A Guide for Research Administration Offices
Proposal and Service Request Review

For up-to-date information and other resources, please visit the ORIS website.

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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.

![Image](image1.png)

**To Print or View the PD Summary:**

☐ Click on the **More Actions** icon 🕵️‍♂️ and then click on **Print Proposal** in the dropdown menu.

![Image](image2.png)

☐ 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.

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.

![Compare with Active Proposal](image)

**To cancel an Admin Correction without saving:**

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

![More Actions](image)
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.

☐ 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.

☐ 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.
- Click on **Link Proposal** button.

- Click on the **Submit Admin Correction** and choose **YES** to confirm.