Grants Electronic Approval (EA) Changes for End Users
This document highlights the changes to the Grants proposal workflow in PeopleSoft due to the implementation of electronic approval of proposals.

For detailed instructions on EA procedures, see the Working With Proposals training materials.

MAINTAIN PROPOSAL PAGE
Proposal tab

An Electronic Approval button has been added to the Status box on the Proposal tab. When the proposal is complete, click this button to generate an electronic approval (EA) page. Retain the default of Draft in the Proposal Status field.

After clicking the button, you can navigate to the EA page in one of two ways.
a. Click the Electronic Approval link in the top Menu to search for the EA page (Main Menu > Grants > Proposals > Electronic Approval).
b. Or click the Go to Electronic Approval Page link below the Electronic Approval button. A new browser window or tab will open with the EA page.
The employees listed on the **Resources** tab (Professional grid) will be listed as signers on the EA page if they have been designated as signers by the campuses. If you want more employees to appear on the EA page, you can add them here and select their roles. The PI, CPI, COI, KEY, NTFY, and SIGN roles are the only roles that can have signers associated.

- An individual with the NTFY (Notification of EA) role gets notified that the proposal has been submitted but is not required to sign the EA page.
- An individual with the SIGN (Signature EA) role is required to sign the EA page.
- Some of the roles, such as the KEY (Key Personnel) role, will only sign if selected to sign by the campuses.
Attachments tab

The documents attached on the Attachments tab, and any updates to them, will automatically be available from the EA page. You can also add attachments here after the EA page has been submitted. You cannot attach documents directly to the EA page.

Shared Credit tab

Click the Load button to populate the Resources grid below with the employees listed on the Resources tab.

The DeptID, which will identify the signers on the EA page, needs to be included for each role, except for those with the NTFY or SIGN role.
ENTER BUDGET DETAIL PAGE

The signers for the DeptID entered on the Cost Share page will be included on the EA page.

Clicking the Cost Share link on the Enter Budget Detail page opens the Cost Share page (see below).

The designated signers for the DeptID you enter in the Dept field in the Institution section will be included on the EA page.
The **Electronic Approval** (EA) page contains all the information in the proposal. The submitter reviews the EA page before submitting it for approval.

The documents that were attached to the **Attachments** tab on the proposal can be viewed by clicking the **View** button in the **Attachments** grid. Documents cannot be attached directly to this page.

The **Signatures** grid displays the list of signers. The employees on the proposal **Resources** page will be signers on the EA page if they have been designated as signers by the campuses. Chairs and deans who have been selected by the campuses will be signers on the EA page as well.

The submitter should review the list to ensure it is correct and complete.

- If signers or alternates are missing from the list, contact OSPA to add them. After they are added, rerun the EA page.
- If one or more DeptIDs are incorrect, correct them in the proposal and rerun the EA page.

If desired, you can add comments in the **E-mail instructions** field, which will display in the email message to the signers.

When the EA page is complete, the submitter clicks the **Submit** button to automatically send an email to the submitter and signers, notifying them of an EA pending approval. After the **Submit** button has been clicked, the signers cannot be changed; however, OSPA and designated staff in each department have the ability to reset the proposal so that it can be revised, if necessary.

If desired, you can click the **Print** button to generate a PDF of the EA page that will be emailed to you for printing. This can be done at any **Electronic Approval Status** (Preview, Submitted, or Approved).

If you make changes and want to submit the EA page later, you can click the **Save** button to save the changes.
APPROVING A PROPOSAL

When an Electronic Approval (EA) page for a proposal is submitted, the submitter and the signers receive an email that the proposal is pending approval. The email provides a link to the EA page and the email recipient’s personal My EA Queue page. Approvers can choose which method they want to use to access and approve the proposal. Signers can also go directly to their My EA Queue page by navigating to Main Menu > Grants > Proposals > My EA Queue.

Email

![Email example]

### Valid Approvers

**Dean:**
Lucas Mason

**Dean Fiscal:**

**Chair:**
Peter Pleasant

**Chair Fiscal:**

How to approve on EA page

To approve the proposal, click the **Approval** check box for your signer row. Clicking the **Approval** check box will also save the page, so there is no need to click the **Save** button.

If you are the last signer to approve the proposal and all others have approved, an email will be sent that notifies OSPA and the proposal submitter of the EA approval.

If you want to disapprove the proposal, you need to click the **Disapproval** check box. You are then required to enter a comment (minimum of 20 characters) in the field below the check box that explains why you are disapproving, and click the **Save** button.

An email will be sent that notifies the proposal submitter and disapprover of the disapproval.
You cannot undo an approval once you select the Approval check box; however, OSPA and designated staff in each department will have the ability to reset individual approvals from the EA page if necessary.

How to approve on the My EA Queue page

The My EA Queue page lists the proposals that are pending your approval and their status. Once all signers have approved a proposal, the proposal will no longer display in the queue.

To approve the proposal, click the Approval check box for the proposal. Clicking the Approval check box will also save the page, so there is no need to click the Save button. You cannot disapprove a proposal on this page; disapproval is available only on the EA page.

If you are the last signer to approve the proposal and all others have approved, an email will be sent that notifies OSPA and the proposal submitter of the EA approval.

You can expand the Approvers section to view the proposal signers and the status of the approvals. If any of the signers have approved the proposal, the Approval check box will be selected, and the approver’s name will display along with the date and time of the approval.
SEARCHING FOR PROPOSAL AND EA STATUS (Using the Global EA Queue)

In the Global EA Queue, you can enter or select various criteria to search for proposal and EA Status. The search results will depend on your security permissions. You cannot approve proposals in this queue.

The queue allows you to create one or more Run Control IDs to save the parameters for proposal searches.

You can click the Proposal ID link to view the EA page.

You can expand the Approvers section in the search results to view the proposal signers and the status of the approvals. If any of the signers have approved the proposal, the Approved check box will be selected, and the approver’s name will display along with the date and time of the approval.

A Reset button on each proposal row will also be available from this page for OSPA and designated staff in each department. This will allow the user to reset a proposal so that it can be revised.

Clicking the Reset button will reset the EA workflow for the proposal, which means that the Electronic Approval button on the Proposal tab will be enabled so that an EA page can be generated again, the EA page can be resubmitted, and all signers will need to approve again.