EGMS Division Administrator Checklist

Initial set up

☐ An e-mail is sent to the EGMS office (spald003@umn.edu and lloyd020@umn.edu) requesting the department be set up in the EGMS system.
  
  • The e-mail should be sent by the dean, department head, or designee, per roles and responsibilities.
  
  • The e-mail should include the name of the person identified to be the department division administrator and the name of the division.
  
  • Divisions can be named in any way but are limited to 30 characters, are case sensitive, and must be unique. Hint: Keep the division name short and easily recognizable.
  
☐ Call Training Services at 612-626-1373 to register for class (required for all EGMS division administrators).

Division set up

☐ The division administrator attends training class.

☐ The division administrator contacts the EGMS office after training to set up the division.

☐ The division administrator identifies who will need access to EGMS electronic routing and at what level.

User set up

☐ The division administrator sets up each user using the FNA form (see Proposal Routing Form Division Administration reference book, page 20).
  
  • All department users will have at least preparer access.
  
  • Users that may be approving a PRF should be set up with preparer/approver access. (Note: PIs and Co-PIs should always be set up with preparer/approver access.)

☐ Users are trained as needed:
  
  • How to use EGMS.
  
  • How to establish a routing chain.

Monitoring FormsNirvana

☐ The division administrator monitors use of the system:
  
  • How approval chains are being set up.
  
  • Documents entered in EGMS FormsNirvana are reaching resolution (approved status or samsara status).
### EGMS Division Administrator Checklist

| **Initial set up of users** | ✓ Who needs access? At what level?  
|                            | ✓ Have all the PIs and Co-PIs been given preparer/approver access? |
| **Establish and communicate procedures** | ✓ Are the department procedures for using EGMS FormsNirvana documented and communicated?  
|                            | ✓ Do the approvers know how to establish a routing chain?  
|                            | ✓ Have procedures been established and communicated for use of alternate approvers?  
|                            | ✓ Do you (the DA) have the knowledge, skills, and ability to function as the first point of contact? |
| **Monitoring use of EGMS FormsNirvana** | ✓ Is the PRF being completed correctly?  
|                            | ✓ Are the PRFs being used per department procedures (samsara versus approved)?  
|                            | ✓ Are all PRFs resolved in a timely manner?  
|                            | ✓ Are routing chains being established correctly?  
|                            | ✓ How many proposals is a PI listed on?  
|                            | ✓ Are users doing their own monitoring?  
|                            | ✓ Do additional users need to be set up?  
|                            | ✓ Do additional divisions need to be set up?  
|                            | ✓ Do new procedures need to be established? |