

UNIVERSITY OF
SASKATCHEWAN

UnivRS Information Guide:
Academic Approvals for
Head of Department and Dean Roles
May 2017

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1. Introduction

The University Research System (UnivRS) is a web-based system with CV management capabilities. It is a central repository intended to simplify the pre-and post-award and compliance processes, while producing reports and CV documents as needed. The data stored in UnivRS may help facilitate a research network among the faculty, finding shared research interests and building collaborations at the University of Saskatchewan (U of S).

For information regarding UnivRS or U of S policies on Research and Scholarly Activities, please visit: <http://www.usask.ca/research>

2. Login

To access UnivRS:

- Login to PAWS, go to **Admin Services** in the left-hand navigation bar and click on **UnivRS**. Then click **Access UnivRS** to open the UnivRS Public Web. The **Sign In** option is located at the top-right hand of the screen.

OR

Go to the U of S webpage, click on the **Faculty and Staff** tab, and select **Research Services**. Then click on



- Enter your NSID and password (same as PAWS) and click the **Login** button.

NSID Account Login

Username:

Password:

Figure 1: Login

To logout, click on your role at the top of the screen to see the drop-down menu, and select **Logout**. Note: under normal circumstances, you are automatically logged out after thirty (30) minutes of inactivity.

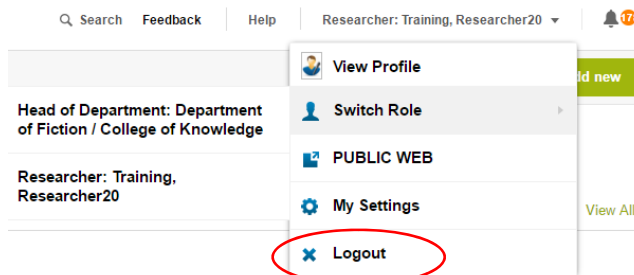


Figure 2: Logout

3. Dashboard

The dashboard provides an overview of your profile. It is divided into four main sections, which are summarized below. At any time, selecting **Dashboard** on the navigation bar brings you back to the dashboard. The options available for a **Head of Department** or **Dean** role are different from the **Researcher** role.

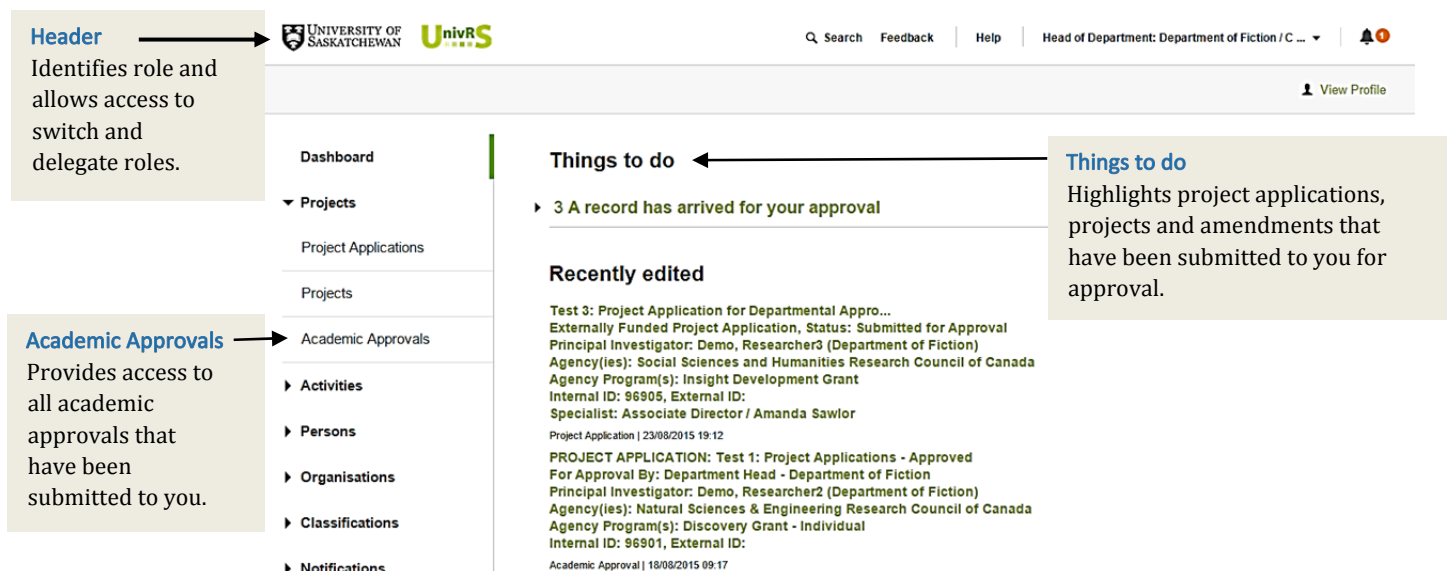


Figure 3: Dashboard

3.1 Switch Role

A role defines a type of end user in UnivRS, and all end users must have at least one role assigned to access information. Most end users in UnivRS have been assigned a **researcher** role. Rights to content may be restricted, depending on the assigned role.

The main roles and permissions in the Pre-and Post-Award Management module include:

- **Researcher**
 - Create - Project ideas, project applications, and additional records, depending on the situation.
 - View - Any project ideas, project applications or projects, on which you are listed as a project member, such as a co-investigator.

- Edit - Any project ideas set to ***In Preparation*** on which you are listed as a project member, and project applications set to ***In Preparation*** on which you are as the Lead Principal Investigator.
- Approve – Projects and amendments that have been assigned to you to approve.
- **Head of Department**
 - View – Project applications, projects and business cards affiliated with your department.
 - Approve – Project applications, projects and amendments that have been assigned to you to approve.
- **Dean**
 - View – Project applications, projects and business card affiliated with your college, school or centre.
 - Approve – Project applications, project and amendments that have been assigned to you to approve.

Select end users have more than one role assigned to them in the following situations:

- Department heads, associate deans, deans and/or directors, who have been designated as an academic approver for their unit.
- ‘Acting’ department heads, deans and/or directors.

Switch Role allows you to move between the roles assigned to you. When you are using a delegated role, you have the access assigned to that role but not the other roles held by the end user who made the delegation.

To switch roles:

- Click on your role at the top of the screen, select **Switch Role** from the drop-down menu and then select the role from the list of options. If you only have one role in UnivRS, the **Switch Role** option is not available.

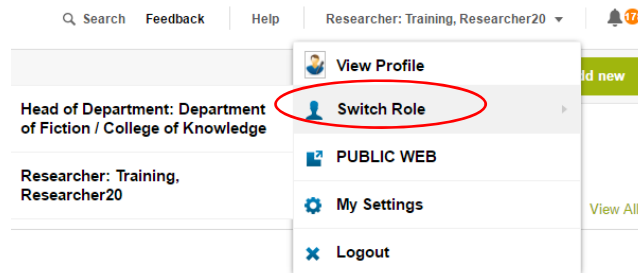


Figure 4: Switch Role

3.2 Delegate Role

You can delegate your role to another end user so they can complete any tasks in UnivRS, when you are unavailable. You will maintain access to your role and receive notifications, despite it being delegated to another end user.

To delegate your role:

- Click on your role at the top of the screen and use **Switch Role** to change to the role you wish to delegate.

- Select **My Settings** from the list of options under your role at the top of the screen.

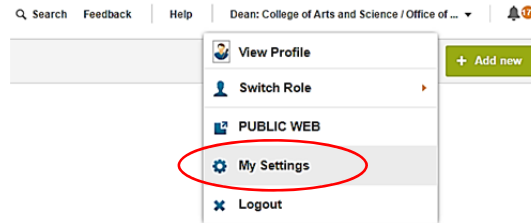


Figure 5: My Settings

- Click the **New delegation** button.



Figure 6: New delegation button

- Enter the last name of the preferred delegate and clicking the button.



Figure 7: Search field

- Click on the button to add your delegate.

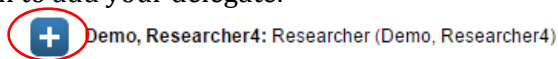


Figure 8: Add delegate

- Click the **Delegate** button to save the selection.



Figure 9: Delegate button

- To remove the delegation, click the icon beside the delegate's name and then click the **Delete** button in the pop-up window.

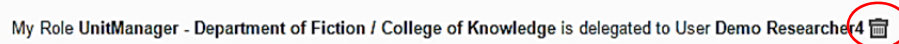


Figure 10: Delete delegation

4. Approve Project Applications, Projects and Amendments

Once a project application, project or amendment is submitted for academic approval, a notification is sent to the approver role – **Head of Department** or **Dean** – indicating that approval is required.

To approve a project application, project or amendment:

- Switch to your **Head of Department** or **Dean** role.
- On the dashboard, select **A record has arrived for your approval** under **Things to do**. Click **View All** to see all academic approvals awaiting approval

Things to do

▼ 35 A record has arrived for your approval

AMENDMENT: Demo 1: amendment 10 - For Approval
 For Approval By: Department Head - Department of Fiction
 Academic Approval | 15/06/2016 15:48

PROJECT APPLICATION: Example of a Project Application - For Approval
 For Approval By: Department Head - Department of Fiction
 Principal Investigator: Training, Researcher20 (Department of Fiction)



View All

Opens a list page that contains all the records submitted to you for approval.

Figure 11: Records awaiting academic approval


- Click on the tile of the record to open the academic approval. The title indicates the type of record to be approved.
- To view the project application, project or amendment, click on the  icon.



Figure 12: Edit icon for a project application

- Click on the tabs in the pop-up window to view the details of the record. The application, award letter or agreement can be found under the Documents tab for project applications and projects, and under **Documents** for amendments. Once you are finished viewing the record, click the **Cancel** button.

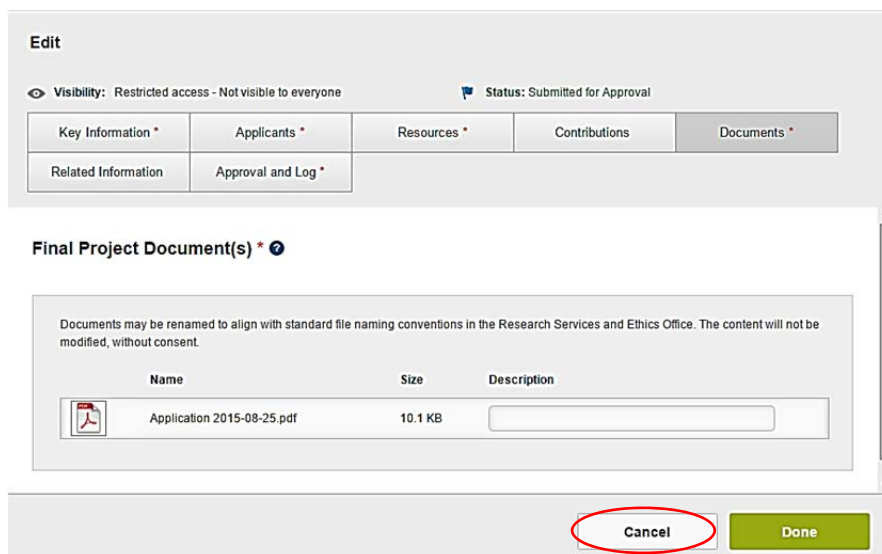



Figure 13: Application uploaded to **Final Project Documents**

- Information that the Research Services and Ethics Office would like to bring to your attention is entered in the **Research Services Comment(s)** area.



Figure 14: Research Services Comment

- Approvers can view comments entered by previous approvers in the **Comments by Previous Approver(s)** section. For example, the Lead Principal Investigator will not see any comments under **Comments by Previous Approver(s)** since they are the first to approve the project or amendment. Subsequent approvers (e.g. deans) will see comments entered by the Lead Principal Investigator and the department head, if applicable.
- If you would like to add a comment to the academic approval, click the  button in the **Your Comments** section. More than one comment may be added in **Your Comments**.
 - Requests for revisions or missing documents should be communicated outside of UnivRS. The Lead Principal Investigator may be contacted directly to modify their project application; changes to a project or amendment should be sent to the Research Services and Ethics Office.
 - Revised or missing documents can be uploaded under **Your Comments** on the academic approval, prior to changing the status. Revised documents can also be uploaded to a project application, project or amendment by the Research Services and Ethics Office.

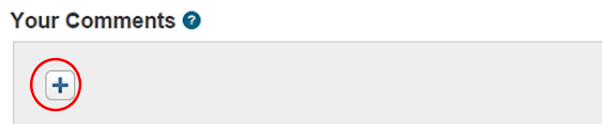


Figure 15: Add a new comment to the Academic Approval

- Once you are finished reviewing the project application, project or amendment, click the **Save and Close** button at the bottom of the screen.
- Scroll down and click on the **Approved** or **Denied** text in the pop-up window.
 - Selecting **Approved** signifies that you have read and agree with the statements listed in the pop-up window.
 - Selecting **Denied** sends a notification to the Lead Principal Investigator. The Lead Principal Investigator will work with the Research Services and Ethics Office to resolve any issues and upload revised documents. If the project application, project or amendment cannot move forward in the approval process, the Research Services and Ethics Office will set the status to **Discarded**.

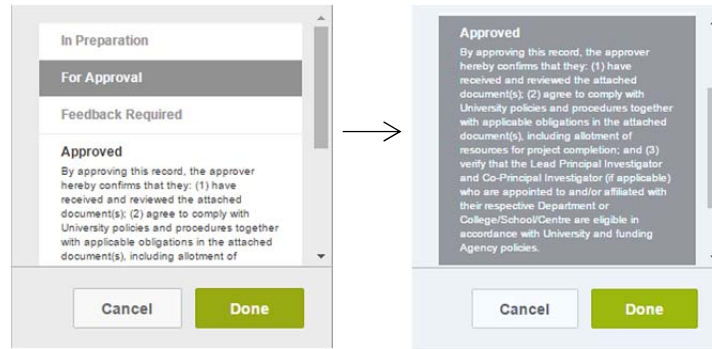


Figure 16: **Approved** statements

- Click the **Done** button.

If the Lead Principal Investigator selected a business card that is not their primary approval home, the project or amendment will be approved by the administrating unit (i.e., the unit listed on the business card selected) and their primary approval home.

Once the academic and institutional approvals are complete, the status of a project application will automatically update to **Approved for Submission** and the status of a project or Amendment will automatically update to **Approval Complete**. Changes to the status of a project application, project or amendment may send a notification to the Lead Principal Investigator.

5. Academic Approvals List Page

The academic approvals list page provides access to all of the academic approvals that have been assigned to the selected role for approval. As an alternate to **Things to do** on the dashboard, this list page can be used to review and approve a project application, project or amendment.

To view the academic approvals list page:

- Select **Projects** from the navigation bar and then select **Academic Approvals**.

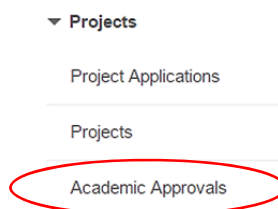


Figure 17: *Selecting the academic approvals list page*

- All of the academic approvals assigned to the selected role appear on the list page. The list page shows a summary of the records, including the status of each record.

Select / Deselect all	Updated on descending	10 50 100	1 of 9
<input type="checkbox"/>	PROJECT APPLICATION: Example of a Project Application - For Approval For Approval By: Department Head - Department of Fiction Principal Investigator: Training, Researcher20 (Department of Fiction) Agency(ies): Natural Sciences and Engineering Research Council of Canada Agency Program(s): Discovery Grant - Individual Internal ID: 97753, External ID:	<input type="checkbox"/> Not publicly visible <input type="checkbox"/> For Approval	<input type="checkbox"/>
<input type="checkbox"/>	AMENDMENT: Demo 1: amendment 10 - For Approval For Approval By: Department Head - Department of Fiction	<input type="checkbox"/> Not publicly visible <input type="checkbox"/> For Approval	<input type="checkbox"/>
<input type="checkbox"/>	PROJECT: Project Example - Approved For Approval By: Department Head - Department of Fiction Approved by: researcher20: Researcher20 Training Principal Investigator: Training, Researcher20 (Department of Fiction) Agency(ies): Natural Sciences and Engineering Research Council of Canada Agency Program(s): Discovery Grant - Individual Internal ID: 345961, External ID:	<input type="checkbox"/> Not publicly visible <input type="checkbox"/> Approved	<input type="checkbox"/>

Figure 18: Academic approvals list page

- Records with the status **For Approval** require review and approval. A filter can be applied to limit the records displayed on the list page to **For Approval**.

6. Support

For further information, we encourage you to visit www.usask.ca/univrs-resources to access other UnivRS Information Guides, browse frequently asked questions or read project documents. In-person training is offered through [Training Services](#).

If you require assistance using UnivRS, please complete the help form in UnivRS or contact univrs.support@usask.ca.