Chair’s User Guide for eCAF

Table of Contents

• Introduction
• Step-by-Step Guide to Reviewing an eCAF
• Searches & Reports
• Additional Resources
Introduction

What Is an eCAF?

- The Campus Approval Form (CAF) is a mandatory cover sheet that must be submitted with each proposal routed through the UCR Office of Research.
- PAMIS eCAF is the web-based electronic version of the required Campus Approval Form that is designed for efficient dissemination of information and fast routing and review.
Who Prepares an eCAF?

• An eCAF can be started by either a PI or a Contract & Grant Analyst.
• If a PI starts the eCAF, it will route next to the C&G Analyst, and then back to the PI.
• If a C&G Analyst starts the eCAF, it will route next to the PI.

How Does eCAF Routing Work?

• After the C&G Analyst either starts or reviews an eCAF, s/he submits it to the PI for review and certification.
• After the PI reviews and certifies the eCAF, s/he submits it to Co-PIs, if there are any.
• If there are no Co-PIs, the PI submits it to the Chair, if there is one.
• If there is no Chair, the PI submits it directly to the Dean.
• The final submission is to a Contract & Grant Officer in the Office of Research.
Can I Designate Someone Else to Act as Chair in eCAF?

• Yes, you may officially designate someone else to perform these roles.

To use eCAF you need a valid UCR Net ID and password, which are assigned by your Enterprise Directory Administrator at the time you become a career employee at UCR.
• You can look up your own Net ID in the electronic Campus Telephone Directory.
• Contact your Enterprise Directory Administrator if you don’t know your password.

Campus Telephone Directory

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone</th>
<th>Dept Name</th>
<th>Title</th>
<th>Email</th>
<th>UCR Net ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adams, Michael E</td>
<td>951-827-4746</td>
<td>Entomology</td>
<td>Professor of Entomology &amp; Entomologist</td>
<td><a href="mailto:michael.adams@ucr.edu">michael.adams@ucr.edu</a></td>
<td>ADAMS</td>
</tr>
</tbody>
</table>

07/16/2007 Chair User Guide for eCAF Slide 8
Step-by-Step Guide to Reviewing an Electronic Campus Approval Form

- You may access eCAF by selecting it from your Authorized Applications list at the campus web portal, iViews (http://iviews.ucr.edu).
- Alternatively, you may select eCAF from the link provided in your notification emails sent to you by the eCAF system.
If you have clicked on a link to the eCAF system from a notification email, you will bypass the iViews login screen shown on the previous slide and go straight to the eCAF login screen where you should:

1. Enter your UCR NetID.
2. Enter your password.
3. Click the “Sign In” button.

From the Main Menu:
- Click on the e-CAFs Work in Progress (WIP) link (this example shows that there are 2 eCAFs in the Work in Progress queue).
If there are multiple eCAFs in the Work in Progress queue, click on the link to the correct one. (If you don’t know which one to select, contact your C&G Analyst.)

The upper portion of the opening eCAF screen has general information, action links, and navigation links that are grouped into 3 discrete sections of the header plus a Show All Tabs toggle switch:

1. Information about the PI, the sponsor, and the various due dates.
2. Action links for approving or returning the eCAF.
3. Navigation links allow you to return to either the eCAF work in progress grid or to the main menu.
4. Clicking on the Show All Tabs reveals all available tabs (see next slide).
This shows all available tabs. Most tabs that were not viewable initially are those used by the C&G Analyst or PI to enter data. All entered data that you need to review is summarized on the OVERVIEW tab, so viewing all tabs is strictly optional.

• The OVERVIEW tab is highlighted in blue, which indicates that the displayed information is on that particular tab.
• Click the “Printer Friendly” button if you want to print the information from a tab. (You may need to disable any popup blockers to print properly.)
• Review all information on the OVERVIEW tab for accuracy.
• The upper section displays the PI name, NetID, Department, Activity, Percent Time Effort, and Title.
• If the proposal had any Co-PIs or Consultants, that information would also be displayed in this upper section of the OVERVIEW tab.

Scrolling down from the top of the OVERVIEW tab reveals the Project Information data.
• Below the Project Information section is a summary of the Facilities and Administrative (F&A) costs, which were formerly called Indirect Costs.
• Further down is the summary budget information.
• Next comes the Cost Sharing information, which is blank in this particular example.

• Input from the PI RESEARCH INTEGRITY tab comes next.
• Through this section either the C&G Analyst or the PI has been allowed to enter information.
• Starting with this section, the mandatory Disclosure of Financial Interest, only PIs and Co-PIs are able to enter answers and provide certifications. A person with a C&G Analyst role is blocked from data input.

• In this example there are no conflicts of interest.

• At the bottom of the overview screen is the log of transactions for this eCAF.
Click the ATTACHMENTS tab

1. In the upper section you have the ability to upload additional documents.
2. In the lower section you can see a list of documents that have already been attached. (Click on any of the blue attachment links to view the document.)

- Click on the CO-PI APPROVAL tab to see a log of approvals and associated comments. (Note that this example eCAF no longer has Co-PIs.)
• Click on the CHAIR APPROVAL tab to enter any comments. Comments are optional if you are approving and sending the eCAF to the Office of Research. However, comments are mandatory if you are returning the eCAF to the C&G Analyst.

Below the comments section you can see a log of previous comments and actions by all Chairs.

• Clicking on the APPROVAL STATUS tab (when you have elected to Show All Tabs) displays the current eCAF routing location.
• When you have finished reviewing the eCAF

1. If you are satisfied, click the Approve – Send to OR link, which submits the eCAF to an Office of Research Contract & Grant Officer. Click “OK” on the gray popup box if you want to continue.

2. If you are unable to approve this eCAF, click the Return to C&G Analyst link. You will receive the following message:

3. Click “OK”

4. Enter mandatory comments
• After completing your review, the system will return you to your Work in Progress grid.
• Click on the Main button to return to the Main Menu, where you can search for eCAFs, run reports, or log out of the eCAF system.
• From your main eCAF opening screen you can search by clicking on the Search for e-CAFs link.

• Fill in (or select specified criteria when there is a drop down arrow) to use the search engine. You may fill in more than one field to refine your search.
• From the main menu you can also run an e-CAF Summary Report.

• Fill in (or select specified criteria when there is a drop down arrow) to designate which records you would like to see in your Summary Report.
• Select HTML, Excel, or PDF for your output, and click on the “Run” button.
- This is a sample showing the format of an eCAF summary report.

- From within eCAF you also have the ability to run a Campus Summary Report.
• Fill in (or select specified criteria when there is a drop down arrow) to designate which records you would like to see in your Campus Summary Report.
• Select HTML, Excel, or PDF for your output, and click on the "Run" button.

• This is a sample report showing the format of the Campus Summary Report.
• Despite the report's name, you may not be able to see data for the entire campus. As a Chair, you only have access to the data from your own department(s).
Additional Resources

- Computing Help Desk Email: helpdesk@ucr.edu.
- Feedback Email: ecaffeedback@ucr.edu.