



A Guide for Research Administration Offices

Proposal and Service Request Review

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

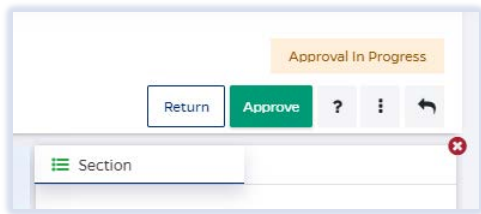
Last Updated: 9/26/2023

Table of Contents

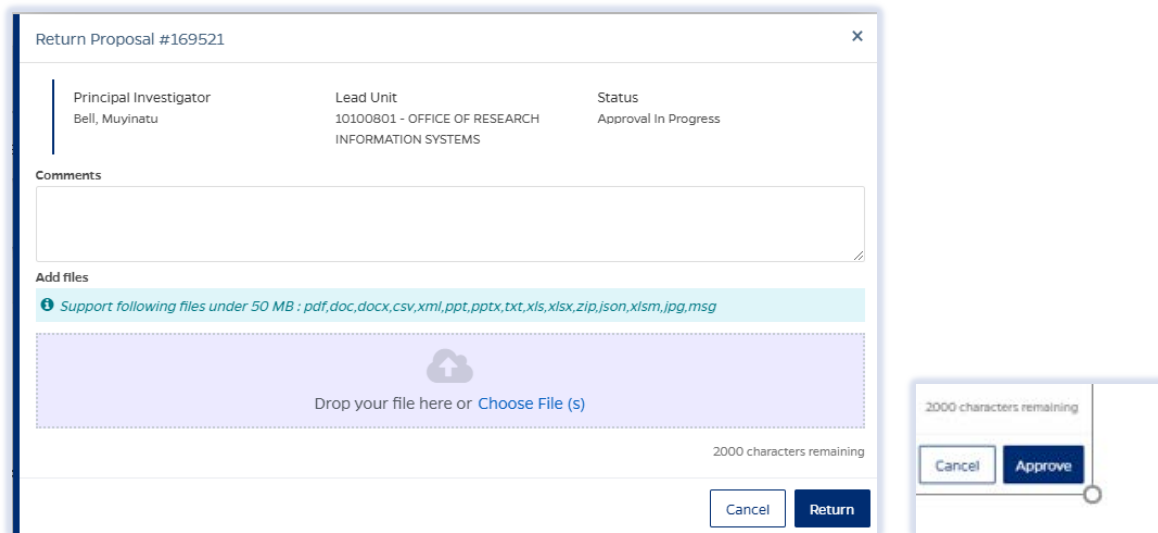
Approval and Bypass Approval	3
To Bypass an approver:	3
To Print or View the PD Summary:	4
Admin Correction to a Proposal.....	7
To review Admin Corrections:	8
To cancel an Admin Correction without saving:.....	9
Service Request Review	10
Institute Proposal Modification	12
To cancel an IP Modification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

APPROVAL 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**.

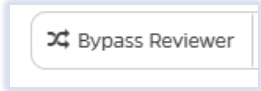


To Bypass an approver:

- ❑ Click on **Route Log** tab.




- ❑ Click on **Bypass Reviewer**.

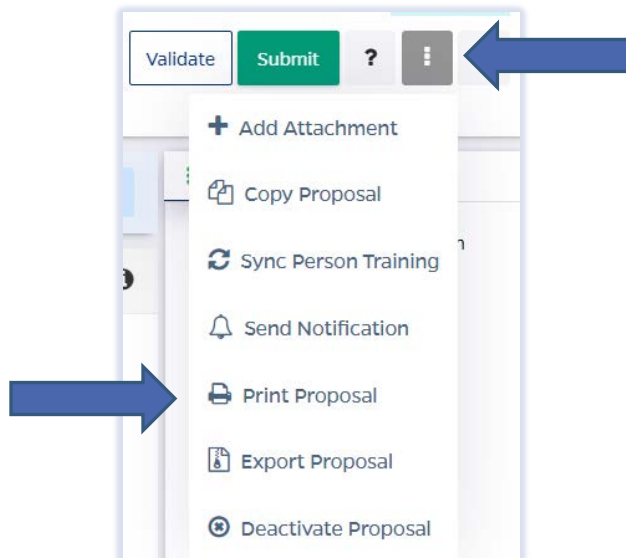


- ❑ Input **Comments** and click on **Bypass** button.

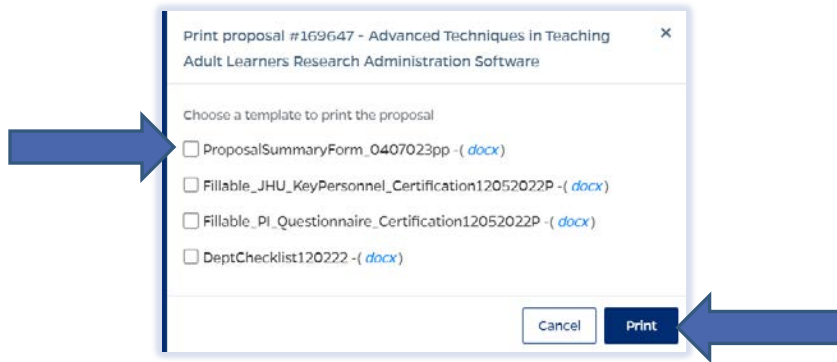
A screenshot of a web form titled 'Bypass Proposal #170078'. The form contains a table with three columns: 'Principal Investigator' (Bell, Muyinatu), 'Lead Unit' (ELECT & COMP ENG - BELL), and 'Status' (Approval In Progress). Below the table is a large text area labeled 'Comments' with a '2000 characters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

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.



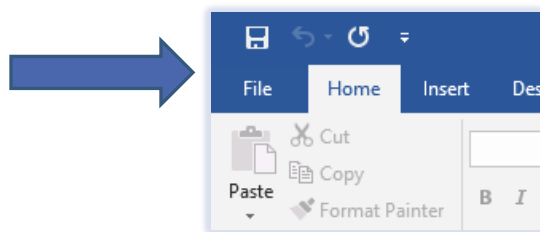
NOTE: If the PD Summary will not open, turn off the Pop-up Blocker for the browser in use.

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.

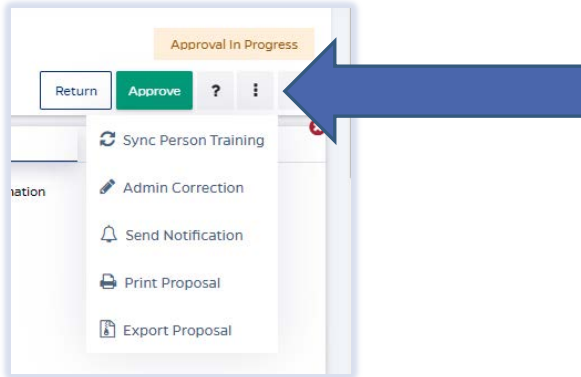


- Click on **Save, Save As** or **Print** as needed.

ADMIN CORRECTION TO A PROPOSAL

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

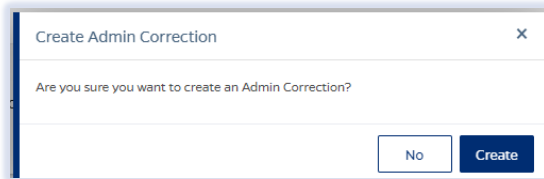
❑ Click on the **More Actions** icon. 



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

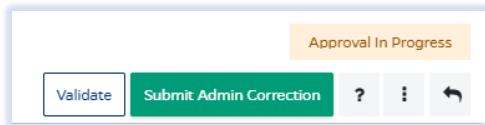


❑ Click on **Create** button.

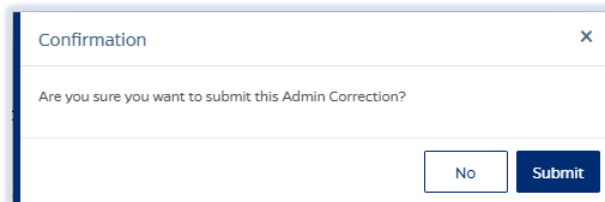


❑ Make desired changes in the record.

❑ Click on **Submit Admin Correction**.

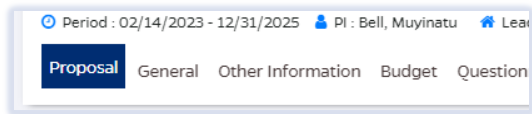


❑ Click on the **Submit** button to confirm.

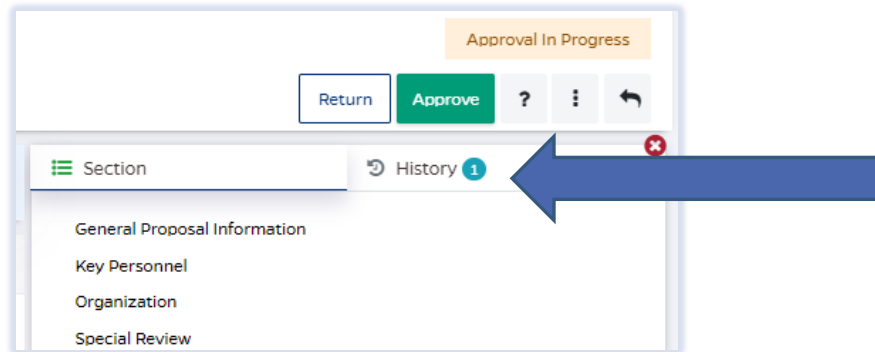


To review Admin Corrections:

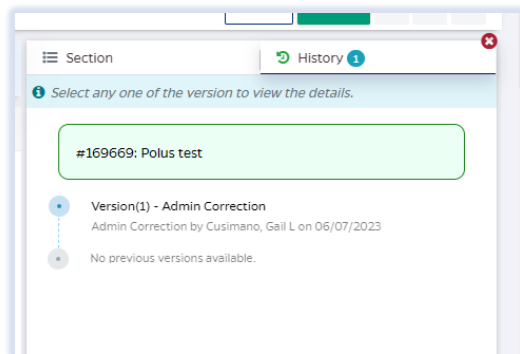
- ❑ Click on **Proposal** tab.



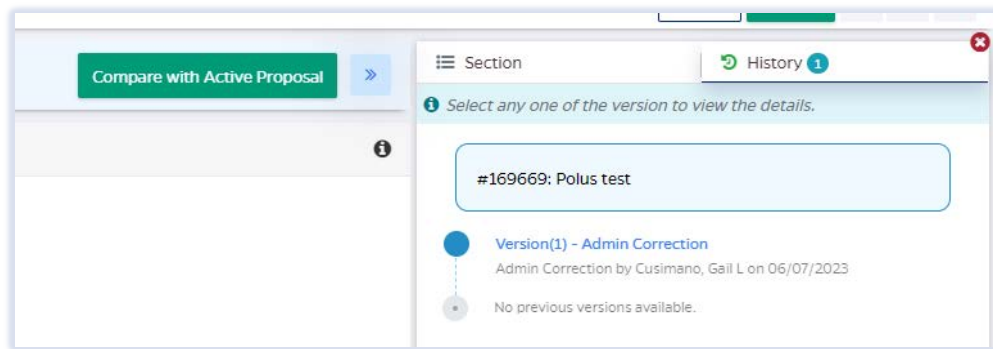
- ❑ Click on **History** in upper right corner.



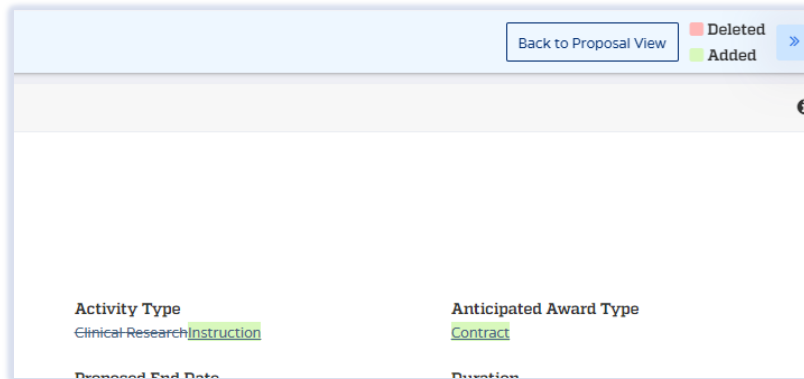
The **Version History** will open:



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

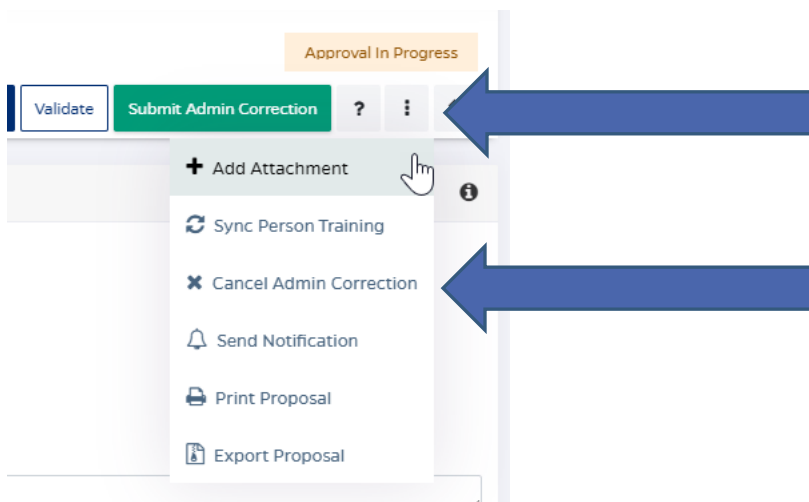


- ❑ Click on **Compare with Active Proposal** to see changes. Deleted changes show in red and Added changes show in green.



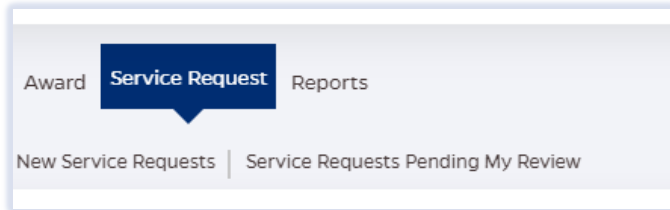
To cancel an Admin Correction without saving:

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



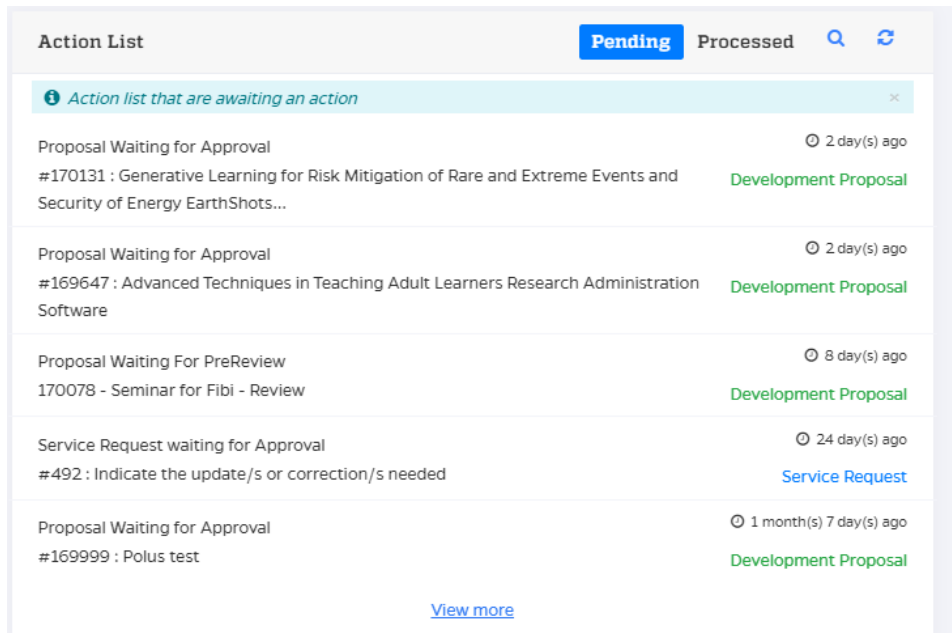
SERVICE REQUEST REVIEW

- ❑ 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)

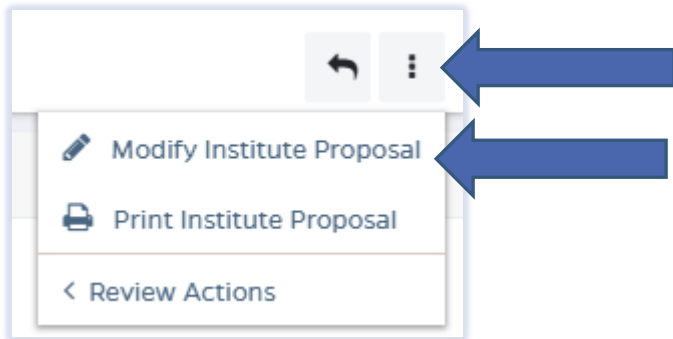
Close Return Approve

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

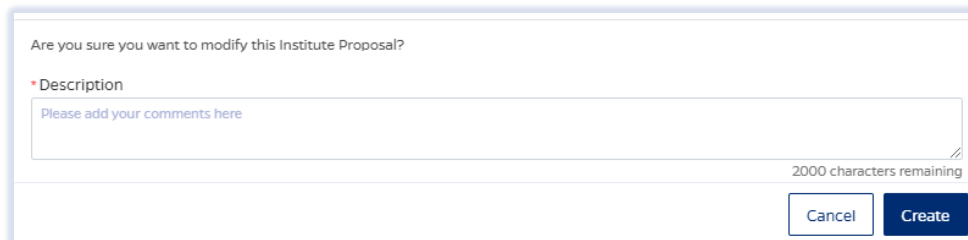
INSTITUTE PROPOSAL MODIFICATION

❑ Click on the Institute Proposal tab.

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

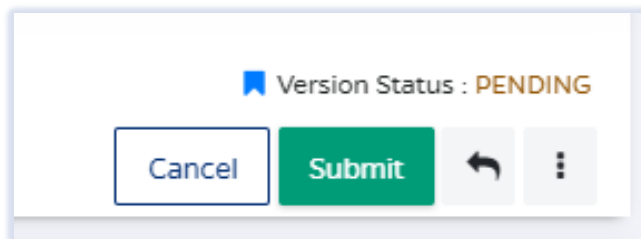


❑ Enter a description and click on **Create** button.

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

❑ Make desired changes in the record.

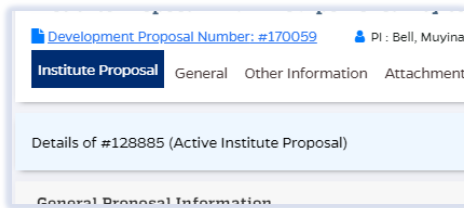
❑ Click on **Submit**.



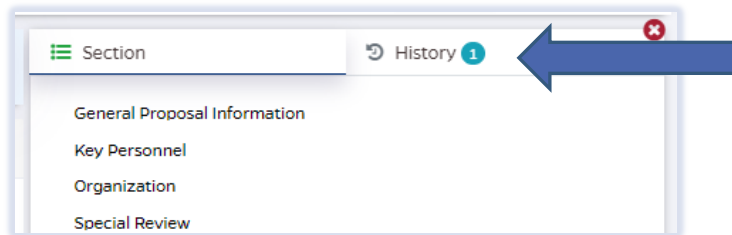
❑ Click on **Save & Submit** button to confirm.

To review IP Modifications:

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

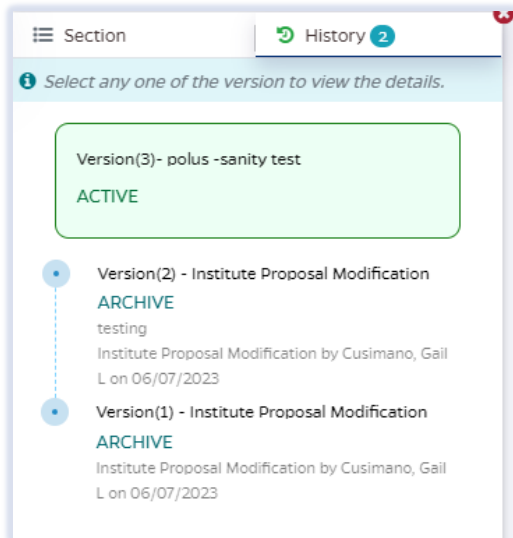


- ❑ Click on **History** in upper right corner.

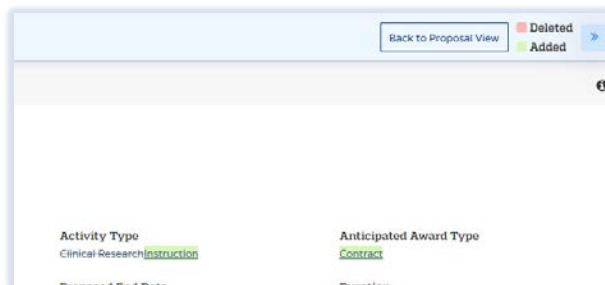


The **Version History** will open:

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

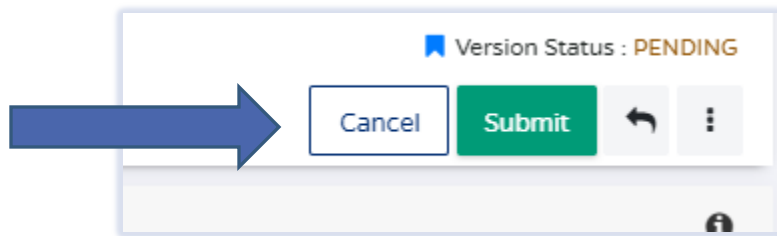


- ❑ Click on **Compare with Active Proposal** to see changes. Deleted changes show in red and Added changes show in green.

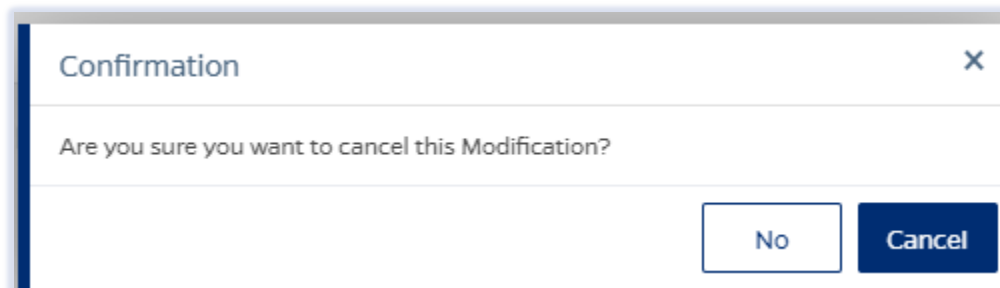


To cancel an IP Modification without saving:

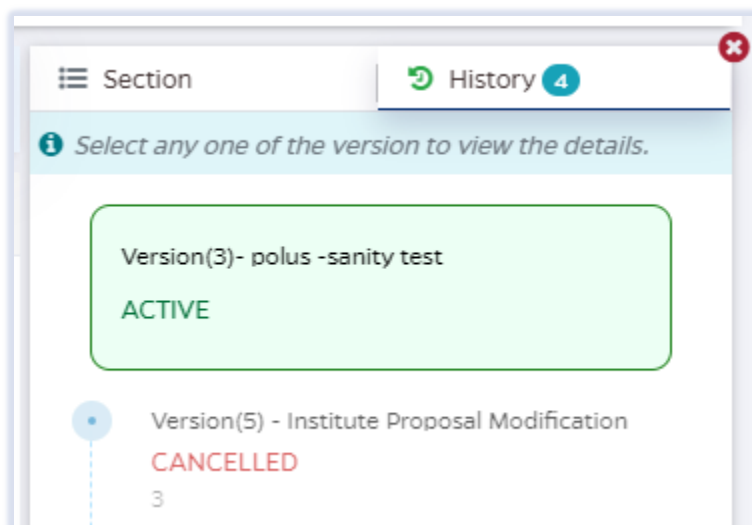
- ❑ Click on the **Cancel** button.



- ❑ Then click on Cancel to confirm.

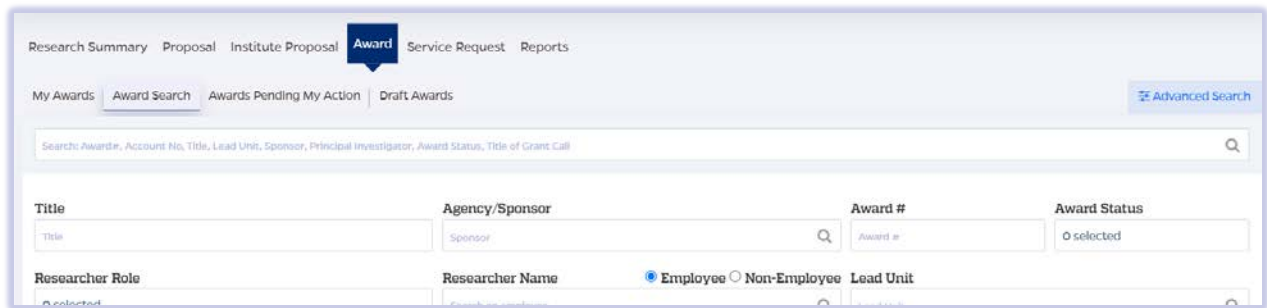



The IP Modification will show as **Cancelled** in the **History**.



LINKING A SUPPLEMENT TO AN AWARD

From the Award Module:



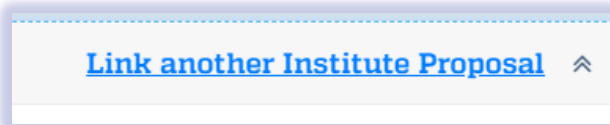
- Find the **Award** under the **Award Search** and click on the link which opens the award.
- Click on the **More Actions** icon  and choose **Admin Correction** from the dropdown menu.



- 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

☐ 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](#)