

# Online Proposal Routing and Approval

## Submitting a Proposal: For Principal Investigators

---

The Online Proposal Routing and Approval system allows a principal investigator to create a project proposal online, upload documents associated with that proposal, and submit the proposal to Sponsored Programs, the department chair, other approvers, and the Provost and Dean of Faculty.

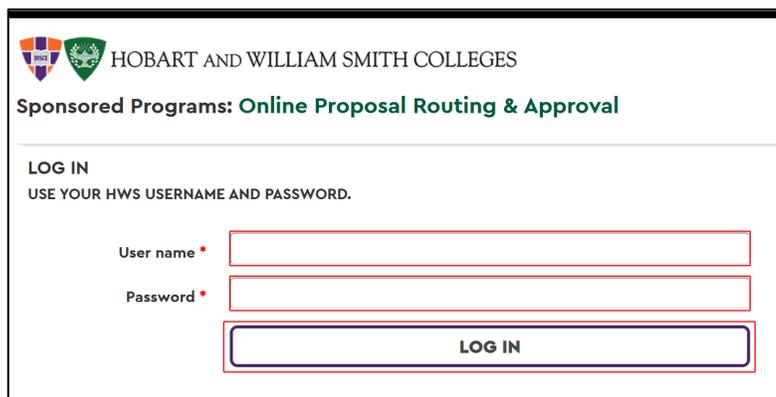
After the proposal is submitted, all approvers may view the proposal and the documents. At this stage, Sponsored Programs conducts a preliminary review of the proposal documents and is the only approver who can add/delete files. Sponsored Programs can request that the principal investigator comment or update the record, and add other designated approvers to the routing sequence as needed. After this initial approval, the proposal is routed to the department chair(s).

After the department chair has approved the proposal, the routing transitions from sequential to parallel routing, allowing all other approvers (except the Provost) to approve. Once all of the approvers at this level have signed off, the proposal is routed again to Sponsored Programs for a penultimate approval before being released to the Provost for final approval.

Once the proposal has been routed to the Provost, only Sponsored Programs can update the proposal or make updates on behalf of the principal investigator or other approvers. Throughout the process, all the approvers may access the submitted proposals and related materials and make comments on each proposal.

### To submit a new proposal:

1. Go to the Online Proposal Routing and Approval program at <https://opra.hws.edu/>
2. Enter your **HWS username and password**
3. Click **Log In**



The screenshot shows the login interface for the Online Proposal Routing & Approval system. At the top, there are the HWS logos and the text "HOBART AND WILLIAM SMITH COLLEGES". Below that, it says "Sponsored Programs: Online Proposal Routing & Approval". The main section is titled "LOG IN" and includes the instruction "USE YOUR HWS USERNAME AND PASSWORD.". There are two input fields: "User name \*" and "Password \*". A "LOG IN" button is located below the password field.

4. On the home page, click **Add New Proposal**



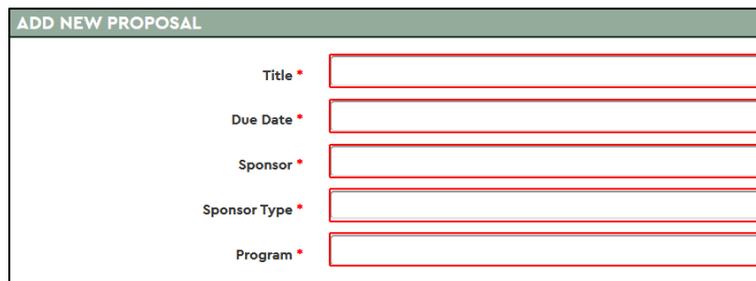
The screenshot shows the home page of the Online Proposal Routing & Approval system. At the top, there are the HWS logos and the text "HOBART AND WILLIAM SMITH COLLEGES". Below that, it says "Sponsored Programs: Online Proposal Routing & Approval". A prominent "ADD NEW PROPOSAL" button is located at the bottom of the page.

# Online Proposal Routing and Approval

## Submitting a Proposal: For Principal Investigators

5. On the Add New Proposal page, enter the required information:

- **Title** (title of the proposal)
- **Due Date** (use the calendar tool)
- **Sponsor** (name of the funding agency)
- **Sponsor Type** (select from the dropdown)
- **Program** (name of the RFP, Solicitation, or Program Announcement)
- **Department Chair's HWS Email**



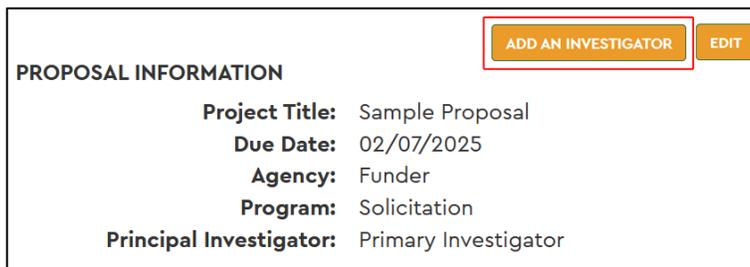
**Note:** An investigator cannot also be the department chair on the proposal. If you are the department chair, check the box instead and the proposal will route to the Associate Provost to act as chair.

6. Click **Save**

To change the title, due date, sponsor, or program information before the proposal is submitted, click the **Edit** button near Proposal Information.

7. Under Proposal, if there will be more than one investigator, click **Add an Investigator**

Only enter HWS investigators.



8. On the Add an Investigator page, enter the **investigator's HWS e-mail address** and **department chair's HWS e-mail address**

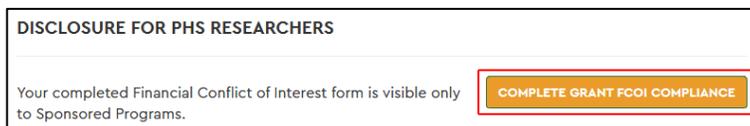
9. Click **Add Investigator**

The additional investigator(s) will be notified by e-mail that they have been added to the proposal.



If the additional investigator's department chair is different from the principal investigator's department chair, that additional investigator's chair must also approve the proposal before the other approvers may approve.

10. If you are doing PHS research, below Proposal Information, use the **Complete Grant FCOI Compliance** button to submit a conflict of interest form



# Online Proposal Routing and Approval

## Submitting a Proposal: For Principal Investigators

Your completed Financial Conflict of Interest form is visible only to Sponsored Programs. This button will also be available to any investigators added to the proposal.

11. Below Proposal Information, in the Associated Documents section, add the required proposal documents (proposal authorization form (PAF), budget, and other sponsor-specific documents as required) by clicking **Add a Document**

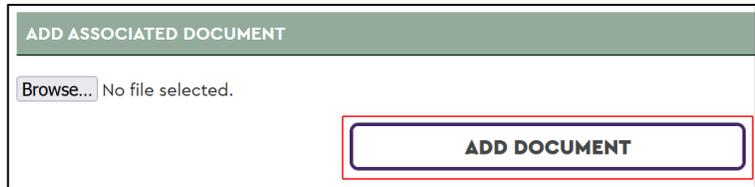


ASSOCIATED DOCUMENTS

ADD A DOCUMENT

12. **Browse** to the appropriate document and select it

**Note:** Only Word documents, Excel spreadsheets, Power Point presentations, or PDF documents may be uploaded.



ADD ASSOCIATED DOCUMENT

Browse... No file selected.

ADD DOCUMENT

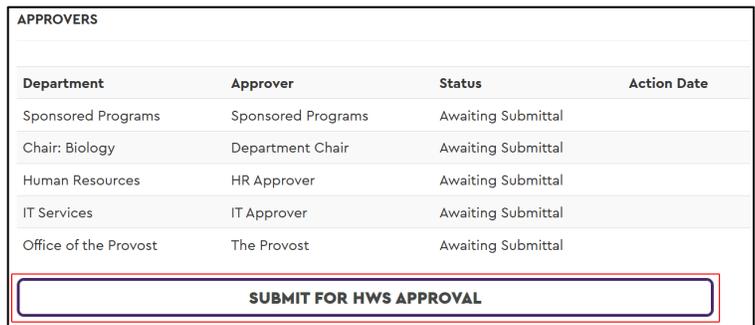
13. Click **Add Document**

Principal investigators (and Sponsored Programs) may add and delete documents; all others associated with the proposal may view documents.

If a document that has been previously uploaded has been updated, the principal investigator must upload the newer document. To do this, the principal investigator may overwrite the old document with the new one without having to delete the old one, **as long as both documents have the same name.**

14. When all investigators and documents have been added, at the bottom of the page, click **Submit for HWS Approval**

After the proposal is submitted, everyone associated with the proposal may add comments. The principal investigator may continue to add or delete documents; however, no other changes can be made to the proposal.



APPROVERS

Department	Approver	Status	Action Date
Sponsored Programs	Sponsored Programs	Awaiting Submittal	
Chair: Biology	Department Chair	Awaiting Submittal	
Human Resources	HR Approver	Awaiting Submittal	
IT Services	IT Approver	Awaiting Submittal	
Office of the Provost	The Provost	Awaiting Submittal	

SUBMIT FOR HWS APPROVAL

If you have any trouble with the Online Proposal Routing and Approval system, please contact the Help Desk in the Library Learning Commons or 315-781-4357 (ext. 4357/HELP on campus) or helpdesk@hws.edu.