Initiating a GeauxGrants Access Request

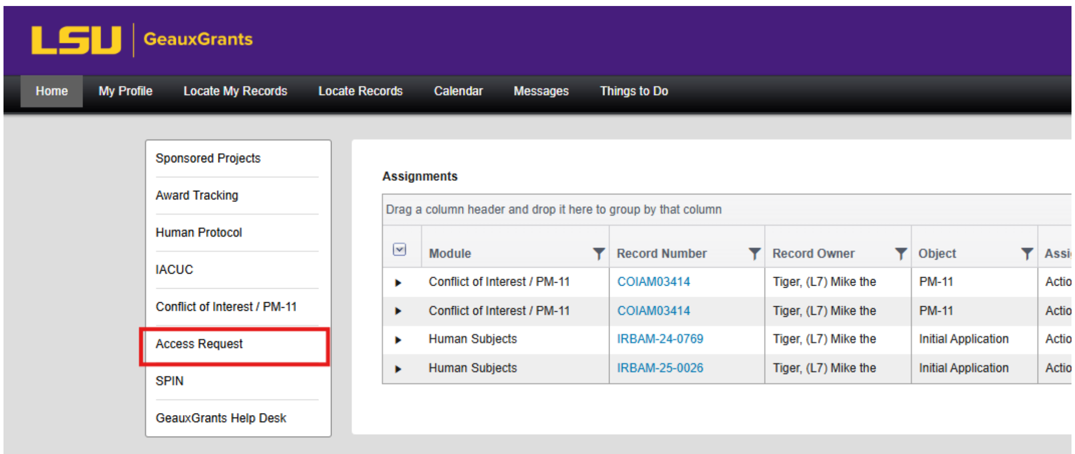
LSU | GeauxGrants

Overview

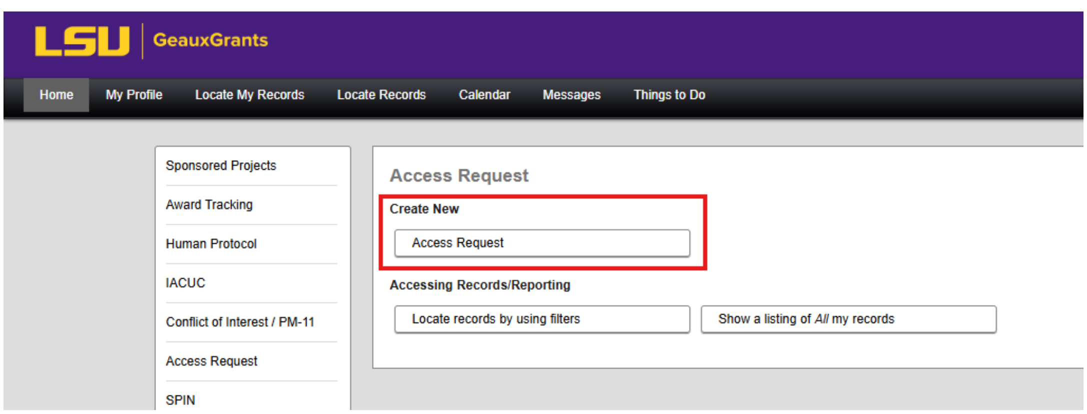
By default, LSU faculty and staff can access GeauxGrants. However, this access is limited to records for which a user is the principal investigator (PI). Users requiring expanded access/roles in GeauxGrants to complete their job duties can request this access via the Access Request module, available in GeauxGrants.

Creating and Submitting the Access Request Form

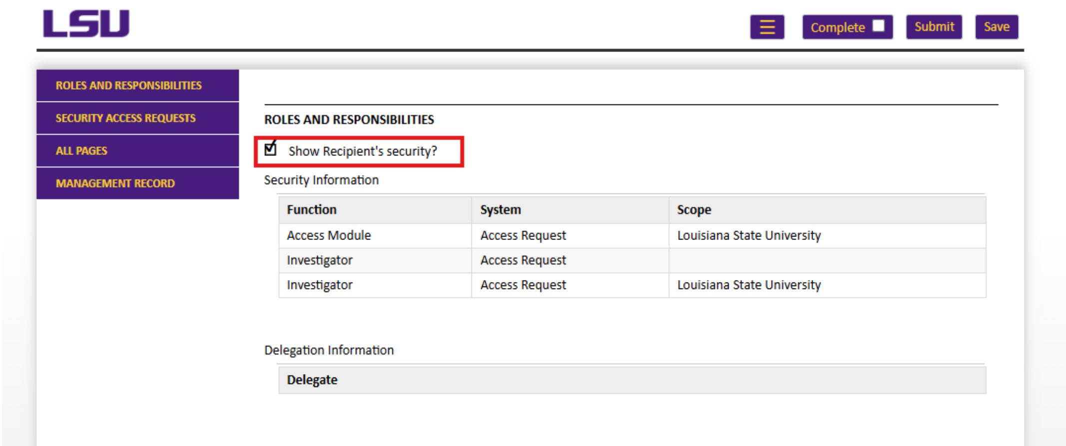
1. **Select "Access Request" on the left sidebar of the GeauxGrants portal.**



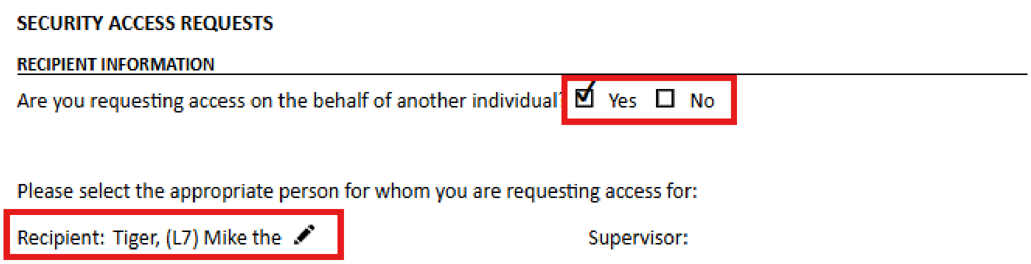
2. **Select "Access Request" under Create New on the Access Request page.**



3. **To see the recipient's current security access, you may select the checkbox next to "Show Recipient's security?"**



4. **Select the appropriate response if you are requesting access on behalf of another individual.** If "yes," then select the appropriate recipient. If "no," then you should populate into the recipient field.



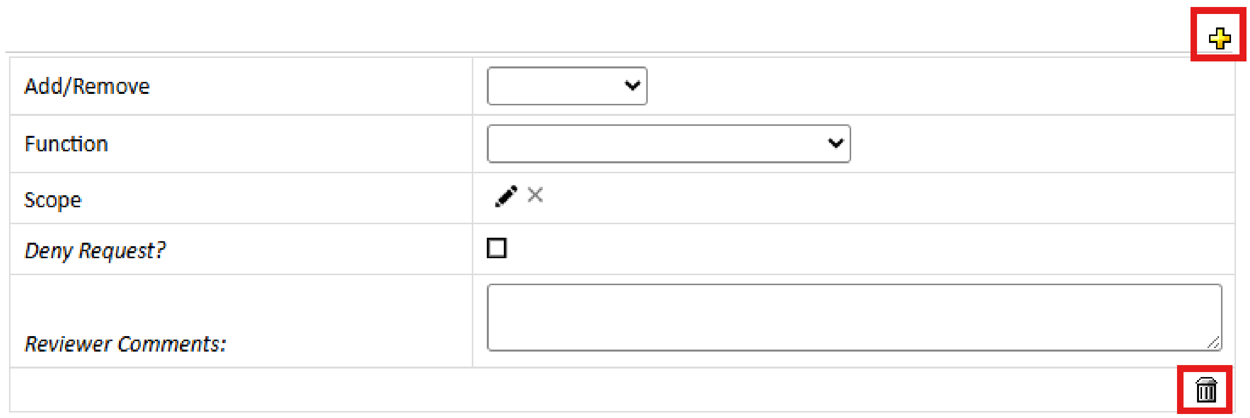
5. **Select the request type.**
   a. Security – The form will provide security-specific options to add to the request.
   b. Delegation – The form will provide the option to request delegate(s) that will be able to access the recipient's messages and/or assignments.
   c. Security and Delegation – The form will provide the option to request both above on the same form.

6. **Select the module category.**
    a. Sponsored Projects – This includes the proposal development, proposal tracking, and awards tracking modules.
    b. Compliance – This includes the IRB, IACUC, and COI/PM-11 modules.
    c. Enterprise (Admin Only) – These are administrative roles for ORED/ITS users.

7. **Select the applicable module(s) for your request.**

8. **Select "Show (Module) Roles/Descriptions?" for a detailed description of each available function.**

9. **Select the + symbol to add a new request into the form.** Multiple roles can be requested by clicking the + symbol. **Select the trash can symbol to remove a request from the form.**



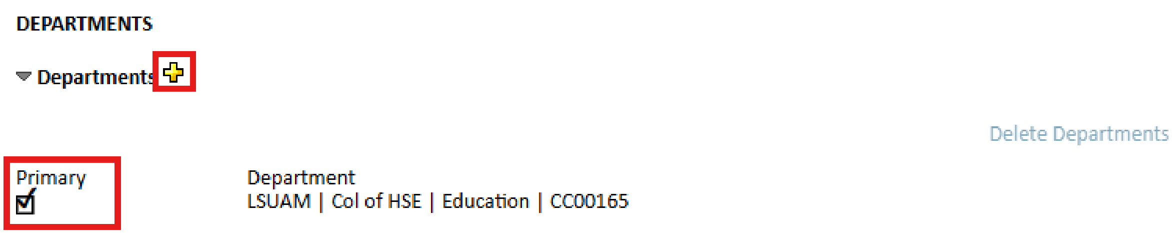
10. **Select the appropriate selection for "Add/Remove."** By selecting "Remove All," you are indicating that all access for this user should be removed for the selected module. No additional information is required if selecting "Remove All."

11. **Select the appropriate "Function" for your request.** A detailed description of the functions is available in the "Show (Module) Roles/Descriptions?" selection on the request form.

12. **Select the appropriate "Scope" for your request by clicking the pencil icon.** This will open a new window with the departmental hierarchy. There is also a progressive text field to allow you to search for the appropriate scope by name.

13. **No action should be taken by the submitter on the review fields in italics.**

14. **If the request is submitted on behalf of an individual in another department, please select the correct department for the identified recipient at the bottom of this page.** Select the ✚ icon, then use the hierarchy or progressive text field to identify the correct department for the recipient. Once the department is selected, mark the checkbox under "Primary" to designate the department for the submission.



15. **Once completed, click "Complete" then "Submit."** A window will appear with the approval route, select "Submit" on this page to complete the process.

Delegation Requests


DELEGATION REQUESTS - GRANTS

☑ Proposals?

☐ Award Tracking? - *Admin Only*

Proposal Tracking - Delegation

Add/Remove	
Delegate	
Deny Request?	☐

1. **Select the symbol to add a new delegate request into the form.** Multiple delegates can be requested for the recipient by clicking the + symbol. **Select the trash can symbol to remove a delegate request from the form.**
2. **Select the appropriate selection for "Add/Remove."** By selecting "Remove All," you are indicating that all delegates for this user should be removed for the selected module. No additional information is required if selecting "Remove All."
3. **Select the appropriate user to receive delegated access (Delegate) using the pencil icon.** The selected user would receive the ability to view and/or act upon behalf of the recipient of the request as configured with the options below.
4. **No action should be taken by the submitter on any of the review fields.**
5. **Once completed, click "Complete" then "Submit."** A window will appear with the approval route, select "Submit" on this page to complete the process.

Review Process Overview

Upon submission, the request will be sent to the first reviewer following the applicable process below. This notification is received 3 ways: an email to the individual's LSU inbox, an internal notification to their GeauxGrants Messages, and from their GeauxGrants Assignments list. All methods contain a link to the Review Dashboard. The review is linear, and subsequent steps will not send out notifications until the current step is completed.

Sponsored Projects Approval Process

Supervisor → Department Head → Data Steward → Security Officer

Compliance Approval Process

Committee Chair → Data Steward → Security Officer

Delegation Approval Process

Delegator → Data Steward → Security Officer