



A Guide for Research Administration Offices

Proposal and Service Request Review

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

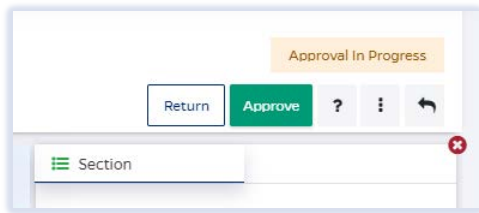
Last Updated: 5/23/24

Table of Contents

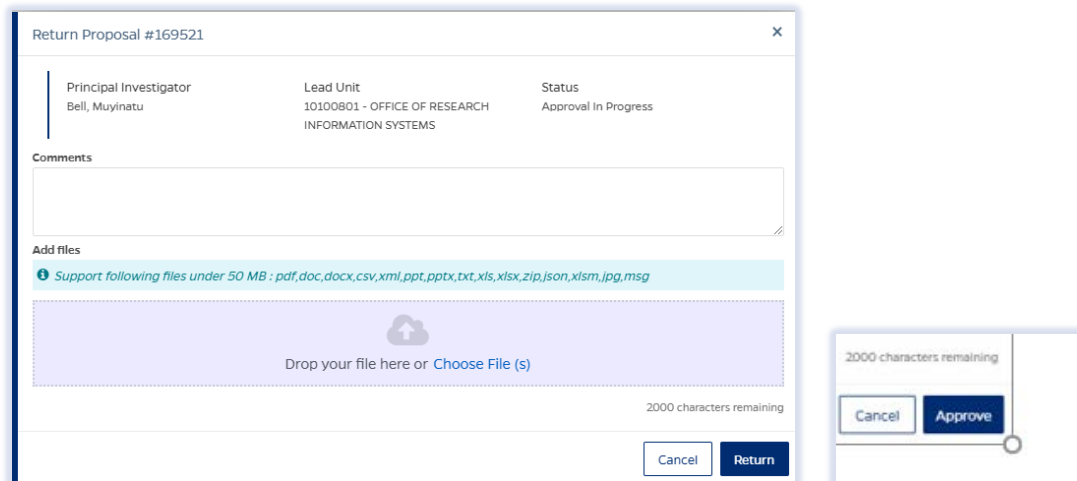
Approval	3
To Bypass an approver:.....	3
To Add an Alternate Approver:.....	4
To Print or View the PD Summary:	5
Admin Correction to a Proposal	7
To review Admin Corrections:.....	8
To cancel an Admin Correction without saving:.....	9
Service Request Review.....	10
Institute Proposal Modification	12
To cancel an IP Modification without saving:	14
Linking a Supplement to an Award.....	15

APPROVAL

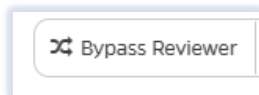
- ❑ Open a proposal with a status = Approval in Progress.
- ❑ Review all tabs and [print a PD Summary](#) (see instructions on the next page).
Note: The Proposal tab is a summary of all information contained within the record.
- ❑ Either **Return** or **Approve** the record as desired.



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



To Bypass an approver:

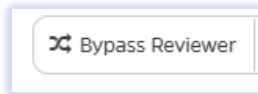


Occasionally, a Dept. Business Office will need to approve a record, but the individual is unable to access the system and will email the Research Administration Office asking to Bypass their stop. It is recommended to note that a Department made this request via email. The email can be attached to the record on the Comments tab.

- ❑ Click on **Route Log** tab.



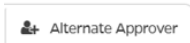
- ❑ Click on **Bypass Reviewer**.



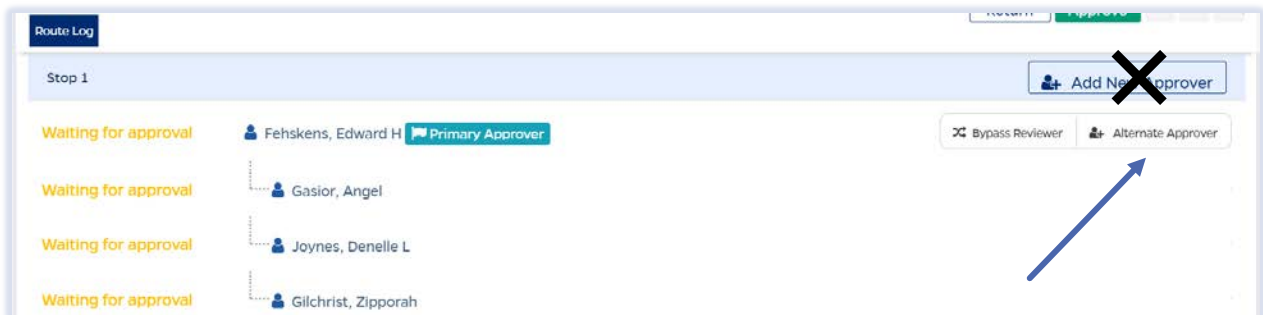
- ❑ Input **Comments** and click on **Bypass** button.

A screenshot of a web form titled "Bypass Proposal #170078". The form contains three fields: "Principal Investigator" with the value "Bell, Muyinatu", "Lead Unit" with "ELECT & COMP ENG - BELL", and "Status" with "Approval In Progress". Below these is a large text area for "Comments" with a "2000 characters remaining" indicator. At the bottom right are two buttons: "No" and "Bypass".

To Add an Alternate Approver:



If the user needs to add someone (including themselves) to a Route log stop, always choose Add **ALTERNATE Approver**. This will add the approver to the current stop and then there is no need for anyone else listed to approve. In essence bypassing the list, but also adding another Research Administrator to approve in their place.



If in doubt, please contact ORIS or your Supervisor for further clarification.

COMMON ERROR:


Often **Add NEW Approver** is used when in fact the user really wants to add an alternate approver.

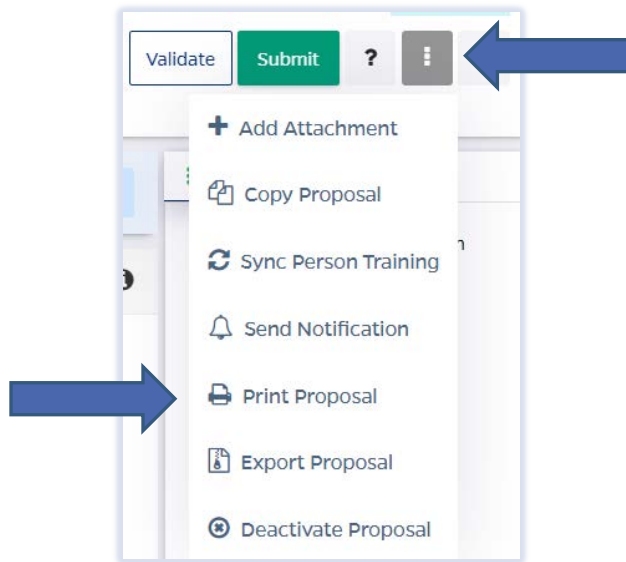
When to use Add **NEW** Approver



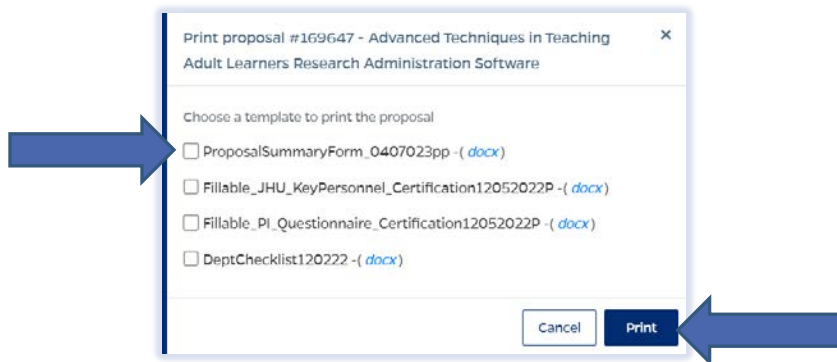
No Business scenarios exist presently where this is needed. However, if an approver needs to be added as a whole new stop this option would be appropriate.

To Print or View the PD Summary:

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



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



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

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)

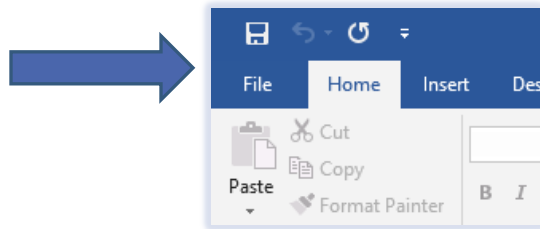
Sponsor Type: Private Profit

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.

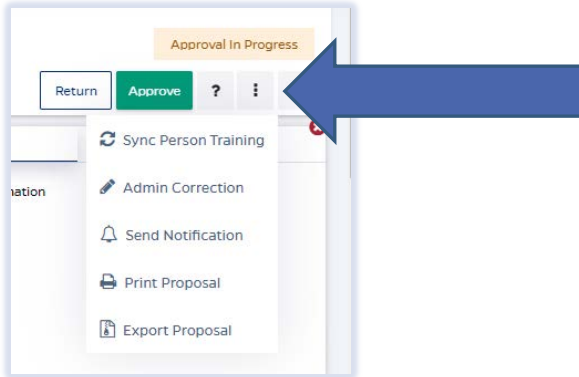


- Click on **Save**, **Save As** or **Print** as needed.

ADMIN CORRECTION TO A PROPOSAL

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

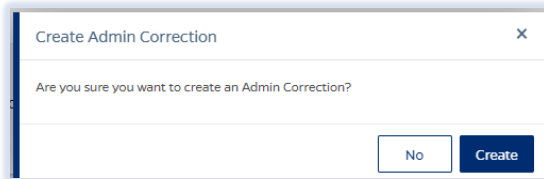
❑ Click on the **More Actions** icon. 



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

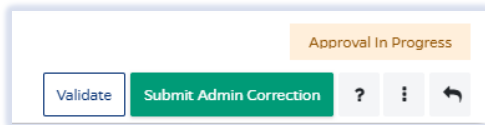


❑ Click on **Create** button.

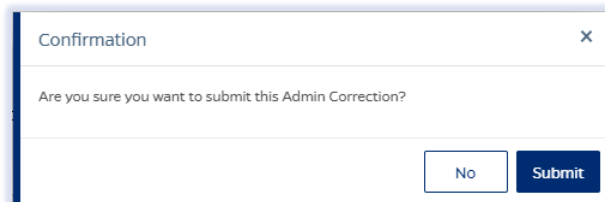


❑ Make desired changes in the record.

❑ Click on **Submit Admin Correction**.

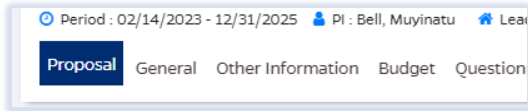


❑ Click on the **Submit** button to confirm.

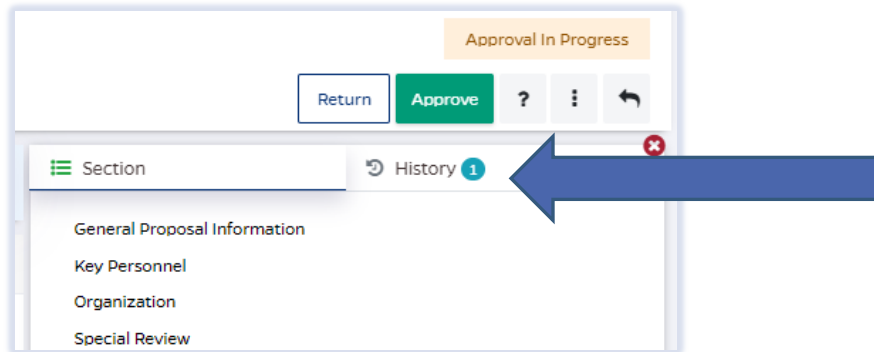


To review Admin Corrections:

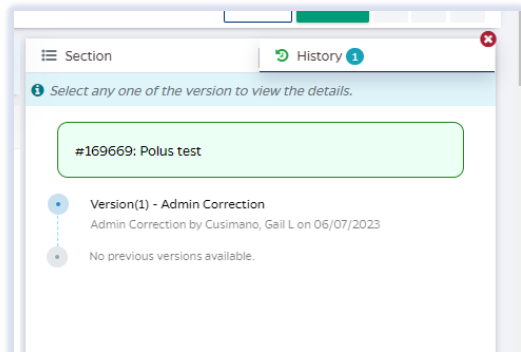
- ❑ Click on **Proposal** tab.



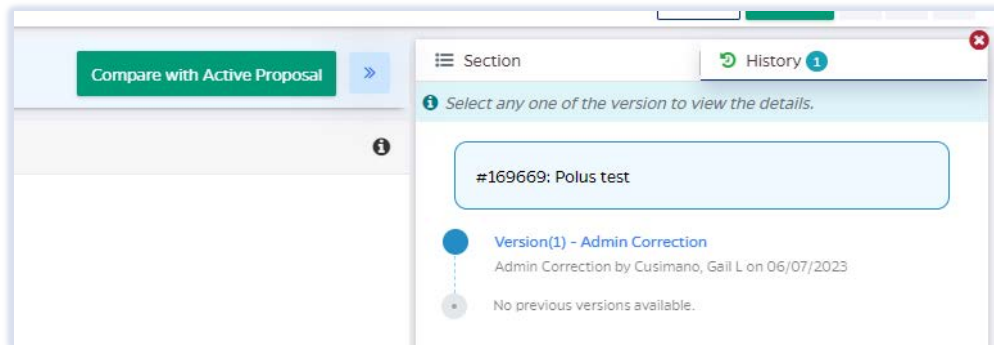
- ❑ Click on **History** in upper right corner.



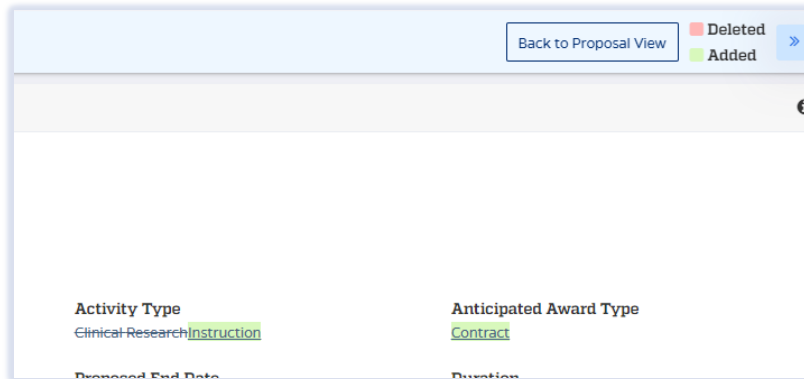
The **Version History** will open:




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

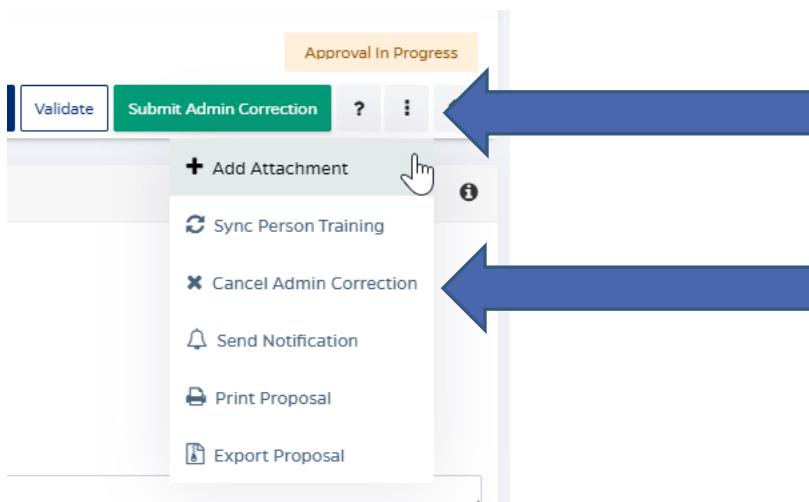


- ❑ Click on **Compare with Active Proposal** to see changes. Deleted changes show in red and Added changes show in green.



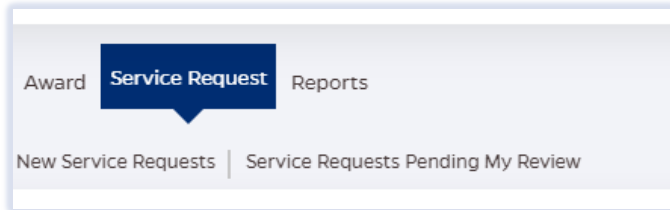
To cancel an Admin Correction without saving:

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



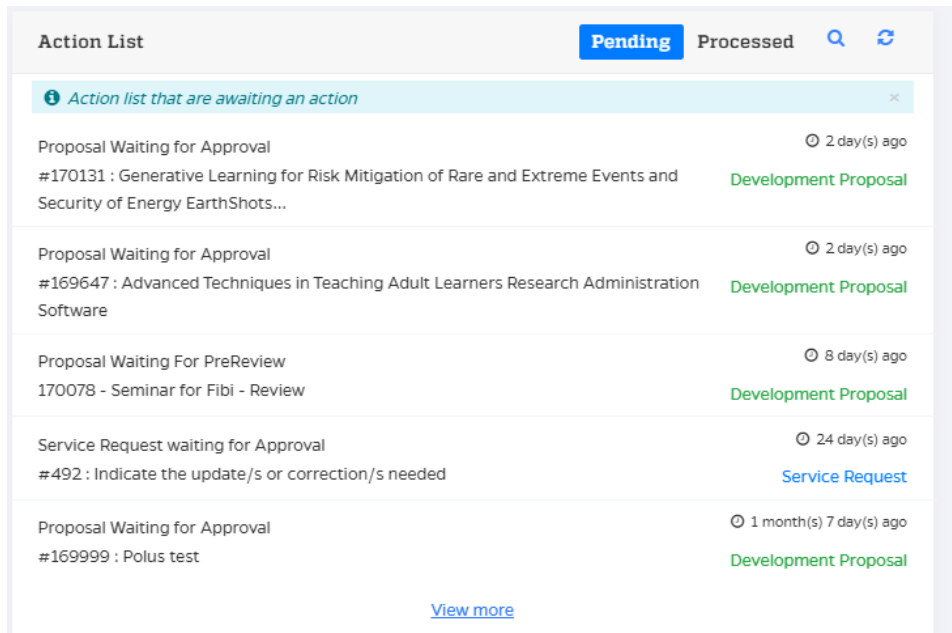
SERVICE REQUEST REVIEW

- ❑ 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, xlsx, jpg, msg

Drop your file here or Choose File (s)

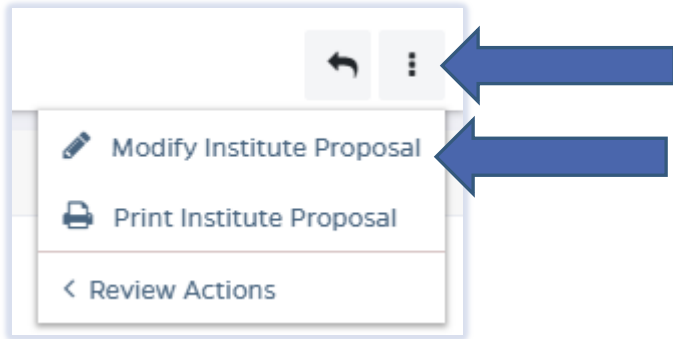
Close Return Approve

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

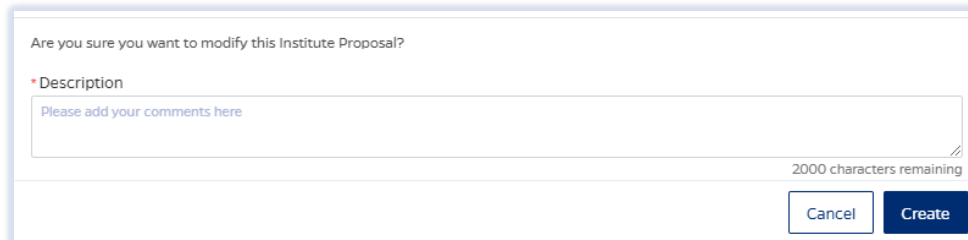
INSTITUTE PROPOSAL MODIFICATION

❑ Click on the Institute Proposal tab.

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

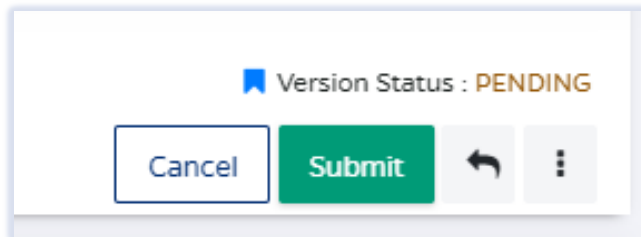


❑ Enter a description and click on **Create** button.

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'. At the bottom right, there are two buttons: 'Cancel' and 'Create'. A character count '2000 characters remaining' is visible at the bottom right of the input field.

❑ Make desired changes in the record.

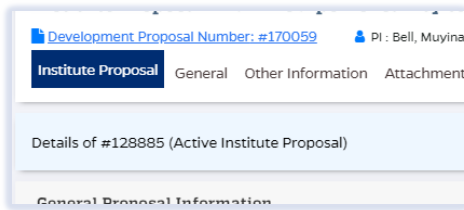
❑ Click on **Submit**.



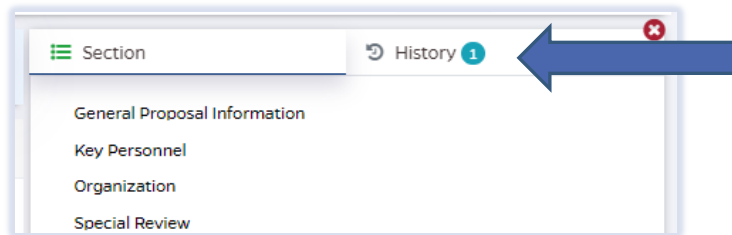
❑ Click on **Save & Submit** button to confirm.

To review IP Modifications:

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

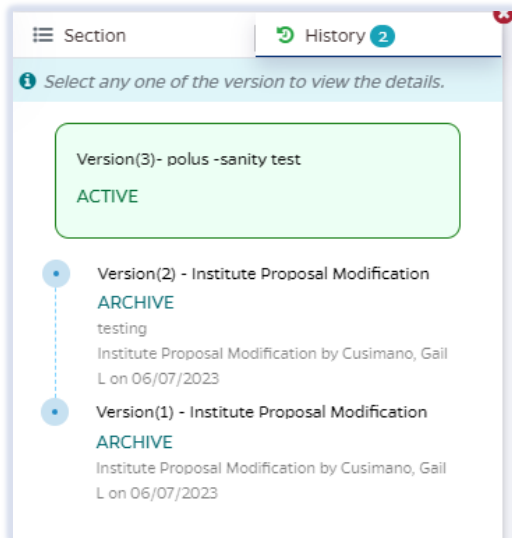


- ❑ Click on **History** in upper right corner.

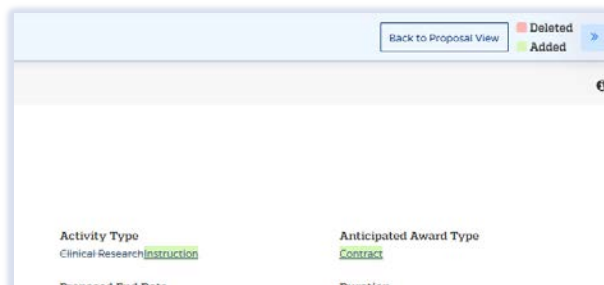


The **Version History** will open:

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

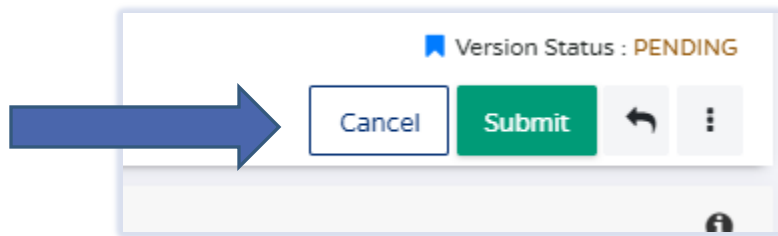


- ❑ Click on **Compare with Active Proposal** to see changes. Deleted changes show in red and Added changes show in green.

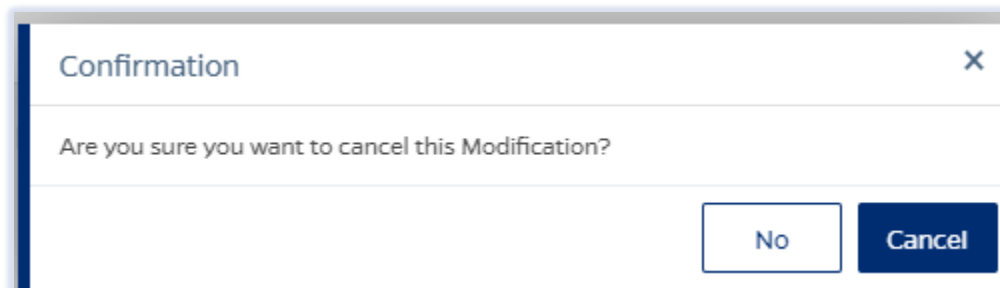


To cancel an IP Modification without saving:

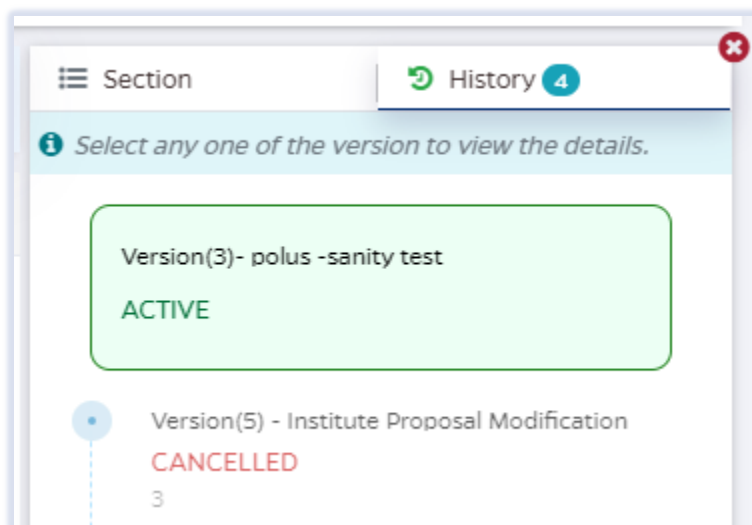
- ❑ Click on the **Cancel** button.



- ❑ Then click on Cancel to confirm.

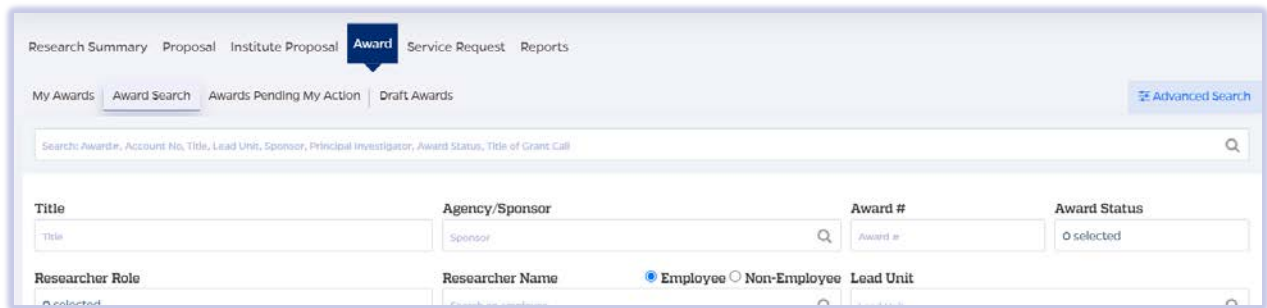



The IP Modification will show as **Cancelled** in the **History**.



LINKING A SUPPLEMENT TO AN AWARD

From the Award Module:



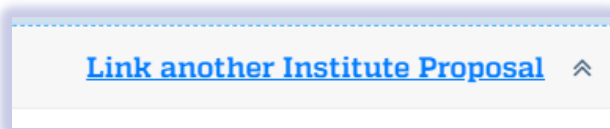
- Find the **Award** under the **Award Search** and click on the link which opens the award.
- Click on the **More Actions** icon  and choose **Admin Correction** from the dropdown menu.



- Enter a description that says Link supplement and click on Create.



- Click on Link another Institute Proposal.



- Enter the IP information in the **Proposal Funding this Award** field.

Proposal Funding this Award

2105444

21054442 | AI Institute: On Dynamic, Resilient Engineered Environments | RUTGERS UNIV | ChemBE - KEVREKIDIS | Organized Research | New | Kevrekidis, Yannis G | Pending

21054443 | 2021-2022 DePuy Synthes Scientific Research Fellowship | MEDICAL DEVICE BUSINESS SERVICES INC | PLASTIC & RECONSTRUCTIVE SURGERY | Instruction | New | O'Brien-Coon, Devin | Not Funded

☐ Click on **Link Proposal** button.

Proposal Funding this Award

AI Institute: On Dynamic, Resilient Engineered Environments

Title	Status
# 21054442 : AI Institute: On Dynamic, Resilient Engineered Environments	Pending
Lead Unit 12024034 - ChemBE - KEVREKIDIS	Agency/Sponsor RUTGERS UNIV

[Link Institute Proposal](#)

Proposal Number	Title	Lead Unit	Agency/Sponsor	Status	Actions
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☐ Click on the **Submit Admin Correction** and choose **YES** to confirm.

#140874-00002:UAE 2022 Summer Program: UAE 2022 Summer Program

Period : 01/01/2022 - 10/31/2022 | PI : Robfogel, Samuel S | Lead Unit : 21500000 - CENTER FOR TALENTED YOUTH | Award status : Terminated | Budget Status : To Be Posted | Version St

Award **Overview** | Other Information | Tasks | Dates & Amounts | Budget & Expenses | Cost Share | Attachments

Questionnaire | Report Summary | Report Req. | Payments | Terms | Outcomes | Permissions | Hierarchy | Medusa

History

This version is created as a result of **Admin Correction** by Gaslor, Angel on 09/20/2023 2:46:26 PM

[Active Award](#) | [Variation Reque](#)

[Validate](#) [Submit Admin Correction](#)