Performing Electronic Routing Functions

With InfoEd, the proposal approvals that transpire during routing at the investigator level, chair/director level, dean/VP level and sponsored projects level all occur electronically within InfoEd. Proposal routes are pre-configured for each campus unit, and the route path is automated; as each step in a route path is completed, InfoEd automatically moves the proposal forward to the next step in the routing process.

Below are instructions for performing proposal routing functions during a Final Review Route.

Performing Routing Review and Approval Actions: Once a route is in progress, individuals included in the route will need to perform review and approval actions in order for the route to move from one step to the next. Individuals involved in the route will receive notifications when their action is required. Notifications will be sent to both one’s InfoEd InBox and one’s UNR Outlook InBox (or the inbox for the email address listed in one’s profile).

An example of the action notification received in one’s InfoEd is illustration below.

The reviewer can view the entire proposal record by clicking Open Submission Package. Once the proposal has been viewed, an approval decision is rendered in the Reviewer Dashboard. To begin the approval process, click Reviewer Dashboard to open the Reviewer Dashboard.

In the Reviewer Dashboard, proposal items will be listed in the Form Name/Category column. Note that one may view these items by clicking . A reviewer must indicate that they have reviewed the items in the Form Name/Category column by clicking the Reviewed radio button in the green column for each item. To record the Reviewer Action as Reviewed, click in the upper right area of the screen.
Next, the drop-down list under My Decision is: will become active which allows the reviewer to render an approval decision.

Reviewer Decisions: A reviewer may choose Approved, Approved Conditionally, Requires Rework and Rejected. Choosing either Approved or Approved Conditionally will allow the route to proceed to the next step. Choosing either Requires Rework or Rejected will halt the route and generate a notification email to the PI. The PI would then need to revise the proposal as appropriate and begin the route again.

Comment Boxes: The comment boxes may be utilized to communicate information during the route. For example, a principal investigator who has included only draft proposal materials at the time of the Final Review Route may want to use the comment boxes to communicate this to the reviewers. Note that the box in which a comment is entered determines with whom the comment is shared.

Recording a Reviewer Decision: Upon selecting a decision, the reviewer will be required to accept a certification. After accepting the certification, click to record the decision. Next, the below pop-up notification will appear.

While a final review route is in progress, the proposal is locked down for editing in order to maintain the
integrity of the proposal data during the approval process. Proposal contents can be modified, however, by contacting one’s pre-award analyst in the Office of Sponsored Projects (OSP).

**Monitoring the Route Progress:** Once a route is underway, the progress of the route can be monitored either by viewing the blue Route tab in the Reviewer Dashboard.

Notice that the route progress indicates when a review was notified and the decision they made. Once a step in the route has been completed, the next person in the route path will automatically be notified to perform a reviewer action. A Final Review route begins with the PI approval and ends with OSP.