

“Proposal Routing Approval” in 3 Easy Steps

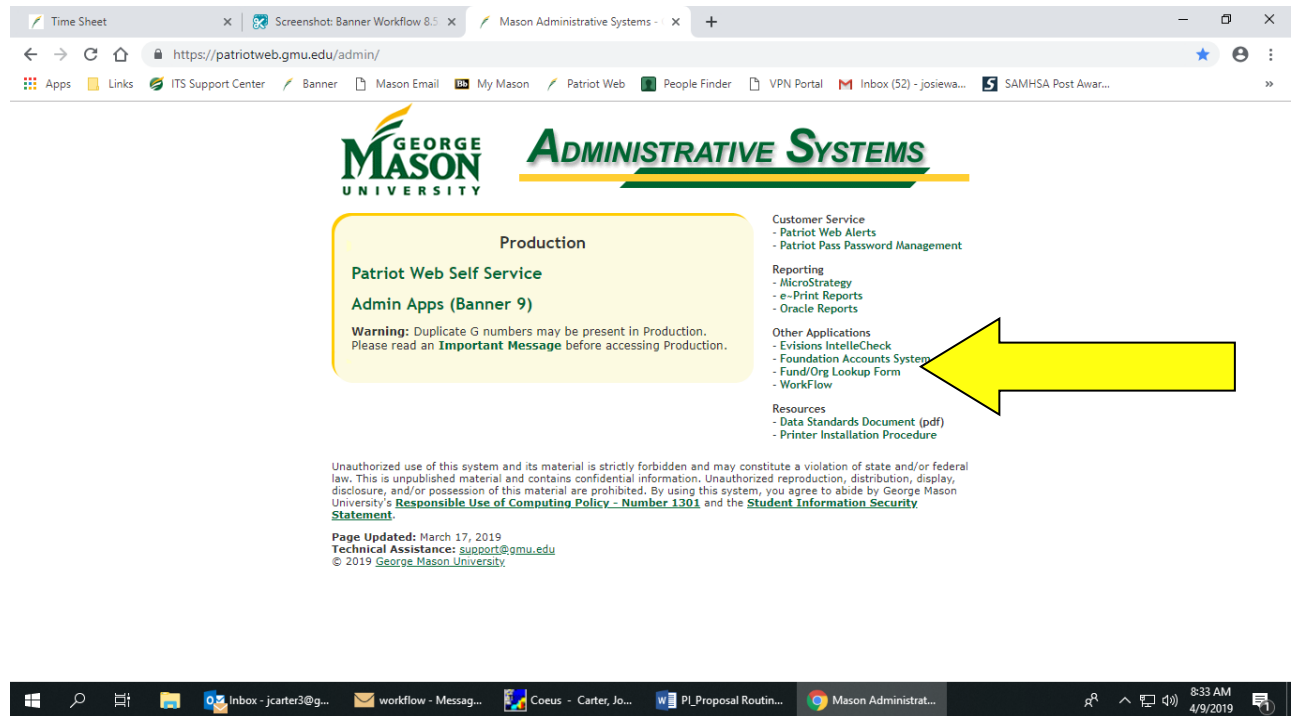
Workflow Approver Quick Reference Guide

Principal Investigator

Revised 4/24/19

Step One: Log into Banner Workflow

In Internet Explorer, enter the url: <https://patriotweb.gmu.edu/admin/>
Then click on the “Workflow” link.

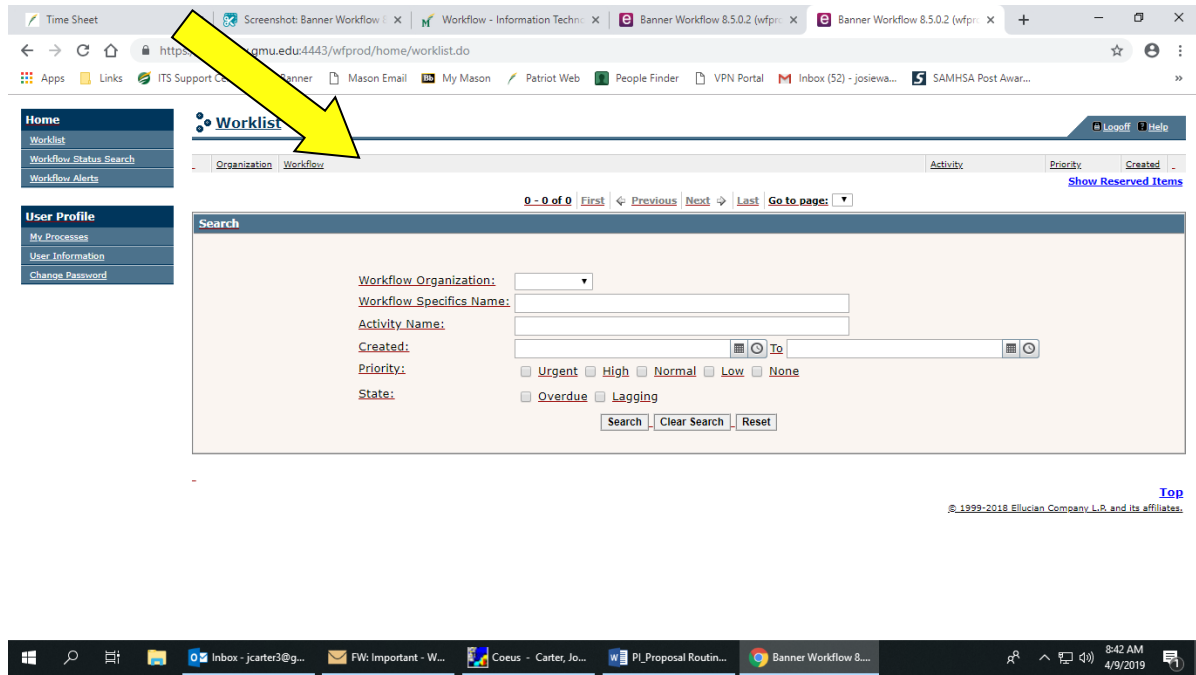


At the login screen, enter your email user name.
The password is your email password.

The screenshot shows the Banner Workflow login screen. The page has a header with the word 'WORKFLOW' in large letters. Below the header is a logo for 'SUNGARD HIGHER EDUCATION'. The main content area is a dark blue box containing a login form. The form has two input fields: 'Username:' and 'Password:'. Below the password field is a checkbox labeled 'Remember my Username'. At the bottom of the form are two buttons: 'Submit' and 'Reset'.

The user's inbox is displayed, containing all workflow instances that require the approver's attention.

Select a workflow transaction from the Worklist to review and approve.



Step Two: Review Transaction information

The transaction information will be displayed. The PI Certifications and Representations are incorporated into Workflow. Please select from the drop down menu for each certification. A sample page is shown below.

Date: 03-Apr-2019 10:32:39 AM

Grants Admin Name: Donna Senator

Grants Admin NetID: dsenator

Grant Admin Comments:

Test

Proposed Cost Share Fund/Org:

PI Name: Donna Senator

PI NetID: dsenator

Proposal #: 123456

Sponsor Name: None
Lead Unit: OSP
PI Dept Chair Name: Donna Senator
PI Dept Chair NetID: dsenator
Approval Required?: No
PI Center Director Name:
PI Center Director NetID:
Approval Required?: No
PI Dean/Director Name: Donna Senator
PI Dean/Director NetID: dsenator
Approval Required?: No

===== **PI CERTIFICATIONS AND REPRESENTATIONS** =====

Research Compliance

Will any of the following be involved in this project? If yes, approval of institutional review boards may be required before award can be made. Please refer to the following websites for information:

Website for the Office of Research Integrity and Assurance: <http://oria.gmu.edu/>

Website for Environmental Health and Safety Office: <http://ehs.gmu.edu>

1. Human Subject Research:

If 'Yes', will there be any exchange of human data with subrecipient(s):

a. from GMU to subrecipient?

b. from subrecipient to GMU?

2. Vertebrate Animals Used:

3. Laboratory Hazards:

(See the laboratory hazards information sheet for more details.)

If 'Yes', indicate laboratory hazards below:

4. Ionizing Radiation (Radioactive material or instruments that produce ionizing):

5. Infectious Materials (Risk Group 2 agents, human or non-human primate tissue, bodily fluids, cell culture, etc.):

6. Recombinant DNA:

7. Biologically-derived Toxins:

8. Environmental Samples:

9. Other Biological Materials:

10. Certification Regarding Proposal Personnel

If a faculty member or administrator might exercise or appear to exercise control over any personnel action associated with a person with whom he or she has a family or close personal relationship, the supervisor of the faculty member or administrator must designate a disinterested person to substitute for the individual who might have a personal interest. The Faculty Handbook (<http://www.gmu.edu/resources/facstaff/handbook/>) contains detailed information on this requirement.

Please indicate if you have any family or close personal relationships with the proposed project personnel.

11. Project Description: Provide three key words that describe the work done on this project and the scope.

Key word 1:

Key word 2:

Key word 3:

12. Project Scope:

* Countries impacted by project:

13. Location, Facilities and/or Specialized Equipment Needs: These must be negotiated with the appropriate University officials PRIOR to submission of proposal. Please indicate where project activities will be conducted and/or any facility and/or equipment needed.

Location

GMU building/room no(s):

If off campus, total sq ft:

Off campus address:

Specialized facilities/equip:

14. Export Control:

a. Does the program involve MILITARY (technology specially designed or developed for a military or intelligence application), SPACE or ENCRYPTION (other than ancillary encryption capabilities associated with a commercial item)?

To view the routing form and the F&A distribution, please click on the attached PDF. The document will open for your review.

The screenshot shows a document review interface. At the top, there is a section titled "* Review documents below and select an action" with two radio buttons: "Approve" and "Return to Initiator (Enter comments below)". Below this is a "PI Comments:" field. At the bottom of the main content area are three buttons: "Complete", "Save & Close", and "Cancel". Below the main content area is an "Attachments" section. The first attachment is titled "test routing form" and is a PDF file named "Blank Test Routing Form.pdf (43 KB)" with a date of "12-May-2010 11:06:42 AM" and links for "[Update]" and "[Remove]". There is also an "Attach File" button. Three yellow arrows point to the "Complete" button, the "Attachments" section, and the "Return to Initiator" radio button.

Step Three: Choose an Action

When finished reviewing, the approver chooses an action: Approve or Return to Initiator. If the information is correct, select "Approve" and press the "Complete" button.

If modifications are necessary, please describe the actions required in the "Comment" field, select "Return to Initiator" and press the "Complete" button.

If you are unable to complete the transaction during this session, press the “Save & Close” button and exit Workflow.