



A Guide for Research Administration Offices

Proposal and Service Request Review

For up-to-date information and other resources, please visit the [ORIS website](#).

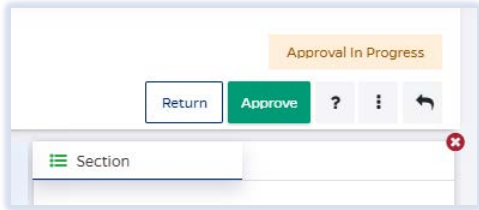
Last Updated: 6/20/2023

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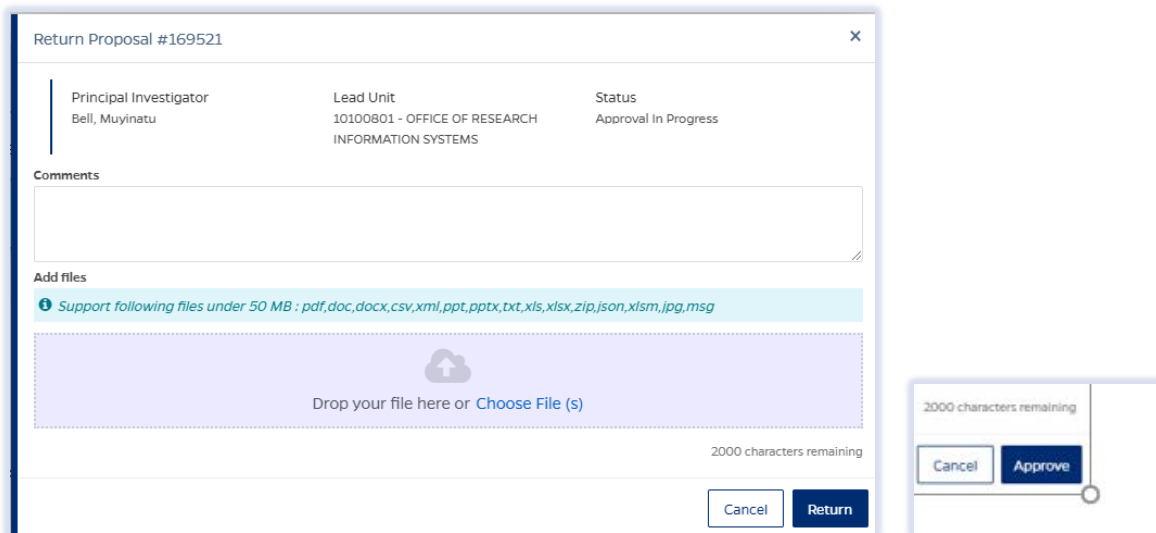
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APPROVAL AND BYPASS APPROVAL

- ❑ Open a proposal with a status = Approval in Progress.
- ❑ Review all tabs and [print a PD Summary](#) (see instructions on the next page).
Note: The Proposal tab is a summary of all information contained within the record.
- ❑ Either **Return** or **Approve** the record as desired.



- ❑ Include **Comments** as needed and confirm **Return** or **Approve**.

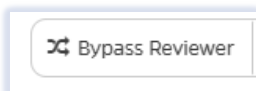


To Bypass an approver:

- ❑ Click on **Route Log** tab.



- ❑ Click on **Bypass Reviewer**.



- ❑ Input **Comments** and click on **Bypass** button.

Bypass Proposal #170078


Principal Investigator Bell, Muyinatu	Lead Unit ELECT & COMP ENG - BELL	Status Approval In Progress
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*Comments

2000 characters remaining

No Bypass

To Print or View the PD Summary:

- ❑ Click on the **More Actions** icon  and then click on **Print Proposal** in the dropdown menu.

Validate Submit ? 

- + Add Attachment
- Copy Proposal
- Sync Person Training
- Send Notification
- Print Proposal
- Export Proposal
- Deactivate Proposal

- ❑ Click on the box next to **Proposal Summary Form** and then click the **Print** button.


Print proposal #169647 - Advanced Techniques in Teaching
Adult Learners Research Administration Software

Choose a template to print the proposal

- ProposalSummaryForm_0407023pp - (.docx)
- Fillable_JHU_KeyPersonnel_Certification12052022P - (.docx)
- Fillable_PI_Questionnaire_Certification12052022P - (.docx)
- DeptChecklist120222 - (.docx)

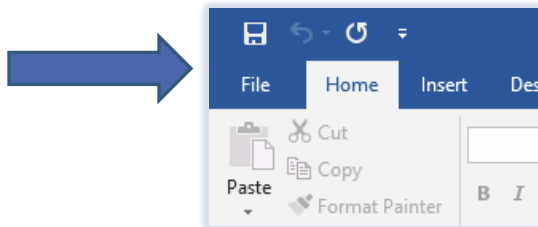
Cancel Print

NOTE: If the PD Summary will not open, turn off the Pop-up Blocker for the browser in use.

JH  Fibi		JOHNS HOPKINS UNIVERSITY PROPOSAL SUMMARY FORM				
Proposal ID: 169647			Institute Proposal Number:			
KEY PERSONNEL						
Name	Dept.	Role	% Effort	COI Training	Effort Training	Certification
Bell, Muyinatu	12015000 - ELECTRICAL AND COMPUTER ENGINEERING	Principal Investigator	56.00	05/04/2020	07/05/2017	Complete
Black-Winstead, Myra A	000001 - JOHNS HOPKINS ENTERPRISE	Co-Investigator			01/09/2009	Complete
Judy, Thomas	12015000 - ELECTRICAL AND COMPUTER ENGINEERING	Co-Investigator			03/20/2009	Complete
GENERAL INFORMATION						
Sponsor (Application to): 300023 - ADVANCED BIONICS CORPORATION (ABC)						
Sponsor Type: Private Profit			Sponsor Deadline:			
Prime Sponsor (if subaward):						

The PD Summary is a Microsoft Word document and can be saved or printed as any other Microsoft Word document.

- Click on **File** and choose the desired action from the menu.

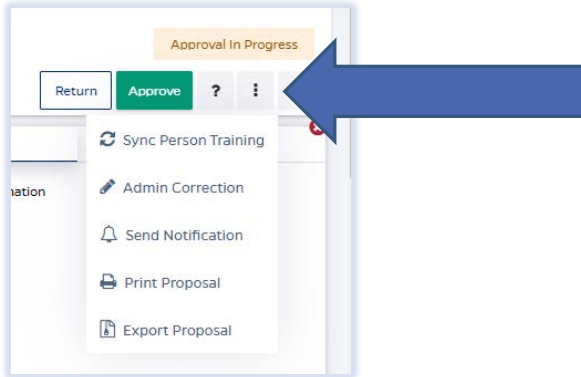


- Click on **Save, Save As** or **Print** as needed.

ADMIN CORRECTION TO A PROPOSAL

❑ Open a proposal with a status = Approval in Progress.

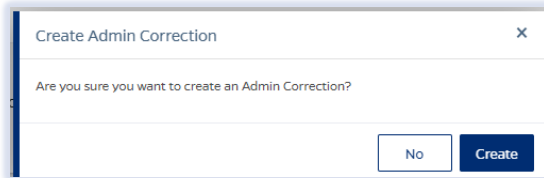
❑ Click on the **More Actions** icon. 



❑ Choose **Admin Correction** from the dropdown menu.

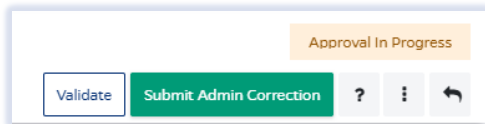


❑ Click on **Create** button.

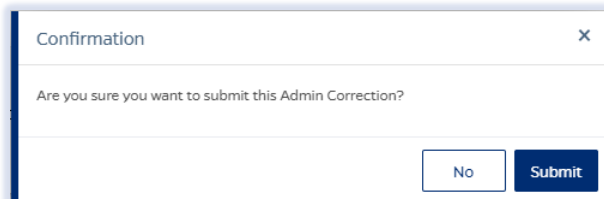


❑ Make desired changes in the record.

❑ Click on **Submit Admin Correction**.

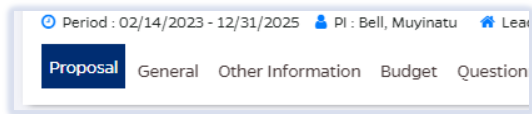


❑ Click on the **Submit** button to confirm.

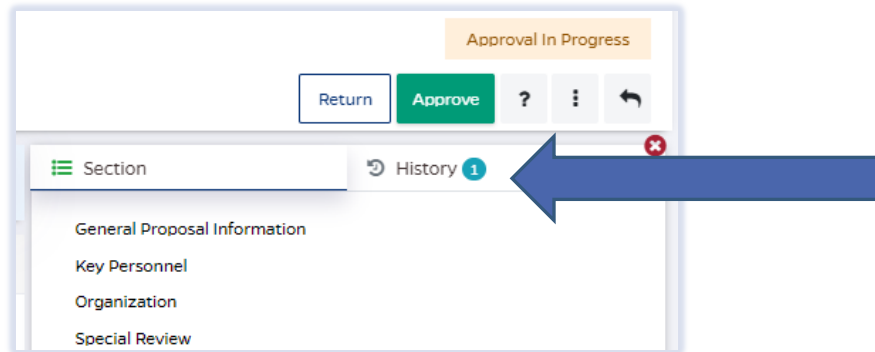


To review Admin Corrections:

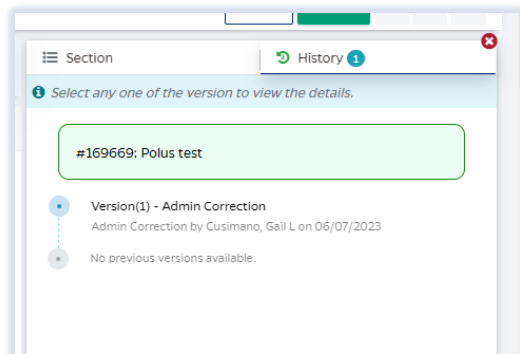
- ❑ Click on **Proposal** tab.



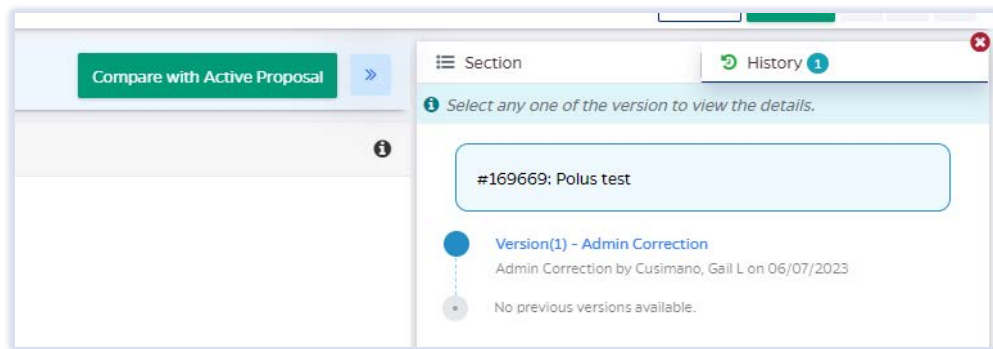
- ❑ Click on **History** in upper right corner.



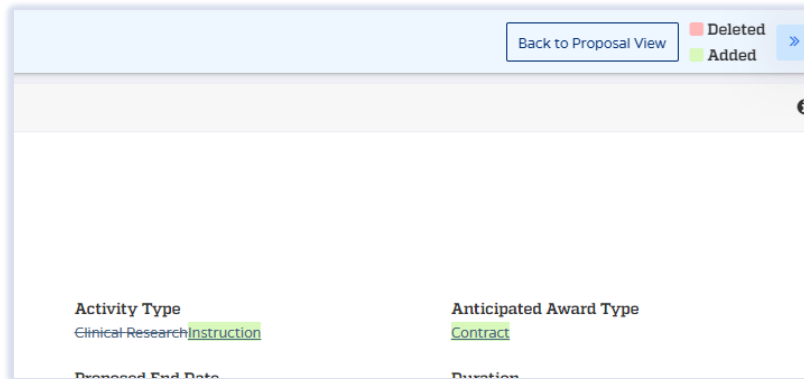
The **Version History** will open:




- ❑ Click on the **Version** you want to review and the following will open:

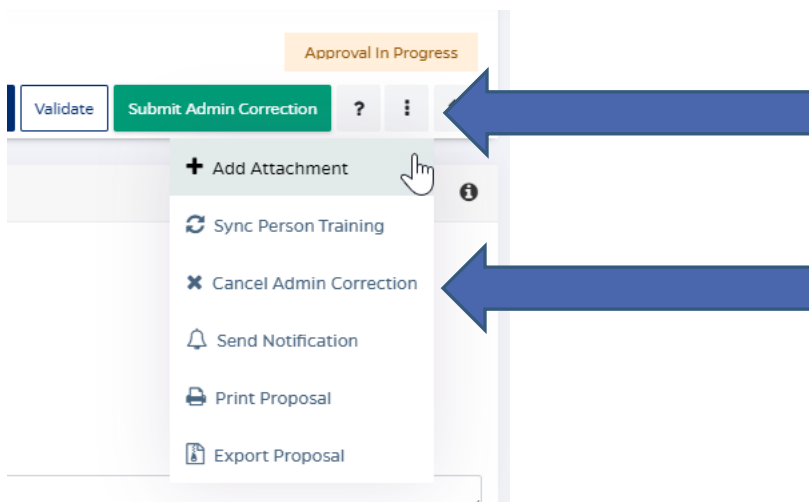


- ❑ Click on **Compare with Active Proposal** to see changes. Deleted changes show in red and Added changes show in green.



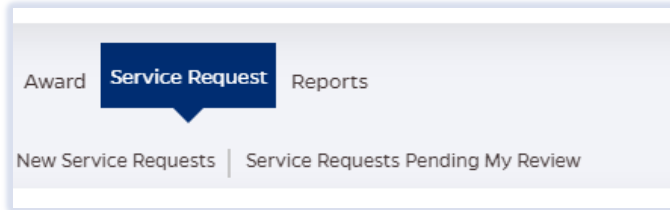
To cancel an Admin Correction without saving:

- ❑ Click on the More Actions icon  and choose **Cancel Admin Correction** from the dropdown menu.



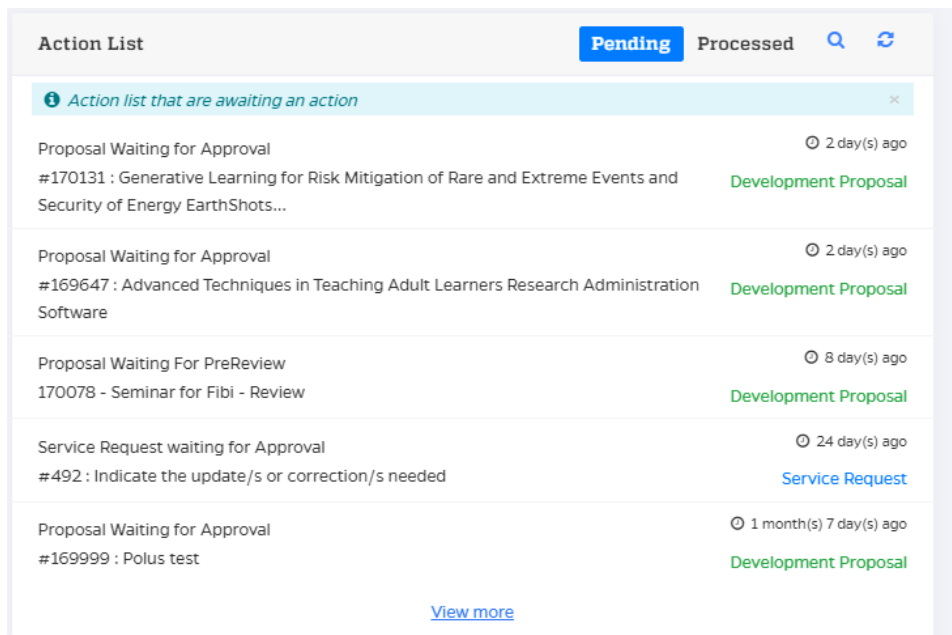
SERVICE REQUEST REVIEW

- ❑ Click on the **Service Request (SR)** tab and then click on the **Service Requests Pending My Review** tab.



OR

- ❑ Click on the SR from the **Action List** widget on the Dashboard.
- ❑ Click on the desired SR to review.



- ❑ Review all tabs in the Service Request and click on **Return** or **Approve** as desired.



- ❑ Enter any comments and confirm by clicking on **Return** or **Approve** as appropriate.

Return Service Request

Comments

2000 characters remaining

Add files

Support following files under 50 MB : pdf, doc, docx, csv, xml, ppt, pptx, txt, xls, xlsx, zip, json, xlsxm, jpg, msg


Drop your file here or Choose File (s)

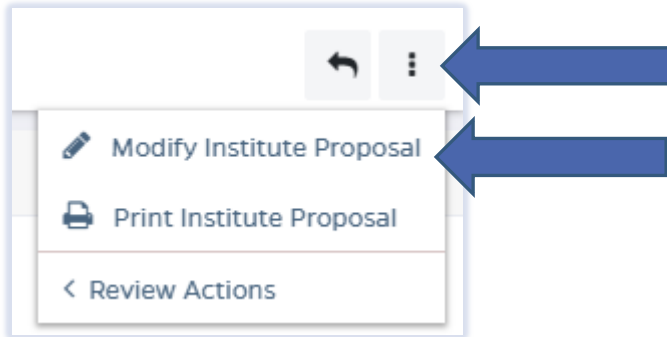
Close Return Approve

- ❑ Status will change to **Approved**.

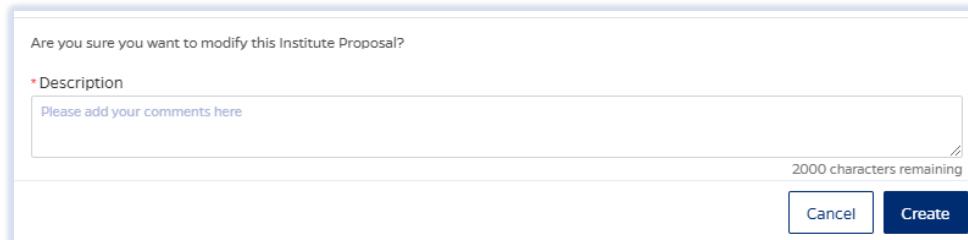
INSTITUTE PROPOSAL MODIFICATION

❑ Click on the Institute Proposal tab.

❑ Click on the **More Actions** icon  and choose **Modify Institute Proposal** from the dropdown menu.

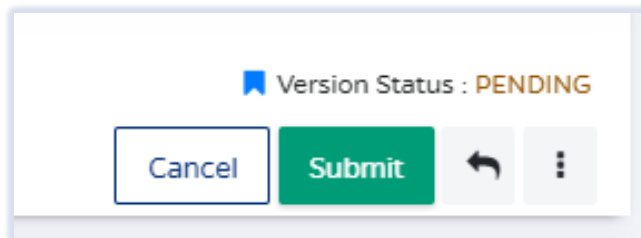


❑ Enter a description and click on **Create** button.

A screenshot of a dialog box titled 'Are you sure you want to modify this Institute Proposal?'. It contains a text input field labeled 'Description' with the placeholder text 'Please add your comments here'. A character count '2000 characters remaining' is visible at the bottom right of the field. Below the field are two buttons: 'Cancel' and 'Create'.

❑ Make desired changes in the record.

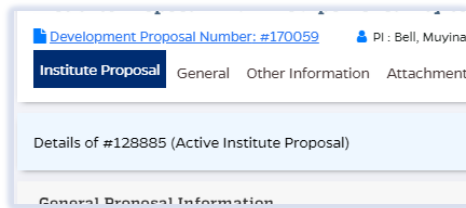
❑ Click on **Submit**.



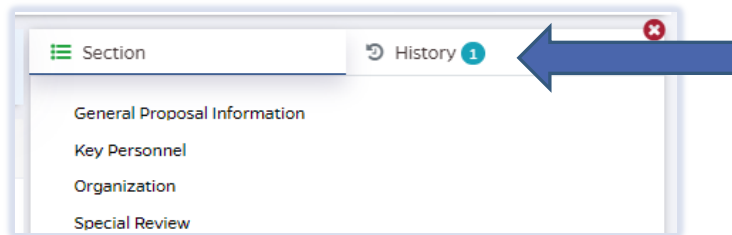
❑ Click on **Save & Submit** button to confirm.

To review IP Modifications:

- ❑ Click on **Institute Proposal** tab.

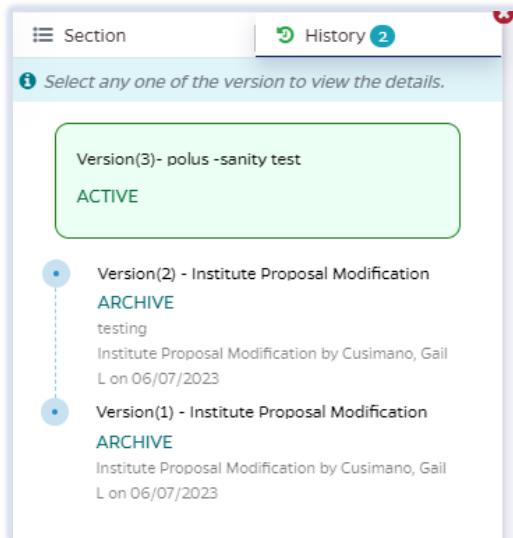


- ❑ Click on **History** in upper right corner.

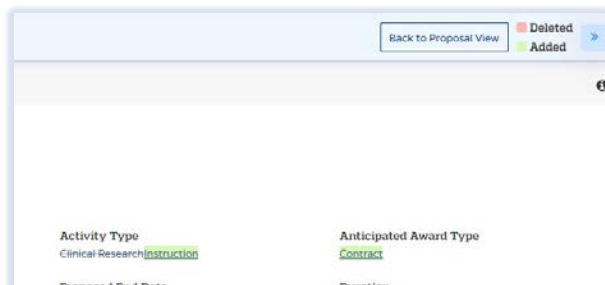


The **Version History** will open:

- ❑ Click on the **Version** you want to review and the following will open:

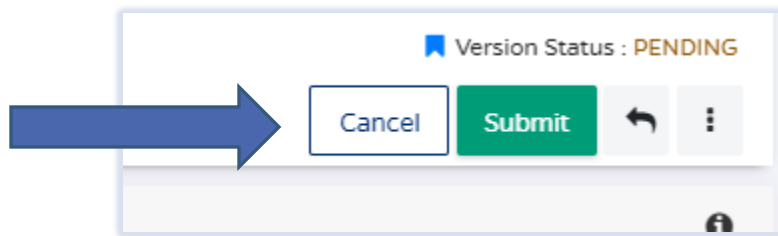


- ❑ Click on **Compare with Active Proposal** to see changes. Deleted changes show in red and Added changes show in green.

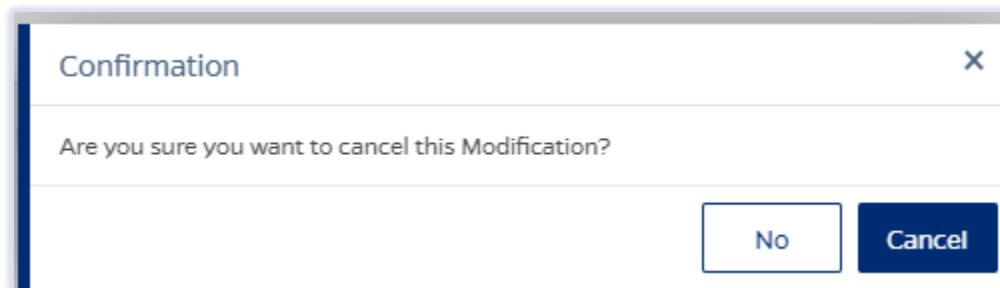


To cancel an IP Modification without saving:

- ❑ Click on the **Cancel** button.



- ❑ Then click on Cancel to confirm.



The IP Modification will show as **Cancelled** in the **History**.

