Introduction

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  - Functional
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  - Technical
Welcome!

1. Introduction
2. Institution
3. Goals
4. Phases
5. Future
6. Questions
University of California Irvine

- One of 10 campuses in UC system
- FY 16
  - ~2000 proposals
  - ~$395m award funding FY16 (as of 6/29)
    - 31% change from $293m FY15
- Proposal Routing/Approval system: Kuali Coeus since 2012
University of California Irvine

- Cayuse School since Spring 2015
- Campus Goals
  - Reduce administrative burden on department proposal preparers, faculty, and central office (i.e. reduce # of errors/warnings)
  - Increase research funding to $500m/yr
  - Support IVCR goal to streamline grant submission process
- Presented on panel with Stanford, USC at ERC 2015
  - USC demoed their instance
Cayusage

SF424 PDF vs. Cayuse

May June July August September October November December January February March April May June

PDF S2S
What % of Grants.gov proposals are being submitted in Cayuse?
Initial Steps

• Obtain Focus group input
  – KC S2S vs. Cayuse vs. G.gov
  – Main benefit – Built in error/warning checking
  – Main drawback – Double data entry
• Assess departments’ usage of Cayuse
  – Reach out to heavy-hitting holdouts
• Adjust to leadership needs for a seamless process from Cayuse to Local System
Cayuse Implementation Approach

Step One
(Feb 2015)
Single Sign On
Quicklink Field in Local System

Step Two
(Feb 2016)
Pairing
Sending permissions
Quicklink format
Feature flag

Step Three
(Future)
Proposal data synchronization
Step One
Single Sign On

Welcome to UCI's Cayuse 424
Cayuse424/v7.1

Username: 
Password: 

SIGN IN

UCInetID Secure Web Login
UCInetID Information
• Activate your UCInetID
• UCInetID Info

UCInetID: 
Password: 
Login

WARNING! Protect your privacy. Logout when you are done and completely exit your browser.

Powered by WebAuth. Developed by CIT.
Computing Security & Resources
Step One
Quicklink Field in Local System
Cayuse Implementation Approach

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(Feb 2015)
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Single Sign On

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Step Three
(Future)
Proposal data synchronization
Step 2

• Quicklink format
• Pairing
• Sending permissions (Read, List, Print)
  • ‘Users not found’
• Feature flag
• Quicklink_WS_Integration.pdf (ask Evisions)
Step 2
Quicklink format

1 error(s) found on page.

<table>
<thead>
<tr>
<th>Cayuse 424 Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cayuse Form URL:</td>
</tr>
<tr>
<td>Is the Cayuse 424 form Final?:</td>
</tr>
<tr>
<td><a href="https://uci.cayuse424.com/1006/login.do">https://uci.cayuse424.com/1006/login.do</a></td>
</tr>
</tbody>
</table>

Other errors:
- The Cayuse 424 link is not formatted correctly
Step 2

- Quicklink format
- Pairing
- Sending permissions (Read, List, Print)
  - ‘Users not found’
- Feature flag
- Quicklink_WS_Integration.pdf (ask Evisions)
Step 2
Pairing
Step 2

- Quicklink format
- Pairing
- Sending permissions (Read, List, Print)
  - ‘Users not found’
- Feature flag
- Quicklink_WS_Integration.pdf (ask Evisions)
Step 2
Sending Permissions
Step 2

- Quicklink format
- Pairing
- Sending permissions (Read, List, Print)
  - ‘Users not found’
- Feature flag
- Quicklink_WS_Integration.pdf (ask Evisions)
Step 2
Feature Flag

Parameter Lookup

<table>
<thead>
<tr>
<th>Actions</th>
<th>Namespace Code</th>
<th>Component</th>
<th>Application ID</th>
<th>Parameter Name</th>
<th>Parameter Description</th>
<th>Parameter Value</th>
<th>Parameter Constraint Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>edit</td>
<td>UCI-KC-PD</td>
<td>Document</td>
<td>KC</td>
<td>&quot;cayuse&quot;</td>
<td>ENABLE CAYUSE PAIR PERMISSION</td>
<td>Y</td>
<td>A</td>
</tr>
</tbody>
</table>

Export options: CSV | spreadsheet | XML
Implementation Challenges

- Username format was different in production vs. staging
- **Dealing with errors**
  - Local System Validation level errors
    - If format does not meet requirement
    - If Cayuse proposal is paired with another local doc
  - Permission Failure Notification: Service Now tickets
  - ‘User not found’ when setting permissions (manually add)
- If doc is canceled/terminated, Cayuse proposal is unpaired
- Planning for new functionality (new APIs)
Dealing with Errors: Local System Validation Level Errors
Dealing with Errors:
Permission Failure Notification

From: OIT Service Desk
Sent: Wednesday, June 22, 2016 10:43:58 AM (UTC-08:00) Pacific Time (US & Canada)
To: kc-admin@uci.edu
Subject: 5 - Routine -- Kuali Coeus System Kuali Coeus System KC:Cayuse setting permissions failed for assigned

A new incident has been assigned to your group.

Priority: 5 - Routine
Caller: Kuali Coeus System Kuali Coeus System
UCI netID: kc-sys
Department:
Conf. Item: KC - Kuali Coeus
Description: KC:Cayuse setting permissions failed for Proposal 206108
Review incident status: INC0097017

Comments and Work notes:

06-22-2016 10:43:08 PDT - SN_WS_KCA
KC Document Id: 206108
Paired Cayuse Proposal Id: 1004960971
UCI Net IDs of Individuals for whom setting perms failed

KHANZADEH, SADEGH, skhanzad@uci.edu

OIT Service Desk
Office of Information Technology
Unpairing

- Document was successfully saved.
Cayuse Implementation Approach

Step One
(Feb 2015)
Quicklink Field in Local System
Single Sign On

Step Two
(Feb 2016)
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Step Three
(Future)
Proposal data synchronization
Next Steps

1. Complete required fields for saving.

2. Paste Cayuse link to pair.

3. *New Sync Button* to pull in certain data from Cayuse → Local System.
Future Phases

Create local system doc proposal from existing Cayuse Proposal.
Future Phases

Create Cayuse proposal from existing local system doc.
Questions & Answers
### CayuseProposalService

**Reference:** “Quicklink_WS_Integration.pdf”, Evisions

<table>
<thead>
<tr>
<th>Operation and Parameters</th>
<th>User Permissions Needed</th>
<th>Results of Operation</th>
</tr>
</thead>
<tbody>
<tr>
<td>getInfoByReferenceId(String referenceId)</td>
<td>none1</td>
<td>Returns a ProposalInfo record representing the 424 proposal paired with referenceId. Since referenceIds must be unique, there will be at most one result for each referenceId. Returns a fault if there is no 424 proposal paired with referenceId</td>
</tr>
<tr>
<td>getPairedProposals()</td>
<td>none1</td>
<td>Returns a list of ProposalInfo representing all paired proposals.</td>
</tr>
<tr>
<td>getUnPairedProposals()</td>
<td>only returns proposals on which the user has write permission</td>
<td>Returns a list of ProposalInfo for all unpaired proposals for which the service user has write permission.</td>
</tr>
<tr>
<td>Pair(String proposalId, String referenceId)</td>
<td>write permission on the target proposal</td>
<td>Creates a pairing between the 424 proposal identified by proposalId and the external entity uniquely identified by referenceId. Returns empty on success; returns a fault if there is no 424 proposal with ID proposalId, the 424 proposal identified by proposalId is already paired, or referenceId has already been used for pairing.</td>
</tr>
<tr>
<td>unPair(String referenceId)</td>
<td>write permission on the target proposal</td>
<td>Removes the pairing between the external entity identified by referenceId and the 424 proposal it is paired with. The affected 424 proposal is then available for pairing. Returns an empty response; returns a fault if user lacks write permission for the paired 424 proposal.</td>
</tr>
<tr>
<td>IsPairedWith(String referenceId)</td>
<td>none1</td>
<td>Returns true or false depending on whether a 424 proposal is found that is paired with referenceId</td>
</tr>
<tr>
<td>Operation and Parameters</td>
<td>User Permissions Needed</td>
<td>Results of Operation</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>getProposalUserPermissions(String referenceId)</td>
<td>none1</td>
<td>Returns a list of UserPerm representing all users with any explicit permissions on the 424 proposal paired with referenceId.</td>
</tr>
<tr>
<td>setProposalPermissions ( String referenceId, String userId, List&lt;String&gt; permActions)</td>
<td>permdeleteuser plus appropriate permissions for permchange or permadduser on the target proposal</td>
<td>Replaces the permissions for userId on the 424 proposal paired with referenceId with the new actions; user's old permissions are lost. If there is no permission record for the user on the proposal, one will be created (unless the list of perm actions is empty). If the passed-in list of permissions is empty, an existing permissions record for the user will be removed. Returns empty response on success; returns a fault if permissions could not be set.</td>
</tr>
</tbody>
</table>
For calls that apply user permissions, an optional additional SOAP Header, named <effectiveUser>, may be used. The <effectiveUser> header must contain a recognized username whose permissions will be applied by 424 when making the call. If this header is not supplied, then the permissions for the <soapUser> will be applied for the call. **Note: <effectiveUser> may only be used with SOAP Header-based authentication.**

```xml
<soapenv:Header>
  <soapenv:soapUser>username</soapenv:soapUser>
  <soapenv:soapPass>password</soapenv:soapPass>
  <soapenv:effectiveUser>permittedUser</soapenv:effectiveUser>
</soapenv:Header>
```

The recommended authentication method is to use SOAP Headers, as this method allows the most flexibility in terms of permissions applied for the call.
Thank You!

Please contact the Evisions marketing team if you have any questions.