

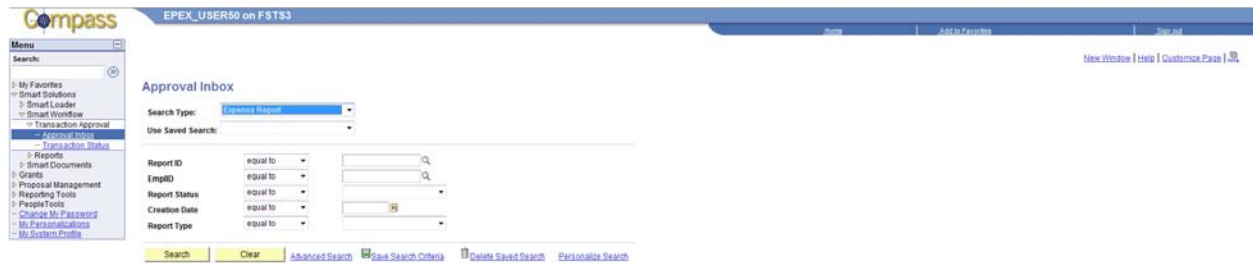
## De-Central Approval Inbox (Proposals):

### 1) Log into PS.

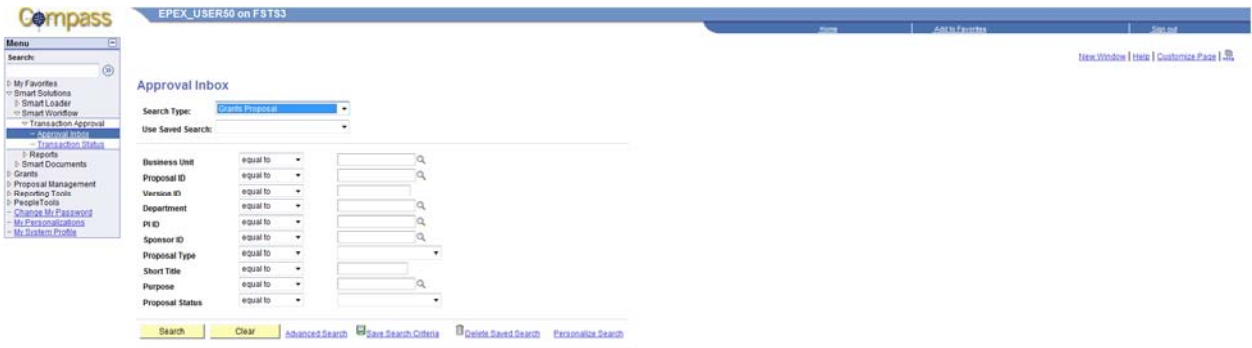


### 2) Navigate to the Approval Inbox:

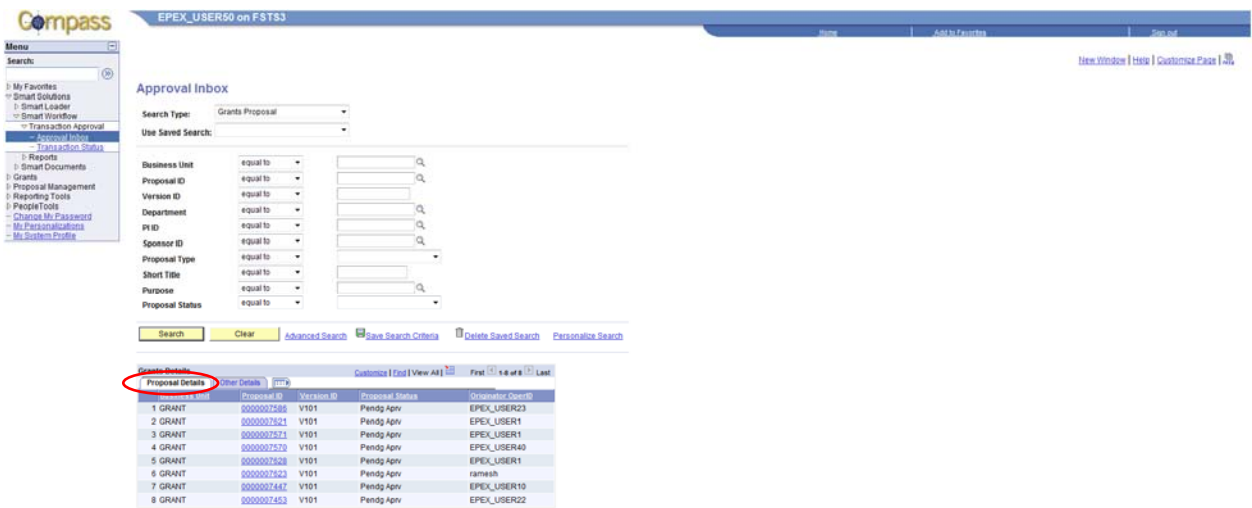
Smart Solutions > Smart Workflow > Transaction Approval > Approval Inbox  
(TIP: Save this page to 'My Favorites')



### 3) Select 'Grants Proposal' from Search Type drop down menu.



4) User can select 'Search' button without any criteria stated to see all the proposals in their individual Approval Inbox's. Results are initially displayed on 'Proposal Details' tab.



5) User can see other criteria by clicking on the 'Other Details' tab.

Compass EPEX\_USER50 on FST53

Approval Inbox

Search Type: Grants Proposal

Use Saved Search:

Business Unit equal to

Proposal ID equal to

Version ID equal to

Department equal to

PI ID equal to

Sponsor ID equal to

Proposal Type equal to


Short Title equal to

Purpose equal to

Proposal Status equal to

Search Clear Advanced Search Save Search Criteria Delete Saved Search Personalize Search

Proposal ID	Department Name	PI Name	Sponsor	Proposal Type	Short Title	Purpose
1 GRANT	SOM Cell Biology	PI DEMO	NH NATL INSTITUTE OF HEALTH	Contin	XX UAT NH LOC	RSRCH
2 GRANT	SOM Cell Biology	PI DEMO	AB SCIENCE	New	JKA.F.ID	
3 GRANT	SOM Cell Biology	PI DEMO	NH NATL INSTITUTE OF HEALTH	Contin	XX UAT NH LOC	RSRCH
4 GRANT	SOM Cell Biology	PI DEMO	AB SCIENCE	New	MK TEST FOR YERKES 7/22/09	
5 GRANT	SOM Cell Biology	PI DEMO	AB SCIENCE	New	Title	RSRCH
6 GRANT	SOM Cell Biology	PI DEMO	ABBOTT LABORATORIES	New	dsatastf adhoc approver	
7 GRANT	SOM Cell Biology	PI DEMO	AB SCIENCE	New	RM UAT NH LOC	RSRCH
8 GRANT	SOM Cell Biology	PI DEMO	JUVENILE DIABETES RESEARCH FOUNDATION	New	XX DAT JDRF Sched Pay	RSRCH

6) User can see all the details about the proposals in their approval inbox by selecting the 'Show All Columns' button. [Proposal Details](#) | [Other Details](#) | 

Compass EPEX\_USER50 on FST53

Approval Inbox

Search Type: Grants Proposal

Use Saved Search:

Business Unit equal to

Proposal ID equal to

Version ID equal to

Department equal to

PI ID equal to

Sponsor ID equal to

Proposal Type equal to

Short Title equal to

Purpose equal to

Proposal Status equal to

Search Clear Advanced Search Save Search Criteria Delete Saved Search Personalize Search

Business Unit	Proposal ID	Version ID	Proposal Status	Operator	Department Name	PI Name	Sponsor	Proposal Type	Short Title	Purpose
1 GRANT	000007208	V101	Pendg Aprv	EPEX_USER23	SOM Cell Biology	PI DEMO	NH NATL INSTITUTE OF HEALTH	Contin	XX UAT NH LOC	RSRCH
2 GRANT	000007262	V101	Pendg Aprv	EPEX_USER1	SOM Cell Biology	PI DEMO	AB SCIENCE	New	JKA.F.ID	
3 GRANT	000007271	V101	Pendg Aprv	EPEX_USER1	SOM Cell Biology	PI DEMO	NH NATL INSTITUTE OF HEALTH	Contin	XX UAT NH LOC	RSRCH
4 GRANT	000007273	V101	Pendg Aprv	EPEX_USER40	SOM Cell Biology	PI DEMO	AB SCIENCE	New	MK TEST FOR YERKES 7/22/09	
5 GRANT	000007268	V101	Pendg Aprv	EPEX_USER1	SOM Cell Biology	PI DEMO	AB SCIENCE	New	Title	RSRCH
6 GRANT	000007263	V101	Pendg Aprv	ramesh	SOM Cell Biology	PI DEMO	ABBOTT LABORATORIES	New	dsatastf adhoc approver	
7 GRANT	000007447	V101	Pendg Aprv	EPEX_USER10	SOM Cell Biology	PI DEMO	AB SCIENCE	New	RM UAT NH LOC	RSRCH
8 GRANT	000007453	V101	Pendg Aprv	EPEX_USER22	SOM Cell Biology	PI DEMO	JUVENILE DIABETES RESEARCH FOUNDATION	New	XX DAT JDRF Sched Pay	RSRCH

7) Search results are limited to the first 10 proposals. User can view all the proposals in their Approval Inbox by selecting the 'View All' hyperlink.

[Customize](#) | [Find](#) | [View All](#) | [First](#) | 1-10 of 16 | [Last](#)

The screenshot shows the 'Approval Inbox' interface. At the top, there is a search type dropdown set to 'Grants Proposal'. Below this, various search criteria are listed with dropdown menus set to 'equal to' and input fields with magnifying glass icons. The criteria include Business Unit, Proposal ID, Version ID, Department, PI ID, Sponsor ID, Proposal Type, Short Title, Purpose, and Proposal Status. At the bottom of the search area are buttons for 'Search', 'Clear', 'Advanced Search', 'Save Search Criteria', 'Delete Saved Search', and 'Personalize Search'.

Below the search area is a table titled 'Grants Details' with the following columns: Business Unit, Proposal ID, Version ID, Proposal Status, Occurrence/Opportunity, Department Name, PI Name, Sponsor, Proposal Type, Short Title, and Purpose. The table contains 11 rows of data, including details for various grants such as 'OSP\_USER2', 'KDHAWK', 'TS3', 'muskie', 'KDHAWK', 'EPEX\_USER1', 'KDHAWK', 'ssahmad', 'EPEX\_USER16', 'EPEX\_USER21', and 'EPEX\_USER17'.

8) User can sort the proposals by using the search criteria fields. User will select the look up icon or the drop down menus to help select specific criteria. Short Title is the only field where free text is allowed. 10 Items are available in the Basic Search. Once the criteria are entered, the user will click the 'Search' button. To clear the criteria, the user clicks the 'Clear' button.

This close-up screenshot shows the search criteria fields. Each field has a dropdown menu set to 'equal to' and an input field with a magnifying glass icon. The criteria listed are Business Unit, Proposal ID, Version ID, Department, PI ID, Sponsor ID, Proposal Type, Short Title, Purpose, and Proposal Status. Below the fields are buttons for 'Search', 'Clear', 'Advanced Search', 'Save Search Criteria', 'Delete Saved Search', and 'Personalize Search'.

Business Unit = GRANT

Proposal ID = XXXXXXXXXXXX (10 digits)

Version ID = V101

Department = Can search by Department Name or PS Dept ID XXXXXX (6 digits)

PI ID = Can search by PI Name or PS EmplID XXXXXXX (7 digits)

Sponsor ID = Can search by Sponsor Name or PS Sponsor ID XXXXXXXX (8 digits)

Proposal Type = Continuation, Internal, New, New-Resubmission, Pre-Proposal, Renewal, Renewal-Resubmission, Revised Budget, Revision, Supplemental

Short Title = Free Text Field

Purpose = Career Development, Conference Grant, Equipment, Financial Aid, Fellowship, Instructional Grants, IPA-Interpersonal Agreement, Other, Renovation and Construction, Research, Technical Service, Institutional Training Grants, Clinical Trials, Unfunded CDAs, Unfunded CTAs, Unfunded MTAs, Unfunded Others.

Proposal Status = Pending Approval

9) User can sort by Due Date by selecting the Advance Search hyperlink.

Due Date = Sponsor Due Date

10) User can organize the data in the columns by numerical or alphabetical order by clicking the header names.

Business Unit	Proposal ID	Department Name	PI Name	Sponsor	Proposal Type	Short Title	Purpose
1 GRANT	0000007597	SOM: Cell Biology	PLDEMO	NIH NATL INSTITUTE OF HEALTH	Supplement	YH UAT SUPPLEMENT NIH LOC	RSRCH
2 GRANT	0000007549	SOM: Cell Biology	PLDEMO	AB SCIENCE	New	MK Test for Yerkas 7/22/09	RSRCH
3 GRANT	0000007582	SOM: Cell Biology	Bkinayeva,Albja T	NIH NATL INSTITUTE OF HEALTH	New	Retest of issue 1768 - SSA	RSRCH
4 GRANT	0000007570	SOM: Cell Biology	PLDEMO	AB SCIENCE	New	Test of Adhoc Workflow and Additional Changes	RSRCH
5 GRANT	0000007598	SOM: Cell Biology	PLDEMO	ABBOTT LABORATORIES	New	test to write steps	RSRCH
6 GRANT	0000007565	SOM: Cell Biology	PLDEMO	JUVENILE DIABETES RESEARCH FOUNDATION	New	SSA Test - WF Routing and Proposal Pages	RSRCH
7 GRANT	0000007519	SOM: Cell Biology	PLDEMO	ABBOTT SPINE	New	MK Test for WF Comments	RSRCH
8 GRANT	0000007513	SOM: Cell Biology	PLDEMO	NIH NATL INSTITUTE OF HEALTH	New	XX UAT NIH LOC	RSRCH
9 GRANT	0000007648	SOM: Cell Biology	Larsen,Christian Peter	NIH NATL INSTITUTE OF HEALTH	New	Testing all aspects of EPEX	RSRCH
10 GRANT	0000007344	SOM: Cell Biology	Faundez,Victor	GENERAL MILLS FOUNDATION	New	Test for Workflow after Migration	RSRCH

11) Once the proposal has been located that needs to be reviewed/approved, the user will select the 'Proposal ID' hyperlink.

Business Unit	Proposal ID	Department Name	PI Name	Sponsor	Proposal Type	Short Title	Purpose
1 GRANT	0000007597	SOM: Cell Biology	PLDEMO	NIH NATL INSTITUTE OF HEALTH	Supplement	YH UAT SUPPLEMENT NIH LOC	RSRCH
2 GRANT	0000007549	SOM: Cell Biology	PLDEMO	AB SCIENCE	New	MK Test for Yerkas 7/22/09	RSRCH
3 GRANT	0000007582	SOM: Cell Biology	Bkinayeva,Albja T	NIH NATL INSTITUTE OF HEALTH	New	Retest of issue 1768 - SSA	RSRCH
4 GRANT	0000007570	SOM: Cell Biology	PLDEMO	AB SCIENCE	New	Test of Adhoc Workflow and Additional Changes	RSRCH
5 GRANT	0000007598	SOM: Cell Biology	PLDEMO	ABBOTT LABORATORIES	New	test to write steps	RSRCH
6 GRANT	0000007565	SOM: Cell Biology	PLDEMO	JUVENILE DIABETES RESEARCH FOUNDATION	New	SSA Test - WF Routing and Proposal Pages	RSRCH
7 GRANT	0000007519	SOM: Cell Biology	PLDEMO	ABBOTT SPINE	New	MK Test for WF Comments	RSRCH
8 GRANT	0000007513	SOM: Cell Biology	PLDEMO	NIH NATL INSTITUTE OF HEALTH	New	XX UAT NIH LOC	RSRCH
9 GRANT	0000007648	SOM: Cell Biology	Larsen,Christian Peter	NIH NATL INSTITUTE OF HEALTH	New	Testing all aspects of EPEX	RSRCH
10 GRANT	0000007344	SOM: Cell Biology	Faundez,Victor	GENERAL MILLS FOUNDATION	New	Test for Workflow after Migration	RSRCH

12) The Proposal selected will open in a new window. All fields are un-editable. See 16) below for details on how to make edits.

Compass EPEX\_USERS0 on FST33

Home Add to Favorites Sign out

New Window Help Customer Page

Menu

Search:

- My Favorites
- Smart Solutions or Grants
- Proposals
  - Emory Proposal Express
  - Review Proposal
  - Cost Proposal
  - Review Pre-Award Budget
  - Review Proposal Audit Log
- Awards
- Interactive Reports
- Proposal Management
- Reporting Tools
- People Tools
  - Change My Password
  - My Personalizations
  - My System Profile

### Emory Proposal Express

Proposal ID: 000007586 Version: V101

Title: XX UAT NH LOC

Description: Limited to 254 Characters. Use attachments if more information is needed.  
XX UAT NH LOC

Principal Investigator: 0351462 PLEMO

Sponsor ID: 00002510 NIH NATL INSTITUTE OF HEALTH

Sponsor Program: ABC123 Link to RFP:

Purpose: RSRCH \*Proposal Status: Pending Approval

Proposal Begin Date: 08/01/2010 Proposal End Date: 08/31/2011 No. of Budget Periods:

Due By: **Proposed Budget Amount**

Deadline Type: POST Postmark **Total Sponsor Budget: 100,000.00**

Deadline Date: 02/02/2009

**Submission Information**

1) Is the proposal due at a time other than 5:00 p.m. EST of the Deadline Date? If Yes, please specify time in comments.  Yes  No

2) Will the proposal be submitted electronically? If Yes, please specify in comments the submission portal (i.e., Grants.gov, NSF Fastlane, Proposal Central, etc.) and if not Grants.gov or NSF Fastlane, also specify who will submit the final version of the proposal (i.e., OSP or RDCI).  Yes  No

3) Do you have any other comments about the submission of the proposal? If Yes, please specify in comments.  Yes  No

**Miscellaneous Information**

1) Does the proposal cover non-safety cost sharing, matching or in-kind contributions? If Yes, please specify in comments if cost sharing, matching or in-kind contributions are (or are not) required by sponsor.  Yes  No

2) Does the proposal cover safety cost sharing, matching or in-kind contributions? If Yes, please specify in comments if cost sharing, matching or in-kind contributions are (or are not) required by sponsor.  Yes  No

3) Are subcontractor(s) involved in the proposal? If Yes, please specify outgoing subcontractor(s) in comments.  Yes  No

4) Will new or additional space or renovation of existing space be required for the proposal? If Yes, please specify in comments.  Yes  No

5) Are possible inventions anticipated for the proposal? If Yes, please give a brief description of possible invention(s) in comments.  Yes  No

6) Does the proposal involve confidential information? If Yes, please identify which pages contain the confidential information in comments.  Yes  No

7) Click Yes, and indicate where the research will be conducted in comments.  Yes  No

8) Is there animal care and use for the proposal? If Yes, please specify current protocol information if available or note if pending in comments.  Yes  No

9) Are Yerkes primates involved in the proposal? If Yes, please specify current protocol information if available or note if pending in comments.  Yes  No

10) Are human subjects involved in the proposal? If Yes, please specify current protocol information if available or note if pending in comments.  Yes  No

11) Is the proposal to be funded with Stimulus (ARRA) Act funding? If Yes, please specify type of program in comments.  Yes  No

12) Will human embryonic stem cells be used in connection with the proposed research? If Yes, please list the registration number of the cell lines in comments.  Yes  No

13) Have any named investigators NOT completed the Investigator Report of Financial Interest in Research form as required by Emory University policies regarding conflict of interest disclosure?  
This includes the Emory statement of Guiding Ethical Principles available at <http://www.emory.edu/academic/integrity/ethics/ethicalPrinciples.pdf> and Policy 7.7 available at <http://isa.emory.edu/policy77/>.  
If Yes, please provide a reason in comments.  Yes  No

14) Do you have any other comments about the proposal? If Yes, please specify in comments.  Yes  No YEAR 2 BUDGET PERIOD 9/1/10-8/31/11 \$100,000 TOTAL

**Export Control Information**

1) Are any of the following statements True?  Yes  No

The proposal involves research to be conducted outside of the U.S.  
The proposal involves payments to be made to foreign nationals, entities, or countries.  
This proposal will involve carrying or shipment of research equipment or other technology that will remain outside of the U.S. for more than one year.  
This proposal will involve shipment of biological or chemical agents, provision of technical assistance or transmission of technical data outside of the U.S.

If any of the above statements are True, please specify in comments the following information: Full name of all foreign parties (individuals, entities, and/or country/government), country of citizenship and/or destination country, a list identifying any agents, equipment, or technology to be transferred outside of the U.S., and a description of any technical assistance or technical data to be provided or transmitted outside of the U.S.

**Key Word Detail**

**Approval Comments**

Standard Comment Type: WF Comment ID:

Comments:

Approve Deny Hold Edit

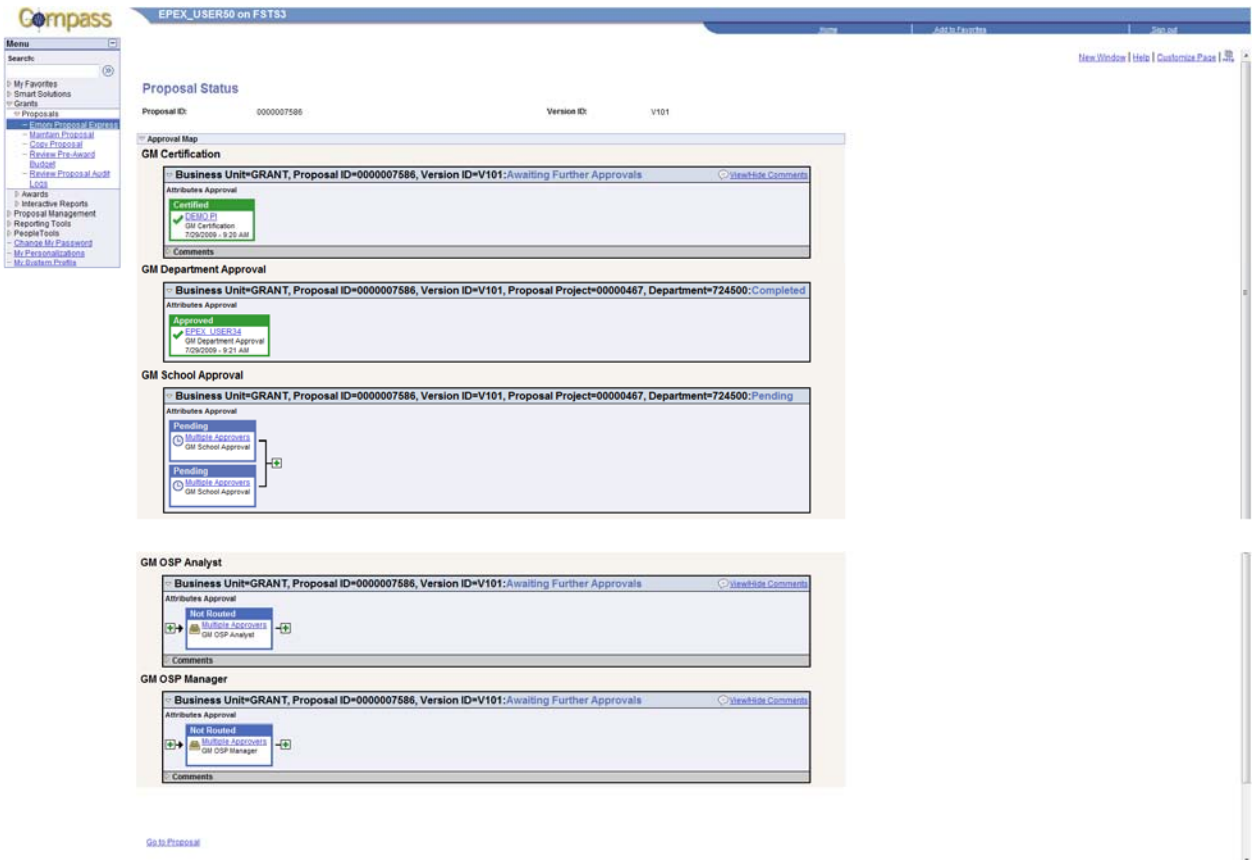
Go to Projects Go to Budgets Review Proposal Audit Log Approver/Reviewer

Return to Search

13) User will review the proposal for accuracy and compliance following School policy and guidelines.

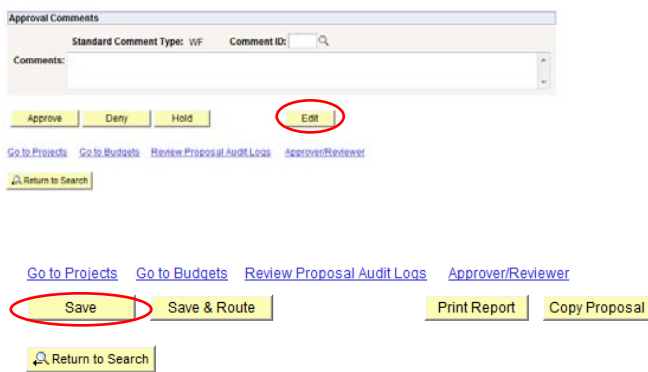
14) The user should review who has approved the proposal up until their stage by clicking the 'Proposal Status: Pending Approval' hyperlink.

\*Proposal Status: Pending Approval



15) User clicks the 'Go to Proposal' hyperlink to return to EPEX proposal.

16) If the User needs to edit the proposal for any reason, the 'Edit' button will be selected. Once the 'Edit' button is selected all the fields will open up for edits and the 'Approve, Deny, Hold and Edit buttons will be replaced with 'Save, Save & Route, Print Report and Copy Proposal' buttons. Once the edits have been completed the user will click the 'Save' button in which the 'Approve, Deny, Hold and Edit' buttons will reappear to the user.



17) User will enter comments if necessary (not required) and then select the 'Approve' button. Once the 'Approve' button is selected it moves onto the next stage in workflow, until it reaches

the OSP Manager Stage, in which the Proposal Status, once approved, will change to 'Institution Approved' and all the stages will be marked 'Approved' (green) on the Approval Map.

Approval Comments

Standard Comment Type: WF    Comment ID:

Comments:

**Approve**    Deny    Hold    Edit

[Go to Projects](#)   [Go to Budgets](#)   [Review Proposal Audit Logs](#)   [Approval/Reviewer](#)

[Return to Search](#)

Compass    OSP\_USER1 on FSTS3

Menu    Search:

- My Favorites
- Smart Solutions
- Customer Contracts
- Grants
- Proposals
- Review Proposal
- Enter Budget Detail
- Submit Proposal
- Generate Award
- Close Proposal
- Close Proposal Version
- Close Budget Period
- Register Pre-Award Budget
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- Departments
- Professionals
- Sponsors
- Subrecipients
- My Proposals
- Program Management
- Project Coding
- Proposal Management
- Reporting Tools
- People Tools
- Change My Password
- My Personalizations
- My System Profile

### Proposal Status

Proposal ID: 000007597    Version ID: V101

#### Approval Map

**GM Certification**  
Business Unit=GRANT, Proposal ID=000007597, Version ID=V101:Approved

Attributes Approval  
Certified  
User: DEBIO, J  
GM Certification  
7/25/2009 - 10:11 AM

Comments

**GM Department Approval**  
Business Unit=GRANT, Proposal ID=000007597, Version ID=V101, Proposal Project=0000478, Department=724500:Approved

Attributes Approval  
Approved  
User: OSP, J  
GM Department Approval  
7/25/2009 - 10:21 AM

Comments

**GM School Approval**  
Business Unit=GRANT, Proposal ID=000007597, Version ID=V101, Proposal Project=0000478, Department=724500:Approved

Attributes Approval  
Approved  
User: OSP, J  
GM School Approval  
7/25/2009 - 10:27 AM

Approved  
User: OSP, J  
GM School Approval  
7/25/2009 - 10:25 AM

Comments

#### GM OSP Analyst

Business Unit=GRANT, Proposal ID=000007597, Version ID=V101:Approved

Attributes Approval  
Approved  
User: OSP, J  
GM OSP Analyst  
8/13/2009 - 4:29 PM

Comments

#### GM OSP Manager

Business Unit=GRANT, Proposal ID=000007597, Version ID=V101:Approved

Attributes Approval  
Approved  
User: OSP, J  
GM OSP Manager  
8/13/2009 - 4:20 PM

Comments

[Go to Proposal](#)

[Return to Search](#)

Compass    OSP\_USER1 on FSTS3

Menu    Search:

- My Favorites
- Smart Solutions
- Customer Contracts
- Grants
- Proposals
- Review Proposal
- Enter Budget Detail
- Submit Proposal
- Generate Award
- Close Proposal
- Close Proposal Version
- Close Budget Period
- Register Pre-Award Budget
- Review Proposal Audit Logs
- Awards
- Institutions
- Departments
- Professionals
- Sponsors
- Subrecipients
- My Proposals
- Program Management
- Project Coding
- Proposal Management

### Emory Proposal Express

Proposal ID: 000007597    Version: V101

Title: YH UAT SUPPLEMENT NIH LOC

Description: Limited to 254 Characters. Use attachments if more information is needed.  
MINORITY SUPPLEMENT

Principal Investigator: 0351462    PLEMO

Sponsor ID: 00002510    NIH NATL INSTITUTE OF HEALTH

Sponsor Program: MINORITY SUPPLEMENT PROGRAM    Link to NSF: WWW.EMORY.EDU

Purpose: RSRCH

Proposal Type: Supplement    **\*Proposal Status: Institution Approved**

Proposal Begin Date: 09/01/2011    Proposal End Date: 09/01/2011    Budget Periods:

Due By	Proposed Budget Amount
Deadline Type: POST    Postmark	Total Sponsor Budget: 30,000.00
Deadline Date: 02/02/2011	



18) User will enter comments (required) and then select the 'Deny' button if the proposal is not acceptable to be signed off as is. When the proposal has been denied, the Proposal Status will change to 'REF' and all the stages will be marked 'Denied' (red) or 'Terminated (maroon) on the Approval Map. If the proposal is denied at any stage, the workflow will start over from the beginning once re-routed.

Approval Comments

Standard Comment Type: WF    Comment ID:

Comments: Comments are required when denying a proposal

[Approve](#) [Deny](#) [Hold](#) [Edit](#)

[Go to Projects](#) [Go to Budgets](#) [Review Proposal Audit Logs](#) [Approver/Reviewer](#)

[Return to Search](#)

OSP\_USER6 on FSTS3

Proposal Status

Proposal ID: 0000007627    Version ID: V101

Approval Map

**GM Certification**  
Business Unit=GRANT, Proposal ID=0000007627, Version ID=V101: **Denied**

Attributes Approval  
**Certified**  
OSFEX\_USERS3  
GM Certification  
7/10/2009 - 1:32 PM

**GM Department Approval**  
Business Unit=GRANT, Proposal ID=0000007627, Version ID=V101, Proposal Project=00000514, Department=724500: **Terminated**

Attributes Approval  
**Approved**  
OSFEX\_USERS3  
GM Department Approval  
7/10/2009 - 1:39 PM

**GM School Approval**  
Business Unit=GRANT, Proposal ID=0000007627, Version ID=V101, Proposal Project=00000514, Department=724500: **Terminated**

Attributes Approval  
**Approved**  
OSFEX\_USERS6  
GM School Approval  
7/10/2009 - 1:36 AM

**GM OSP Analyst**  
Business Unit=GRANT, Proposal ID=0000007627, Version ID=V101: **Denied**

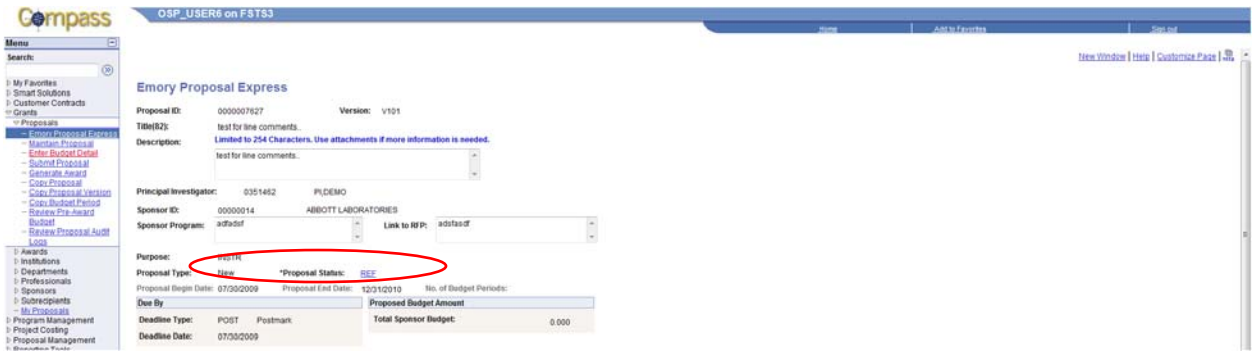
Attributes Approval  
**Denied**  
OSP\_USER6  
GM OSP Analyst  
8/10/2009 - 4:40 PM

**GM OSP Manager**  
Business Unit=GRANT, Proposal ID=0000007627, Version ID=V101: **Denied**

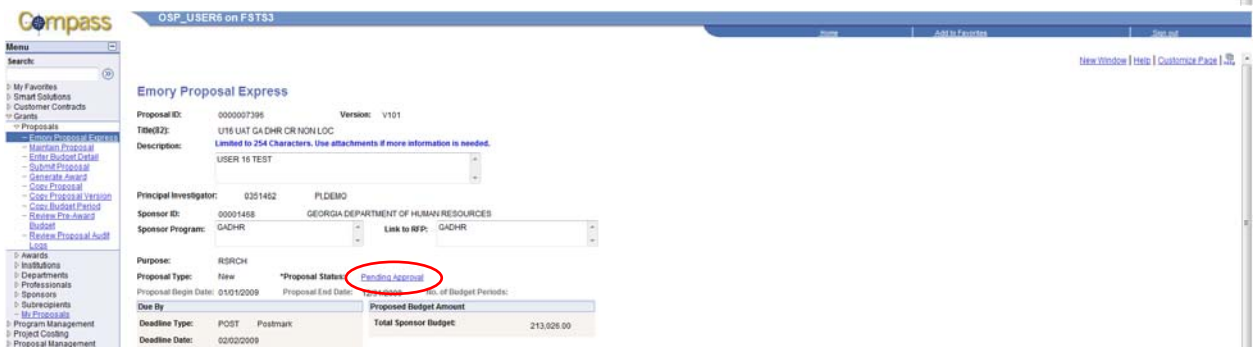
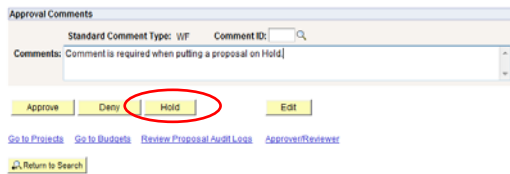
Attributes Approval  
**Not Routed**  
MultiSite\_Acc00018  
GM OSP Manager

[Go to Proposal](#)

[Return to Search](#)



19) User will enter comments (required) and then select the 'Hold' button if additional items need to be obtained or if you didn't want another person to work on the proposal. When the proposal is on 'Hold' status, only the person who put the proposal on hold will be able to access this proposal via the Approval Inbox. Proposal status will remain as 'Pending Approval'.



## APPENDIX:

- Workflow Stages for Proposals:
  - 1 – GM Certification: Electronic certification is required of all persons with the roles of:
    - Principal Investigator (PI),
    - Co-Investigator (Co-Inv),
    - Co-Principal Investigator (Co-PI),
    - Named Investigator (NINV) and
    - Multi Principal Investigator (MPI)
  - 2 – GM Department Approval: Electronic approval is required of one individual from the Department.
  - 3 – GM School Approval: Electronic approval is required of two individuals from the School.
  - 4 – GM OSP Analyst: Electronic approval is required of OSP Analyst.
  - 5 – GM OSP Manager: Electronic approval is required of OSP Manager. This is the final stage in workflow.
  
- Additional Workflow Stages for Proposals:
  - GM – Yerkes: Question 9 under Miscellaneous Information will trigger the Yerkes approval. This stage is located in between the GM Department Approval and GM School Approval stage. Electronic approval is required of one individual from Yerkes.
  - Departmental and OSP Ad-Hoc:
    - Limited to 300 users – Have to be identified and added to the Ad-Hoc approval list.
    - Ad-Hoc approver(s) inserted in Department or OSP stages
    - Does not create additional stage of approval
  - School Ad-Hoc:
    - Unlimited – Anyone can be added without being identified.
    - Ad-Hoc approver(s) inserted in GM Ad-Hoc Stage which is after the GM School Approval stage but before the GM OSP Analyst stage.
    - Ad-Hoc Approver(s) are added via the ‘Approver/Reviewer’ hyperlink.
    - Ad-Hoc Approver(s) must be added to this stage before School approval is obtained.
  
- Notifications will be generated by PS that indicates Approvals are required for a proposal. They will be sent to the Approver’s email address listed in their HR records.
  - Subject Line of Email:  
  
Proposal XXXXXXXXXXX, PI Name, Department Name has been routed to you for approval

o Body of Email:

Proposal Title                    Testing EPEX  
Sponsor Name                    NIH NATL INSTITUTE OF HEALTH  
Proposal Type                    NEW  
Proposal Purpose                RSRCH

Use the link below to view the Grants Budget for further information.

[https://fsts3.cc.emory.edu/psp/fsts3\\_1/EMPLOYEE/ERP/c/SM\\_DC\\_SMARTDOC.SM\\_DC\\_GM\\_PROPOSAL.GBL?Page=SM\\_DC\\_GM\\_PROPOSAL&Action=U&BUSINESS\\_UNIT=GRANT&PROPOSAL\\_ID=0000007689&VERSION\\_ID=V101](https://fsts3.cc.emory.edu/psp/fsts3_1/EMPLOYEE/ERP/c/SM_DC_SMARTDOC.SM_DC_GM_PROPOSAL.GBL?Page=SM_DC_GM_PROPOSAL&Action=U&BUSINESS_UNIT=GRANT&PROPOSAL_ID=0000007689&VERSION_ID=V101)

- Approver's are the only person's that have edit capabilities once the proposal has been routed and is in workflow.
- If individuals need to be added as Approvers for proposals, they should contact the Data Management Group in OSP/OGCA to obtain the necessary forms.