



Updating Proposal Routing Forms

NOTE: This document contains **two sets of the same instructions**—the first is an overview/checklist, which does not include screenshots or explanations; the second uses screenshots to guide you through each step and explains the reasons for the actions you take. You may click on the titles below to jump to each section!

CONTENTS OVERVIEW

How to Update a Proposal Routing Form After the PI Has Signed	2
• Instructions (Overview)	
• Instructions (with Screenshots & Explanations)	
Changelog	6

How to Update a Proposal Routing Form After the PI Has Signed

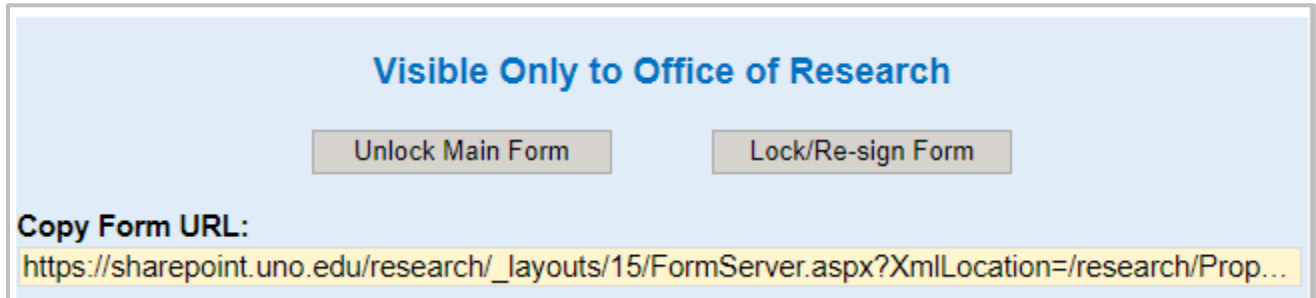
*Note: I do mean **any time** after the PI has signed, even if the form is COMPLETED.*

Instructions (Overview)

1. Scroll down to the blue section at the bottom of the Proposal Routing form.
2. Click the **Unlock Main Form** button.
3. Make whatever changes are necessary.
4. **IMPORTANT:** Add a comment explaining the changes that you made.
5. Click away from whatever field you have selected—ideally, in the empty space on either side of the form.
6. Click the **Lock/Re-Sign Form** button until the PI's signature re-appears.
7. DO NOT SUBMIT YET! In most cases, if you submit now, you will receive a validation error.
8. In the blue section at the bottom of the form, find the text field labeled **Update Status/Re-Route**.
9. **IMPORTANT:** Change the form status text to: **AWAITING PI**
10. Click away from the form status field—ideally, in the empty space on either side of the form.
11. Click the **Submit** button until the form *closes*.

Instructions (with Screenshots & Explanations)

1. Scroll down to the blue section at the bottom of the Proposal Routing form.

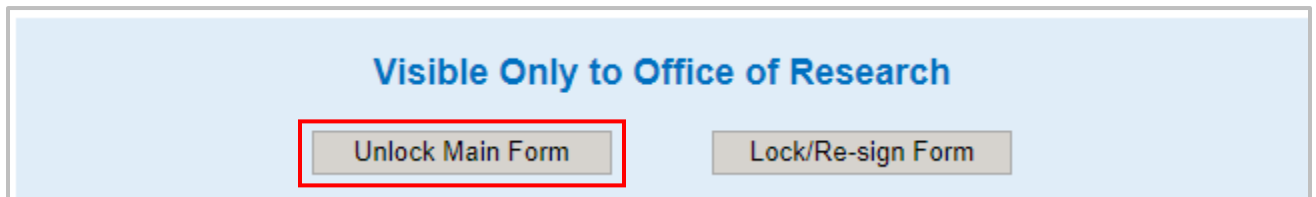


Visible Only to Office of Research

Unlock Main Form Lock/Re-sign Form

Copy Form URL:
https://sharepoint.uno.edu/research/_layouts/15/FormServer.aspx?XmlLocation=/research/Prop...

2. Click the **Unlock Main Form** button.



Visible Only to Office of Research

Unlock Main Form Lock/Re-sign Form

This will temporarily remove the PI's signature, thereby unlocking all the fields in the main form.

3. Make whatever changes are necessary.
4. **IMPORTANT:** Add a comment explaining the changes that you made.

The **Comments** section is located beneath the **Proposal Processing (Office of Research Only)** section and above the **Conflicts of Interest & Investigator Signatures** section. Some comments may already be visible.



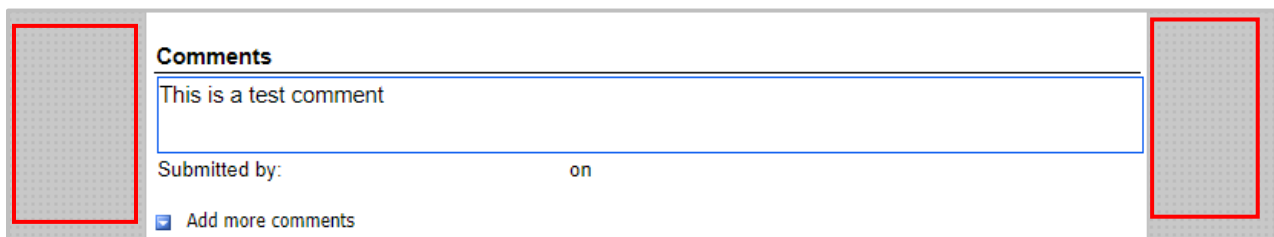
Purpose Code: Research - Basic

Reminder: Purpose Code Definitions

Comments
Add comments

Conflicts of Interest & Investigator Signatures

5. Click away from whatever field you have selected—ideally, in the empty space on either side of the form. This will de-select the field.



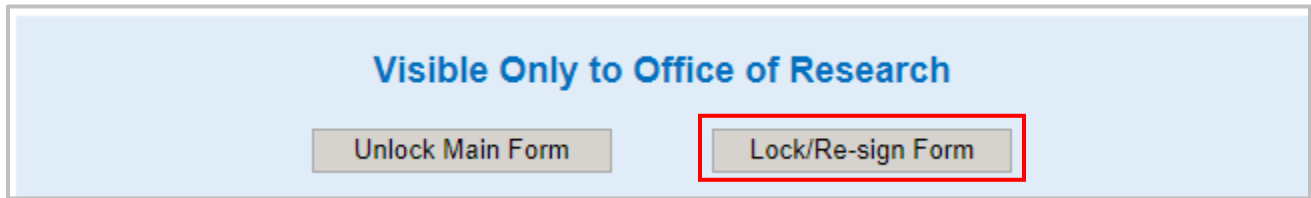
Comments

This is a test comment

Submitted by: on

Add more comments

6. Click the **Lock/Re-Sign Form** button.

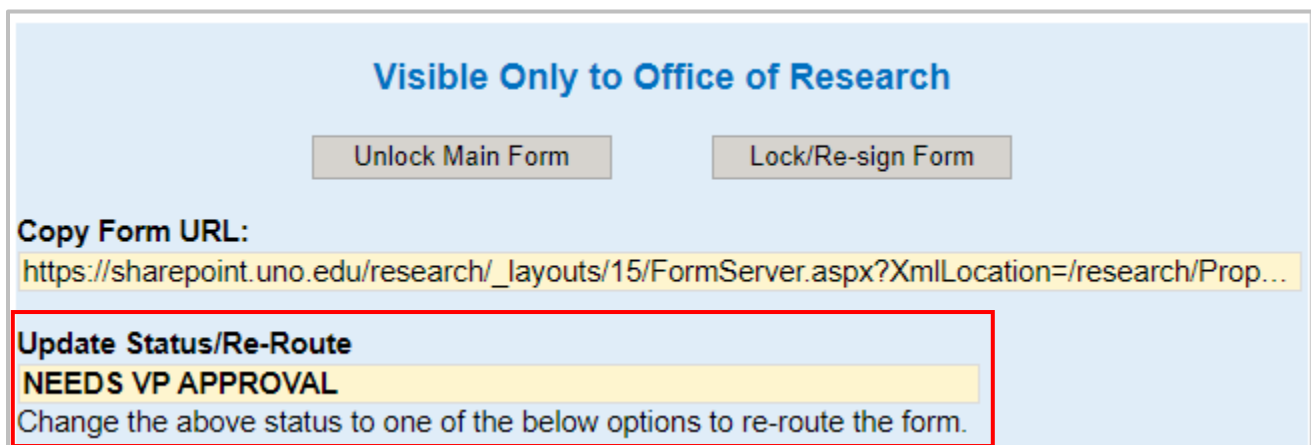


This adds the PI's first and last name back into the PI signature field. **Your username** will now appear as the person who signed for the PI—this is what makes adding an explanatory comment so important!

NOTE: If you did not first de-select the previous field, you may need to click this button more than once. Click the **Lock/Re-sign Form** button until a signature reappears in the field indicated below.

I want to...	1. Change Status to:	2. Clear this field:
Save the form (despite unfilled required fields)	SAVED	N/A
Unlock Co-PI 1 Conflict of Interest	AWAITING CO-1	
Unlock Co-PI 2 Conflict of Interest	AWAITING CO-2	
Unlock Co-PI 3 Conflict of Interest	AWAITING CO-3	
Unlock Co-PI 4 Conflict of Interest	AWAITING CO-4	
Unlock PI Conflict of Interest	AWAITING PI	
Request approval from PI's chair	NEEDS CHAIR APPROVAL	
Request approval from PI's dean	NEEDS DEAN APPROVAL	
Request approval from Co-PI's chair or dean	<i>(Contact the Office of Research Office Manager)</i>	
2. Then click Submit!		

7. DO NOT SUBMIT YET! In most cases, if you submit now, you will receive a validation error.
 8. In the blue section at the bottom of the form, find the text field labeled **Update Status/Re-Route**.



9. **IMPORTANT:** Change the form status text to: **AWAITING PI**

- Copy those words ***EXACTLY*** – ANY EXTRA SPACES OR DEVIATION WILL HAVE UNDESIRABLE SIDE EFFECTS. The text is available for copying in the table just below the form status text field.

I want to...	1. Change Status to:
Save the form (despite unfilled required fields)	SAVED
Unlock Co-PI 1 Conflict of Interest	AWAITING CO-1
Unlock Co-PI 2 Conflict of Interest	AWAITING CO-2
Unlock Co-PI 3 Conflict of Interest	AWAITING CO-3
Unlock Co-PI 4 Conflict of Interest	AWAITING CO-4
Unlock PI Conflict of Interest	AWAITING PI
Request approval from PI's chair	NEEDS CHAIR APPROVAL

- Why do you need to do this? Because the status dictates which fields in the form are required. If you re-sign the form for the PI, then change the status to AWAITING PI, then there won't be any incomplete required fields!

10. Click **away** from the form status field—ideally, in the empty space on either side of the form.

Copy Form URL:
https://sharepoint.uno.edu/research/_layouts/15/FormServer.aspx?XmlLocation=/research/Prop...

Update Status/Re-Route
NEEDS VP APPROVAL
 Change the above status to one of the below options to re-route the form.

11. Click the **Submit** button.

NOTE: If you did not first de-select the previous field, you may need to click this button more than once. Click the **Submit** button until the form closes.

- The form will automatically review which fields are complete and which are incomplete—and, based on which fields are incomplete, the form will return itself back to whatever status is necessary.
- Additional workflow emails may go out.
- For example, if the form is currently in “NEEDS VP APPROVAL” status when you make your changes, you’ll update the status to “AWAITING PI” and re-submit the form. Then, the form will automatically put itself back in “NEEDS VP APPROVAL” status based on the incomplete VP signature—and SharePoint will send another email requesting said VP’s signature.

Changelog

Date	Change(s)	Changed By
10/27/21	Created	Julie Landry
10/27/21	Wording, formatting	Julie Landry