CAMS BASICS

www.med.upenn.edu/apps/cams Also on your my.med page.

N.B. The placement of orders for goods and services continues to be in the particular Core's application, not in CAMS.

REQUEST ACCESS

- Anyone with a PennKey can request access for themselves or for others by:
    - selecting one or more people
    - selecting one or more accounts (searchable by PI or by account number)
    - selecting one or more cores
- As a BA, you will probably never need to spend on an account, so you will probably never need to use the Request Access form (on the left side-navigation and the green card on your Dashboard). For compliance reasons, obviously, you should not spend on an account you manage.

MANAGE ACCESS

- A BA (Senior BA, Org Manager or Account Manager) can manage access By User, By Account, or By PI. Each section lets you manage the same data from different starting points. See the left side-navigation and the sub-navigations.
- No matter where you start you can add and manage access for users to accounts at cores using the purple 'Add Access' tool (click the bar).
- You can also set a spending limit per person per account at each core. The spending limit resets to the same amount each month unless you change it. If you do not set a spending limit, there will be no limit on spending.

CREATE AND MANAGE ACCOUNTS

Penn Accounts

- As a Penn BA, you can add a Project Title to a PennERA account. This is the title that will appear when the account is picked, so you can add a title that is familiar to the people in the lab. We will also retain the official PennERA title.
- You must manage all other aspects of PennERA accounts e.g. creating subaccounts or freezing accounts, in PennERA.
- The expiration date is the account end date from the fund table (i.e. the end of the project, not the increment).
- You cannot duplicate a PennERA account in CAMS.
- You can create and manage non-grant accounts in CAMS.
    - The account will automatically become Active on the Start date you specify and expire on the End Date; between those dates, you can manually freeze and reactivate the account.
    - You can extend the expiration date by editing the End Date field.
    - To edit details of the account after the End Date, you must first extend the End Date.
- To Save and Activate an interfund account, you must supply the correct Lawson number.
- The cores supply the object code. This is uneditable.

External Accounts

- As a Core Admin, you can create and manage external accounts in CAMS.
    - The account will automatically become Active on the Start date you specify and expire on the End Date; between those dates, you can manually freeze and reactivate the account.
    - You can extend the expiration date by editing the End Date field.
    - To edit details of the account after the End Date, you must first extend the End Date.
- To Save and Activate an external account, you must supply the correct Federal Tax ID for the external PI's home institution.
- An invoice will be automatically generated and emailed to the external PI and another email account, potentially an institutional account provided by you. You can also add an email address for the external BA.
- If a PI or institution is to receive more that one invoice, a summary cover sheet will also be included.

MANAGE ROLES

- What role(s) you can assign depends on the role(s) you have.
- Senior BAs can create Org Managers, Account Managers, and Core Admins

- Org Managers can manage all accounts on an org. They can also create Account Managers on accounts on their orgs.
- Account Managers can manage an individual account on an org.
- Core Admins can manage the business of a particular core, including creating accounts.
- Senior BAs, Org Managers, Account Managers, and Core Admins can approve, edit, and deny access to accounts they manage.
- An Org Manager does not also need to be an Account Manager on accounts on orgs they manage (redundant).
- What you see in the sub-navigation of the Manage Roles section (left side navigation) shows what you can manage and the various starting places you can use.
    - e.g. an Org Manager can create an Account Manager either by searching for a person and adding one or more accounts, or by searching for an account and adding one or more people.

CHARGES

- BAs and Core Admins can view pending and billed charges placed against accounts they manage.
- Pending charges cannot be moved from one account to another; the order must be canceled and placed again on the correct account.
- Use the Charges side-navigation. Each type of charge can be filtered by a number of variables.
- The more filters you use on a search, the narrower your results will be and the more quickly they will be returned.
- It is the Core that determines when it will notify CAMS that a charge is billable.

PIs

- A PI's own accounts automatically appear on his/her page, but access to spend on them is in a pending status and requires BA approval.
- PIs can see who has access to spend on their accounts.
- PIs see their own accounts and others' access to them by looking up their own user page. PIs have a dark blue card on their dashboard which, when clicked, takes them to their user page.

OTHER SPENDERS' ACCESS

- All spenders have a dashboard showing their Pending Access, allowing them to Request Access (for themselves and others), and giving them a way to see their own approved access.
    - To see their own access, a spender can click the blue card on the Dashboard.

EMAILS

- When a request is submitted, the person placing the request, and any others on whose behalf that request is being placed, receive an email telling them the request has been sent and is pending BA approval.
- When a request is submitted, any person who can manage that account (Senior BA, Org Manager, Account Manager, or Core Admin) receives an email asking them to act on the pending access request.
- Once a person who can manage that account (Senior BA, Org Manager, Account Manager, or Core Admin) has acted on the account, by approving or denying (including in an edited form, e.g. by changing the account number), the person placing the request, and any others on whose behalf that request is being placed, receive an email telling them the request has been approve or denied.
- If a person who can manage can account (Senior BA, Org Manager, Account Manager, or Core Admin) affirmatively adds or deletes access to an account or to a role, the affected person who is losing access receives an email.
- PIs do not receive emails other than those that apply to requestors (above).

FEEDBACK

- Please provide feedback (about defects, for support, or to make suggestions) by using the Feedback form at the top right of the CAMS page. You are much more likely to get a response than by calling or emailing!

UPCOMING FUNCTIONALITY

- Accounts Receivable: Core Admins will me able to match checks to invoices to reconcile payments
- History: View changes to access and to accounts.
- Copying account access from an expiring account to a new account, e.g. when the fund number changes.