Electronic Proposal Approval Process

Starting September 6, 2005, Research Administration and Finance will begin piloting an electronic routing process for obtaining proposal approvals. This application replaces the current hard copy circulation process and is accomplished via email. This process was initiated last year by Research Administration and Finance under the leadership of Lester Gerhardt, and has been developed and implemented by IACS under the direction of Jeff Miner.

As a Principal Investigator or Required Approver, here’s what you do:

NOTE: Updated 3/2013 – the email contains link to a secure web page to approve/disapprove, no authentication necessary. Email replies are no longer required or available.

• You will receive an email with the following header information:
  From: Research Administration
  Subject: PI: Name – Proposal for Review

• To review the proposal related documents, click on:

  Repository and enter your RCS user ID and password.
• You will be linked to the repository:

**Index of /AFS/dept/raf/proposals/101010376**

<table>
<thead>
<tr>
<th>Name</th>
<th>Last modified</th>
<th>Size</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Parent Directory</strong></td>
<td>01-Sep-2005 14:49</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td><strong>Cassimatis 8-30-05.pdf</strong></td>
<td>30-Aug-2005 10:39</td>
<td>15k</td>
<td></td>
</tr>
</tbody>
</table>

Under the **Parent Directory** heading, the repository includes documents for your review, including:

1. Proposal Information Form labeled “PIF – PI Name”
2. Budget(s) labeled “Budget – Internal – PI Name” and/or “Budget – Sponsor – PI Name”
3. Executive Summary or Abstract labeled “Abstract – PI Name”
4. Cover Page labeled “Cover – PI Name”

To navigate between the documents you must use the **BACK** button.

(continued, next page…)
• Following your review of these documents, Click on the link:

  Approve or Disapprove

• A secure web page will load, showing a welcome message and a link to
  the repository, as well as buttons to Approve and Disapprove.

  ![Image of Rensselaer Self-Service Information System]

  o If you Approve, click the Approve button.

  o If you do not approve, we suggest you contact the Principal
    Investigator or Research Administration and Finance as needed, in an
    attempt to resolve the issue, if possible.

    If this cannot be done, click the Disapprove button.

    This action will stop the circulation of the proposal. An email indicating
    the Disapproval will be sent to the Principal Investigator and Research
    Administration and Finance.

• Close the web page.

• You will NOT receive any hard copies of the proposal.
To Check the Status of the Circulation and the Date Submitted to Sponsor:

- Click on the link in the email:
  Access the Circulation Status Page:
  [Rensselaer Self Service URL]

- Enter your **RIN** User ID Number and Password
  *Info*
  Use your Rensselaer ID Number (RIN), not your RCS ID. Your RIN may be found on your Rensselaer ID card or a recent pay stub.
  Enter your PIN
  For *first time* users this is your date of birth - MMDDYY. Three wrong tries will disable your access.
  If you can't remember your PIN and before you disable your access, click on the Forgot PIN? button.

- Click on the bottom link:
  Research Proposal Tracking

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**Welcome, to the Rensselaer Self-Service Information System!**

- Electronic Research Approvals
- Update Your Address/Change Your PIN
- Parking Menu
- Human Resources/Payroll Menu
- Research Proposal Tracking

- Click on the Proposal Code:
  You can identify the proposal by the Proposal Code, PI Name or Proposal Title.

**Research Proposal Circulation Tracking**

<table>
<thead>
<tr>
<th>Proposal Code</th>
<th>PI</th>
<th>Title</th>
<th>Sponsor</th>
<th>Circulation Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>101010367</td>
<td>PI name here</td>
<td>Proposal title here</td>
<td>Sponsor name here</td>
<td>FULLY APPROVED</td>
</tr>
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</table>
Circulation Status

Info This shows the status of all circulations

Proposal Code 101010367
Original Circulation Date 08/29/2005 02:41PM
Received in RAF Date 08/29/2005
Current Status FULLY APPROVED
Submitted to Sponsor Date

Circulation #1 - FULLY APPROVED

<table>
<thead>
<tr>
<th>Organization</th>
<th>Email Sent</th>
<th>Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2810 Integrated Admn Computing Solutions</td>
<td>08/29/05 02:41PM</td>
<td>Deborah L. Clark PI</td>
<td>Approved 08/29/05 02:43PM</td>
</tr>
</tbody>
</table>

Chain Type Organization Email Sent Name Status Email Sent Name Status
PI 2810 Integrated Admn Computing Solutions 08/29/05 02:51PM Jeffrey G. Miner Director Approved 08/29/05 02:56PM John E. Kolb Vice President, DotCIO Approved 08/29/05 03:00PM
Co-PI 4040 Controller's Office 08/29/05 02:51PM Denise J. Clark Co-PI Approved 08/29/05 02:55PM
Submitting Unit 2810 Integrated Admn Computing Solutions 08/29/05 02:51PM Jeffrey G. Miner Director Duplicate 08/29/05 02:56PM John E. Kolb Vice President, DotCIO Duplicate 08/29/05 03:00PM

Back to Proposal Tracking Page
Summary Page
E-Approvals Home Page

- Click on Exit to log out of the system, or use one of the buttons at the bottom of the page to navigate elsewhere in EARS.