 3: Figure 8). Please note that this login page is for local login only.

Section 3: 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.

10. If the request needs to be declined because the user already exists or the user's access is not approved, click on "Decline Self-registration" and then OK. (See Section 3: Figure 9)

Section 3: Figure9

The screenshot displays a web application interface with a top navigation bar containing tabs for 'My Inbox', 'Agreements', 'COI', 'Grants', 'IACUC', and 'S'. The main content area is divided into 'Edit Details' and 'Summary' sections. The 'Summary' section shows the name 'Christopher Chen' and a blank 'Title' field. A modal dialog box titled 'Decline Self Registration' is open, displaying the following information:

- Decline this person**
- This registration request will be declined.
- 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
- Campus Login ID:**

At the bottom of the dialog box, there are 'OK' and 'Cancel' buttons. 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.

A. Creating accounts for SUNY Federated Single Sign-on (SSO) enabled campuses:

In section 1, we mentioned that there are exceptions for Single Sign-on enabled campuses to create PACS account for users. If a campus user is on SUNY IFR Payroll but doesn't have an active RF Assignment (e.g. SUNY Employee but not RF Employee), to make SUNY Federated SSO available for the user, campus User Managers need to send a request through customer services (customer.services@rfsuny.org), copying Nick Yelich (nick.yelich@rfsuny.org) and Chris Chen (siyu.chen@rfsuny.org). Make sure to provide user's full name, campus, department, and campus email address in request. Then Nick Yelich or Chris Chen at Central Office will work with HR (Kathy Shattuck or Brain Ammerman) to set up "shell record" for user in Oracle HR. After setting up, a PACS account will be created through People Bulk Load on the next business day. Then the user can be notified to login through SUNY Federated SSO.

If user has urgent needs to access PACS before, Central Office can create PACS account manually. It is crucial to make sure:

1. To use user's campus email address as PACS User ID;
2. When setting up shell record in Oracle HR after, make sure first name, last name, and email address matches the set up in PACS;
3. After obtaining user's employee number from Oracle, make sure to update the ID field in the Properties (Search for User in the Contact and Organization Management → In the user record, go to Admin View → Select Properties tab, then in the dropdown list, select HR Interface Properties. You should be able to see what is in the screenshot below). The format of the ID should be LocationNumber-EmployeeNumber, e.g. 650-107086. This is to make sure the account can be updated through People Bulk Load;

Section 3 A: Figure 1

The screenshot shows the Oracle HR system interface for user Siyu Chen. The top navigation bar includes tabs for My Inbox, Agreements, COI, Grants, SF424 Center, and Courses. Below this, the user's profile is displayed, including their name, title (Business Analyst I), and contact information. The main content area shows the 'Properties' tab for the user's account, with a dropdown menu set to 'HR Interface Properties'. A red box highlights the 'ID (used to match the person to the record in the feed*)' field, which contains the value '650-107086'. A red arrow points to this field. Other fields include 'is TestUser', 'Account Disabled', 'is Active', 'DateLastImported', 'Checksum', 'Created', 'Last Updated', 'Employer', 'Department', 'First Name', 'Last Name', 'userId', and 'eMailAddress'. A note at the bottom states: '*If this record is being actively managed by the feed (see DateLastImported) and you change this ID then the local record will become might not be a good thing!'

4. 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.

B. 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 4: A: Figure 1)

Section 4: A: Figure 1

The screenshot shows the top navigation bar with 'User Management' selected. Below it, a 'Shortcuts' section on the left has a red arrow pointing to 'Contact and Organization Management'. The main content area is titled 'User Management' and includes a 'Text Block' with tabs for 'Unprocessed Registrations', 'Recent Registrations', 'Recent Lockouts', 'User Role Assignment', and 'Reports'. A search filter is visible with 'ID' selected and a search box containing 'Enter text to search for'. Below the search box, it says 'No data to display.' and an 'Export' button is present.

2. Search for the user you wish to edit. Put your cursor on the right side of the user you would like to edit. A “Wrench” icon will show up. Then click on it. (See Section 4: A: Figure 2)

Section 4: A: Figure 2

The screenshot shows the 'Contact & Organization Management' page. It has tabs for 'Contacts' and 'Organizations'. There are buttons for 'Create New Contact', 'Open Data Type Center', and 'Open Security Policies'. A search bar is set to 'Last Name' with 'Chen' entered. Below the search bar is a table of users. The table has columns for 'First Name', 'Last Name', 'Employer', 'User ID', and 'E-Mail'. The user 'Christopher' is highlighted in yellow, and a red arrow points to the wrench icon in the right-hand column of that row. At the bottom right, there is an 'Administrative Settings' link.

First Name	Last Name	Employer	User ID	E-Mail	Execute Activity
Alan	Chen	010 University at Albany	ac321789@albany.edu	achen6@albany.edu	Execute Activity
Anting	Chen	020 Binghamton University	achen47@binghamton.edu	achen47@binghamton.edu	Execute Activity
Changqing	Cheng	020 Binghamton University	120870		Execute Activity
Cheng	Chen	010 University at Albany	CC558781@albany.edu		Execute Activity
Chi-Yao	Chen	200 Old Westbury	124133	571110@gmail.com	Execute Activity
Christine	Chen	580 College of Optometry	cchen@sunyopt.edu	cchen@sunyopt.edu	Execute Activity
Christopher	Chen	210 SUNY New Paltz	chris.chen@fsuny.org	chris.chen@fsuny.org	Execute Activity
Dana	Chen	020 Binghamton University	dchen66@binghamton.edu	dchen66@binghamton.edu	Execute Activity

3. Make sure you are under the Account Tab. You can see User Roles section at the bottom. (See Section 4: A: Figure 3)

Section 4: 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

Home

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

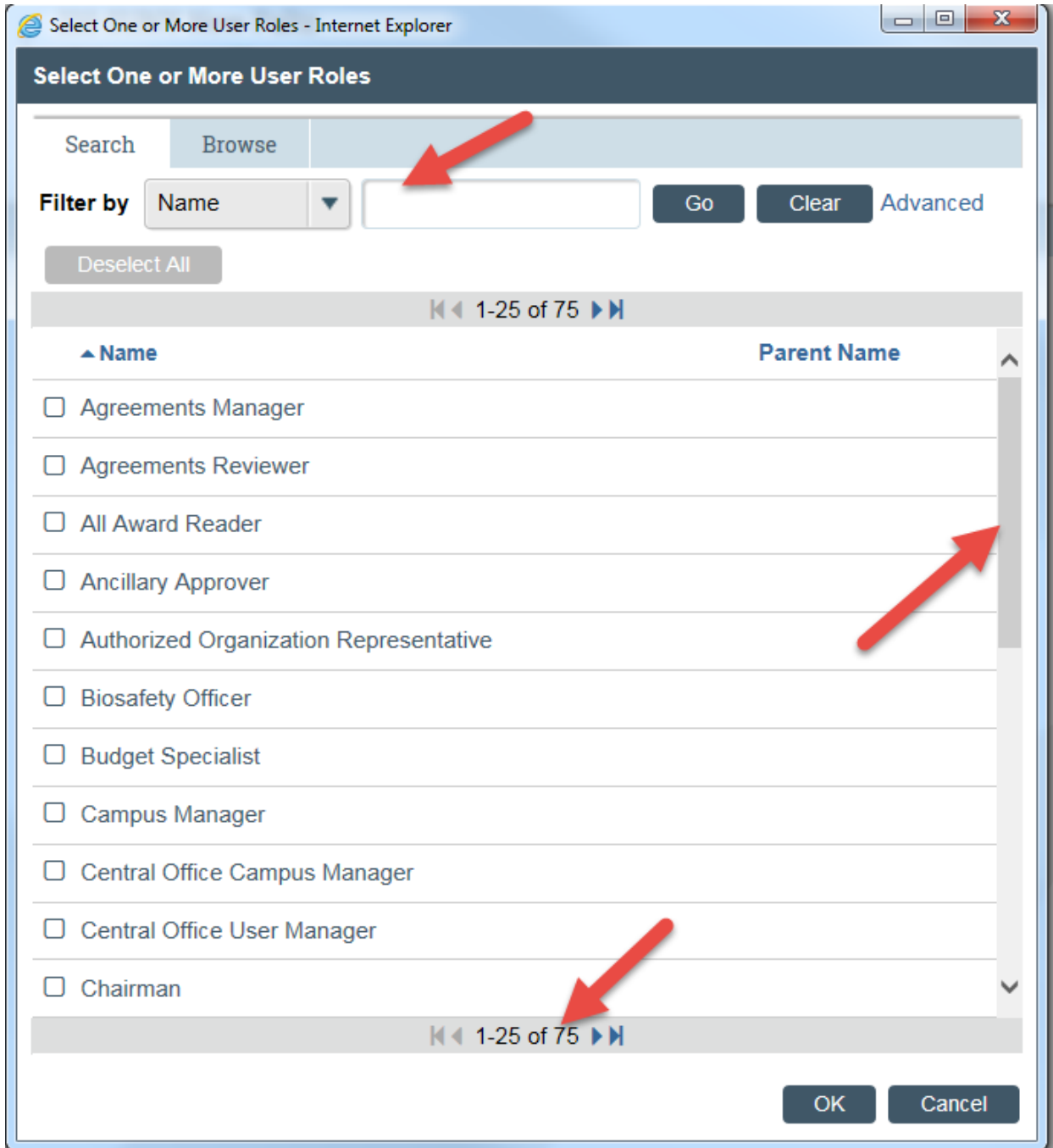
User Roles +

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 4: A: Figure 4)

Section 4: A: Figure 4



6. To remove a User Role, select the Role and click on Remove. (See Section 4: A: Figure 5)

Section 4: 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 + x

Registered User
Study Staff

C. 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 4: B: Figure 1)

Section 4: 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 4: B: Figure 2)

Section 4: B: Figure 2

First Name	Last Name	Employer	User ID	E-Mail
Alan	Chen	010 University at Albany	ac321789@albany.edu	achen6@albany.edu
Anting	Chen	020 Binghamton University	achen47@binghamton.edu	achen47@binghamton.edu
Changqing	Cheng	020 Binghamton University	120870	
Cheng	Chen	010 University at Albany	CC558781@albany.edu	
Chi-Yao	Chen	200 Old Westbury	124133	571110@gmail.com
Christine	Chen	580 College of Optometry	cchen@sunyopt.edu	cchen@sunyopt.edu
Christopher	Chen	210 SUNY New Paltz	chris.chen@rfsuny.org	chris.chen@rfsuny.org
Dana	Chen	020 Binghamton University	dchen66@binghamton.edu	dchen66@binghamton.edu

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

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

Section 4: B: Figure 2

The screenshot displays the user management interface for Christopher Chen at SUNY New Paltz. The top navigation bar includes 'My Inbox', 'Agreements', 'COI', and 'Grants'. The user's profile shows 'Christopher Chen' with a profile picture and a list of roles: 'Type Center', 'Workspace', and 'Contact and Organization Management'. The user is associated with '210 SUNY New Paltz' and has additional roles of 'Type Center' and 'Workspace'.

The user details section shows:

- Name:** Christopher Chen
- Title:**

The 'Account' tab is active, showing the following settings:

- * 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

Account settings include the following options:

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

The 'User Roles' section shows a list of roles: Registered User and Study Staff.

D. 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 4: C: Figure 1)

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

Select View:
Creation
Summary
COI Properties Admin
Default Ancillary Reviews (store specific)
Training Records
Restrictions
Grants Properties (SUNY)
Animal Research Experience

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

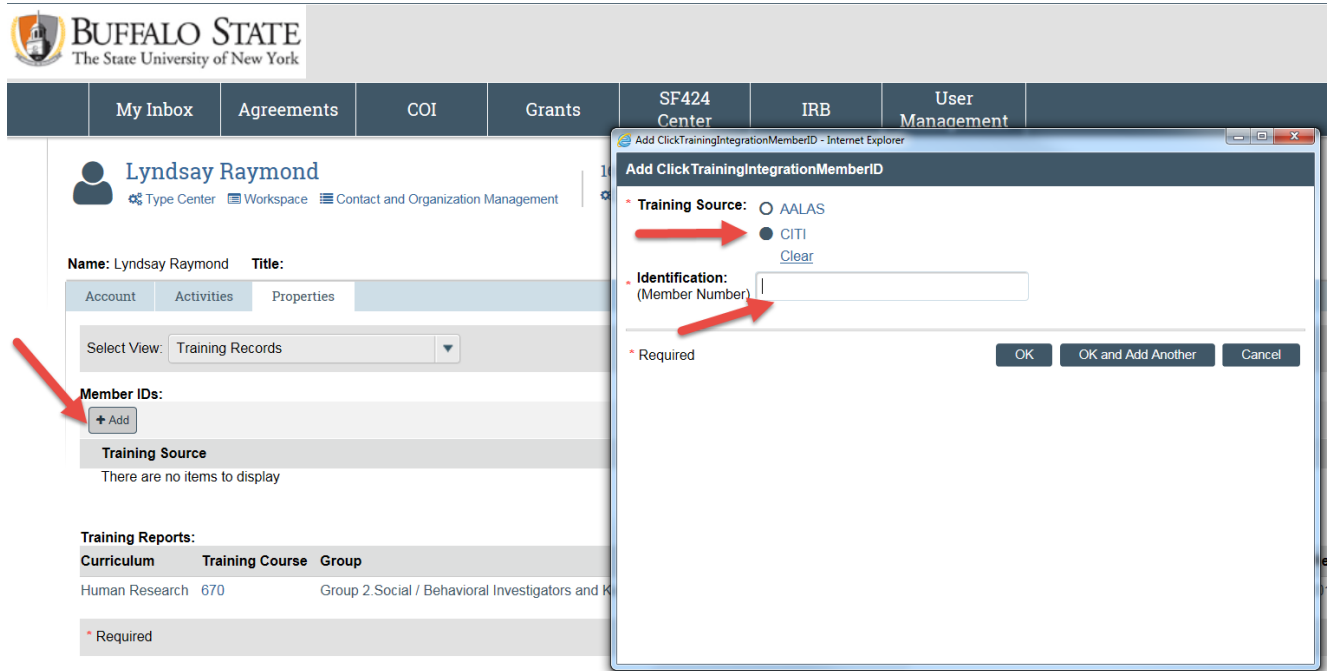
Employer (Campus):
160 Buffalo State College
Department:
160 Higher Education Administration Department ...
Time Zone:
Bulk Delivery Preference:

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.

Date Created: Thursday, February 8, 2018 5:53:59 PM
Date Last Updated: Friday, April 6, 2018 9:52:33 AM
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:

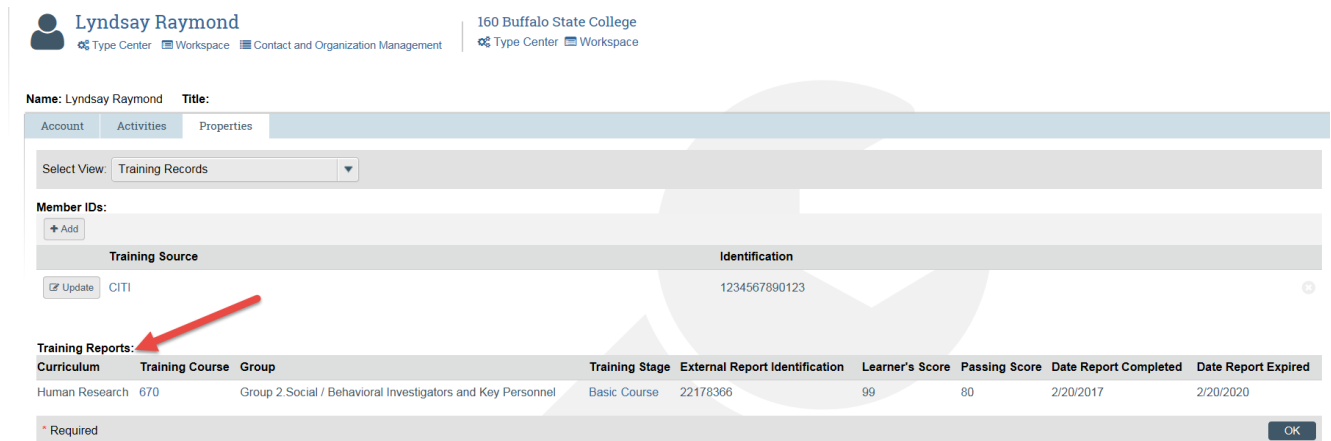
- Under the Member ID section, click on Add button, a new window will pop up. Select CITI and enter the Identification Number for CITI. Then click OK (See Section 4: C: Figure 2).

Section 4: C: Figure 2



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

Section 4: C: Figure 3



NOTE: On the Workspace page, under the Activities section, entitled "Update COI Training from training Integration" (Section 4: 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 4: C: Figure 4

The screenshot displays a user profile interface. On the left, there is a sidebar with two main sections: 'Edit Details' and 'Activities'. The 'Edit Details' section includes links for 'COI Properties Admin', 'Detail (SUNY)', 'Grants Properties (SUNY)', 'HR Interface Properties', 'Research Profile', and 'Restrictions'. The 'Activities' section includes 'Request HR Refresh', 'Process Self Registration', 'Decline Self Registration', 'Update COI Training Date from Training Integration' (highlighted with a red arrow), 'Admin Staff Create Research Disclosure Certification', and 'Email User Manager With Self'. The main content area is titled 'Summary' and shows the user's name as 'Christopher Chen' and their title. Below this, there are tabs for 'Details' and 'Grants Info'. The 'Details' tab is active, showing fields for 'Person', 'Honorific', 'First' (Christopher), 'Middle', 'Last' (Chen), 'Title', and 'RF Employee Number'. The 'Grants Info' tab is currently inactive. At the bottom of the 'Summary' section, there is a 'Phone' field with a 'Business' label.

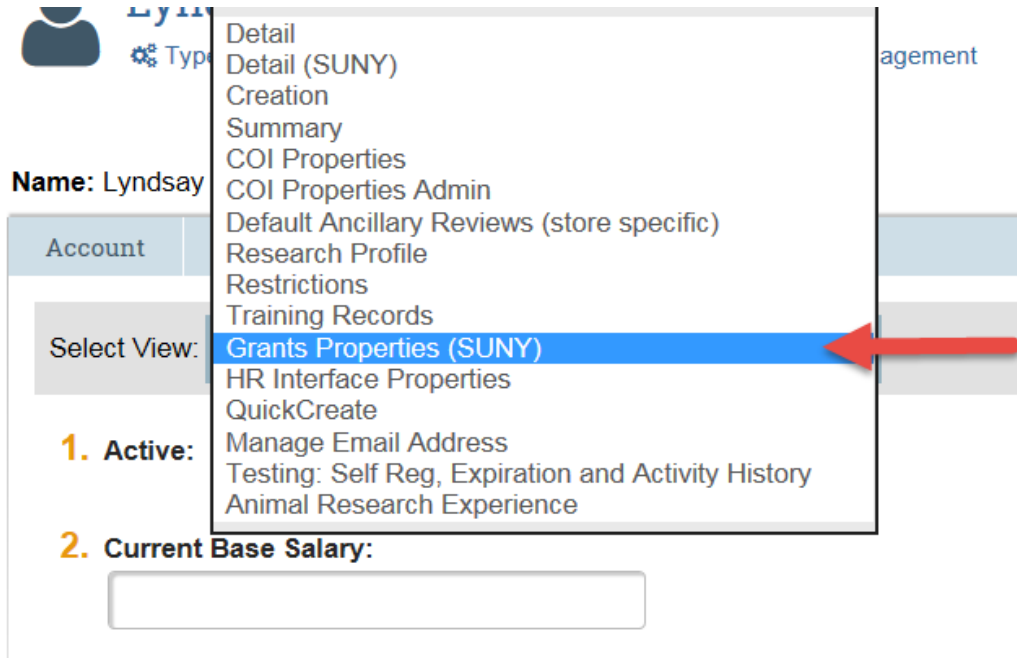
Grants Properties (SUNY):

Purpose:

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

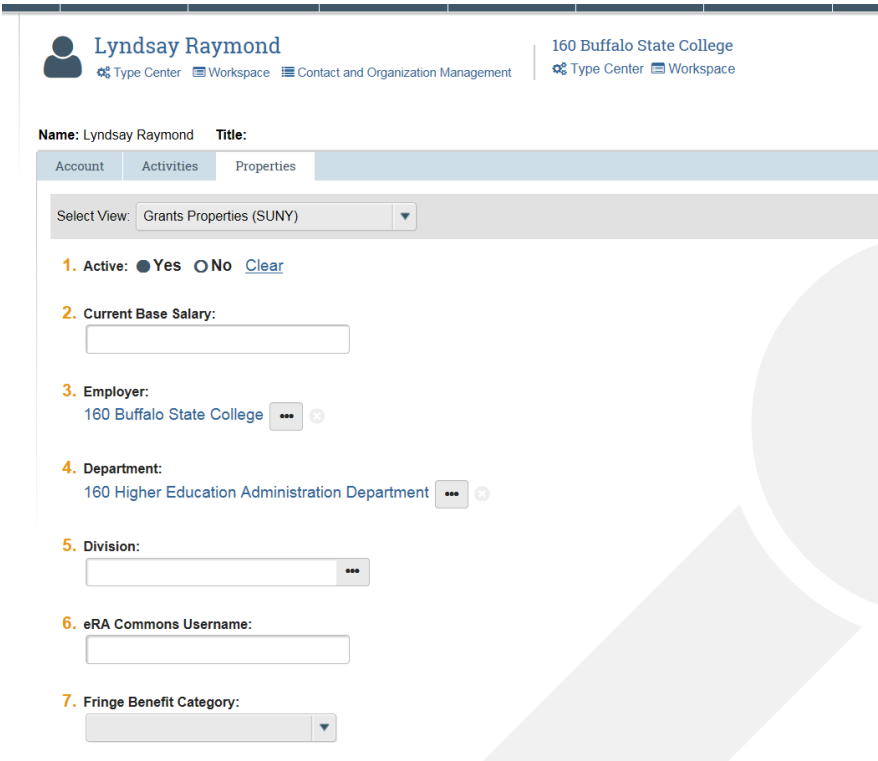
1. In the User Management section. Click on the Contact and Organization Management link on the left-hand side.
2. Search for the user you wish to update the grants properties.
3. Select the “Wrench” icon for the user that need to be edited. Go to Properties tab, then select the Grants Properties (SUNY) under the Selection View dropdown list. (see Section 4: C: Figure 5)

Section 4: C: Figure 5



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

see Section 4: C: Figure 6



- 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:

5. 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 5: A: Figure 1)

Section 5: 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 may 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
Honoric: -- 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?

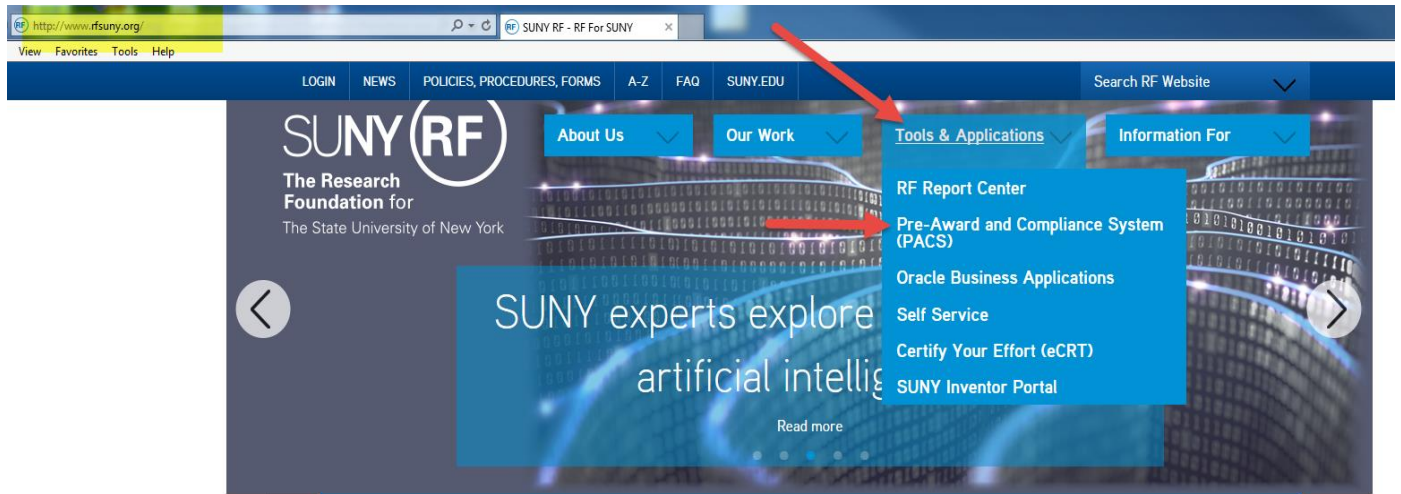
Users go to different locations to sign on depending on whether they have a portal account or if they were created thru self-registration. Once it is determined whether the user signs on thru the portal link or thru the local link below is how to access these links:

1. Go to the RF Website. (See Section 5:B:Figure 1)
2. Go to the Tools & Applications tab.(See Section 5:B:Figure 1)
3. Click on Pre-Award and Compliance System (PACS). (See Section 5:B:Figure 1)
4. On the SUNY PACS page the user selects the campus they are associated with.(See Section 5: 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 5: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 5: B: Figure 1



Section 5: 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 RF / Information For / Online Tools / SUNY PACS / SUNY PACS Login

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
 ▼

UNIVERSITY AT ALBANY
State University of New York

BINGHAMTON UNIVERSITY

University at Buffalo

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

[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 5: 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).

SUNY Federated SSO

Using Campus Login

Select your Campus

SUNY RF
All other locations

RF Account

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 5: B: Figure 4

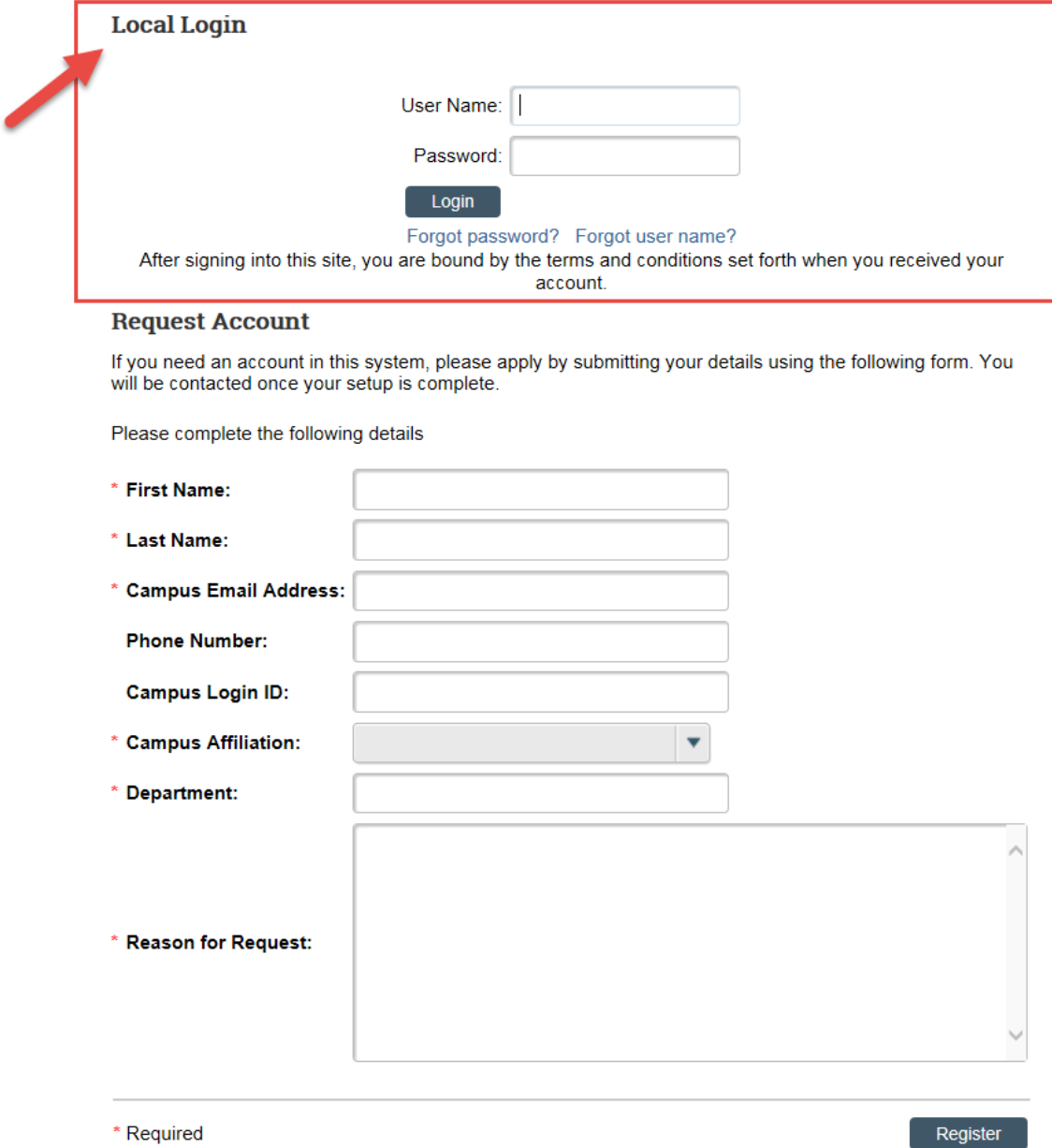
SUNY RF
The Research Foundation for
The State University of New York

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 5: 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. However, because 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 5:C: Figure 1)
2. The user would then go to the portal sign on page and click "Forgot your password?". (Section 5: 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 5: C: Figure 3)

Section 5: 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: [Text Field]

Dashboard Template: My Inbox Dual Store [Dropdown]

Default Page: Dashboard [Dropdown]

New Password: [Text Field]

Confirm Password: [Text Field]

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.

[Text Field]

[Text Field]

Login

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

Section 4: C: Figure 3

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

Home Who We Are What We Do Innovation Reports & Publications Working at the RF Contact the RF Policies & Procedures

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 5: 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 5: D: Figure 1

https://pacsprd2.rfsuny.org/SponsoredPrograms/PublicCustomLayouts/SSO/InvalidUser

File Edit View Favorites Tools Help

Invalid User Please Try Again

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 user's 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

For the campuses that activated People Bulk Load, 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 (Please note that every PACS user should be assigned Registered User and Study Staff by default)**

PACS Module	PACS User Roles	Activities
Agreements	Registered User+ Study Staff	<p>This role enables users to:</p> <ul style="list-style-type: none"> • Allows user to login. • Allows user to be selectable on certain LOVs. • Create Agreements • Create Amendments • Submit Ancillary Reviews • Submit Clarifications • Assign PI Proxies • View Public Correspondence
Agreements	<p>Agreements Reviewer</p> <p>(User(s) must be added to Campus Agreements office. Submit service request to customer service for RF Central Office Resource to complete)</p>	<p>All permissions enabled from the Registered User and Study Staff roles, in addition:</p> <ul style="list-style-type: none"> • View all agreements assigned to your Agreements office. • Edit and Submit Agreements • 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	<p>Agreements Manager</p> <p>(User(s) must be added to Campus Agreements office.</p>	<p>All permissions enabled from the Registered User and Study Staff roles, in addition:</p> <ul style="list-style-type: none"> • View all Agreements assigned to your Agreements office • Edit and Submit Agreements

PACS Module	PACS User Roles	Activities
	Submit service request to customer service for RF Central Office Resource to complete)	<ul style="list-style-type: none"> • Edit and Submit Amendments • Assign/Un-assign Owners • Approve Agreement language • Activate Agreements • Approve Amendments • Request clarification • Revise an agreement document • Finalize Agreements • Terminate active Agreements • Manage Ancillary Reviews • Notify Ancillary Reviewers • Void an Agreement • Copy Agreement • Log Correspondence • View public and private correspondence
Agreements	Agreements Reviewer + Principal Investigator (If Principal Investigator role is not provided to user with Agreements Reviewer role – user will not be able to Submit Agreements)	All permissions enabled from the Registered User and Study Staff roles, in addition: <ul style="list-style-type: none"> • Edit and Submit Agreements • Edit and Submit Amendments • Assign a PI Proxy • Withdraw Agreement • Submit Ancillary Review • Submit Clarifications
Agreements	Principal Investigator	All permissions enabled from the Registered User and Study Staff roles, in addition: <ul style="list-style-type: none"> • Edit and Submit Agreements • Edit and Submit Amendments • Assign PI Proxies • Withdraw Agreement • Submit Clarifications

PACS Module	PACS User Roles	Activities
		<ul style="list-style-type: none"> • Submit Ancillary Reviews • View Public Correspondence
Agreements	Campus Agreements Viewer	<p>All permissions enabled from the Registered User and Study Staff roles, in addition:</p> <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	<p>All permissions enabled from the Registered User and Study Staff roles, in addition:</p> <ul style="list-style-type: none"> • View only rights to all agreements/amendments utilizing central office. • View only rights to any attachments uploaded
COI	Registered User+ Study Staff	<p>This role enables users to:</p> <ul style="list-style-type: none"> • Allows user to login. • Allows user to be selectable on certain LOVs.
COI	COI Discloser	<p>All permissions enabled from the Registered User and Study Staff roles, in addition:</p> <ul style="list-style-type: none"> • Complete and submit a COI annual, updates and research disclosures. • Respond to Clarifications requested. • Respond to Management Plans
COI	COI Administrator	<p>All permissions enabled from the Registered User and Study Staff roles, in addition:</p> <ul style="list-style-type: none"> • Administer COI submissions. • Request clarifications requested. • Create Management Plans • Create Annual and Research certifications
COI	COI Committee	All permissions enabled from the Registered

PACS Module	PACS User Roles	Activities
	Member	User and Study Staff roles, in addition: <ul style="list-style-type: none"> • View disclosures assigned to the committee. • Participate in the committee meetings. • Be assigned as the committee reviewer
COI	Research Project Administrator	All permissions enabled from the Registered User and Study Staff roles, in addition: <ul style="list-style-type: none"> • View only rights to any disclosure in the system regardless of disclosure type
COI	COI Monitor	All permissions enabled from the Registered User and Study Staff roles, in addition: <ul style="list-style-type: none"> • Monitor management plans. • File reports on management plans
Grants	Registered User+ Study Staff (Note: user must be listed on the proposal for either read or edit access)	All permissions enabled from the Registered User and Study Staff roles, in addition: <ul style="list-style-type: none"> • Allows user to login. • Allows user to be selectable on certain LOVs. • if read only view the proposal • if edit access granted can edit the proposal
Grants	Principal Investigator	All permissions enabled from the Registered User and Study Staff roles, in addition: <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 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-

PACS Module	PACS User Roles	Activities
		<p>Grants.gov submissions)</p> <ul style="list-style-type: none"> • 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 the 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	Department Administrator+ SF424 Administrator	<p>All permissions enabled from the Registered User and Study Staff roles, in addition:</p> <ul style="list-style-type: none"> • Same Access as the Principal Investigator for creating a proposal on their behalf.
Grants	SF424 Reader	<p>All permissions enabled from the Registered User and Study Staff roles, in addition:</p> <ul style="list-style-type: none"> • Review and approve a funding proposal. • Disapprove a funding proposal which will send it back to the PI
Grants	Contract Specialist	<p>All permissions enabled from the Registered User and Study Staff roles, in addition:</p> <ul style="list-style-type: none"> • Read only access to proposals at a campus level.
Grants	SF 424 Administrator+ Specialists Finance/Grant+ Contract Specialist	<p>All permissions enabled from the Registered User and Study Staff roles, in addition:</p> <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

PACS Module	PACS User Roles	Activities
		<p>team.</p> <ul style="list-style-type: none"> • 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 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	SF 424 Administrator+ Authorized Organization Representative	<p>All permissions enabled from the Registered User and Study Staff roles, in addition:</p> <ul style="list-style-type: none"> • Review and edit funding proposal. • Review and edit SF424. • Submit proposal to grants.gov
Grants	RFCO	This role is for central office only. All

PACS Module	PACS User Roles	Activities
	Finance/Grants Specialist+ Specialists Finance/Grant+ SF424 Reader+ Contract Specialist+	permissions enabled from the Registered User and Study Staff roles, in addition: <ul style="list-style-type: none"> • Ability to award and create funding allocations on a proposal. • Ability to view proposals
IRB	Registered User+ Study Staff	<ul style="list-style-type: none"> • Allows user to login. • Allows user to be selectable on certain LOVs. • Create a submission. • Be listed as a submission's PI. • Be assigned to a study team. • Be listed as a submission's primary contact
IRB	Principal Investigator	All permissions enabled from the Registered User and Study Staff roles, in addition: <ul style="list-style-type: none"> • Create and submit IRB Studies
IRB	IRB Committee Member	All permissions enabled from the Registered User and Study Staff roles, in addition: <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	All permissions enabled from the Registered User and Study Staff roles, in addition: <ul style="list-style-type: none"> • View all submissions assigned to IRB office. • Assign Coordinator • Create meetings. • Submit Pre-Review • Edit Pre-Review

PACS Module	PACS User Roles	Activities
		<ul style="list-style-type: none"> • Request Clarification • Assign Reviewers • Assign to Meeting • Submit Committee Review • Remove from Agenda • Finalize Documents • Prepare Letter • Send Letter • Terminate studies
IRB	IRB Director	<p>All permissions enabled from the Registered User and Study Staff roles, in addition:</p> <ul style="list-style-type: none"> • Create Committee • 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
IACUC	Registered User+	<ul style="list-style-type: none"> • Allows user to login.

PACS Module	PACS User Roles	Activities
	Study Staff	<ul style="list-style-type: none"> • Allows user to be selectable on certain LOVs. • Be listed as a submission's Principal Investigator. • Create and modify research teams, team procedures, and team substances. • Create and Submit IACUC Protocols
IACUC	Principal Investigator	<ul style="list-style-type: none"> • The Principal Investigator role does not give permissions in IACUC.
IACUC	Facility Manager	<p>All permissions enabled from the Registered User and Study Staff roles, in addition:</p> <ul style="list-style-type: none"> • Create and edit buildings and rooms. • Deactivate and activate buildings and rooms
IACUC	IACUC Coordinator	<p>All permissions enabled from the Registered User and Study Staff roles, in addition:</p> <ul style="list-style-type: none"> • Administer and approve IACUC Protocols administratively. • Record Committee determinations of Protocols
IACUC	IACUC Director	<p>All permissions enabled from the Registered User and Study Staff roles, in addition:</p> <ul style="list-style-type: none"> • Administer and approve IACUC Protocols administratively. • Record Committee determinations of Protocols. • Assign IACUC Coordinator
IACUC	IACUC Committee Member	<p>All permissions enabled from the Registered User and Study Staff roles, in addition:</p> <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	<p>All permissions enabled from the Registered User and Study Staff roles, in addition:</p>

PACS Module	PACS User Roles	Activities
		<ul style="list-style-type: none"> Schedule and conduct inspections
IACUC	IACUC Training Coordinator	All permissions enabled from the Registered User and Study Staff roles, in addition: <ul style="list-style-type: none"> Create Training courses. Select users who passed Training course
IACUC	PAM Coordinator (This role is currently not being used.)	This role is for central office only. All permissions enabled from the Registered User and Study Staff roles, in addition: <ul style="list-style-type: none"> Submit a full-detailed 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	All permissions enabled from the Registered User and Study Staff roles, in addition: <ul style="list-style-type: none"> View all submissions across all IACUC offices
IACUC	Veterinarian	All permissions enabled from the Registered User and Study Staff roles, in addition: <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 Create and submit Safety Protocols
Safety	Registered User+ Study Staff	<ul style="list-style-type: none"> Allows user to login. Allows user to be selectable on certain LOVs.
Safety	Principal Investigator	The Principal Investigator role does not give permissions in the Safety module.
Safety	Safety Specialist	All permissions enabled from the Registered User and Study Staff roles, in addition: <ul style="list-style-type: none"> Administer and approve Safety Protocols

PACS Module	PACS User Roles	Activities
		administratively. <ul style="list-style-type: none"> Record Committee determinations of Protocols
Safety	Safety Administrator	All permissions enabled from the Registered User and Study Staff roles, in addition: <ul style="list-style-type: none"> Administer and approve Safety Protocols administratively. Record Committee determinations of Protocols. Assign Safety Specialist
Safety	Safety Committee Member	All permissions enabled from the Registered User and Study Staff roles, in addition: <ul style="list-style-type: none"> View disclosures assigned to the committee. Participate in the committee meetings. Be assigned as the committee reviewer.
Safety	Biosafety Officer	All permissions enabled from the Registered User and Study Staff roles, in addition: <ul style="list-style-type: none"> Complete a Biosafety review.

***Appendix B – SUNY PACS People Load**

As each campus goes live with SUNY PACS the users are uploaded into PACS from the Oracle EBS Human Resources system. RF Central Office will continue to update SUNY PACS with New or Changed data from the source system each weekday.

Important: If user data is updated in PACS, i.e. 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.

Oracle EBS Human Resources – This includes all active people with Primary Assignment status of:

- Active Assignment

- Paid Leave
- SUNY
- SUNY Extra Service
- Unpaid Leave
- Unpaid Grad Summer
- Terminated - Processes Pending.