

Adding/Removing an Approver

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Quick Reference Guide

- Purpose:**
- Research Facilitators and ADRs can add approvers for Pre-award records that have any of the following statuses:
- Submitted for Approvals
 - Pending PI Information
- Grants Assistant and Grants Officer can add approvers for Pre-award records that have any of the following statuses:
- Submitted for Approvals
 - Pending PI Information
 - For Intake by Research Services
 - For Review by Research Services

Audience: ADRs, Research Facilitators, RSO

To add an Approver:

Step 1:

After opening a Pre-award record, go to the **Approvals & Comments** tab. Click the plus icon below the **Academic Approvals** heading. The **Add Approver** page displays.

Academic Approvals					
	Description	Status	Approval By	Approval Date	
1	Approved by Department Head / Equivalent	Approved	Walker, Richard Edward Allan	2020/03/17 8:49:40 AM	
2	Review by Research Administrator	Pending approval	Beug-Jang, Patty; Gabel, Ryan; Krawetz, Angela; Mahjor, Sara; Povitz, Brandi; Rai, Cristina; Slobozian, Jenna; Westgard, Clint		
3	Approval by Associate Dean (Research)	Queued for approval	Schnetkamp, Paul; Turner, Raymond William; Visser, Frank; Zamponi, Gerald		

Note: The names listed on the same row are all the possible individuals who can provide that approval. The approval from that row (role) is only needed from one person in the list.

Step 2:

Click the plus icon below the **Approver** heading.

Approver

Step 3:

Enter the approver's name into the **Keyword** search field or click the A-Z icon and select a name from the list that displays.

Approver

3

Search results for **dallas**

4

Callaway, Dallas - Graduate Sciences Education (Active) - Scholarship & Stipend Officer

Step 4:

Click the plus icon beside the approver's name. Details for the approver are populated into the fields.

After adding the approver, enter the approver's role name (e.g., Research Administrator) into the **Description** field. This **must be entered**, otherwise the approver role will not display in the **Description** field of the **Academic Approvals** table.

Description

Step 6:

Click **Save & Set Status**.

Cancel & Return
Save & set status

Step 7:

Select Queued for Approval. Click **Save & Set Status**

Set status

Queued for approval
In the approval queue.

Cancel
Save & set status

Step 8:

The approver has been added. To exit, click save and then cancel.

A variety of circumstances (e.g., vacations, leaves, moves to other faculties, etc.) could require that an approver be discarded from a Pre-award record. Another example is where an ADR may choose to review Pre-award records with Special Requirements. In this case, they would remove the Research Administrator who is automatically added into the Academic Approvals when Special Requirements are selected.

Only certain roles within RMS (e.g., Research Facilitator, ADR, Grants Assistant, Grants Officer) have permission to discard approvers.


RMS retains a permanent record of discard approvers for tracking and audit purposes.

To discard an Approver:

Step 1:

After opening the Pre-award record, click the **Approvals & Comments** tab.







Step 2:

Click the  icon beside the approver you want to discard.

Step 3:

Click **Save**.

The approver moves from the **Academic Approvals** section to the **Discarded Approvals** section at the bottom of the page where it is permanently retained.

	Description	Status	Approval By	Approval Date	
1	Approved by PI	Approved	Gnanakumar, Ruban	2020/04/02 9:17:23 AM	 
2	Approval by Department Head / Equivalent	Pending approval	Pike, G. Bruce; Walker, Richard Edward Allan		 
3	Approval by Associate Dean (Research)	Queued for approval	Schnetkamp, Paul; Turner, Raymond William; Visser, Frank		 
+					