UT RESEARCH MANAGEMENT SUITE

# Grants Module Frequently Asked Questions

## System Access

1. **How can I get access to *UT Research Management Suite – Grants (UTRMS-Grants)*?**
All employees can log in to UTRMS-Grants with their University of Texas EIDs and passwords. When new employees join UT Austin, their user accounts are automatically created in UTRMS after their appointments are processed in Workday.

2. **Does that mean *everyone* can see all proposals and awards?**
No. Each user can only access proposals and awards that they have permission to see, based on their department and security role.

3. **Do departmental contacts need to be added manually to each proposal (FP) record to have access?**
An initial listing of departmental contacts was gathered as part of the implementation project. These users will be able to view and edit all proposals in UTRMS-Grants for their departments at go-live.

   If additional users need departmental access, please submit an ERA Help Ticket request.

   Please note: departmental access for the Agreements module is not yet available, but is planned for a future release in the Spring of 2023.

4. **Can we give team members access to individual proposals if they don't need full departmental access?**
Yes, you can add team members to individual proposals with edit or read-only access. This is done on the Personnel page of a proposal's SmartForm in the Administrative personnel section. Note that aside from the PI, Project personnel listed on the proposal such as Co-Investigators do not automatically gain access to the proposal, and need to be added separately in the Administrative personnel section if they need edit or read-only access.

5. **Is there a way to globally assign users to an award or funding proposal?**
A report can be created to show proposals or awards within a department and a user can manually go to those records and assign users to the guest list using the Manage Guest List activity. Note that users who will be able to run this activity on an Award record are those that currently have edit rights, the assigned award approver, and the assigned specialist. On a Proposal record, the Manage Guest List activity can be run by anyone who currently has edit rights to that record.

6. **Will team members be notified when they are added to a proposal?**
An email notification will not be sent, but the proposal will also appear in the team member's UTRMS Inbox.
If you want to notify the team member directly, click **Send Email** in the left-hand menu of the proposal workspace. After completing the Send Email form and clicking **OK**, an email will be sent with a direct link to the proposal and a record of the email will be added to the History tab of the proposal.

7. **I do not see the Principal Investigator (PI) in the drop down list – how can they get added?**
If you do not see a PI in the list of available selections, they may need to request for PI status from the Office of Sponsored Projects (OSP) by submitting an ERA Help Ticket request. If the PI has a future appointment but needs access to the system to submit a proposal, you can submit a ticket request to OSP to request early access for the PI prior to their official start date.