Setting up Default Approvers and FYI’s

User Guide

Version 1.0
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Overview

SeRA will now pre-populate default approvers based on administering department org codes and answers on the PDRF regarding cost sharing, space renovations, and unapproved use of space. Default approvers are determined by finding all approvers in Authority Manager for the administering department. The department is based on the answer to “Which Department/Lab/Institute is submitting this proposal” under the “Administrative and Sponsor Details” section of the PDRF.

Types of Approvers

All Proposals – Will be given an approval task on ALL proposals for the administering department

Cost Sharing Committed - Will be given an approval task based on answers to questions related to cost share on the PDRF.

How is effort being accounted for? COST SHARE

Does this project include cost sharing? YES
**Project Requires Space Renovations** – Will be listed as an approver when answer to “Is all of the above space assigned to you or otherwise approved for your use?” is marked NO

**Unapproved Use of Space** – Will be listed as an approver when the question “Do you anticipate rental space, construction or renovations will be required to house this project or any equipment acquired for this project?” is answered YES

**FYI Notifications**

SeRA will pre-populate FYI notifications based on administering department. All individuals set up to receive FYI notifications for a PDRF in Authority Manager will be populated on the FYI section of the PDRF.
Setting Up a PDRF Department Approver

1. Go to Authority Manager http://authority.stanford.edu
2. Click on Grant Authority

3. Enter SUNet ID or Name and click “search”

4. Click on hyperlink for individual’s name
5. Click “Stanford Electronic Research Administration”
6. Click “PDRF Department Approver”

7. Select appropriate org code(s) from the list. For those approving for multiple org codes, each will need to be setup individually by org code.

8. Select which approvals the individual should be included on.

*If more than one role is selected, approver will only receive one approval task for each PDRF.
9. Leave “effective until” blank and select “cannot” grant this privilege (unless individual should be able to grant others the same access; then select “CAN”) Click “Finish”.

- can ONLY – individual can add individuals to the approval list, but will not be listed as ab approver themselves
Setting Up a PDRF Department FYI

1. Go to Authority Manager http://authority.stanford.edu
2. Click on Grant Authority

3. Enter SUNet ID or Name and click “search”

4. Click on hyperlink for individual’s name
5. Click “Stanford Electronic Research Administration”
6. Click “PDRF Department (FYI)"

7. Select appropriate org code(s) from the list. *For those receiving FYI Notifications for multiple org codes, each will need to be setup individually by org code.*

8. Leave “effective until” blank and select “cannot” grant this privilege (unless individual should be able to grant others the same privilege; then select “CAN”). Click “Finish”.

- can ONLY – individual can add individuals to the approval list, but will not be listed as ab approver themselves