

Leanne Every

From: OGCA <ogca@research.umass.edu>
Sent: Friday, November 20, 2015 4:58 PM
To: activepis-l@research.umass.edu; biz-managers@research.umass.edu
Cc: Leanne Every; Paul Kelley
Subject: SmartGrant - Important changes to Electronic Routing (projected 11/27/15)

We want to alert you to improvements that we anticipate will be installed in the SmartGrant system after 5 PM on November 27th. In response to feedback from Approvers and Administrators, programming changes have been made that should improve the routing process. Please see below for a list of the most important changes. Though we do not anticipate any difficulties with proposals or awards already in routing when this update is installed, we suggest that pending actions, or actions being routed next week, be completed if at all possible before 5 PM on Friday 11/27/15. If routing has not been initiated and can wait until after the 27th, we recommend waiting until the new routing has been installed.

Changes in the Routing map and Approver levels:

- There are 3 Approver Tiers: Tier 1 is the PI; Tier 2 are all other academic/administrative approvers; Tier 3 is the OGCA approvers
- The PI as Tier 1 and cannot be moved or removed from the routing map
- Once the PI approves the proposal/award, all other approvers will simultaneously receive an email notification stating that Action is Required
- Tier 2 Approvers may approve the proposal or award in any order
- The map may be modified prior to or after initiation and all changes will be made in Tier 2

Changes/Clarifications to email notifications:

- PI will receive an email with an approval hotlink ONLY if someone besides the PI initiates routing
- Each approver after the PI will receive an "Action required" email with a hotlink
- Every Approver, including the PI, will receive a Confirmation notification email indicating that they have successfully approved the proposal/award
- PI will receive an email after ALL approvers in Tier 2 have approved and that the action is now pending with OGCA
- Subject line in email notifications will indicate "Proposal" or "Award" as appropriate depending on the action item
- All other informational emails currently being sent, will no longer be sent

Change in Online Routing screen

- There is now a Reminder email timer that may be set only BEFORE routing is initiated. The timer can be set in 15 minute intervals which is expressed in fractions of an hour, i.e. 15 minutes is .25 hours. The default reminder time is 24 hours. This reminder will send emails to ALL pending approvers.
- We advise **caution** when using the timer feature and to use it only when necessary.

Guides for the new module will be uploaded to <http://www.umass.edu/research/e-systems/smartgrant> late next week.

Thank you,

SmartGrant Support Team

Questions or Feedback to <http://www.umass.edu/research/webform/ogca-electronic-data-systems-support-form>