

eProposal Quick Guide for PIs: *Approving Proposals*

When a proposal is ready for you to review and approve, you will receive an email notification from iRIS with the subject line: *eProposal Action – Approval Required*. Follow the steps below to access, review and approve the proposal.

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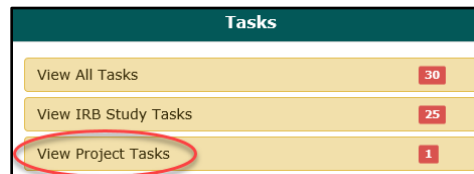
Access the Submission Routing Signoff Sheet

- 1) Access the [eProposal – iRIS](#) link from MyAccess.

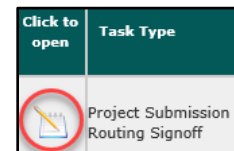


NOTE: If you are using a PC, use Internet Explorer version 8 or later, Firefox or Chrome. If you are using a Mac, use Safari version 6 or later.

- 2) Under **Tasks**, click **View Project Tasks**.



- 3) Under the **Project Tasks** tab, click the **Notepad** icon to open the proposal referenced in the notification.



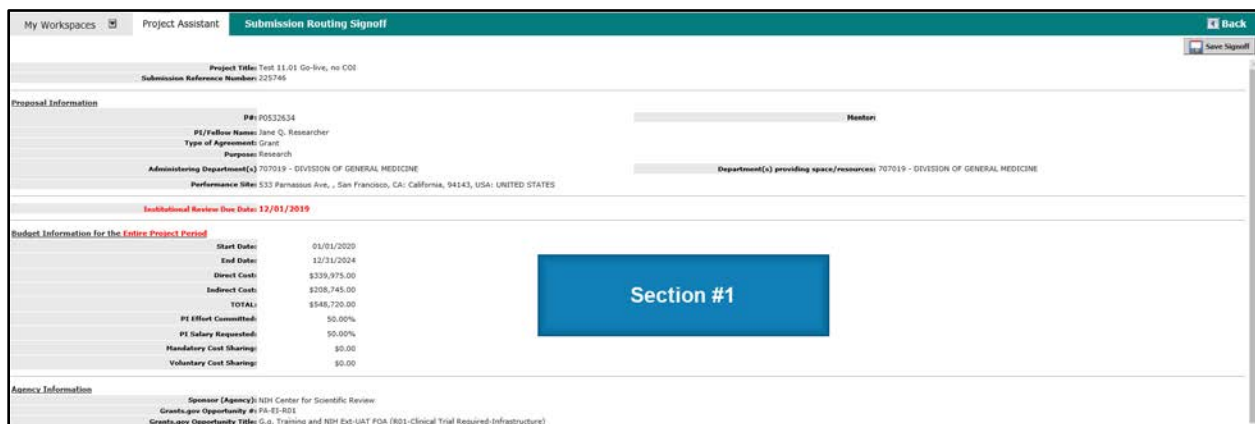
- 4) You are taken to the **Submission Routing Signoff Sheet**.

Review the Proposal

There are 3 sections for you to review and approve:

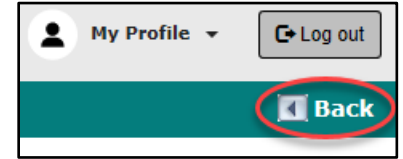
1) Summary Proposal Information

- This section includes proposal summary information about the budget and sponsor agency.





NOTE: To navigate back to the previous page, use the system **Back** button in the upper right corner of the screen. Do not use your browser's back button.

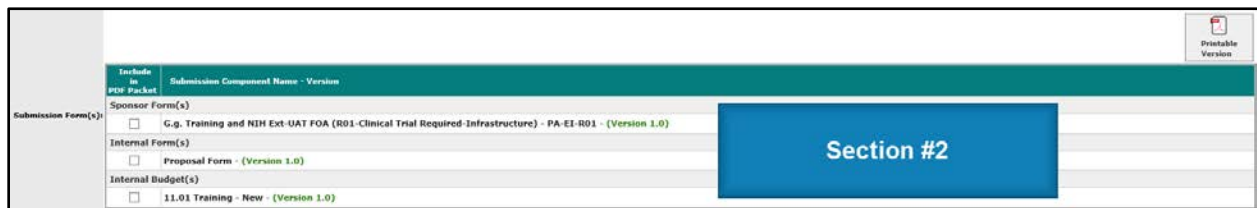


2) Attachments of Relevant Proposal Documents

- This section allows you to view relevant proposal documents.
- Attachments can be opened individually by clicking the title of the submission component.
 - When viewing the **Proposal Form**, use **Entire view of the Application** since it is a quicker read than **Section view of Application**.



- Clicking a submission component in the **Internal Budget(s)** section brings you to the **Budget Setup** page.
 - From here, you can select the **Detailed Budget** tab to see the full budget, or you can download and print the budget.
 - To retrieve the excel workbook when a basic budget is used, scroll down on the **Budget Setup** page to find the excel attachment.
- Selected forms can be printed as a single PDF document by clicking the **checkbox** in the **Include in PDF Packet** column and then clicking the **Printable Version** button.



3) Certification and Approval

- In this section, you can review comments and certification information before approving the proposal.
- If revisions are required, contact your Primary Research Analyst (i.e. RSC).



Approve the Proposal

1) After reviewing the proposal, scroll to the bottom of the **Submission Routing Signoff Sheet**.

2) Click **Approve**.

3) Click **Save Signoff**.



Important Notes About Approvals

Keep the following information in mind while working on the approval.

Key Point	Description
Routing is sequential	<ul style="list-style-type: none"> The PI must sign off before the Chair/Chair Delegate will receive notification to go into iRIS to sign the proposal. The Chair/Chair Delegate must sign off before the AOR will receive notification to sign.
If the PI is the Chair:	If you are the Chair, you should sign <u>as the PI</u> . Your PI sign-off will serve for both PI and Chair approval.
When there are multiple PD/PI proposals:	<ul style="list-style-type: none"> PI approval can be completed concurrently. All Chairs/Delegates must approve the proposal.