NOTES FOR SWITCHING AGGREGATORS

If an Aggregator (Fund Manager) is unable to approve the record for routing and the proposal needs to move forward, Fund Managers with the ‘Department Assistant’ role can add a new Aggregator or themselves and remove the original Aggregator from the record. If the original Aggregator’s name needs to be maintained in the proposal record, an alternate Aggregator can be added to the by the Central Office.

STEPS FOR SWITCHING AGGREGATORS

1. After locating the correct proposal, navigate to the ‘Proposal Roles’ section in the left navigation. This will show a list of the individuals associated with the record at that time. In the ‘Aggregator’ section, click ‘Add User’ to the right of the page.

Click the ‘Add User’ hyperlink to search for your own name or the name of the Aggregator that will need access to the proposal.

In the search box, enter the search criteria for the individual that needs to be added as the Aggregator.
2. Once in the Aggregator is listed in the proposal roles, the original aggregator can be removed and their approval will no longer be required to continue routing the record.

Select the correct name in the results box to populate the new aggregator. Their name will now appear in the Proposal Roles section under ‘Aggregator’.

Click ‘Remove’ next to the Aggregator that no longer needs access to the record.

Once the individual is removed, the new Aggregator will see the proposal record in their queue. They will now be ready to route it and approve it to keep it moving forward.

Note: If an Aggregator knows they will be unavailable ahead of time, they can complete the above steps themselves. However, once they remove themselves from the record, they will no longer be able to make any further adjustments.