

Streamlyne Implementation Project

When Should We Go To The BAR?

RAN Meeting

3/8/2022

Authentication and authorizations goals of the project

- Authentication: method of logging in (you are who you say you are)
- Authorizations: privileges in the system (you have all, and only, the access you need)
- Overall goals of this area (and the whole project):
 - Security
 - Convenience
 - Efficiency and effectiveness
 - Automation
- And...ummmm...*streamlining* our processes wherever possible.
For real :)

Evaluating every current process

- Is everyone happy with it the way it is?
- Can it be made more secure, more efficient, more effective?
- Can manual processes be automated?
- Does the new system (Streamlyne) do it the same way Cayuse does?

Process 1: Requesting access to the system

- Current state: manual request and creation process



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Cayuse Research Suite

Cayuse Research Suite: A set of integrated, Web-based software modules that deliver flexibility and control in research administration. UNM's Cayuse Research Suite consists of two modules: Cayuse SP and Cayuse 424. Cayuse SP is used for developing and managing proposal submissions to UNM Office of Sponsored Projects, Main; as well as monitoring and tracking award activity throughout the projects lifecycle. Cayuse424 is now an addition to SP used strictly for the creation of electronic SF424 forms for direct, web-based submissions to Grants.gov for federal opportunities. All proposals are initially developed in Cayuse SP; with a Cayuse 424 link added if the proposal will be submitted system to system directly to Grants.gov.

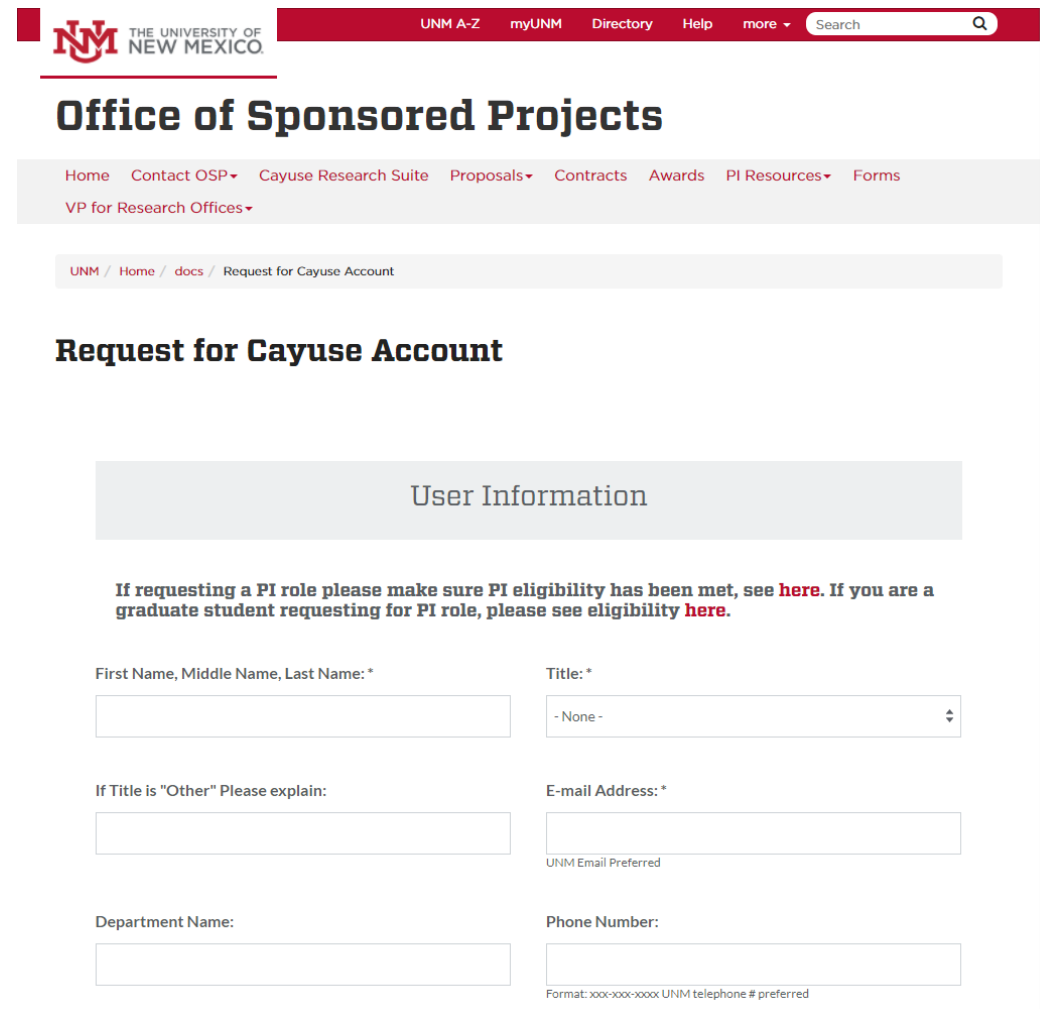
[Schedule a Proposal Review](#)

How Do I Obtain an Electronic Research Access Account?

UNM Research Administration Systems
0:00 / 5:47

- [Request a Cayuse Research Suite User Account](#)
- [Log into Cayuse Research Suite](#)
- [CayuseSP User Guide](#)
- [Information on Sponsor Portal Accounts](#)

Problems with Cayuse? Call: (505)277-4186 or Email: osp@unm.edu
 Contact a Team Lead



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Request for Cayuse Account

User Information

If requesting a PI role please make sure PI eligibility has been met, see [here](#). If you are a graduate student requesting for PI role, please see [eligibility here](#).

First Name, Middle Name, Last Name: *

Title: *

If Title is "Other" Please explain:

E-mail Address: *

Department Name:

Phone Number:

Format: xxx-xxx-xxxx UNM telephone # preferred

Process 1: Requesting access to the system

- Future state: **AUTOMATED!**

The image displays two side-by-side screenshots of the UNM Office of Sponsored Projects website, illustrating the process of requesting access to the Cayuse Research Suite. A large red 'X' is overlaid across both screenshots, indicating that the current manual process is being replaced by an automated future state.

Left Screenshot: Cayuse Research Suite Page

- Header:** UNM THE UNIVERSITY OF NEW MEXICO, UNM A-Z, myUNM, Directory, Help, Search
- Navigation:** Home, Contact OSP, Cayuse Research Suite, Proposals, PI Resources, Forms, VP for Research Offices
- Breadcrumbs:** UNM / Home / Cayuse Research Suite
- Section:** Cayuse Research Suite
- Description:** Cayuse Research Suite: A set of integrated, Web-based software modules that provide access and control in research administration. UNM's Cayuse Research Suite consists of Cayuse SP and Cayuse 424. Cayuse SP is used for developing and managing proposals, submitting to UNM Office of Sponsored Projects, Main; as well as monitoring award activity throughout the projects lifecycle. Cayuse424 is now an addition strictly for the creation of electronic SF424 forms for direct, web-based submission Grants.gov for federal opportunities. All proposals are initially developed in Cayuse Cayuse 424 link added if the proposal will be submitted system to system directly.
- Video:** How Do I Obtain an Electronic Research Access Account? (UNM Research Administration Systems, 0:00 / 5:47)
- Links:**
 - Request a Cayuse Research Suite User Account
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 - Information on Sponsor Portal Accounts
- Contact:** Problems with Cayuse? Call: (505)277-4186 or Email: osp@unm.edu
Contact a Team Lead

Right Screenshot: User Information Form

- Header:** UNM THE UNIVERSITY OF NEW MEXICO, UNM A-Z, myUNM, Directory, Help, more, Search
- Navigation:** Home, Cayuse Research Suite, Proposals, Contracts, Awards, PI Resources, Forms
- Section:** User Information
- Text:** please make sure PI eligibility has been met, see [here](#). If you are a PI, please see [eligibility here](#).
- Form Fields:**
 - Title: * (Dropdown menu with "- None -")
 - E-mail Address: * (Text input field)
 - Phone Number: (Text input field)
- Footer:** Format: xxx-xxx-xxxx UNM telephone # preferred

Process 1: Requesting access to the system

- Future state:
 - Direct feed from Banner with everyone who is allowed to use the system
 - “Automated provisioning” means no more requests, no more manual process
 - Will still have an emergency process if access can’t wait for overnight process
 - Automation also enables “automated deprovisioning”, so people’s access is removed when they leave the university!
 - So no requests to OSP, no BAR role, just pure automation!

Process 2: System Administration

- These are the “module administrators”, like Michelle for OSP and Linda for IRB
- These are very powerful elevated privileges in the system so we need to keep track of who has these roles and need to have an audit trail of who approved that access
- Current state: manual process in Cayuse, same issues as the other – pure manual process, no automated deprovisioning
- Future state: BAR roles for the Module Admins and System Admins
- Provides audit trail of requester and approvals, automation, and automated deprovisioning

Process 3: Proposal Approvers

- This is an elevated privilege, more than PIs but less than admins
- Current state: completely manual, no automation, no audit trail, no automated deprovisioning
- Future state: ??
- Can't automate it completely, since it varies by job title, level, dept
- HUGE group of people, huge manual effort, want to automate

Role assignments	458
Departments	226
Individuals	258
People with 1 dept	178
People with multiple depts	75

Process 3: Proposal Approvers

- Options
 - Continue the purely manual process
 - Create a BAR role for approvers
 - Others??

Discussion and suggestions