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-Pi's 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? |