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UNIVERSITY OF WISCONSIN–MADISON

# RAMP - Research Administration Management Portal

## How to Add a Comment, Send an Email, and Initiate an Ancillary Review

Security Role(s): Study Staff – All UW employees have this role.

RAMP has multiple communication functions available to users. This resource outlines how to add comments, send an email, and initiate an ancillary review.

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|---|---|---|
| **Add Comment** | No email goes out | Available in Grants Module Only |
| **Send Email** | Notification email goes out automatically | Available in Grants Module Only |
| **Ancillary Review** | Notification email goes out automatically * | Available in Grants and Agreements Modules |

*For Agreements in a Pre-Submission state, when creating the Ancillary Review, there is a question asking, 'Send notification now?'. The email only goes out automatically when this question is answered 'Yes'. If answered 'No' or left blank, the AR email will go out when the user Submits the agreement.

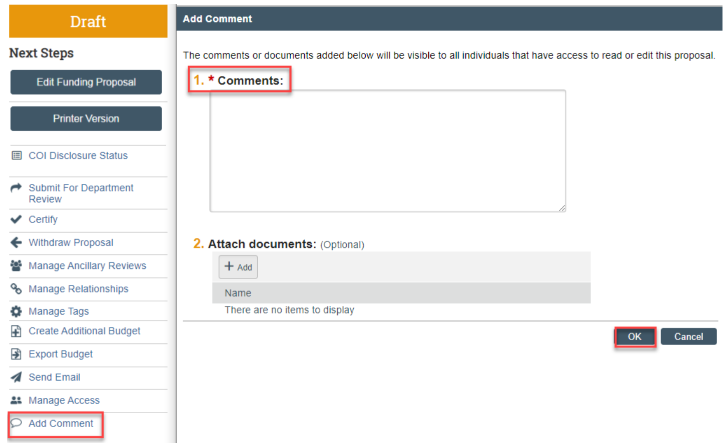
### How to Add a Comment

Comments can be added to a Proposal, Award, Award Modification, Award Modification Request, and Export control record. Comments are visible to all individuals that have access to read or edit the proposal.

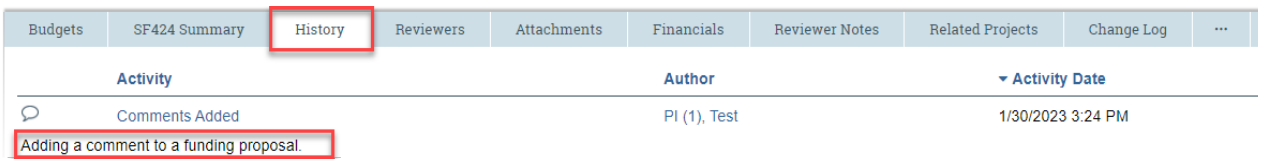
Follow the steps below to add a comment:

1. On the Workspace, select the **Add Comment** activity.

2. In the Add Comment window, enter your comments and any attachments. When complete, select **OK** to return to the Workspace.




3. Navigate to the **History** tab to review the comments.

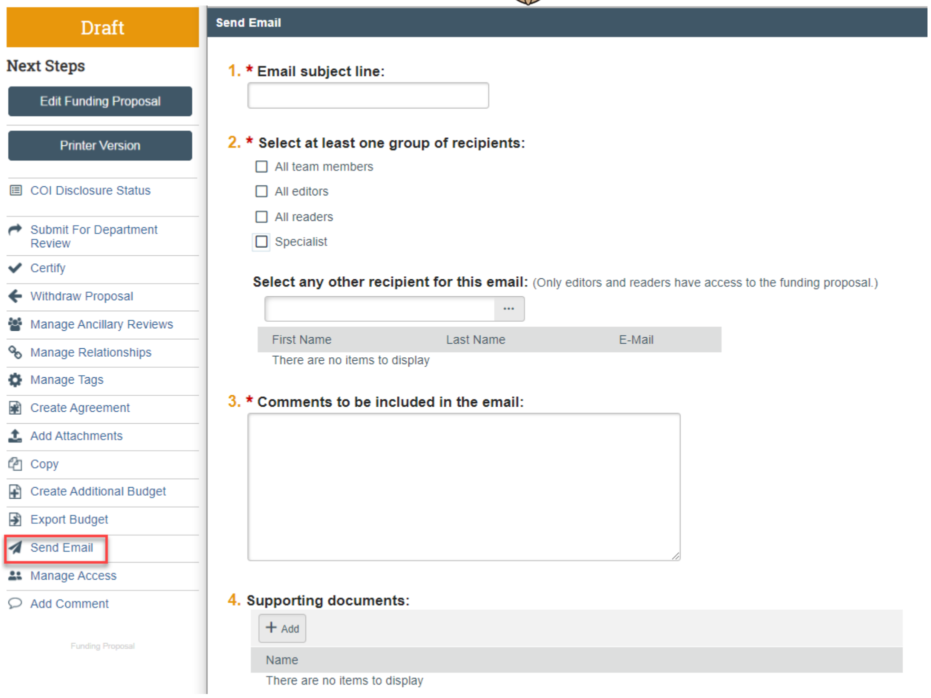



**Note**: Adding a comment to a record does not send a notification that a comment has been added. Use the Send Email function if you would like to send a notification.

## How to Send an Email

Emails can be sent on Grants Module records (using RAMP) from the Workspace to other users at UW-Madison. All emails are tracked within the History tab of the proposal and are available to anyone with access to the record. If you use the Send Email feature within RAMP, note that it will be specific to the record. Do not include information about other proposals, awards, or agreements in the email if they are unrelated. Follow the steps below to send an email from the Proposal:

1. On the Proposal Workspace, select the **Send Email** activity.
2. In the Send Email window, complete the required fields and add documents if needed. If you would like to send the email to a recipient that is not included in one of the groups selected in required Question 2, type the additional recipient's name(s) in the person selector in Question 2.




3. When complete, select **OK** to send the email and return to the Workspace.
4. Navigate to the **History** tab to review the comments entered in the activity.

## How to Initiate an Ancillary Review

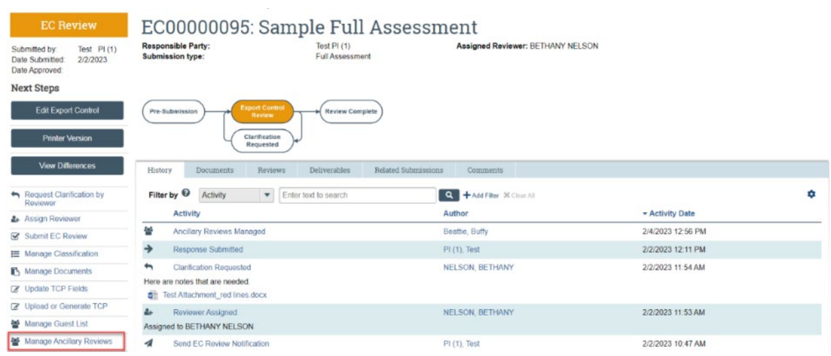
UW-Madison departments, divisions, and/or other offices may need to review and approve details of a proposal, award, award modification, award modification request, agreement, or export control record. This UW-Madison review process will be fulfilled using Research Administration Management Portal's (RAMP's) Manage Ancillary Review functionality. *This is similar to a WISPER approval.* An ancillary review can be initiated by members of the University of Wisconsin – Madison (UW-Madison) Research Administration Community at various points throughout the workflow. The assigned Ancillary Reviewer may complete (or manage) an ancillary review after it has been initiated.

- Ancillary Reviewers receive an email notification when the ancillary review is initiated, and multiple Ancillary Reviewers may perform their reviews in parallel.
- Ancillary Reviewers will have view-only access to the entire record. For more information on how to navigate records in RAMP, reference the Grants and Agreements Overview Guide on the RAMP website.

- Ancillary Reviewers do not have access to edit the record. If edits to a record are required, the Ancillary Reviewer will communicate necessary changes to the PI, Administrative/Primary Contact, or appropriate RSP team member.
- There are slight differences between ancillary reviews in the modules, which have been highlighted as appropriate. For instance, for Agreements in a Pre-Submission state, when creating the Ancillary Review, there is a question asking, 'Send notification now?'. The email only goes out automatically when this question is answered 'Yes'. If answered 'No' or left blank, the AR email will go out when the user Submits the agreement. **Please see the [Ancillary Review User Guide] for more information on these differences.**

Follow the steps below to add an ancillary review to a record:

1. Navigate to the Workspace of the record where the ancillary review is to be added. This can be done by accessing the record from the Dashboard or by searching for the appropriate record in the Grants, Agreements, or Export Control module. Select the **project name** to display the project Workspace.
2. On the Workspace page, select the **Manage Ancillary Reviews** activity.



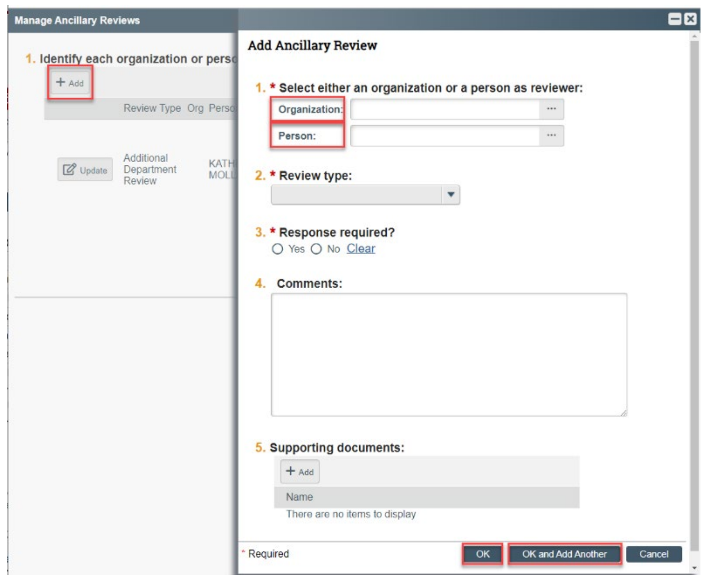

3. In the Manage Ancillary Reviews window, select **Add**.
4. In the Add Ancillary Review window, complete the questions and note the following. Select **OK** to continue.
   a. **Q1. Select either an organization or person as a reviewer** – Select the **ellipsis button** (three dots "…") next to the "Organization" or "Person" field to select the appropriate reviewer.
   b. **Q2. Review Type** – Select the applicable review type. Available review types are specific to the record. Select the "Other" review option for review types not included in the drop-down list.
   c. **Q3. Response Required** – Select **Yes** or **No** as appropriate based on the ancillary review requirements outlined in this guide. Some ancillary reviews

are required and should be completed before the record is finalized while others are informational only and will not cause workflow to stop.

d. **Q4. Comments –** Add comments as necessary.

e. **Q5. Supporting Documents –** Add supporting documents as necessary. The ancillary reviewer will have access to all Grants, Agreements, and Export Control records and documents, so project records do not need to be added here. **Note:** This question is not on the Manage Ancillary Reviews window in Export Control

5. In the Manage Ancillary Reviews window, repeat the steps above to change the ancillary reviewer/office, comments, or supporting documents as needed. When complete, select **OK**.




6. On the Workspace, the list of Ancillary Reviews and assigned Ancillary Reviewers displays on the Reviewers tab in the Grants module and on the Agreement Workspace in the Agreements module.