

Online Proposal Routing and Approval

Submitting a Proposal: For Principal Investigators

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

After the proposal is submitted, all approvers may view the proposal and the documents. After the department chair has approved the proposal, the other approvers may approve it, and then the Provost. 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://campus.hws.edu/OPRA>
2. Enter your **HWS username and password**
3. Click **Log In**



The screenshot shows the login page for the Online Proposal Routing & Approval program. At the top, there are two logos (a purple shield and a green shield) followed by the text "HOBART AND WILLIAM SMITH COLLEGES" and "Sponsored Programs: Online Proposal Routing & Approval". Below this is a "Log in" section with two input fields: "User name" and "Password". A "Log in" button is located at the bottom left of the login section.

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



The screenshot shows the home page of the Online Proposal Routing & Approval program. At the top, there are two logos (a purple shield and a green shield) followed by the text "HOBART AND WILLIAM SMITH COLLEGES" and "Sponsored Programs:". Below this is a button labeled "Add New Proposal".

5. On the Add New Proposal page, enter the required information:
 - **Title** (the title of the proposal)
 - **Due Date** (use the calendar tool that appears)
 - **Department Chair** (select the name from the list that appears as you type)



The screenshot shows the "Add New Proposal" form. It has three input fields: "Title", "Due Date", and "Department Chair". A "Save" button is located at the bottom left of the form.

Note: An investigator cannot also be the department chair on the proposal.

6. Click **Save**

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

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

In this area, only enter HWS investigators.

Proposal Information

Project Title: Test Proposal

Due Date: 11/30/2013

Principal Investigator: Mihaela Petrescu

Add an Investigator

- On the Add an Investigator page, enter the **investigator's name** and **department chair's name** (select the names from the lists that appear as you type)

- Click **Add**

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.

Add Investigator

Investigator Name

Department Chair

Add

- 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

- 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... grant_paf.pdf

Add

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12. Click **Add**

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

If a principal investigator updates a document that has been previously uploaded, he or she 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.**

13. 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

Sponsored Programs has yet to review this proposal.

<u>Department</u>	<u>Approver</u>	<u>Status</u>
Chair: German Area Studies	Eric Klaus	Awaiting Submittal
IT Services	Christina Mosley	Awaiting Submittal
Office of Human Resources	Peggy Ferran	Awaiting Submittal
Office of the Provost	Titilayo Ufomata	Awaiting Submittal

Submit for HWS Approval

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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.