



# Northeastern University Research Enterprise Services

E-PAWS

Electronic Proposal Approval & Workflow System

USER GUIDE

Version 3

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## EPAWS WORK FLOW



Route Log Example:

Grant Officer				
Name	Action	Date	Comments	
Keya, Diane	Approved	05-18-2017 08:51:09 am		

Department Approver				
Name	Department	Action	Date	Comments
Brooks, Boyd	University	Approved	05-18-2017 08:52:56 am	
asha V	University	Approved by other	05-18-2017 08:52:56 am	
Maria T	University	Approved by other	05-18-2017 08:52:56 am	
Akooop Noohan	University	Approved	05-20-2017 10:54:55 am	
Indira Rajeev	University	Waiting for Approval		

Investigator				
Name	Department	Action	Date	Comments
Dr. Jason M.	University	To be Submitted		

Department Top Approver				
Name	Action	Date	Comments	
Indira Rajeev	To be Submitted			
asha V	To be Submitted			
Mariya Sara	To be Submitted			

Grant Officer				
Name	Action	Date	Comments	
Keya, Diane	To be Submitted			

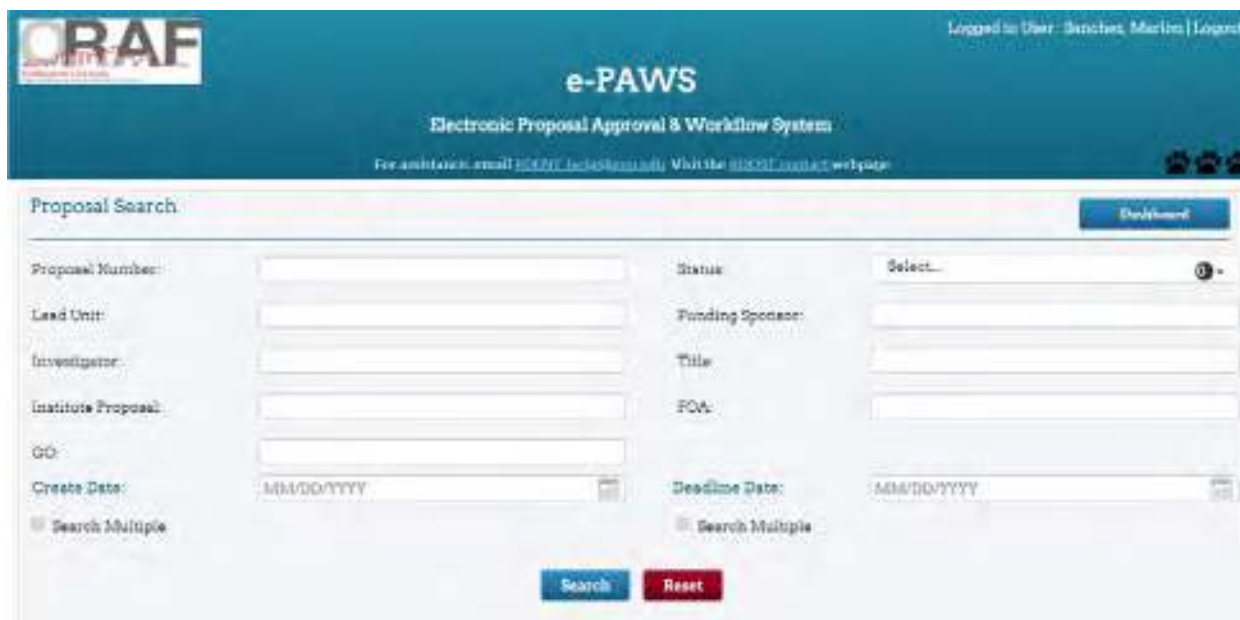
# LOGIN AS A PROPOSAL CREATOR/ INVESTIGATOR

<https://coeus-web.neu.edu/epaws/login>

## EPAWS DASHBOARD



**Search icon:** Search proposals according to different search criteria.



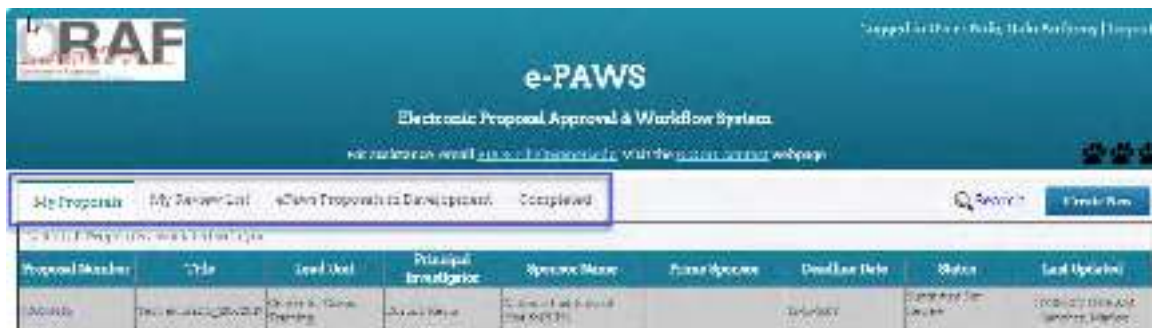
**Create New button:** Creates proposals.

\*Please note if user does not see this button, user does not have a role and must

request one via [RDOST-help@northeastern.edu](mailto:RDOST-help@northeastern.edu)

There are **4 Tabs**:

- **My Proposals:** List of all Proposals associated with logged in user.
- **My Review List:** List of all Proposals that are awaiting your action.
- **ePaws Proposals in Development:** List of all Proposals in development
- **Completed:** List of Completed Proposals that are submitted to Institute Proposal (IP)



Sort any column ascending/descending by selecting the column title; select again to sort in the opposite direction



Once user opens a proposal from any tab, they can see the workflow by Selecting **Route Log**



Route Log

Proposal Number: H0001204      Status: Approval in Progress

Title: Test Vineeth Chagnes 5/10/20

Proposal Creator

Name	Action	Date
Chagnes, Vineeth	Request/Approval	20/05/2021 11:48:47 AM

Grant Officer:

Name	Action	Title	Comments
Chagnes, Vineeth	Approved	20/05/2021 12:05:41 PM	None

Select **Dashboard** to go back to the home page.



### How to create/save a proposal



- User creates a proposal by selecting **Create New** button.
- Enter the minimum necessary fields and select “**Save**” button
  - Minimum fields: Research Theme, Deadline Date, Title, FOA (or “none”), Lead Unit, Principle Investigator Name, Role and Appointment



- For fields Lead Unit, Investigator, and Unit, begin typing in the elastic search field to search the Person and Unit databases
  - Investigators who are Northeastern Employees can be searched by either typing the name in the Investigator field,



or selecting “Search,” then selecting “Person” radio button, & insert name



- Investigators who are NOT Northeastern Employees can be searched by selecting “Search,” then “Rolodex” radio button, & insert name



- Investigators who are not found can be manually inserted in the

### Investigator field

- For those investigators, insert the Lead Unit as the Investigator Unit
- Hover the mouse over Field Labels to see a “ToolTip” definition:



- User can save the proposal with/without a Deadline Date. The application asks whether user wants to save the proposal without a Deadline Date. User can proceed with/without entering it. The proposal is saved and the status changes to **“In Progress”**.



### Investigators with Multi-appointments

If an investigator has a multi-appointment (data provided by HR), ePaws will indicate this by revealing an “M” next to the investigator units:

Name	Unit	Role	Effort %	Changed %	Appointment	Credit Split	Actions
Cyr, Joan	Northeastern University	Principal Investigator	100	100	100 DURATION	100	[Edit] [Delete]
Attorney, Michael W	Harvard Divinity School Divinity School & Tufts Prof Unit - 11	Investigator/Consultant	100	100		50	[Edit] [Delete]

- Select the “M” to show the multi-appointment, which shows the unit credit split as defined in HR; to change the split, select “Edit” and make credit split changes, the SAVE:



### Add units to Investigators

ePaws has the ability to add additional units under a PI in a proposal so as to split the credit between the primary unit, and any additional units.


- Add the Investigator to the proposal; once added, select the icon for “Add/Remove Unit”

Name	Unit	Role	Percent Effort	Person Months	Appointment	Credit Split	Actions
Beauregard, Michael	Center for Coach Strategy	Principal Investigator			100 DURATION	100	[Add/Remove Unit] [Edit] [Delete]

- Select “Add Unit”



**Multiple Appointments**

Name: Sanchez, Marlon + Add Unit 

Primary Unit	Unit Number	Unit Name	Credit Split	Action
<input checked="" type="checkbox"/>	00001	Center for Ocular Training	100	

- Type either unit name or unit number in "Unit" field; select the unit, and ADD:

**Multiple Appointments**


Name: Sanchez, Marlon + Add Unit 


Unit:

Primary Unit	Unit Number	Unit Name	Credit Split	Action
<input checked="" type="checkbox"/>	00001	Center for Ocular Training	100	
<input type="checkbox"/>	100201	Boove College Health Sciences		



- Adjust the credit split as necessary and select "OK"

**Multiple Appointments**

Name: Sanchez, Marlon + Add Unit 

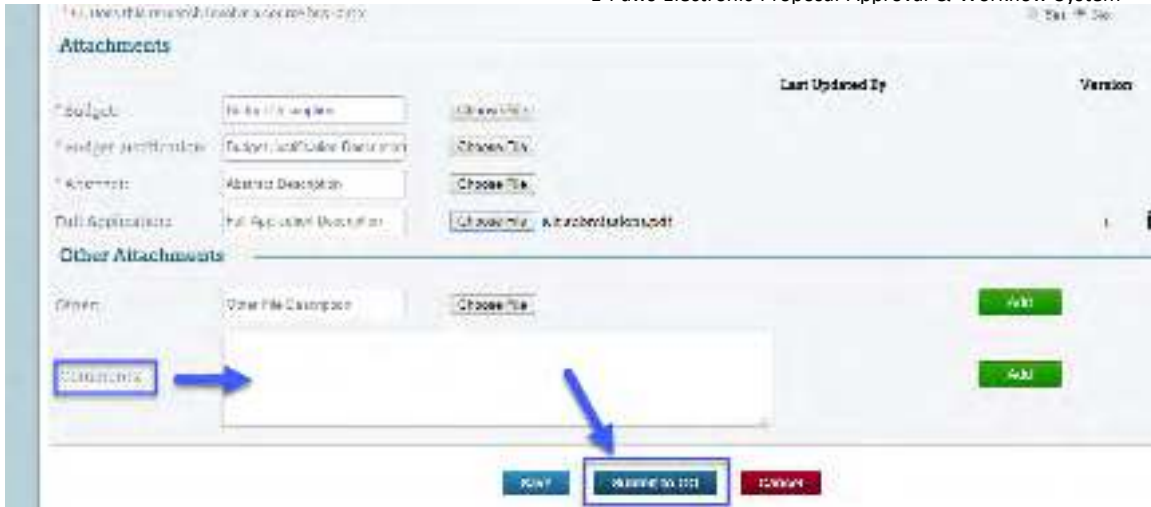
Primary Unit	Unit Number	Unit Name	Credit Split	Action
<input checked="" type="checkbox"/>	00001	Center for Ocular Training	<input type="text" value="50"/>	
<input type="checkbox"/>	100201	Boove College Health Sciences	<input type="text" value="50"/>	

- Investigator row has "M" icon indicating multiple units assigned to investigator

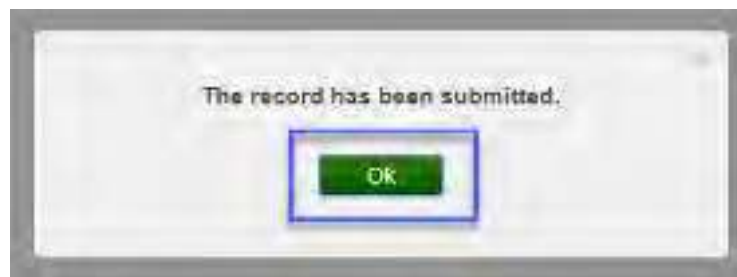
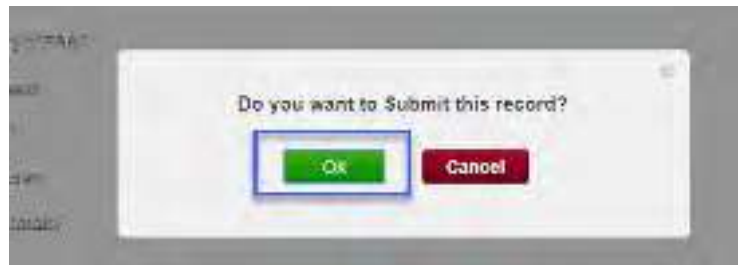
Name	Unit	Role	Percent Effort	Person Months	Appointment	Credit Split	Actions
Sanchez, Marlon	Center for Ocular Training	Principal Investigator			04 EMPLOYEE	100	 

## How to submit a proposal

- Enter the necessary fields, and answer all Yes/No questions; required fields will be noted; Proposals must include the following attachments: Budget, Budget Justification, and Abstract; alternatively, a copy of the Full Application is required to submit the proposal. Use the "Other Attachments" field to upload additional attachments if necessary. When finished, user can choose to add comments in the comments box and then select the **"Submit to GO"** button.

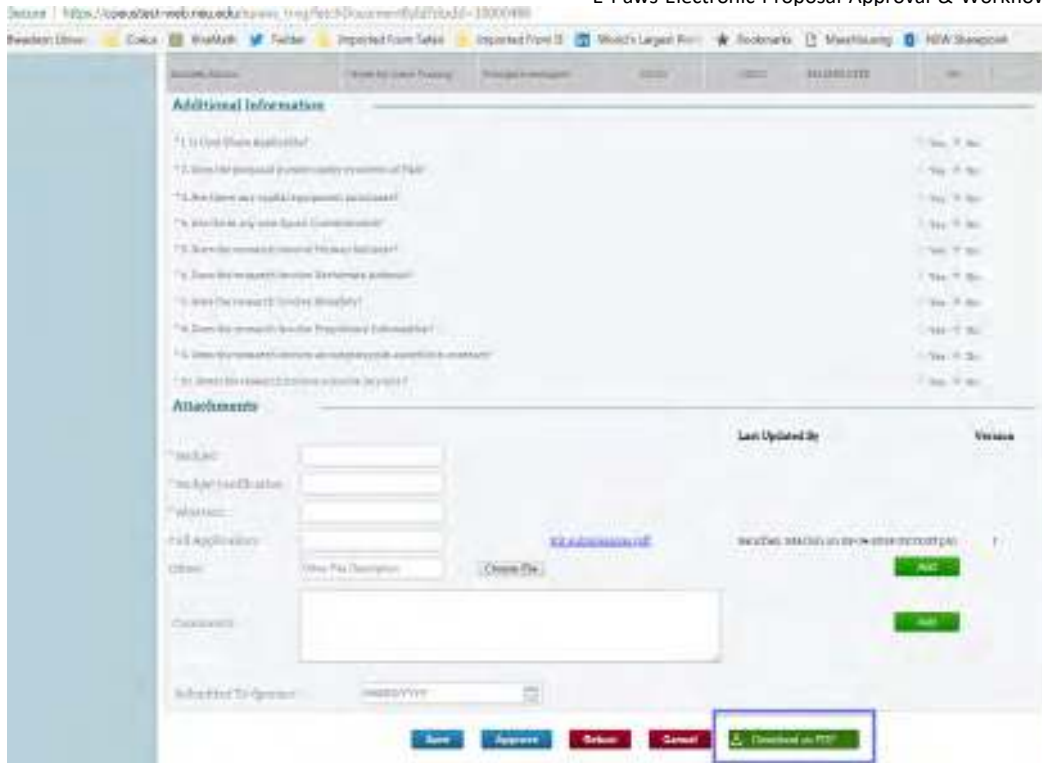


- ePaws will then show two pop-up boxes:



- Select 'My Review' list tab. Choose proposal and scroll to the bottom of the screen and select 'Download as PDF.'



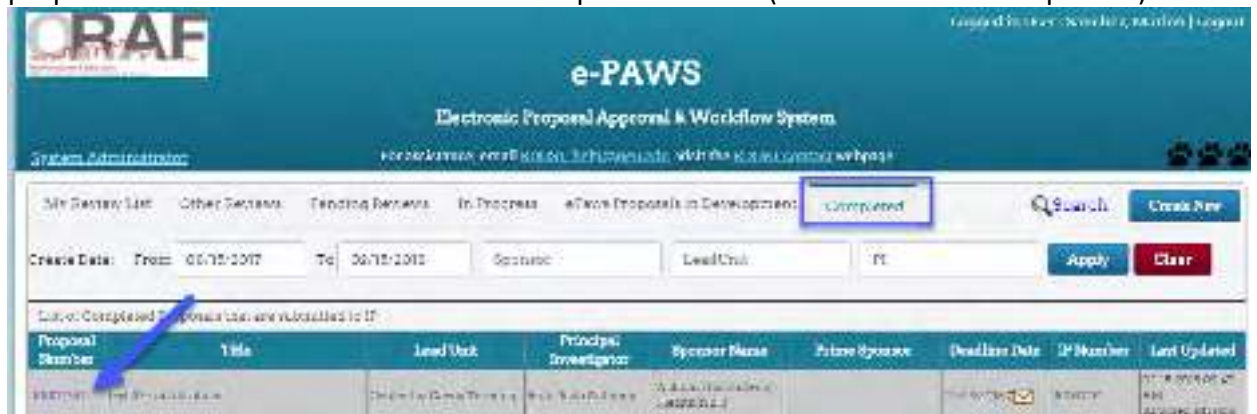


- User can submit the proposal with/without a Deadline Date. The application asks whether user wants to submit the proposal without a Deadline Date. User can proceed with/without entering it.

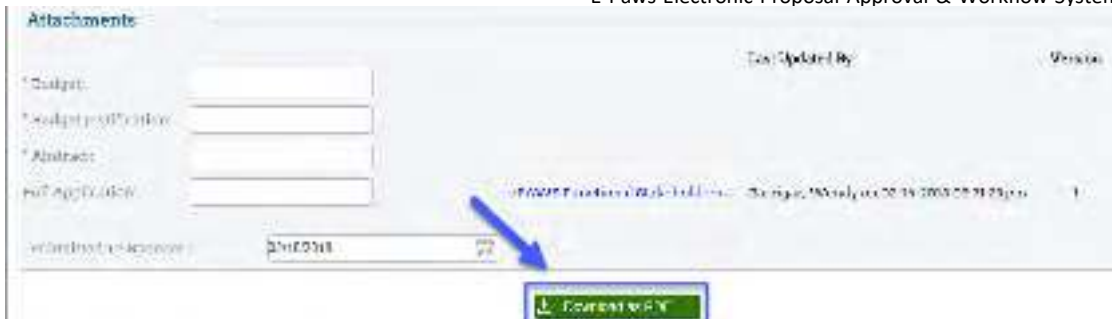
- The proposal is submitted and the status changes to **“Submitted for Review”**.



- Select ‘Download as PDF’ at the bottom of the screen print a copy of your submitted proposal Insert on how to view the print button (search for it and print-it)



- Scroll down and select ‘Download as PDF’:

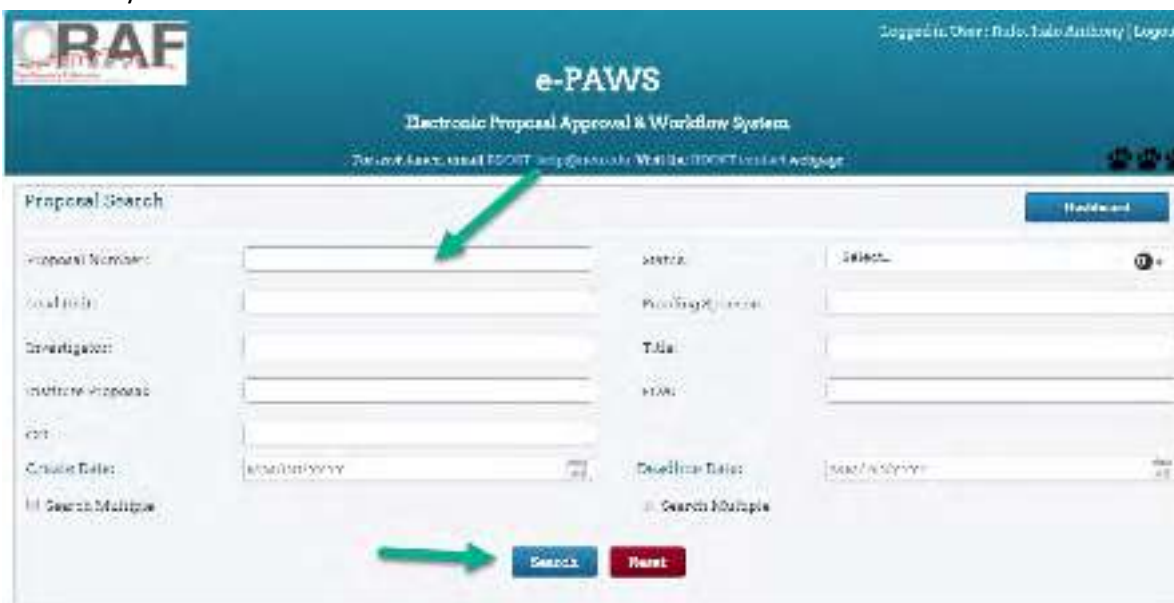


How to see the Grant Officer assigned to your proposal

- Go to the “ePaws Proposals in Development” tab and select “Search”



- Insert your search criteria and select Search



- Once you find your proposal, select it



Grant Officer is shown on the dashboard and at the top above “Proposal Number:”

- Alternatively, you can sort the “ePaws Proposals in Development” tab by selecting the “Proposal Number” column title and scroll to find your proposal and see the Grant Officer assigned to it



## How to certify a proposal

**NOTE:** Once GO & College has approved, proposals are listed under **“My Review List”** Tab.

- Select **“My Review List”** Tab.

Proposal Number	Title	Lead Unit	Principal Investigator	Proposer Name	Propose Sponsor	Deadline Date	Status	Last Updated
10004592	Topic: 08/14/2016	Office of the Provost	Senior Key	Michael J. ...		03/19/2016	Awaiting Certification	03/19/2016 10:54 AM

- Select a proposal in **“Awaiting Certification”** status.
- Review the certification and then check the **“I Agree”** checkbox and select **“Certify”** button.

For PI and/or Multi-PI:

**Certification**

I, **Cyr, Joan**, assure that the information submitted within the application is true, complete and accurate to the best of the my knowledge, belief, or faith, or that the statements or claims may subject me to criminal, civil, or administrative penalties, and to cooperate with relevant university policies and, further, if an award is granted as a result of this application, I will comply with all terms and conditions of the notice of award and applicable laws, regulations and policies.

I Agree. I agree to accept responsibility for the scientific conduct, financial, and administrative management of this project and will provide all scientific/technical and other reports as required by the funding agency and NSF.

I Agree

**Certify** **Cancel**

- For Investigator/Senior Key

**Certification**

I, **Michael J. ...**, assure that the information submitted within the application is true, complete and accurate to the best of the my knowledge, belief, or faith, or that the statements or claims may subject me to criminal, civil, or administrative penalties, and to cooperate with relevant university policies and, further, if an award is granted as a result of this application, I will comply with all terms and conditions of the notice of award and applicable laws, regulations and policies.

I Agree

**Certify** **Cancel**

Once the proposal is certified by all proposal personnel, the status changes to **“Certification Completed”**

Proposal Number:	10004592	Status:	Certification Completed
Last Updated:	03/08/2016 14:57, By Cyr, Joan M.		

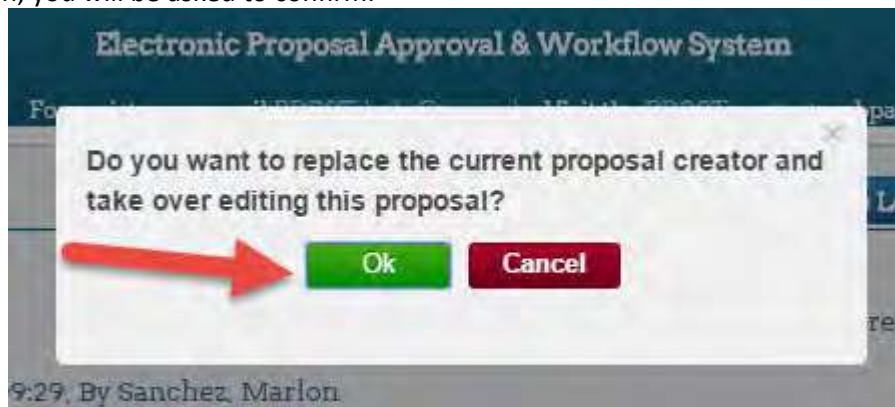
## How to assume editing rights of a proposal

Users that have a role within the lead unit of a proposal can switch the editing rights of an **“In Progress”** proposal from the current proposal creator to a new person (*user effectively replaces the current proposal creator and takes over editing the proposal*).

- User with a role in the lead unit of a proposal opens the proposal; an **“Edit”** button appears at the top of the proposal:



- To take over editing rights of the proposal from the current proposal creator, select the “Edit” button; you will be asked to confirm:



- Select “OK,” and the user becomes the new proposal creator, and can continue processing the proposal.
- The previous proposal creator will receive a notification alerting them to the fact that their proposal has been taken over by a new proposal creator:

Greetings:

Continued processing of the ePaws Proposal listed below has been assumed by a new Proposal Creator.

**ePaws Proposal Number:** 10000481  
**Title:** Test: New Proposal Creator  
**Funding Sponsor:** National Institutes of Health(NIH)  
**Principal Investigator:** Sanchez, Marlon  
**New Proposal Creator:** Cyr, Joan  
**Deadline Date:** 01-22-2018

To view this proposal, log into [ePaws](#) and select the proposal from the "All ePaws Forms" tab.

Questions about ePaws should be directed to [RDOST-help@neu.edu](mailto:RDOST-help@neu.edu).

### How to put an “In Progress” proposal on Hold (remove from dashboard view)

If a proposal is started and saved, the proposal will remain in the dashboard as an “In Progress”

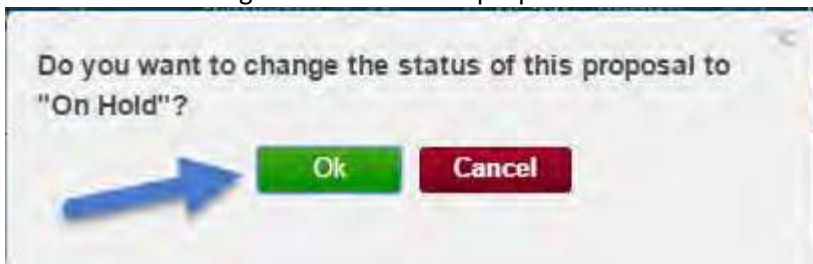
proposal. If an “In Progress” proposal was started in error, or the proposal creator would otherwise like to abandon the proposal and remove it from view, Proposal Creators have the ability to put the proposal “on hold” and delete the proposal from the view.

User must be the Proposal Creator in order to put an “In Progress” proposal on hold (users can use the process to [assume editing rights of a proposal](#) if they want to put an “In Progress” proposal on hold but are not the Proposal Creator).

- Search for and select the “In Progress” proposal that you want to put on hold; select the “Change to Hold” button



- Select “OK” to change the status of the proposal to “On Hold”



- Once the status is changed, the proposal disappears from all views. A notification will be sent to the Top Approver to let them know that a proposal, for which they already received a notification that the proposal was ‘in progress,’ is now ‘on hold.’

### How to change an “On Hold” proposal to “In Progress (return to dashboard view)

If a user wants to re-activate an “On Hold” proposal

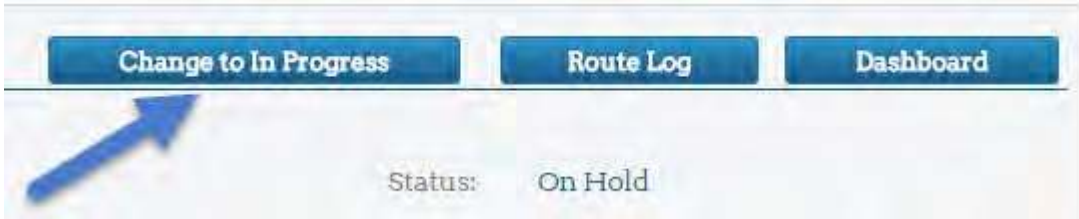
- Use the search function, and search for status “On Hold” proposals





Proposal Number	Title	Lead Unit	Principal Investigator	Status
10000366	Testing: Can Diane edit my proposal	Center for Coeus Training	Sanchez, Marion	On Hold

- Select the proposal number and open it
- Select the button “Change to In Progress”



- Select “OK” to change the status back to “In Progress”



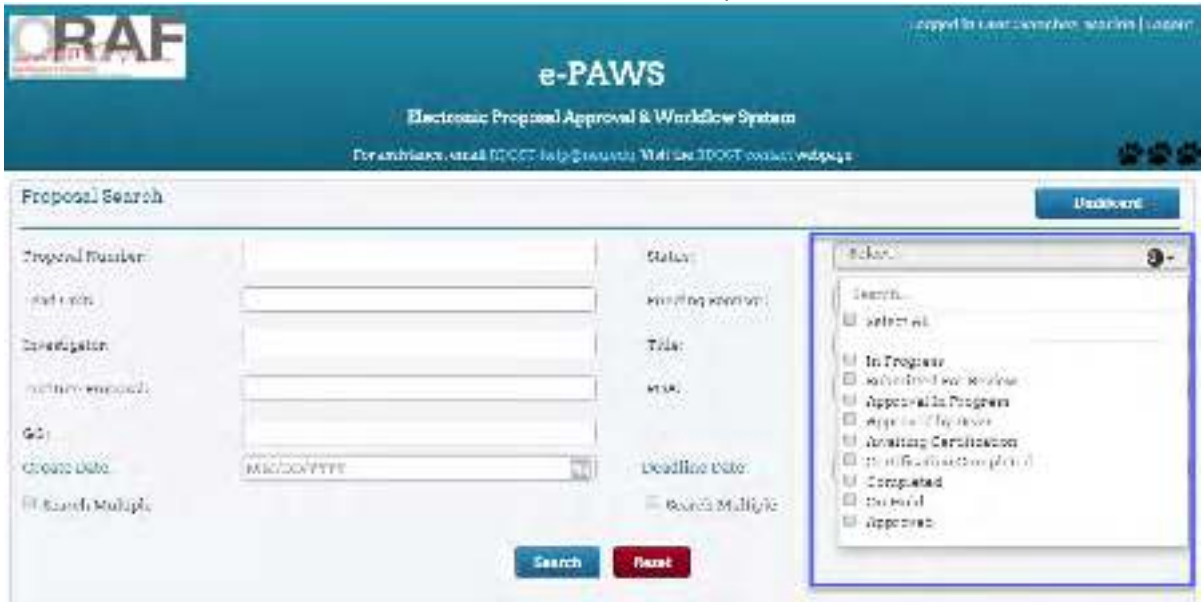
- Once activated, the proposal status changes back to “In Progress,” and the Top Approver gets a notification that the proposal is now ‘In Progress’ again.

### Advance Search (January 2018)

#### 1. Search of the Dashboard:

In advanced search pop-up, users will be able to search create date (single or by range), deadline date (single or by range), status (single or multiple). Status (Single or Multiple):

- **Status field:** User will be able to choose and search for multiple statuses at a time

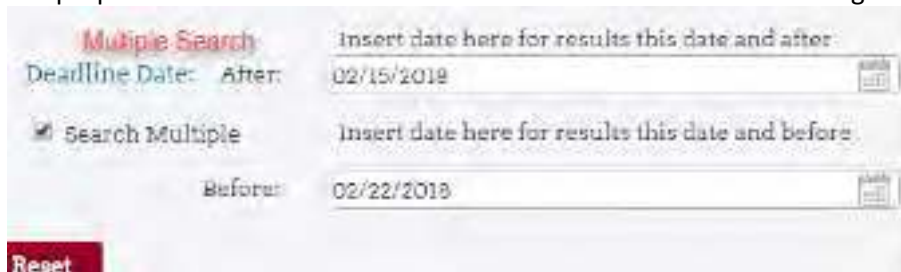


### Deadline (Single or by Range)

- For Single search user selects date in calendar



- For Multiple search user there will be a corresponding check box “Search Multiple,” checking this will enable users to search proposal by date range.
  - **After field** corresponds to deadline date: In After field user can enter a date from where he or she needs to start the search. In search result ePaws will list all the proposals whose deadline date is on or after the date which was given in the After field.
  - **Before field** corresponds to deadline date: In Before field user can enter a date where he or she needs to do the search. In the search result list ePaws will display all proposals whose deadline date is on or before the date which was given in before field.



### Create Date (Single or By Range):

- For Single search user selects date in calendar



- For Multiple search user there will be a corresponding check box “Search Multiple,” checking this will enable users to search proposal by date range. When checkbox is selected, two fields will appear: ‘After’ and ‘Before’ fields.

- **After field** corresponds to create date: In After field user can enter a date from where he or she needs to start the search. In search result it will list all the proposals where the create date is on or after the date which was inserted in the After field.
- **Before field** corresponds to create date: In Before field user can enter a date where he or she needs to do the search. In the search result list ePaws will display all proposals whose created date is on or before the date which was given in Before field.

*Note: While the search will return all records that match your search criteria, you will only be able to open records where you have a related role; otherwise, you will see a pop-up noting you do not have permission to view the proposal:*



2. Search on the Completed tab:
  - User can search by IP create date range, sponsor, lead unit, and PI

Proposal Number	Title	Lead Unit	Principal Investigator	Sponsor Name	Price Sponsor	Deadline Date	IP Number	Last Updated
10000001	HEALTHCARE PLAN FOR THE AGING	MARKET DEVELOPMENT	KAREN AVARIS	UNIVERSITY OF CALIFORNIA		02/15/2019	10000001	02/15/2019 11:05:11 AM
10000002	TRUCKING AND LOGGING	MARKET DEVELOPMENT	KAREN AVARIS	UNIVERSITY OF CALIFORNIA		02/15/2019	10000002	02/15/2019 11:05:11 AM

### Upload Other Attachments during routing (January 2018)

- Users with a role on a proposal will be able to upload 'other' attachments during routing even if it is not at their stop.
- A red-line indicator will be displayed next to these attachments to show it was uploaded AFTER routing started.

- It will also show a message “Attachments highlighted in RED were uploaded after routing started.”



Indicator for submitted to sponsor date (January 2018)

- GO can edit Submit to Sponsor date field in all stops.
- On the dashboard, icon indicates that this field is filled in the proposal. Hover over the icon and ePaws shows the date as a tooltip (Submitted to Sponsor: {date}).



Notifications

At different tasks during the workflow email notifications are triggered. See below:  
 Proposal Creator/investigator:

- When a proposal is submitted to the GO, the corresponding approvers are notified that a New Proposal is created; Title of notification “New ePaws proposal (PROPOSAL\_NUMBER) created”
- Top Approvers are notified when an “in progress” proposal is put “on hold,” or when an “on hold” proposal is changed to “in progress”; Title of notification “ePaws Proposal (PROPOSAL\_NUMBER) status change: In Progress to On Hold”
- When a proposal is selected for review by the Grant Officer, proposal submitter is notified that a proposal is under Grant Officer review (indicates GO name); Title of notification “ePaws Proposal (PROPOSAL\_NUMBER) submitted for review”
- When a proposal is ready for review in the sponsor system, Grant Officer is notified (if no GO is assigned to proposal, RDOST helpdesk is notified); ePaws proposal (PROPOSAL\_NUMBER) ready for sponsor system review

- When a user assumes editing rights of an “In Progress” proposal, previous creator is notified; Title of notification is “ePaws proposal (PROPOSAL\_NUMBER) has been assumed by a new Proposal Creator”
- When all PI’s certify, the Top Approver is notified that proposal is ready for review: Title of notification is “Approval pending for ePaws proposal (PROPOSAL\_NUMBER)”

## LOGIN AS GRANT OFFICER

<https://coeus-web.neu.edu/epaws/login>

Proposal Number	Title	Lead Unit	Proposal Investigator	Sponsor Name	Review Requester	Deadline Date	Status	
1000000	West Campus (WCS) Open Office Hours as meeting	Training	WCS/IT&Security	WCS/IT&Security - Meeting (ITK)		10/15/2017	Submitted for Review	Edit
3000044	Duplicate training status	Center for Jobs training	Chancellor's Office	WCS/IT&Security - Meeting (ITK)		1/10/2017	Submitted for Review	Edit

**Search icon:** Search proposals according to different search criteria.

**6 Tabs** are shown which contain proposals according to their actions to be completed:

**My Review List:** List of all Proposals that are awaiting for logged in user’s Approval.

**Other Reviews:** List of all Proposals that are awaiting for other Grant Officer’s Approval.

**Pending Reviews:** List of all Proposals that are not yet assigned.

**In Progress:** FYI List of Proposals that are started.

**Completed:** List of all Proposals that are submitted to IP.

**ePaws Proposals in Development:** List of all Proposals in Development.

Electronic Proposal Approval & Workflow System	
Reviewing By: Keys Diane	<a href="#">Route Log</a> <a href="#">Dashboard</a>
Proposal Number: 10010266	Status: Submitted for Review
Last Updated: 2016-03-10. By Keys Diane	Review Status: Reviewing FOA

Open a proposal from any tab to see the workflow by selecting **Route Log** [Route Log](#)

Route Log			
Proposal Number: 10000304		Status: Approved In Progress	
Title: Test: Vinethi Changes 5 TO 10			
Proposal Creator			
Name	Action	Date	
Chetan Chaudhary	Proposal Created	05-10-2020 11:50:40 AM	
Grant Officer			
Name	Action	Date	Comments
Sanjeev Narain	Approved	20/10/2020 10:05:41 AM	100%

Select [Dashboard](#) to go back to the home page.

[Dashboard](#)

### How to assign a proposal to GO when proposal status is “In Progress”

Proposals in “In Progress” are being completed by user. Status of “In Progress” shows on the “In Progress” tab. GO can only **view** an “In Progress” proposal.

Proposal Number	Title	Lead User	Principal Investigator	Agency Name	Phase Number	Deadline Date	Status	Reviewing By
10000304	Test: Vinethi Changes 5 TO 10	Chetan Chaudhary	Sanjeev Narain	10000304	1	05-10-2020	In Progress	<a href="#">Assign to me</a>
10000305	Test: Vinethi Changes 5 TO 10	Chetan Chaudhary	Sanjeev Narain	10000305	1	05-10-2020	In Progress	Sanjeev Narain
10000306	Test: Vinethi Changes 5 TO 10	Chetan Chaudhary	Sanjeev Narain	10000306	1	05-10-2020	In Progress	<a href="#">Assign to me</a>
10000307	Test: Vinethi Changes 5 TO 10	Chetan Chaudhary	Sanjeev Narain	10000307	1	05-10-2020	In Progress	Sanjeev Narain

There are 2 different ways that the proposal can be assigned to logged in GO:

1. Select on “Assign to me” button and assign it to logged in user (GO).
2. Open the proposal by Selecting on the Proposal Number **10000300** and Select on “Assign to me” [Assign To Me](#) button. **Grant Officers can take Proposals from each other using this method.**

### How to assign a proposal to GO when proposal status is “Submitted for Review”

Proposals in “Submitted for Review” status are on the “Pending Reviews” tab. GO can **Edit** the proposals only once it is assigned to him/her.

There are 2 different ways that the proposal can be assigned to logged in GO:

1. Select on “Edit” button and assign to logged in GO. [Edit](#)
2. Open the proposal by Selecting on the Proposal Number **10000300** and Select on

“Edit” button. **Grant Officers can take Proposals from each other using this method.**

### Fields for Grant Officer Completion

When the Proposal is assigned to the Grant Officer, fields that were not presented to the proposal submitter are highlighted in **YELLOW**; these fields should be reviewed and/or completed by GO as necessary:

***For each investigator***, select the ‘edit’ pencil icon, and enter the Percent Effort and the Person Months – use the Excel Calculator “Converting months to effort and effort to months 1-3-17” to annualize the numbers, and insert the results in these ‘text only’ fields; select “Update” to complete, and “Save” to save the record.

Name	Unit	Role	Percent Effort	Person Months	Appointment	Credit Split	Certified	Actions
Clabby, Sara J	Center for Coeus Training	Principal Investigator	25%	2	6M EMPLOYEE	100		

### Review Status

Grant Officers can change the Review Status of an assigned “Submitted for Review” proposal by selecting a review status from the dropdown menu:

The Review Status will show on the dashboard under the Proposal Status:

Proposal Number	Title	Lead Unit	Principal Investigator	Deadline Date	Status	Reviewing By
1000024	Small-wireless devices and their security	Center for Coeus Training	Clabby, Sara J		Submitted For Review Reviewing POF	Shelley Martin

### How to save a proposal

- Select on “My Review List” Tab.

Proposal Number	Title	Lead Unit	Principal Investigator	Deadline Date	Status	Reviewing By
1000031	ATA	College Of Business Administration	Healy, Robert D	09-30-2018	Submitted For Review	<a href="#">Reviewing Status</a>
1000037	Dev	College Of Computer Science	Christina, Mary Ann	09-30-2018	Submitted For Review	<a href="#">Reviewing Status</a>

- Select a proposal in “Submitted for Review” status.
- Enter necessary fields and Select on “Save” button.
- Proposal can be saved with/without a Deadline Date. The application asks whether user wants to save the proposal without a Deadline Date. User can proceed with/without entering it.
- The proposal is saved and the status changes to “**Submitted for Review**” with the **Review Status** shown below it.

Proposal Number:	1000031	Status:	Submitted For Review
Last Updated:	05/21/2016 09:14, By Sanchez, Marlon	Review Status:	Reviewing FOA

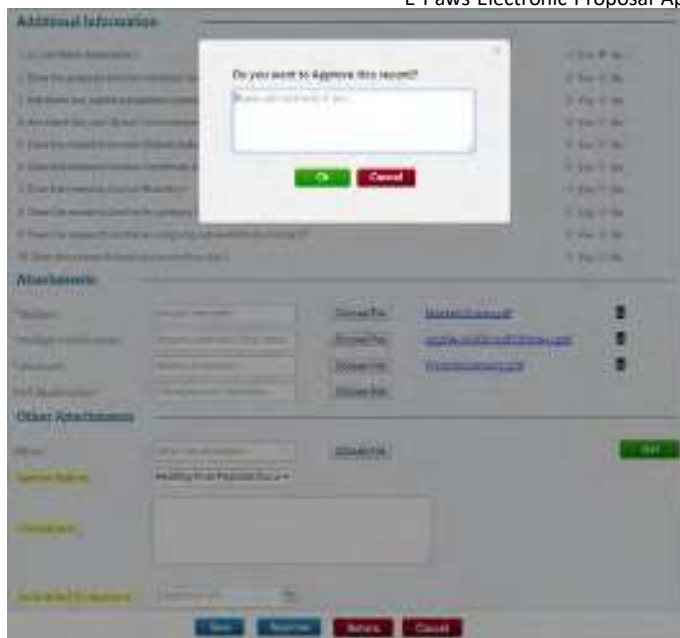
### How to Approve/Return a Proposal

- Select on “My Review List” section.

Proposal Number	Title	Lead Unit	Principal Investigator	Original Status	Prime Sponsor	Deadline Date	Status	Reviewing By
1000031	ATA	College Of Business Administration	Healy, Robert D	Submitted For Review		09-30-2018	Submitted For Review	<a href="#">Reviewing Status</a>
1000037	Dev	College Of Computer Science	Christina, Mary Ann	Submitted For Review		09-30-2018	Approved Progress	<a href="#">Reviewing Status</a>
1000038	ATA	College Of Business Administration	Healy, Robert D	Submitted For Review		09-30-2018	Approved Progress	<a href="#">Reviewing Status</a>

- Select a proposal in “**Submitted for Review**” status.
- Enter necessary fields and Select on Approve/Return buttons where a provision to add comment (not mandatory) is given.





Grant Officer can Save/Return/Approve the proposal with/without a Deadline Date. The application asks whether the Grant Officer wants to Approve/Return the proposal without a Deadline Date. User can proceed with/without entering it.

Once **Approved**, the status changes to **“Approval in Progress”**



If the proposal is **Returned**, the status changes to **“In Progress”**



**Validation to restrict GO from routing proposals with an invalid unit**

ePaws will not allow GO to route the proposal for approval if the proposal’s lead unit or any PI’s unit is 999000/Non-users

Reviewing By: Keys, Diane

Route Log Dashboard

Proposal Number: 1000019 Route: Submitted For Review

Last Updated: 2017-10-28 By Keys, Diane Last IP: amamkey

\* Here if required field:

\* Research Theme: Health Anticipated Award Type:

\* Proposal Type: Please Select Activity Type: Instructor

\* Title: da

Lead Unit: 10032307 \* Lead Unit: 999006 Post-users (small Lead Unit)

\* PDA Rec. Type: dd \* PDA Number: \* PDA Issues

\* Funding Sponsor: 00342 Diversified Career and Educational Services, I Prime Source of Funding: 333736 Koplex Technologies(NT)

\* Funding Sponsor Contact Email: \* @

**Personnel**

\* Investigator: Janet Kuhn Search \* User: 999006 Non-User Powers

\* Role: Please Select \* Appointment: Please Select

Credit Spch: 100 % Add

**Additional Information**

### How to Generate an IP for a proposal

- o Select on “My Review List” section.



- o Select a proposal in “Approved” status.
- o Enter the date when proposal was “Submitted to Sponsor” and Select on “Complete” button (Required to submit to IP)

Submitted To Sponsor : MM/DD/YYYY

Complete Cancel

This proposal can be viewed in the “Completed” tab alternatively, you can view the newly generated IP in Coeus (note the IP number assigned).

Proposal Number: 10003036 search for ePaws proposal number in "Merged with" search field in IP Status: Completed

Last Updated: 03/10/2016 15:19 By Keys, Diane IP Number: 16090366

### Notifications

- When the proposal is approved, the Department Approver/Alternates/Notifier is

- notified; Title of notification “New ePaws proposal (PROPOSAL\_NUMBER) created”
- When the proposal is returned, the Proposal Creator is notified; Title of notification “ePaws Proposal (PROPOSAL\_NUMBER) has been returned
  - When proposal is completed and submitted to Institute Proposal, the Proposal Creator is notified; Title of notification “ePaws Submission <Department>”
  - Notify GO that sponsor application is ready for GO review:
    - Users with a role will have permission to send notification to GO when the ‘sponsor application is ready for GO review’ at any point during routing. This can be done by hitting the “Notify GO” button.
    - When user hits the button “Notify GO”, a notification will be triggered to GO to begin reviewing proposal in sponsor system
    - Roles that can trigger notification to GO - Creator, GO, Approvers, Top Approvers including their Alternates, and Investigators.
    - If no Grant Officer is assigned, then notification will be sent to helpdesk (rdost-help@northeastern.edu) that says “Epaws Proposal #123456 ready for sponsor review; no Grant Officer is assigned.”



## LOGIN AS DEPARTMENT APPROVER

<https://coeus-web.neu.edu/epaws/login>

Proposal Number	Title	Local Unit	Principal Investigator	Sponsor Agency	ePaws Operator	ePaws Version	Status	Last Updated
10009002	Health Applications	Department of Health	Diane Keys	Medical Center of Northeastern	10009002	10009002	Approved	10/24/2017 12:38 PM
10009003	Health Applications	Department of Health	Diane Keys	Medical Center of Northeastern	10009003	10009003	Approved	10/24/2017 12:38 PM
10009004	Health Applications	Department of Health	Diane Keys	Medical Center of Northeastern	10009004	10009004	In Progress	10/24/2017 12:38 PM

There are **5 Tabs**:

**My Proposals:** List of all Proposals associated with Approver.

**My Review List:** List of all Proposals that are awaiting College Approval.

**In Progress:** FYI List of Proposals that are started.

**ePaws Proposals in Development:** List of all Proposals in Development

**Completed:** List of all completed ePAWs Proposals.

### How to Approve/Return a proposal

- Select “My Review List” tab.
- Select a proposal for an action to be completed.
- Select Approve/Return buttons where a provision to add comment (not mandatory) is given.



Once approved by all Approvers , the status changes to **“Awaiting Certification;”**

Proposal Number: 10003205 Status: Awaiting Certification  
Last Updated: 03/10/2016 13:15 By Cyr, Joan M.

Once approved by all Top Approvers the status changes to “Approved.” Add another screenshot for top approver

- Once Returned to the proposal creator, the status changes to **“In Progress”**.

Proposal Number: 10004757 Status: In Progress  
Last Updated: 03/10/2016 14:45 By Cyr, Joan M.

### Notifications

- When the proposal is approved by Approver, the Investigators in the proposal are notified for certification; Title of notification “Certification awaiting for ePaws proposal (PROPOSAL\_NUMBER)”
- When the proposal is Returned, the Proposal Creator and the Grant Officer is notified; Title of notification “ePaws Proposal (PROPOSAL\_NUMBER) has been returned”
- When a proposal is approved by all Top Approvers, the Grant Officer is notified; Title

of notification “All Top Approvers have completed their review for ePaws proposal (PROPOSAL\_NUMBER)”

## APPENDIX

### System Administrator Screen

ePaws includes a simple administrative interface for system administrators to perform the following functions:

1. Add Alternate Approvers
2. Sync Unit, Sponsor, and Person table information with the Coeus database

### Add Alternate Approvers

Users with the SysAdmin role in Coeus can add alternate approvers to ePaws using the system administrator tool

- Select the System Administrator button





- Enter the unit name, and select a unit administrator type:

- Select the Approver/Top Approver for whom you are designating an alternate

- Type the name of the alternate, and select the result, and select “Add”

- The alternate now appears in the list

Unit Name	Unit Administrator Type	Approver	Alternate Approver	Last Updated	Action
Coast College Health Sciences	EPAWS_DEPT_APPROVER	Robert Masala	Marlene Ortiz	09-01-2017 09:03 AM Sanchez, Marlon	 

## Sync Unit, Sponsor, and Person Table

Users with the SysAdmin role in Coeus can sync unit, sponsor, and person data in Coeus to ePAWS using the system administrator tool

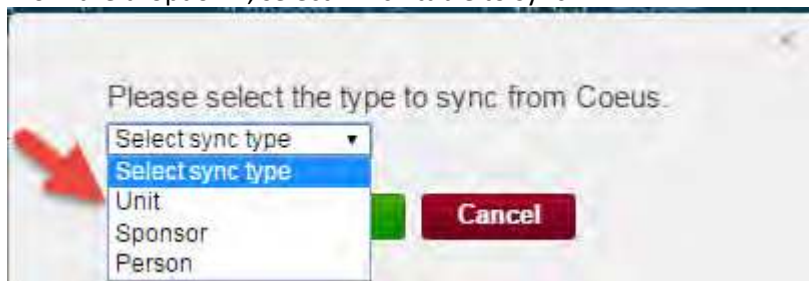
- Select the System Administrator button



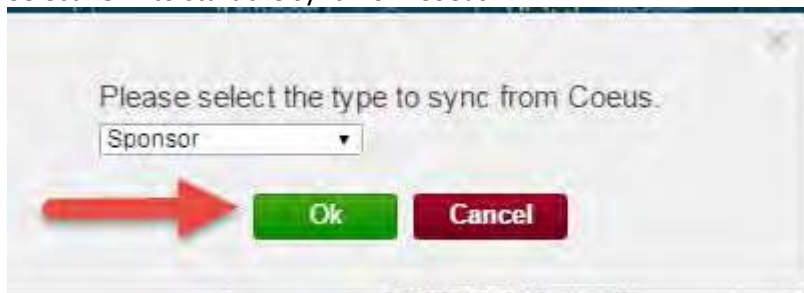
- Select "Sync from Coeus" button



- From the dropdown, select which table to sync



- Select "OK" to start the sync from Coeus



- Receive the successful acknowledgement



Repeat for each table to sync.

## Notification Appendix

**To Top Approver/Approvers when proposal is submitted**

To: <Top Approvers>

CC: <Approvers>

Subject: New ePaws Proposal {PROPOSAL\_NUMBER} created

Deadline Date: (DEADLINE\_DATE)

Body:

Greetings:

A new ePaws Proposal has been created. If you would like to view it, log into ePaws and check the "My Proposals" for proposals under review by the Grant Officer.

ePaws Proposal Number : (PROPOSAL\_NUMBER)

Title: (TITLE)

Funding Sponsor: (SPONSOR\_NAME)

Principal Investigator: (LPI)

Deadline Date: (DEADLINE\_DATE)

To view this proposal, log into [ePaws](#) and select the proposal from the "My Review List" tab.

Questions about ePaws should be directed to [RDOST-help@neu.edu](mailto:RDOST-help@neu.edu).

**To Previous Proposal Creator when a user takes over editing rights of a proposal**

To: Previous proposal creator

Subject: ePaws proposal (PROPOSAL\_NUMBER) has been assumed by a new Proposal Creator

Body:

Greetings:

Continued processing of the ePaws Proposal listed below has been assumed by a new Proposal Creator.

ePaws Proposal Number : (PROPOSAL\_NUMBER)

Title: (TITLE)

Funding Sponsor: (SPONSOR\_NAME)

Principal Investigator: (LPI)

New Proposal Creator: (new proposal creator)

Deadline Date: (DEADLINE\_DATE)

To view this proposal, log into [ePaws](#) and select the proposal from the "ePaws Proposals in Development" tab.

Questions about ePaws should be directed to [RDOST-help@neu.edu](mailto:RDOST-help@neu.edu).

**To Top Approver when status changed from In Progress to On Hold**

To: Top Approver

Subject: ePaws Proposal (PROPOSAL\_NUMBER) status change: In Progress to On Hold

Body:

Greetings:

The ePaws proposal below has changed status from In Progress to On Hold. Please contact the

Proposal Creator for more information, or to view the proposal, log into ePaws, search for the proposal number, select it, and review the comments.

ePaws Proposal Number : (PROPOSAL\_NUMBER)  
Title: (TITLE)  
Funding Sponsor: (SPONSOR\_NAME)  
Principal Investigator: (LPI)  
Proposal Creator: (proposal creator)  
Deadline Date: (DEADLINE\_DATE)

To view this proposal, log into [ePaws](#) and use the search function to find the proposal.

Questions about ePaws should be directed to [RDOST-help@neu.edu](mailto:RDOST-help@neu.edu).  
To Top Approver when status changed from On Hold to In Progress  
To: Top Approver  
Subject: ePaws Proposal (PROPOSAL\_NUMBER) status change: In Progress to On Hold  
Body:  
Greetings:

The ePaws proposal below has changed status from On Hold to In Progress. If you would like to view it, log into ePaws and check the "In Progress" tab for saved proposals, or "My Review List" for proposals under review by the Grant Officer.

ePaws Proposal Number: (PROPOSAL\_NUMBER)  
Title: (TITLE)  
Funding Sponsor: (SPONSOR\_NAME)  
Principal Investigator: (LPI)  
Deadline Date: (DEADLINE\_DATE)

To view this proposal, log into [ePaws](#) and select the proposal from the "My Review List" tab.

Questions about ePaws should be directed to [RDOST-help@neu.edu](mailto:RDOST-help@neu.edu).

### **To GO when proposal lands in their queue**

To: <Grant Officer>  
Cc: <proposal creator>  
Subject: ePaws Proposal {PROPOSAL\_NUMBER} submitted for review  
Deadline Date: (DEADLINE\_DATE)  
Body:  
Greetings:

The ePaws proposal below has been submitted for Grant Officer Review and now appears in the "My Review List" tab for the Grant Officer; for the submitter, the proposal appear on the "My Proposals" tab.

ePaws Proposal Number : (PROPOSAL\_NUMBER)  
Title: (TITLE)  
Funding Sponsor: (SPONSOR\_NAME)  
Principal Investigator: (LPI)



Deadline Date: (DEADLINE\_DATE)

Questions about the application should be directed to <GO>.

To view this proposal, log into [ePaws](#) and select the proposal from the “My Review List” tab.

Questions about ePaws should be directed to [RDOST-help@neu.edu](mailto:RDOST-help@neu.edu).

To GO (or RDOST HD if no GO is assigned) when proposal is ready for review in Sponsor System

To: <Grant Officer> (or <RDOST HD>)

Subject: ePaws proposal (PROPOSAL\_NUMBER) ready for sponsor system review

Body:

Greetings:

The ePaws proposal below is ready for Grant Officer Review in the sponsor system.

ePaws Proposal Number : (PROPOSAL\_NUMBER)

Title: (TITLE)

Funding Sponsor: (SPONSOR\_NAME)

Principal Investigator: (LPI)

Deadline Date: (DEADLINE\_DATE)

To view this proposal, log into [ePaws](#) and select the proposal from the “My Review List” tab.

Questions about ePaws should be directed to [RDOST-help@neu.edu](mailto:RDOST-help@neu.edu).

**To Approvers/Alternates/Notifiers when the GO routes for College approval**

To: Approver(s), Approver Alternate(s)

Cc: ePaws Department Notifier(s),

Subject: Approval pending for ePaws proposal (PROPOSAL\_NUMBER)

Body:

Greetings:

The ePaws proposal below has been submitted for college review and approval, and appears in the “My Review List” tab for approvers. For department notifications, the proposal appears on the “My Proposals” tab.

If changes are required, you may return it to the proposal originator with comments.

ePaws Proposal Number : (PROPOSAL\_NUMBER)

Title: (TITLE)

Funding Sponsor: (SPONSOR\_NAME)

Principal Investigator: (LPI)

Deadline Date: (DEADLINE\_DATE)

To view this proposal, log into [ePaws](#) and select the proposal from the “My Review List” tab.

Questions about ePaws should be directed to [RDOST-help@neu.edu](mailto:RDOST-help@neu.edu).

**To PI(s) for certification when Approvers approve**

To: Principal Investigator

Subject: Certification awaiting for ePaws proposal (PROPOSAL\_NUMBER)

Body:

Greetings,

The ePaws Proposal below is awaiting your Certification. Please review the proposal in the “My Review List” tab.

For more information on elements of your certification, visit the ORAF [Certification Webpage](#).

ePaws Proposal Number : (PROPOSAL\_NUMBER)

Title: (TITLE)

Funding Sponsor: (SPONSOR\_NAME)

Principal Investigator: (LPI)

Deadline Date: (DEADLINE\_DATE)

To view this proposal, log into [ePaws](#) and select the proposal from the “My Review List” tab.

Questions about ePaws should be directed to RDOST-help@neu.edu.

**To Top Approvers after all PI’s certify**

To: Top Approver(s), Top Approver Alternate(s)

Subject: Approval pending for ePaws proposal (PROPOSAL\_NUMBER)

Body:

Greetings:

The ePaws proposal below is awaiting your review and approval; The proposal now appears in your “My Review List” tab.

If changes are required, you may return it to the proposal originator with comments.

ePaws Proposal Number : (PROPOSAL\_NUMBER)

Title: (TITLE)

Funding Sponsor: (SPONSOR\_NAME)

Principal Investigator: (LPI)

Deadline Date: (DEADLINE\_DATE)

To view this proposal, log into [ePaws](#) and select the proposal from the “My Review List” tab.

Questions about ePaws should be directed to RDOST-help@neu.edu.

To Proposal Creator when proposal is returned (Note: when returned by GO, only sent to proposal creator)

**To: (Proposal Creator)**

Cc: (GO)

Subject: ePaws Proposal (PROPOSAL\_NUMBER) has been returned

Body:

Greetings:

The ePaws proposal below has been returned. Please review the proposal in the “My Proposals” tab and see the comments.

ePaws Proposal Number : (PROPOSAL\_NUMBER)  
Title: (TITLE)  
Funding Sponsor: (SPONSOR\_NAME)  
Principal Investigator: (LPI)  
Deadline Date: (DEADLINE\_DATE)

To view this proposal, log into [ePaws](#) and select the proposal from the “My Review List” tab.

Questions about ePaws should be directed to [RDOST-help@neu.edu](mailto:RDOST-help@neu.edu).

To GO when the proposal routes back to GO after all Top Approvers approve

To: <Grant Officer>  
Subject: All Top Approvers have completed their review for ePaws proposal (PROPOSAL\_NUMBER)  
Body:  
Greetings:  
All Top Approvers have completed their review for the ePaws proposal below:

ePaws Proposal Number : (PROPOSAL\_NUMBER)  
Title: (TITLE)  
Funding Sponsor: (SPONSOR\_NAME)  
Principal Investigator: (LPI)  
Deadline Date: (DEADLINE\_DATE)

To view this proposal, log into [ePaws](#) and select the proposal from the “My Review List” tab.

Questions about ePaws should be directed to [RDOST-help@neu.edu](mailto:RDOST-help@neu.edu).

To Proposal Creator when proposal is completed and submitted to Institute Proposal

To: <Proposal Creator>  
Subject: ePaws Submission <Department>  
Body:  
Greetings:

Your ePaws proposal has been approved for submission.

The Institute proposal number is (PROPOSAL\_NUMBER)

Principal Investigator: Rufo, Italo Anthony  
Department: (DEPARTMENT\_NUMBER)  
ePaws Proposal: (PROPOSAL\_NUMBER)  
Sponsor: (SPONSOR)  
Deadline Date: (DEADLINE\_DATE)  
Title: (TITLE)

To view this proposal, log into ePaws and search the proposal from Advance search.

Questions about ePaws should be directed to [RDOST-help@neu.edu](mailto:RDOST-help@neu.edu).