

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?