Routing a Proposal for Budget Approval and/or Final Approval

In InfoEd, proposal approvals occur electronically in what is referred to as electronic routing. All approval routing in InfoEd is configured to be automated. For example, once the principal investigator (PI) has approved the proposal, InfoEd will automatically notify the appropriate person(s) in the next step (such as the chair/director) to review and approve the proposal. Currently, there are two available routes in InfoEd: a pre-review budget approval route and a final review route. The information provided in this document details the process of activating both routes.

Pre-Review Budget Approval Route

A pre-review budget approval route notifies one’s college grants and projects analyst (GPA) and/or sponsored projects pre-award research administrator (RA) that a budget has been completed and is ready review. This route is useful for receiving feedback on one’s budget while the rest of the proposal is still in draft stage. A pre-review budget approval route can be accessed from two areas within the InfoEd Proposals Development (PD) module: either the Internal eForms & Docs tab or the Finalize tab. The process for beginning the route is the same regardless of where the route is accessed.

To begin the route, locate the pre-review budget approval route on either the Internal eForms & Docs tab or the Finalize tab and click the icon.

The route path and those included will appear. To activate the route, click .

The route is now active and individuals have been notified that a proposal budget is ready for review. A screen reflecting the routing progress will also appear.

To monitor the progress of the route, return to the PD tab where the route was initially activated and click the icon next the active route to reveal the route progress.

Any decisions rendered will be reflected in the Decision column.
**Final Review Route**

A final review route is utilized when a proposal has been completed or contains at least full draft materials, and a PI desires to obtain full proposal approval at the investigator, college GPA level, chair/director, dean/VP and sponsored project levels. When a final review route is activated, those involved in the approval process will be notified that the proposal is ready for final review and approval. Unlike a pre-review budget approval route, a final review route can only be activated once all PD tabs are completed and may only be accessed via the Finalize tab. Completion is reflection by a red checkmark next to each PD tab.

To begin the route, locate the final review route on Finalize tab, Submit for Internal Review area of the screen and click the Submit icon.

A Certification window will appear, and one must accept the certification in order to continue. The certification that appears will depend upon who is activating the route. After accepting the certification, the route path and those included will appear. To activate the route, click Submit.
The route is now active and individuals have been notified that a proposal is ready for final review and approval. A screen reflecting the routing progress will also appear.

To monitor the progress of the route, return to the PD tab where the route was initially activated and click the icon to reveal the route progress.

Any decisions rendered will be reflected in the Decision column.