

Research Administration Workflow - Use of Gmail Filters to Manage Notifications.

Overview:

Approvals for the following research administration requests are obtained through PeopleSoft automated workflow (online approvals):

- New Application/Proposal/Project Request
- Project Amendment Request
- Over Expenditure (OE) Request
- Sub Grant Request
- Agreement Acknowledgement Report

Email Notifications:

With Research Administration Workflow department and faculty approval steps are managed through a group of reviewers and/or approvers whereby only one individual in the group needs to approve at each step (for additional information about approval groups refer to SECTION XXXX/PROCEDURE). Each Approver and Reviewer in the group will receive an email notification of pending approvals, but only one individual at each approval step needs to approve.

Notifications are sent to an individual's ualberta.ca email address.

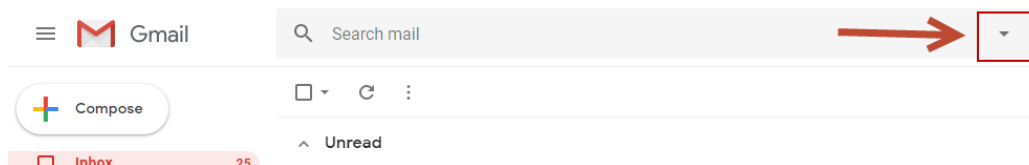
Email notifications can be managed using Gmail filters (see instructions below).

Use of Gmail Filters to Manage Notifications:

Incoming email notifications can be managed using Gmail filters, which can be used to automatically add a label to an email, archive, delete (not recommended for research administration workflow), star and/or automatically forward your mail to another email address.

Instructions:

- 1) Open Gmail
- 2) Click the down arrow in the "Search mail" box at the top of your page.



- 3) Enter Search Criteria. See Table 1. below for a list of subject lines associated with research administration workflow related emails, which can be used to set up filters as needed.

From _____

To _____

Subject RSO Approval Request

Has the words _____

Doesn't have _____

Size greater than _____ MB _____

Date within 1 day _____

Search All Mail _____

Has attachment Don't include chats

Create filter

Enter Search Criteria - this will determine which emails the filter options picked in the next step apply to.

Note: Individuals can verify their search criteria by clicking Search to see what emails show up.

4) Click **Create Filter**.

Search All Mail _____

Has attachment Don't include chats

5) Choose what you'd like the filter to do from the options listed (see screen shot below for available selections). The page defaults in with the check boxes blank. More than one option can be picked.

subject:(RSO Approval Request)

← When a message arrives that matches this search:

Skip the Inbox (Archive it)

Mark as read

Star it

Apply the label: Grants 3.0/workflow - online approvals ▾

Forward it to: rsoadmin@ualberta.ca ▾ [add forwarding address](#)

Delete it

Never send it to Spam

Send template: Choose template... ▾

Always mark it as important

Never mark it as important

Categorize as: Choose category... ▾

Also apply filter to matching messages.


Note: old mail will not be forwarded

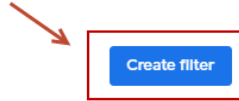
[Learn more](#)

Options default in unchecked. More than one option can be picked.

6) Click **Create filter**.

Note: old mail will not be forwarded

 Learn more



Filters can be edited or deleted as required in your Gmail Settings>Filters and Blocked Addresses.

Additional information on the creation and management of filters (including editing and deleting) in Gmail can be found at the following link: <https://support.google.com/mail/answer/6579?hl=en>

Table 1: Research Administration Workflow Email Subject Lines.

Request Type	Approval Step/Action	Sent To:	Subject Line
New Project Request	Submit/Approve	Next set of Pending Approvers	RSO Approval Request - New Proposal - RES00XXXXX
New Project Request	Submit / Co-PI Add Remove	Co-PI	Co-PI Acknowledgement - RES00XXXXX is requesting your agreement to participate
New Project Request	Deny	Submitter	RSO Proposal - RES000XXXXX has been denied
New Project Request	Send Back	Submitter	RSO Proposal - RES000XXXXX has been sent back for revisions
New Project Request	Final Approval	Submitter	RSO Proposal - RES000XXXXX has been Received by RSO
Sub Grant	Submit/Approve	Next set of Pending Approvers	RSO Approval Request - SubGrant - RES00XXXXX SXXX
Sub Grant	Deny	Submitter	RSO Sub Grant - RES000XXXXX SXXX has been denied
Sub Grant	Send Back	Submitter	RSO Sub Grant - RES000XXXXX SXXX has been sent back for revisions
Sub Grant	Final Approval	Submitter	RSO Sub Grant - RES000XXXXX SXXX has been Received by RSO
Over Expenditure	Submit/Approve	Next set of Pending Approvers	RSO Approval Request - OE Authorization - RES00XXXXX
Over Expenditure	Deny	Submitter	RSO OE Authorization - RES00XXXXX has been denied
Over Expenditure	Send Back	Submitter	RSO OE Authorization - RES00XXXXX has been sent back for revisions
Over Expenditure	Final Approval	Submitter	RSO OE Authorization - RES00XXXXX has been Received by RSO
Project Amendment	Submit/Approve	Next set of Pending Approvers	RSO Approval Request - Project Amendment - RES00XXXXX
Project Amendment	Deny	Submitter	RSO Project Amendment - RES000XXXXX has been denied
Project Amendment	Send Back	Submitter	RSO Project Amendment - RES000XXXXX has been sent back for revisions

Project Amendment	Final Approval	Submitter	RSO Project Amendment - RES000XXXXX has been Received by RSO
Agreement Acknowledgement	Submit/Approve	Next set of Pending Approvers	RSO Approval Request - Agreement Acknowledgment - RES00XXXXX
Agreement Acknowledgement	Deny	Submitter	RSO Agreement Acknowledgment - RES000XXXXX has been denied
Agreement Acknowledgement	Send Back	Submitter	RSO Agreement Acknowledgment - RES000XXXXX has been sent back for revisions
Agreement Acknowledgement	Final Approval	Submitter	RSO Agreement Acknowledgment - RES000XXXXX has been approved