

# UAccess Research Proposal Provisioning

The following two (2) methods illustrate how to determine who is provisioned with what UAccess Research proposal approval roles for a selected college or department. Use the Access Provisioning Tool (APT) to make changes.

## Method 1: UAccess Research Lookup

- 1) Log in to UAccess Research and navigate to the Maintenance tab.
- 2) Click the “Unit Administrator” link in the Shared group.

UAccess Research
Logged in User:mundts

RESEARCHER
UNIT
CENTRAL ADMIN
Step 1
MAINTENANCE
SYSTEM ADMIN

☰ action list
🔍 doc search
📊 analytics

MESSAGE OF THE DAY No messages today.

<p><b>Shared</b></p> <ul style="list-style-type: none"> <li><a href="#">Activity Type</a></li> <li><a href="#">Address Book</a></li> <li><a href="#">Appointment Type</a></li> <li><a href="#">Argument Value Lookup</a></li> <li><a href="#">Budget Category</a></li> <li><a href="#">Budget Category Mapping</a></li> <li><a href="#">Budget Category Maps</a></li> <li><a href="#">Budget Category Type</a></li> <li><a href="#">Citizenship Type</a></li> <li><a href="#">Comment Type</a></li> <li><a href="#">Contact Type</a></li> <li><a href="#">Contact Usage</a></li> <li><a href="#">Cost Sharing Type</a></li> <li><a href="#">Custom Attribute</a></li> <li><a href="#">Custom Attribute Document</a></li> <li><a href="#">F&amp;A Rate Types</a></li> <li><a href="#">Institute La Rate</a></li> <li><a href="#">Institute Rate</a></li> <li><a href="#">Investigator Credit Type</a></li> <li><a href="#">Keywords</a></li> <li><a href="#">Notice of Opportunity</a></li> <li><a href="#">Notifications</a></li> <li><a href="#">Notification Module Roles</a></li> <li><a href="#">NSF Science Code</a></li> <li><a href="#">Object Code</a></li> <li><a href="#">Organization</a></li> <li><a href="#">Organization Type List</a></li> <li><a href="#">Person Document Type</a></li> <li><a href="#">Proposal Type</a></li> <li><a href="#">Rate Class</a></li> <li><a href="#">Rate Class Type</a></li> <li><a href="#">Rate Class Exclusion</a></li> <li><a href="#">Rate Class Inclusion</a></li> <li><a href="#">Rate Type</a></li> <li><a href="#">Formulated Type</a></li> <li><a href="#">Unit Formulated Cost</a></li> <li><a href="#">Question</a></li> <li><a href="#">Questionnaire</a></li> <li><a href="#">S2S Form to Questionnaire</a></li> <li><a href="#">Question Category</a></li> <li><a href="#">Question Type</a></li> <li><a href="#">Special Review Approval Status</a></li> <li><a href="#">Special Review Type</a></li> <li><a href="#">Special Review Usage</a></li> <li><a href="#">Training Stipend Rate</a></li> <li><a href="#">Valid Special Review Approval</a></li> <li><a href="#">Valid Calculation Type</a></li> <li><a href="#">Valid Cost Element Job Code</a></li> <li><a href="#">Valid Cost Element Rate Type</a></li> <li style="border: 2px solid red; padding: 2px;"><a href="#">Unit Administrator</a></li> <li><a href="#">Unit Administrator Create Global</a></li> <li><a href="#">Unit Administrator Delete Global</a></li> <li><a href="#">Unit Administrator Type</a></li> <li><a href="#">Yes/No Questions</a></li> <li><a href="#">Watermark</a></li> <li><a href="#">Person Signature</a></li> <li><a href="#">Person Signature Modules</a></li> </ul>	<p><b>Proposals</b></p> <ul style="list-style-type: none"> <li><a href="#">Abstract Type</a></li> <li><a href="#">Budget Categories</a></li> <li><a href="#">Budget Status</a></li> <li><a href="#">Mail Type</a></li> <li><a href="#">Object Code</a></li> <li><a href="#">Deadline Type</a></li> <li><a href="#">Degree Type</a></li> <li><a href="#">IP Review Activity Type</a></li> <li><a href="#">IP Review Requirement Type</a></li> <li><a href="#">IP Review Result Type</a></li> <li><a href="#">Job Code</a></li> <li><a href="#">Location Type</a></li> <li><a href="#">Mail By</a></li> <li><a href="#">Narrative Status</a></li> <li><a href="#">Narrative Types</a></li> <li><a href="#">Person Document Type</a></li> <li><a href="#">Person Table Editable Columns</a></li> <li><a href="#">Proposal Dev Editable Columns</a></li> <li><a href="#">Proposal Development Status</a></li> <li><a href="#">Rate Class</a></li> <li><a href="#">Rate Type</a></li> <li><a href="#">Rate Class Exclusion</a></li> <li><a href="#">Rate Class Inclusion</a></li> <li><a href="#">S2S Submission Type</a></li> <li><a href="#">S2S Revision Type</a></li> <li><a href="#">S2S Providers</a></li> <li><a href="#">Training Stipend Rate</a></li> <li><a href="#">Valid Calculation Type</a></li> <li><a href="#">Valid Cost Element Rate Type</a></li> <li><a href="#">Valid Narrative Form</a></li> <li><a href="#">Institutional Proposal Status</a></li> <li><a href="#">Proposal Log Status</a></li> <li><a href="#">Proposal Log Type</a></li> <li><a href="#">To Be Named Person</a></li> <li><a href="#">Budget Editable Columns</a></li> </ul> <p><b>Awards</b></p> <ul style="list-style-type: none"> <li><a href="#">Account Type</a></li> <li><a href="#">Attachment Type</a></li> <li><a href="#">Award Status</a></li> <li><a href="#">Award Type</a></li> <li><a href="#">Basis of Payment</a></li> <li><a href="#">Valid Award Basis of Payment</a></li> <li><a href="#">Valid Class Report Frequency</a></li> <li><a href="#">Valid Frequency Base</a></li> <li><a href="#">Valid Basis and Method of Payment</a></li> <li><a href="#">Frequency</a></li> <li><a href="#">Frequency Base</a></li> <li><a href="#">Method of Payment</a></li> <li><a href="#">OSP File Copy</a></li> <li><a href="#">Report</a></li> <li><a href="#">Report Class</a></li> <li><a href="#">Report Status</a></li> <li><a href="#">Sponsor Template</a></li> <li><a href="#">Sponsor Terms</a></li> <li><a href="#">Award Transaction Type</a></li> </ul>	<p><b>Compliance - Conflict of Interest</b></p> <ul style="list-style-type: none"> <li><a href="#">COI Attachment Type</a></li> <li><a href="#">COI Disclosure Status</a></li> <li><a href="#">COI Disposition Status</a></li> <li><a href="#">COI Committee Role Type</a></li> <li><a href="#">COI Disclosure Event Type</a></li> <li><a href="#">COI Note Type</a></li> <li><a href="#">COI Review Type</a></li> <li><a href="#">COI Reviewer</a></li> <li><a href="#">COI Status</a></li> <li><a href="#">Entity Relationship Type</a></li> <li><a href="#">Entity Status</a></li> <li><a href="#">Entity Data Groups</a></li> <li><a href="#">Entity Data Matrix</a></li> <li><a href="#">COI Review Status</a></li> <li><a href="#">COI Recommended Action Type</a></li> </ul> <p><b>Compliance - Shared</b></p> <ul style="list-style-type: none"> <li><a href="#">Attachments Entry Type</a></li> <li><a href="#">Committee Decision Motion Type</a></li> <li><a href="#">Committee Membership Type</a></li> <li><a href="#">Committee Type</a></li> <li><a href="#">Exemption Type</a></li> <li><a href="#">Funding Source Type</a></li> <li><a href="#">Membership Role</a></li> <li><a href="#">Minute Entry Type</a></li> <li><a href="#">Scheduled Other Action Type</a></li> <li><a href="#">Schedule Status</a></li> </ul> <p><b>Compliance - IRB</b></p> <ul style="list-style-type: none"> <li><a href="#">Batch Correspondence</a></li> <li><a href="#">Correspondence Generated</a></li> <li><a href="#">Correspondence Template</a></li> <li><a href="#">Correspondence Type</a></li> <li><a href="#">Correspondent Type</a></li> <li><a href="#">Exempt Studies CheckList</a></li> <li><a href="#">Expedited Review CheckList</a></li> <li><a href="#">Organization Correspondent</a></li> <li><a href="#">Participant Type</a></li> <li><a href="#">Protocol Action Notification Template</a></li> <li><a href="#">Protocol Action Type</a></li> <li><a href="#">Protocol Affiliation Type</a></li> <li><a href="#">Protocol Attachment Group</a></li> <li><a href="#">Protocol Attachment Status</a></li> <li><a href="#">Protocol Attachment Type</a></li> <li><a href="#">Protocol Attachment Type Group</a></li> <li><a href="#">Protocol Contingency</a></li> <li><a href="#">Protocol Follow-up Actions</a></li> <li><a href="#">Protocol Person Role</a></li> <li><a href="#">Protocol Online Review Determination Recommendation Codes</a></li> <li><a href="#">Protocol Online Review Status Codes</a></li> <li><a href="#">Protocol Organization Type</a></li> <li><a href="#">Protocol Review Type</a></li> <li><a href="#">Protocol Reviewer Type</a></li> <li><a href="#">Protocol Status</a></li> <li><a href="#">Protocol Type</a></li> <li><a href="#">Reference Type</a></li> <li><a href="#">Risk Level</a></li> <li><a href="#">Submission Status</a></li> </ul>
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**Miscellaneous**

- [Classroom Report Type](#)

**Negotiations**

Step 2

## UAccess Research Proposal Provisioning

- 3) Enter search criteria as described below and then click the ‘search’ button to display results.
- a) Unit Number: You may search for one unit at a time or use wildcards (\* or %) to narrow search results.
    - i) Departments are identified with a numerical code. 0750 = Dept of Emergency Medicine
    - ii) Colleges are denoted by an alphabetic code. MDPX = College of Medicine – Phoenix
  - b) Unit Administrator Type Code: As of December, 2015, there are only 2 Unit Administrator Types in use and they both have to do with proposal unit approvers. Leaving this filter blank will return results for both types.
    - i) 17 = LeadUnitPre-Approver Type

### Lead Unit Pre-Approver

Approve Proposals - Lead Unit Level: Allows access to approve proposals at the Lead Department Pre-Approval level. Department proposal owner reviews for quality assurance before other approvers.

This is an administrative review that allows a Lead Unit *proposal owner* an opportunity to:

- monitor routing progress and prompt approvers as needed to meet deadlines
- review proposal quality before others approve
- check for major administrative errors to avoid re-routing
- double check key content and advance arrangements between departments or colleges to avoid re-routing

- ii) 16 = UnitHierarchyRoutingApproverType

### Department Approvers

Approve Proposals - Department Level: Allows access to approve proposals at the Department Level

Department Head agrees:

- PI is capable of carrying out the proposed project
- Department responsibilities will be adjusted so investigators can commit required project effort
- Department will manage award funds in compliance with UA and sponsor policies
- Cost sharing and/or proposed Facilities & Administrative needs will be provided
- Space and facilities are or will be available
- Project is consistent with the mission of the department, the college, and the University

UAccess Research
Logged in User:mundts [logout](#)

RESEARCHER UNIT CENTRAL ADMIN MAINTENANCE SYSTEM ADMIN
[action list](#) [doc search](#) [analytics](#)

Unit Administrator Lookup [create new](#) [Main](#)

\* required field

KC Person:

Unit Administrator Type Code:

Unit Number:

Step 3: search criteria

^hide

6 items retrieved, displaying all items. Step 4

	KcPerson Full Name	Description	Unit Number
<a href="#">delete</a>	Maria L Puig	LeadUnitPre-Approver Type	2001
<a href="#">delete</a>	Maria L Puig	UnitHierarchyRoutingApproverType	2001
<a href="#">delete</a>	Martha L Sesteaga	LeadUnitPre-Approver Type	2001
<a href="#">delete</a>	Martha L Sesteaga	UnitHierarchyRoutingApproverType	2001
<a href="#">delete</a>	Laura L Ross	UnitHierarchyRoutingApproverType	2001
<a href="#">delete</a>	Laura L Ross	LeadUnitPre-Approver Type	2001

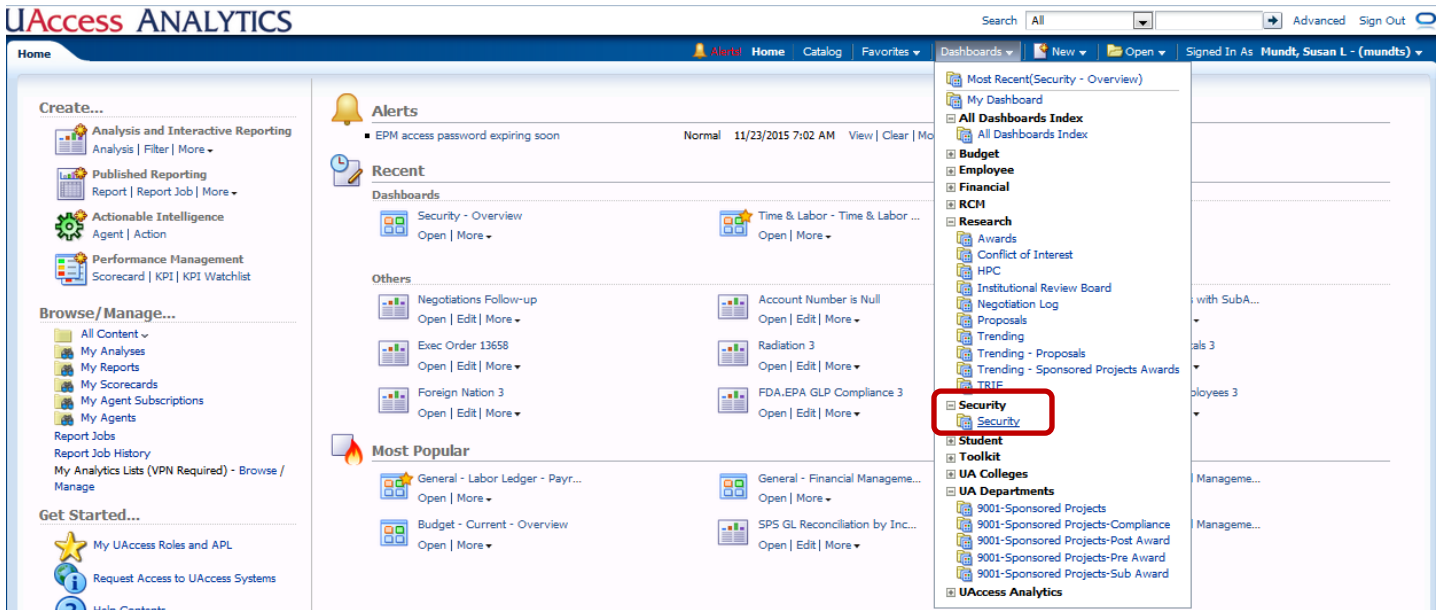
Export options: [CSV](#) | [spreadsheet](#) | [XML](#)
Step 5

- 4) Sort results in ascending or descending order by clicking underlined column headings.
- 5) Export lookup results to a spreadsheet or other available format using the links below the results display.

## UAccess Research Proposal Provisioning

### Method 2: Analytics Security Dashboard for All Roles

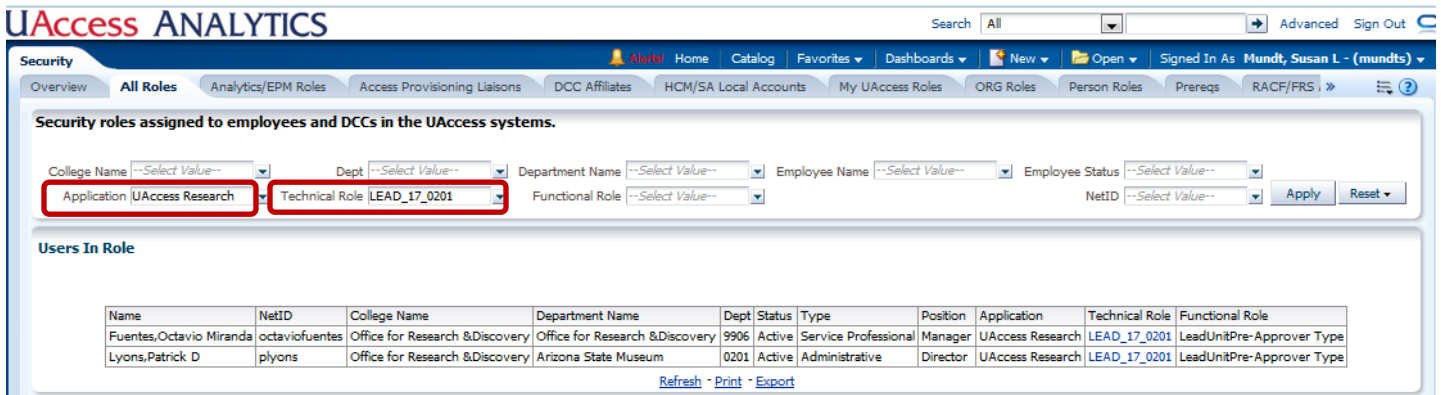
1) Anyone with a NetID may log in to UAccess Analytics and navigate to the dashboards for Security.



2) Click on the “All Roles” dashboard tab and ‘apply’ the following filters as needed:

- a) Application = UAccess Research
- b) Technical Role starts with “LEAD\_17\_” for the Lead Unit Pre-Approver role

Technical Role starts with... (Technical Role ends with the unit number)	Functional Role
LEAD_17_	LeadUnitPre-Approver Type
UNIT_16_	UnitHierarchyRoutingApproverType



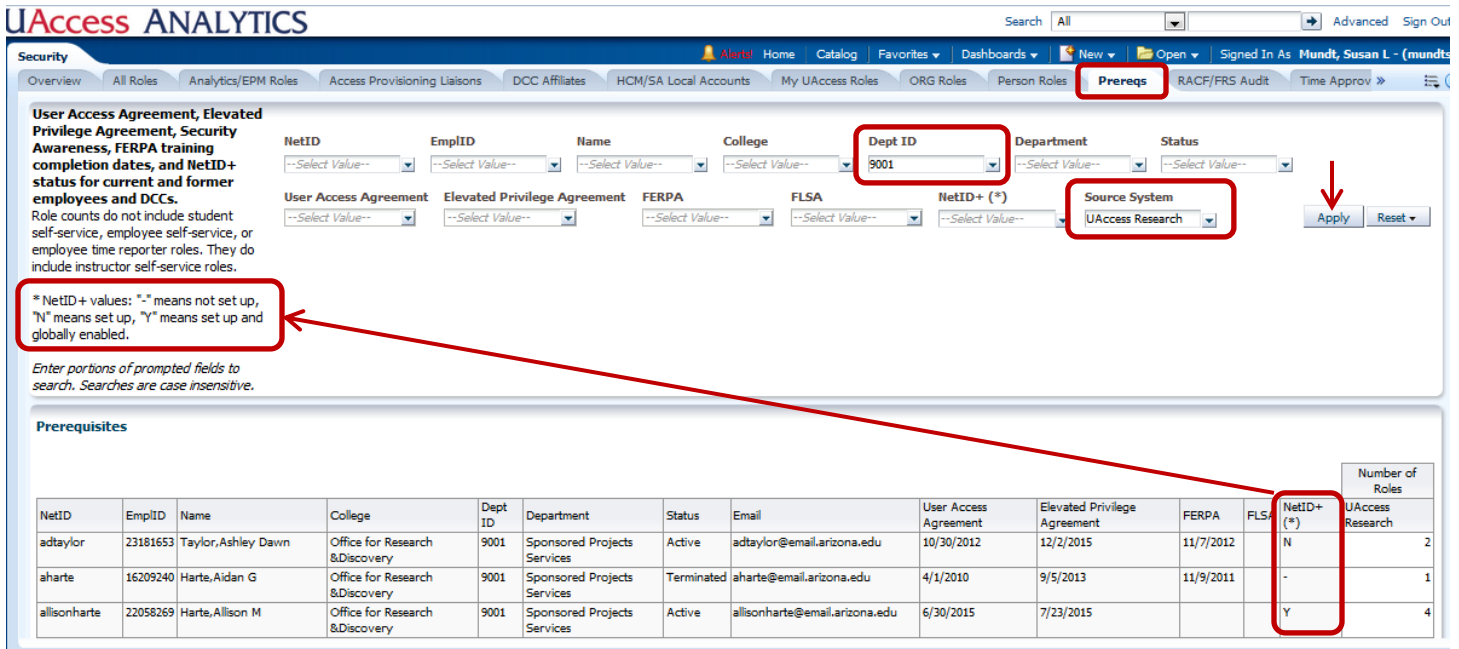
## UAccess Research Proposal Provisioning

EAST (Enterprise Applications Security Team) provides another campus dashboard to identify NetID+ enrollment.

### Analytics Security Dashboard for Prereqs

This dashboard displays NetID+ enrollment for your department personnel

NetID+ column values	Meaning
-	NetID+ is not set up for this user
N	NetID+ has been set up for this user and will be used by applications if it is required
Y	NetID+ has been set up for this user and will be used with <u>all</u> UA applications when not on a UA network



**UAccess ANALYTICS** Security

Overview | All Roles | Analytics/EPM Roles | Access Provisioning Liaisons | DCC Affiliates | HCM/SA Local Accounts | My UAccess Roles | ORG Roles | Person Roles | **Prereqs** | RACF/FRS Audit | Time Approv

**User Access Agreement, Elevated Privilege Agreement, Security Awareness, FERPA training completion dates, and NetID+ status for current and former employees and DCCs.**  
 Role counts do not include student self-service, employee self-service, or employee time reporter roles. They do include instructor self-service roles.

NetID: --Select Value-- | EmplID: --Select Value-- | Name: --Select Value-- | College: --Select Value-- | **Dept ID: 9001** | Department: --Select Value-- | Status: --Select Value--

User Access Agreement: --Select Value-- | Elevated Privilege Agreement: --Select Value-- | FERPA: --Select Value-- | FLSA: --Select Value-- | NetID+ (\*): --Select Value-- | **Source System: UAccess Research**

\* NetID+ values: "-" means not set up, "N" means set up, "Y" means set up and globally enabled.

Enter portions of prompted fields to search. Searches are case insensitive.

**Prerequisites**

NetID	EmplID	Name	College	Dept ID	Department	Status	Email	User Access Agreement	Elevated Privilege Agreement	FERPA	FLSA	NetID+ (*)	Number of Roles UAccess Research
adtaylor	23181653	Taylor,Ashley Dawn	Office for Research &Discovery	9001	Sponsored Projects Services	Active	adtaylor@email.arizona.edu	10/30/2012	12/2/2015	11/7/2012		N	2
aharte	16209240	Harte,Aidan G	Office for Research &Discovery	9001	Sponsored Projects Services	Terminated	aharte@email.arizona.edu	4/1/2010	9/5/2013	11/9/2011		-	1
allisonharte	22058269	Harte,Allison M	Office for Research &Discovery	9001	Sponsored Projects Services	Active	allisonharte@email.arizona.edu	6/30/2015	7/23/2015			Y	4