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| Office of Sponsored Programs |
| Export Control Module in eRouting |
| Quick Start Guide |

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| Office of Sponsored Programs  5-13-2020 |

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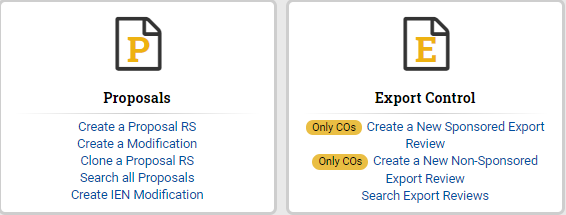
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# Accessing the Application

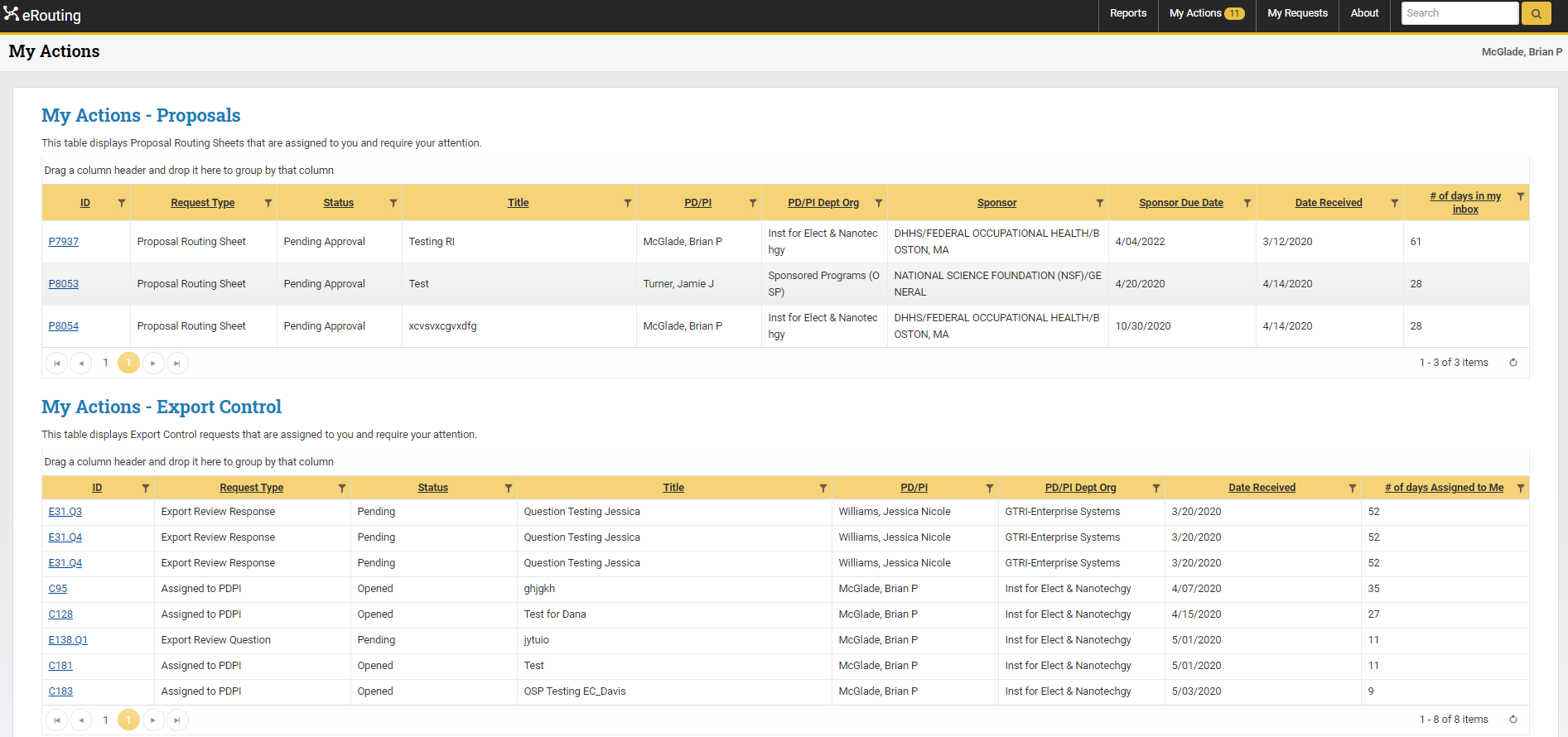
Open your Web Browser and go to: <https://erouting.gatech.edu/erouting>.

The following application home page will display: Screenshot will be different for GTRI

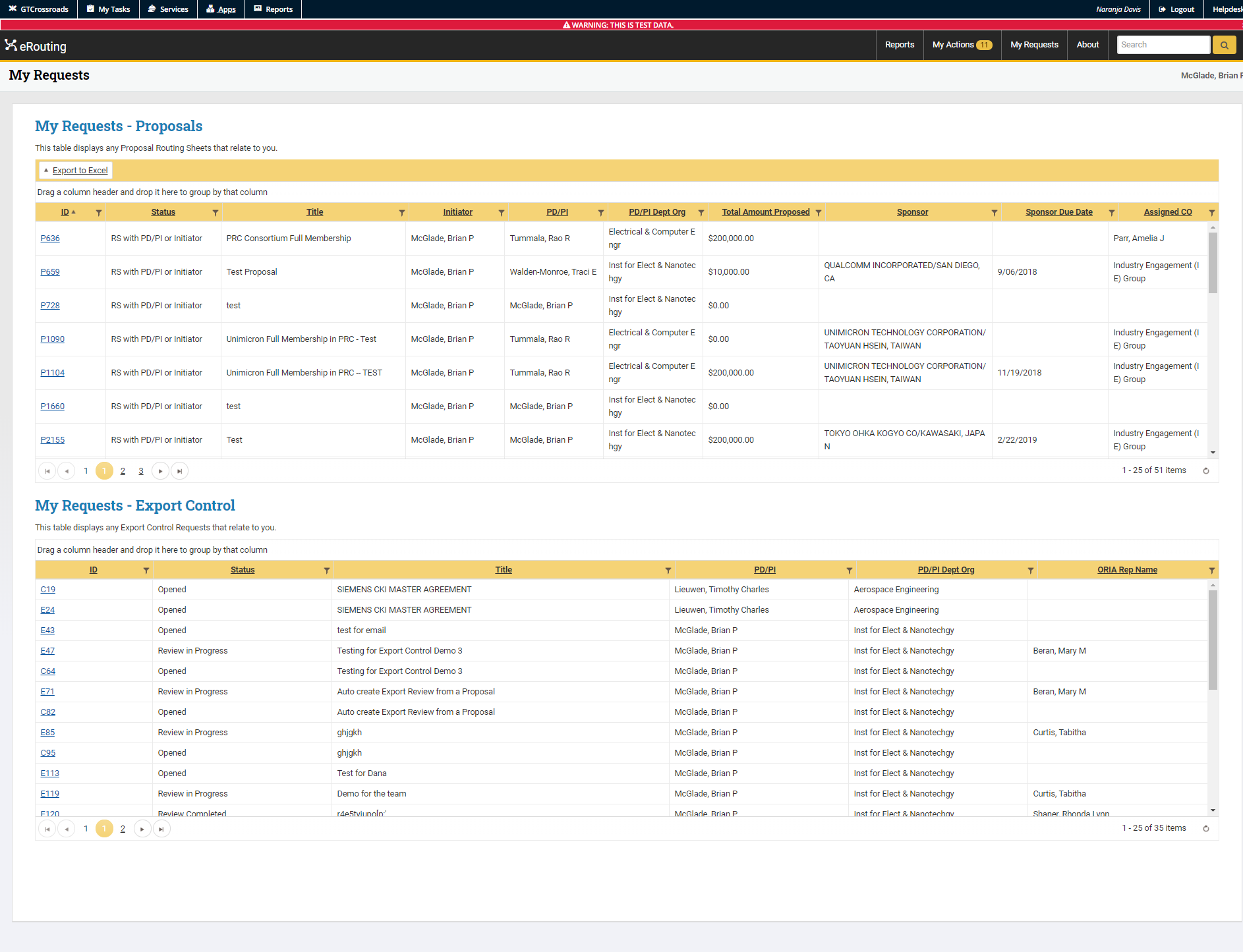


**Home Page Components**

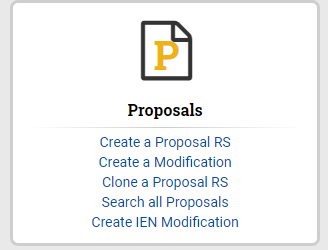
* **My Actions –** displays Proposals and Export Control (reviews and certifications) waiting for an action to be performed by the User— Screenshot will be different for GTRI



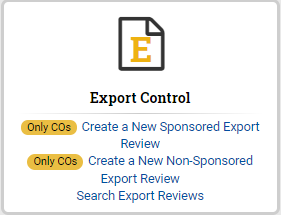
* **My Requests -** displays all Proposals and Export Control (reviews and certifications) requested by the User— Screenshot will be different for GTRI



* **Proposals Module –** used to create a new Proposal Routing Sheet to Office of Sponsored Programs (OSP). OSP will use this information to submit the proposal to the Sponsor. Users can **Create a Proposal RS, Create a Modification, Clone a Proposal RS, Search all Proposals and Create IEN Modification—** Screenshot will be different for GTRI



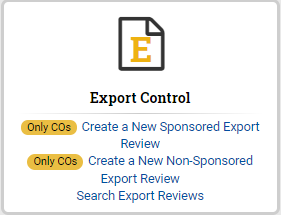
* **Export Control Module** **–** usedto create a New Sponsored Export Review, a New Non-Sponsored Export Review and Search Export Reviews.



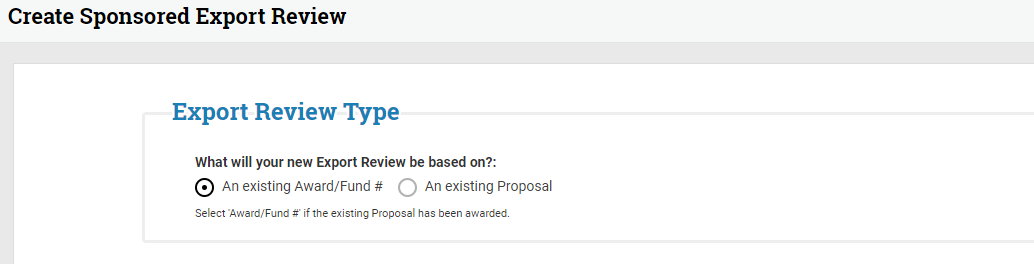
# Export Control Module

## Create a New Sponsored Export Control Review from an existing Award/Fund #

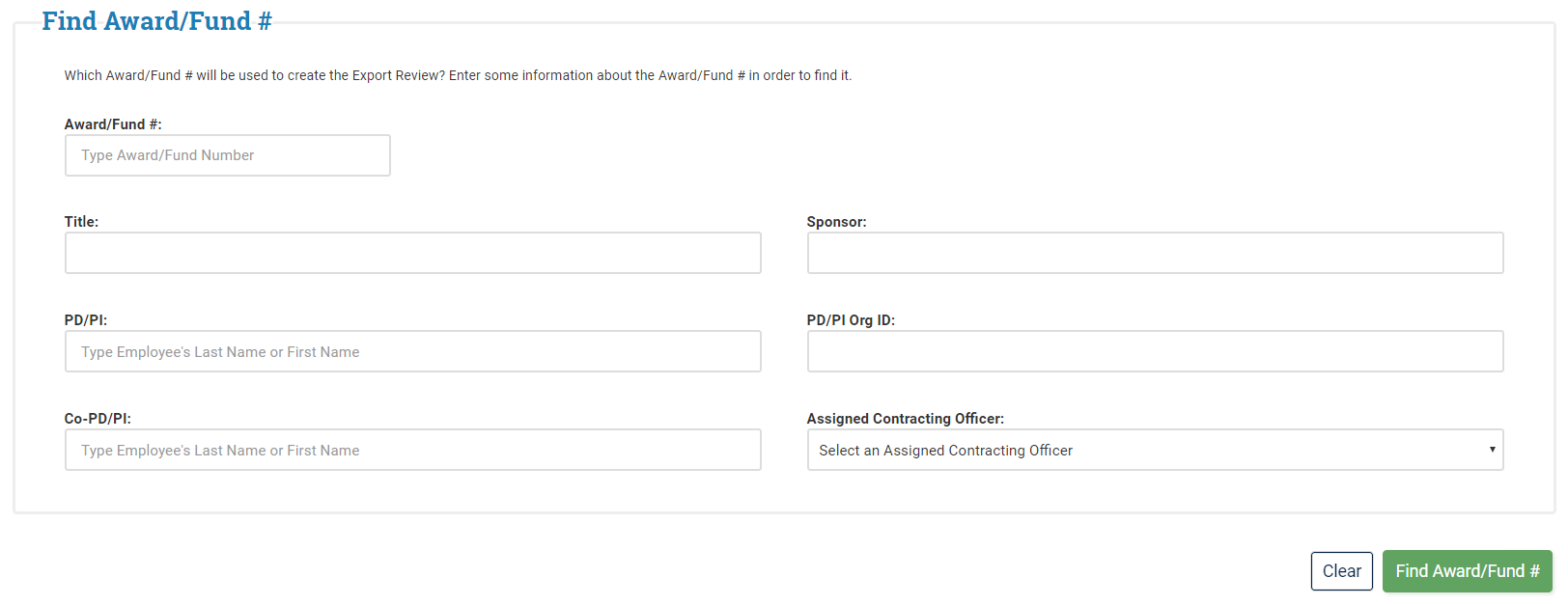
* Click **Create a New Sponsored Export Control Review** to create a review:
  + The Office of Sponsored Programs (OSP) will be the initiator



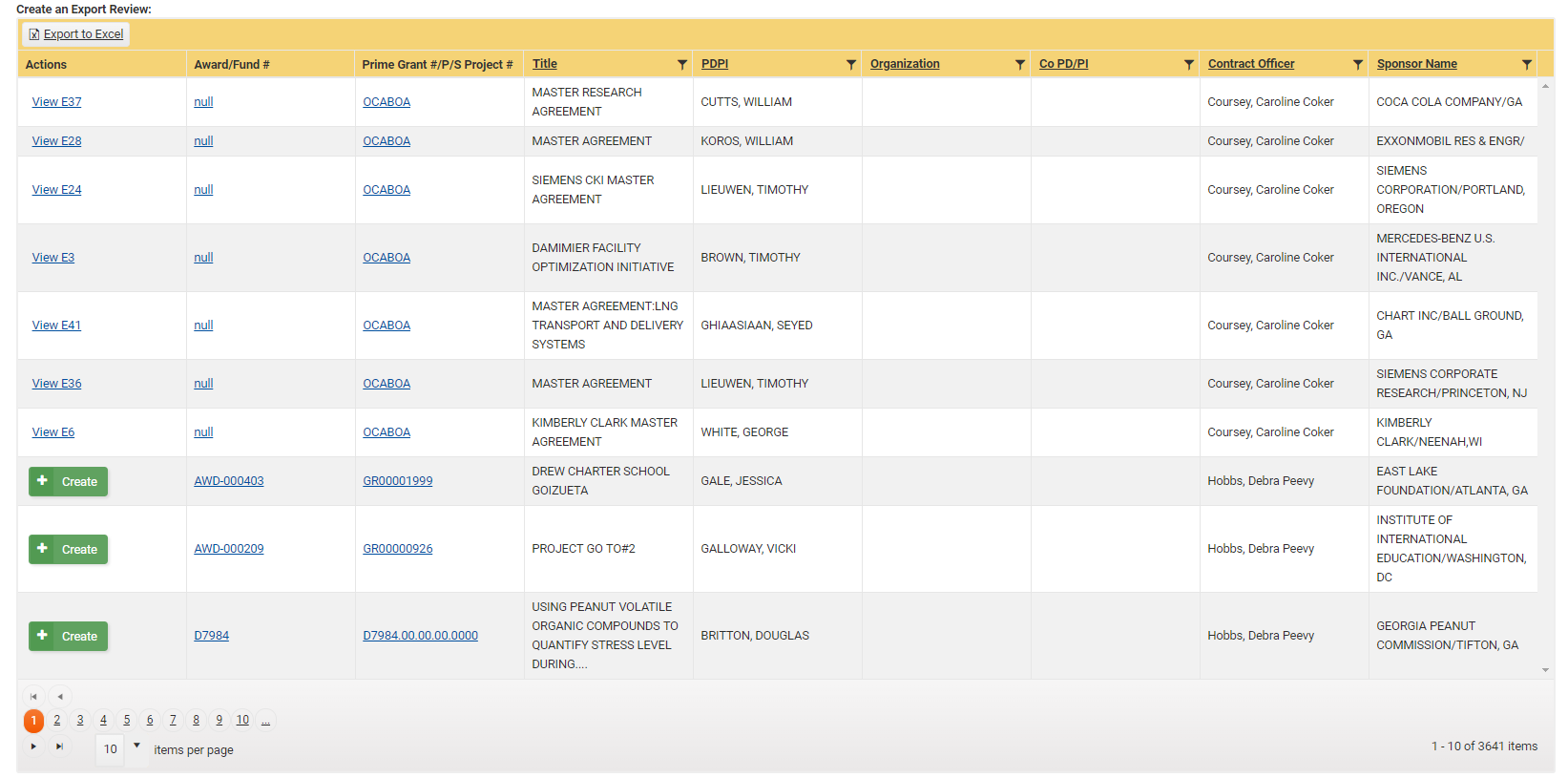
* A new screen will appear for the User to select what the new Export Review will be based on.
  + Click **An** **existing Award/Fund #**, which gives the User the option to search by the available fields



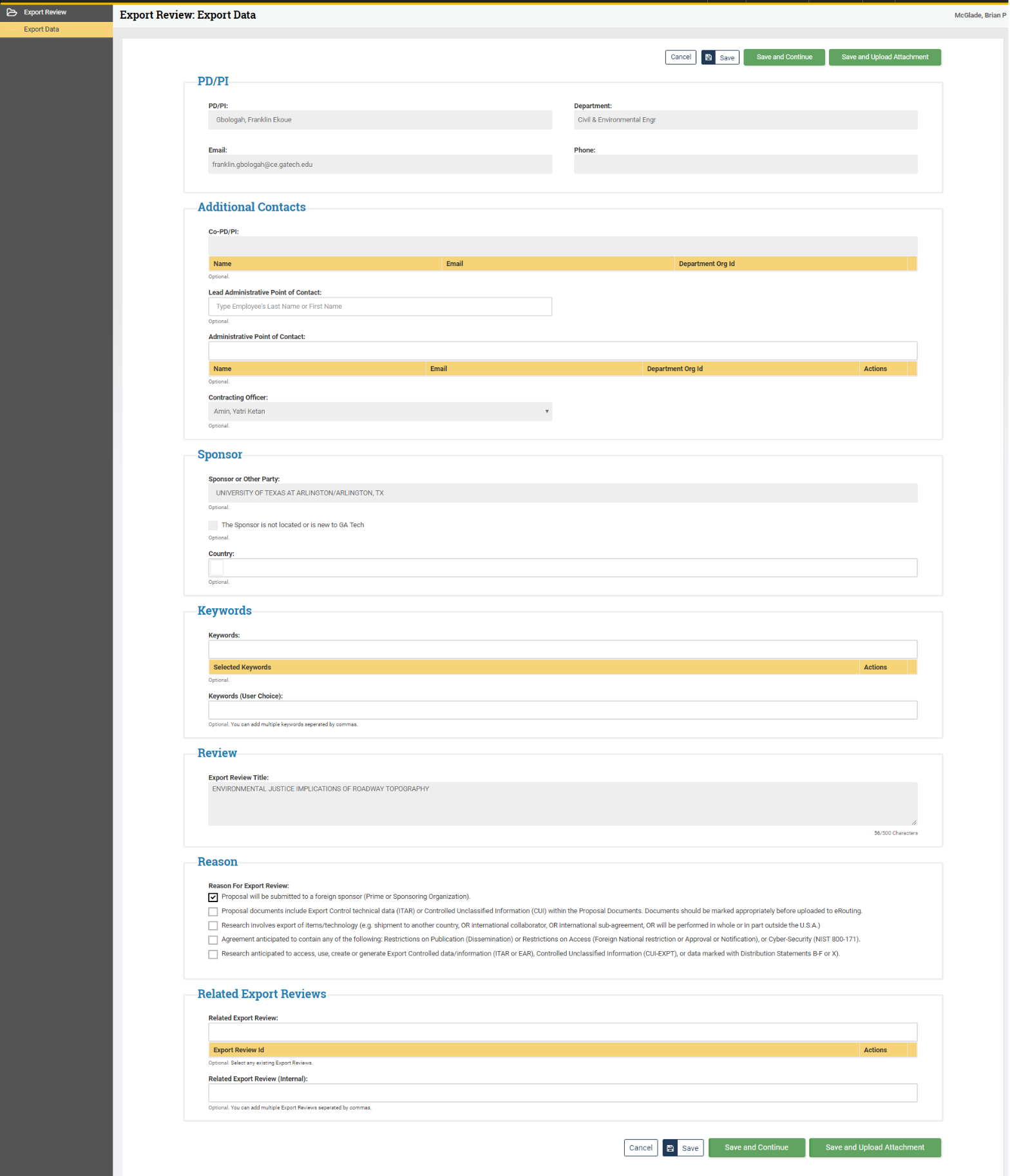
* The User will enter any available field to narrow their search



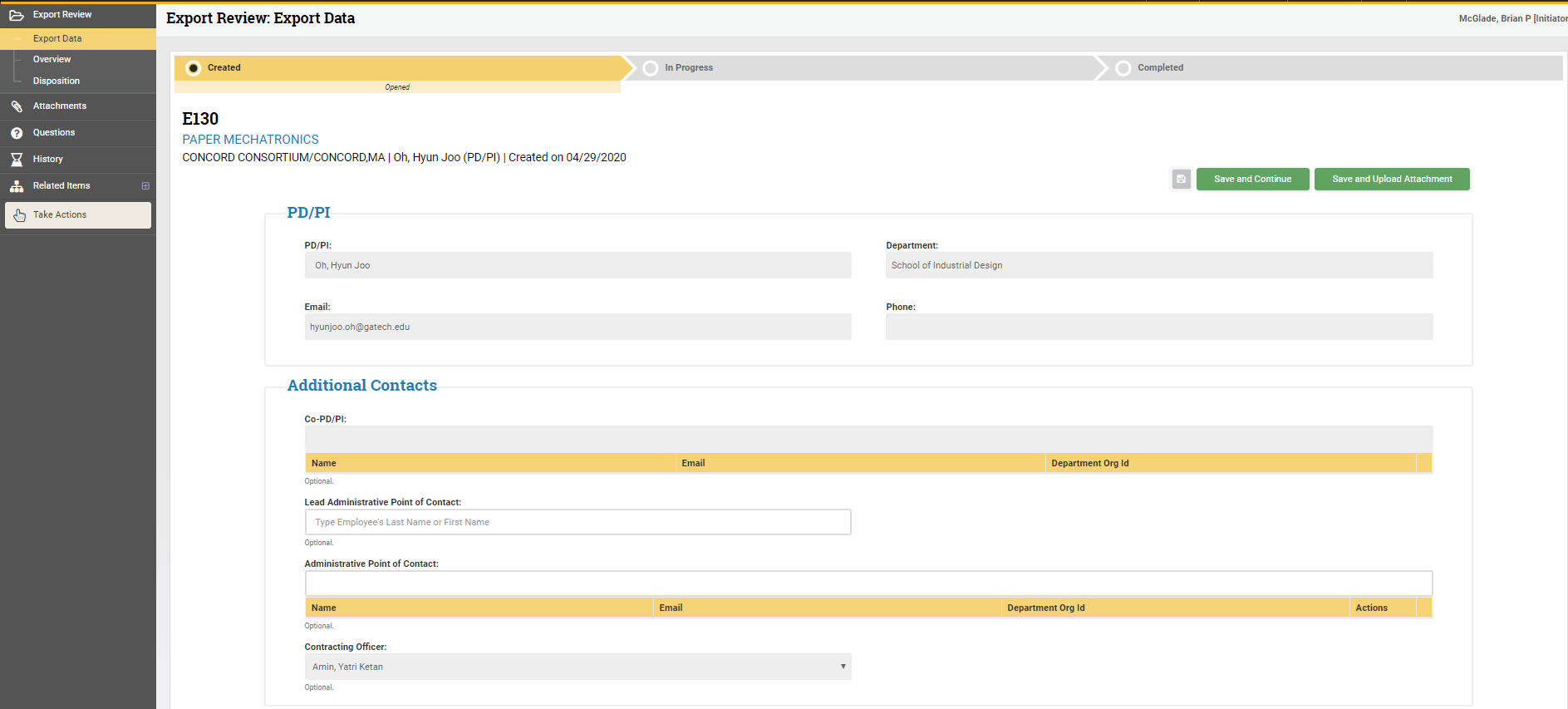
* The following screen will appear and the User will select **+ Create** next to the desired Award/Fund #
  + The **Actions** column will allow the User to view Export Review already created or create new ones by clicking the **+Create** button

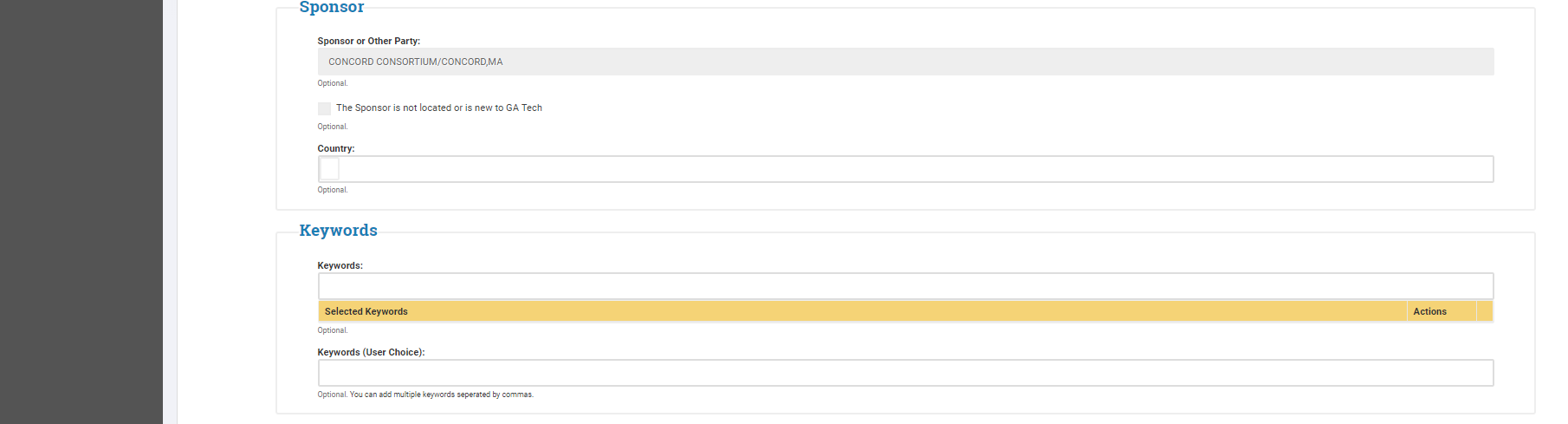


* Once the User has clicked the **+ Create** icon, the below screen will appear for the User to enter data on the **Export Review:** **Export Data**.
  + **NOTE:** If the PD/PI is different from the Initiator then the User performing the actions will be given the Initiator Role

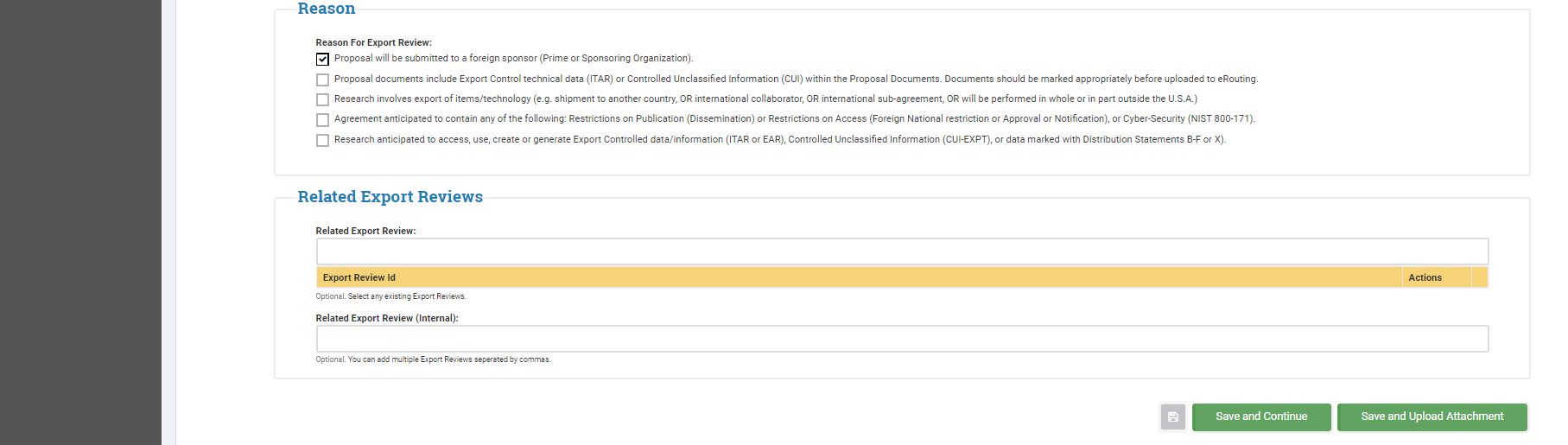


* The User is assigned the role of Initiator
* The following fields are pre-populated, all others are optional:
  + PD/PI
  + Contracting Officer
  + Sponsor or Third Party
  + Export Review Title
* Once all required fields are completed, click **Save and Continue** or **Save and Upload Attachment** at the bottom of the screen
  + **NOTE:** An eRouting Export Control review number is assigned upon clicking save from the **Export Review:** **Export Data** screen

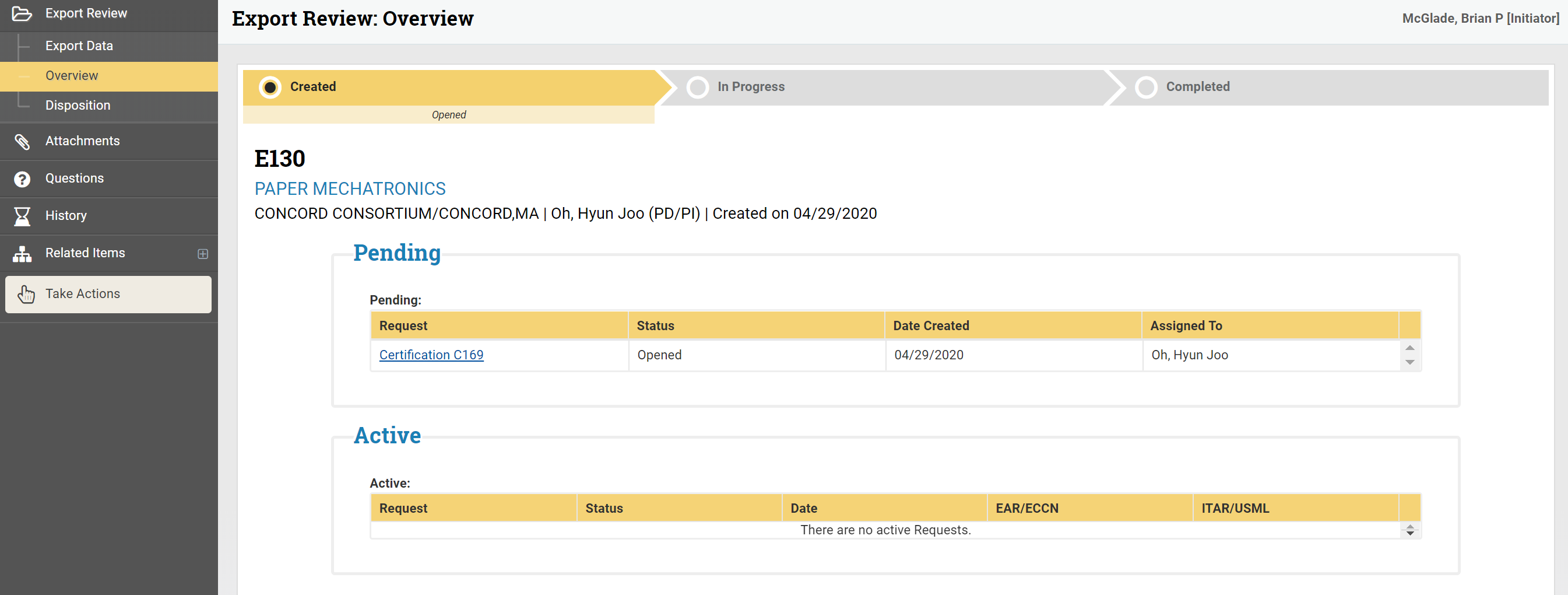




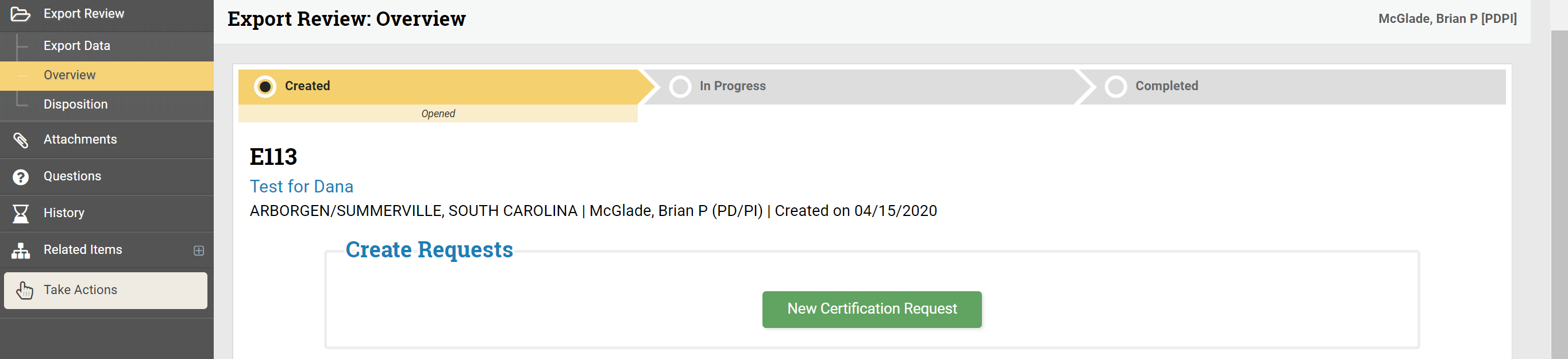
* The **Reason** sectionis pre-populated by information that was entered in the Proposal eRouting Module but should be updated to reflect any changes
* Related **Export Reviews** may be identified if relevant to the current review (e.g. a review completed for a previous phase of the project)
  + The User may type the Export Control number



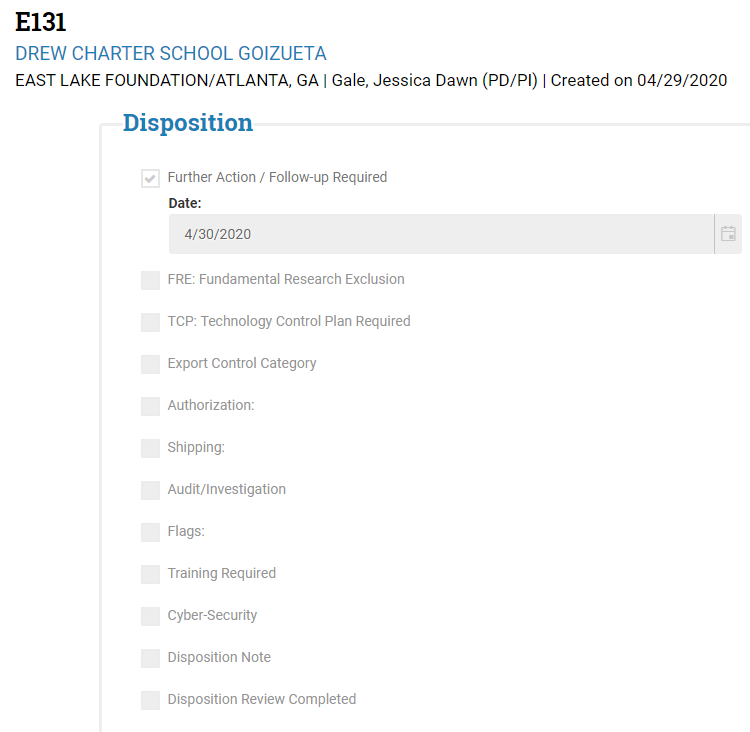
* Upon saving the Export Data
  + New tabs will appear on the left under **Export Review**
    - Navigation between the tabs is allowable at this point
  + The **Export Review: Overview** tab will provide information on the PD/PI Export Certification
    - Once the request have been approved by ORIA it will then become **Active**



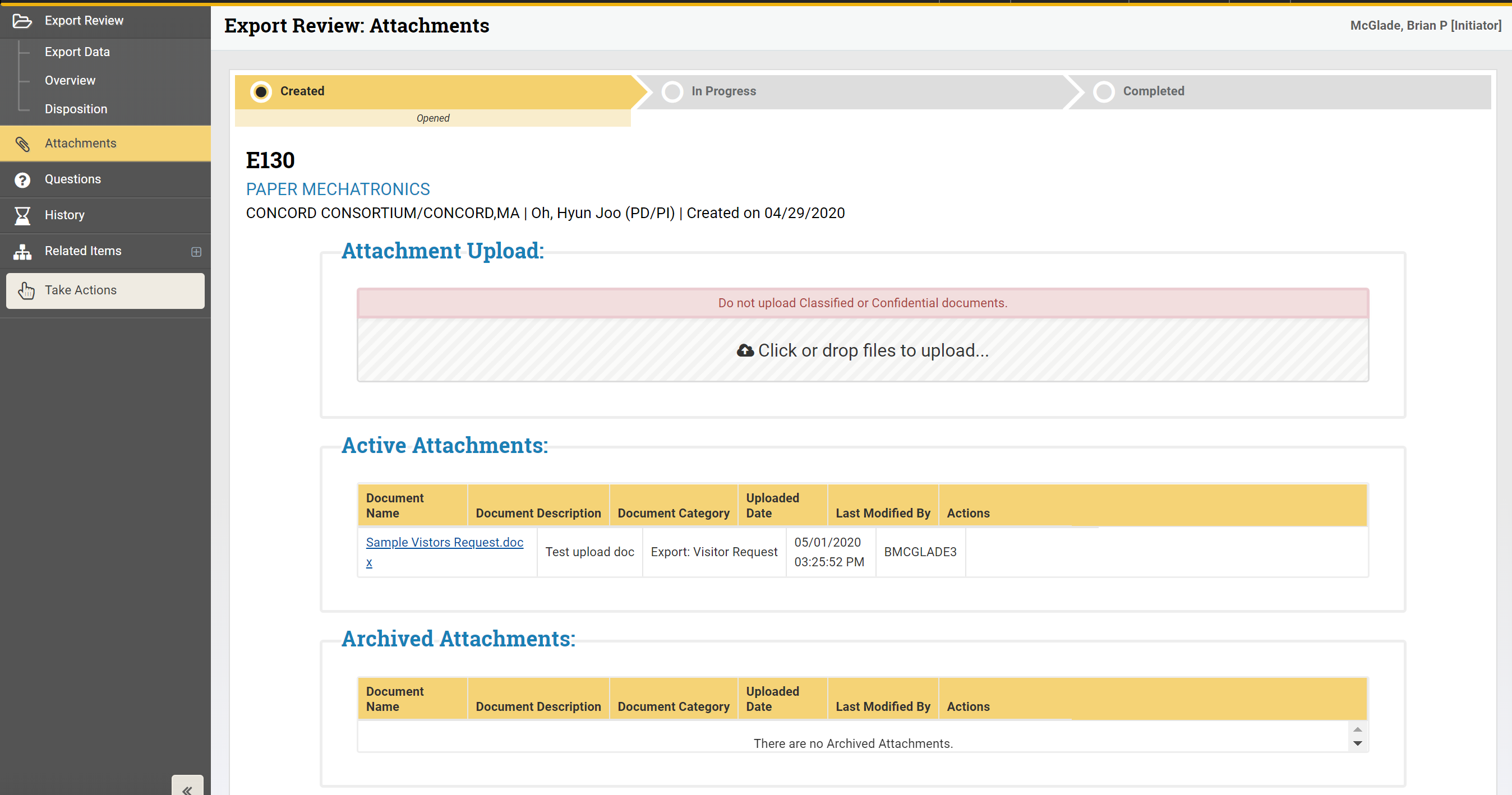
* + The ORIA Team will request a **New Certification Form** on the **Export Review: Overview** if needed
    - Remember, this step is needed if “Proposal will be submitted to a foreign sponsor (Prime or Sponsoring Organization)” is not selected in the **Reason** section of the **Export Data** tab



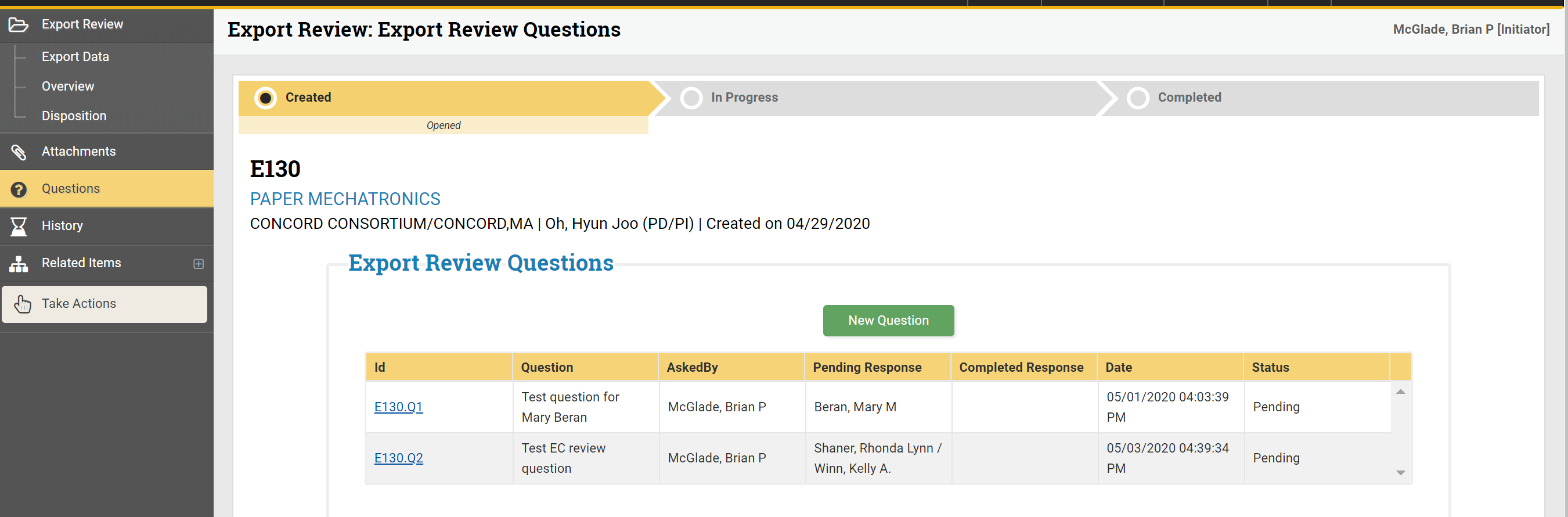
* The **Disposition** tab is for ORIA use and is a read-only section for the User



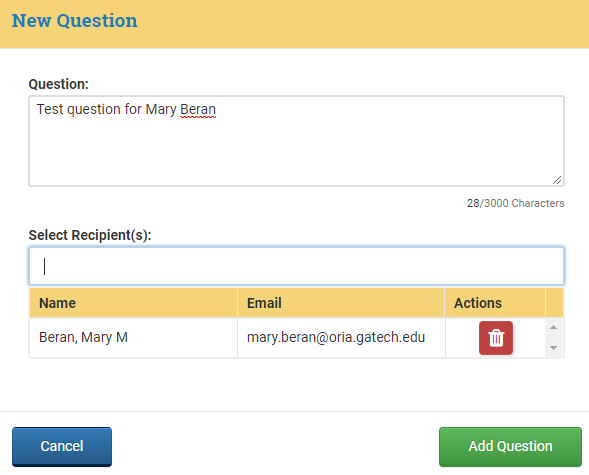
* The **Attachments** tab will allow the User to upload, manage and edit attachments
  + Attachments are optional (e.g. Sponsored Agreement, SOW, etc.)



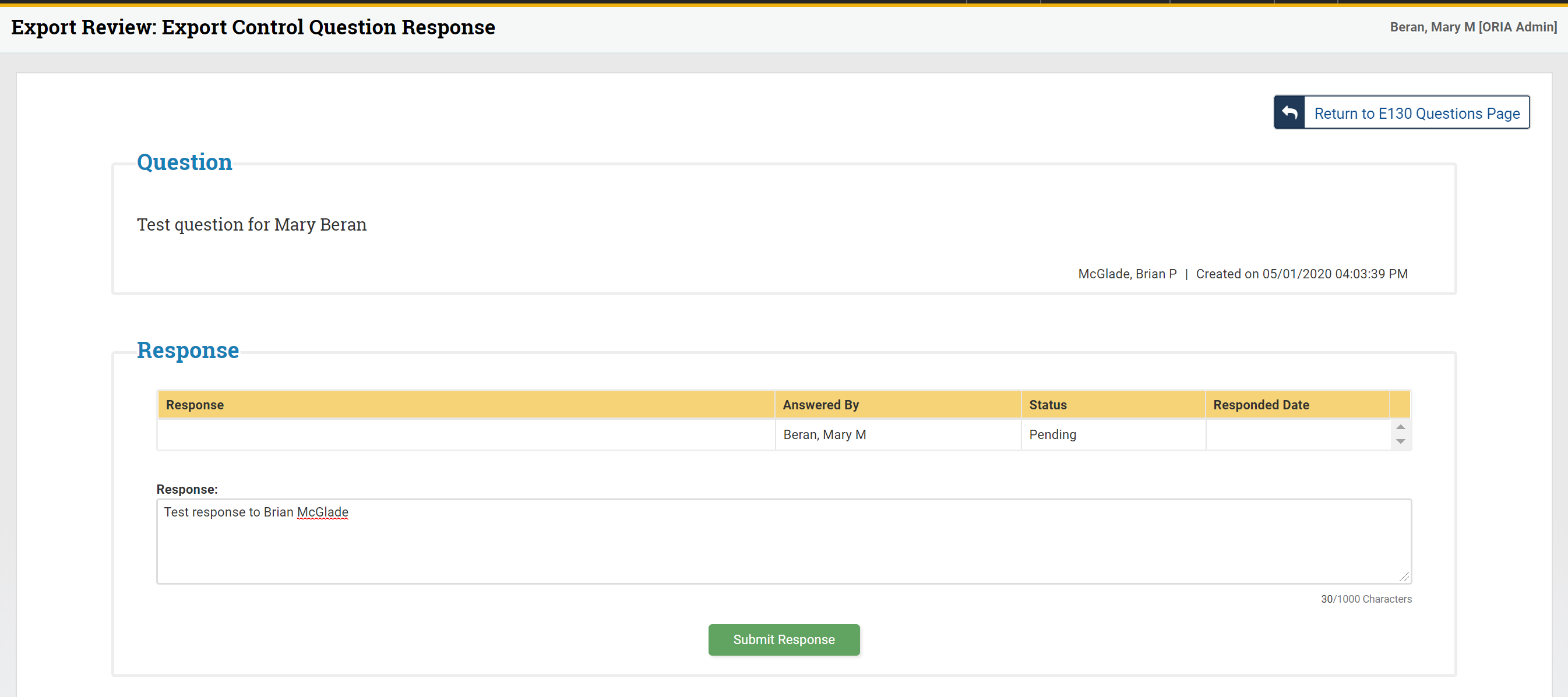
* The **Questions** tab will allow for Q&A between select recipient(s)
  + The User may add more than one person per question



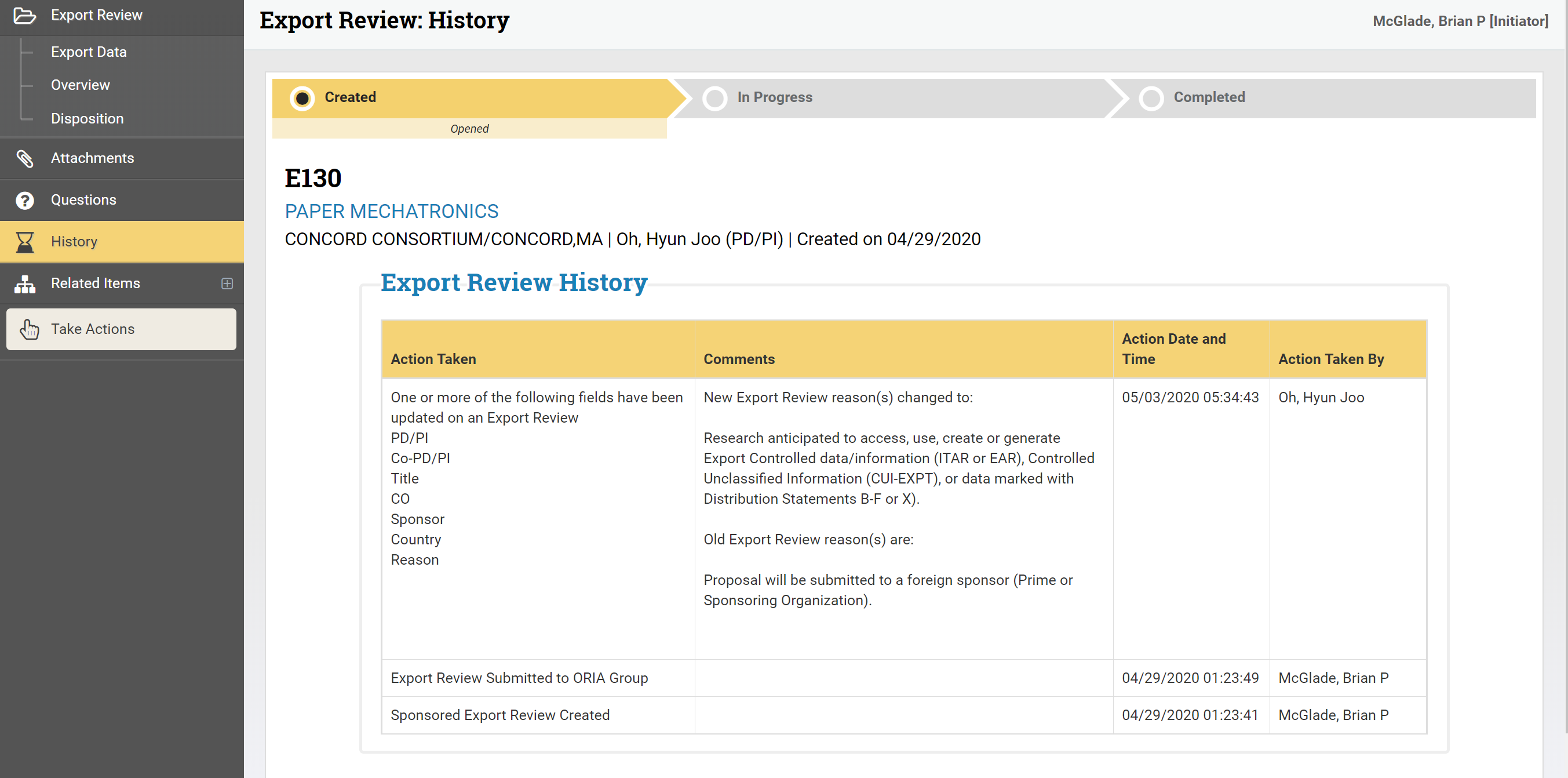
* + Upon clicking the **New Question** button (pg. 10), the below box will appear. This is where question(s) are entered



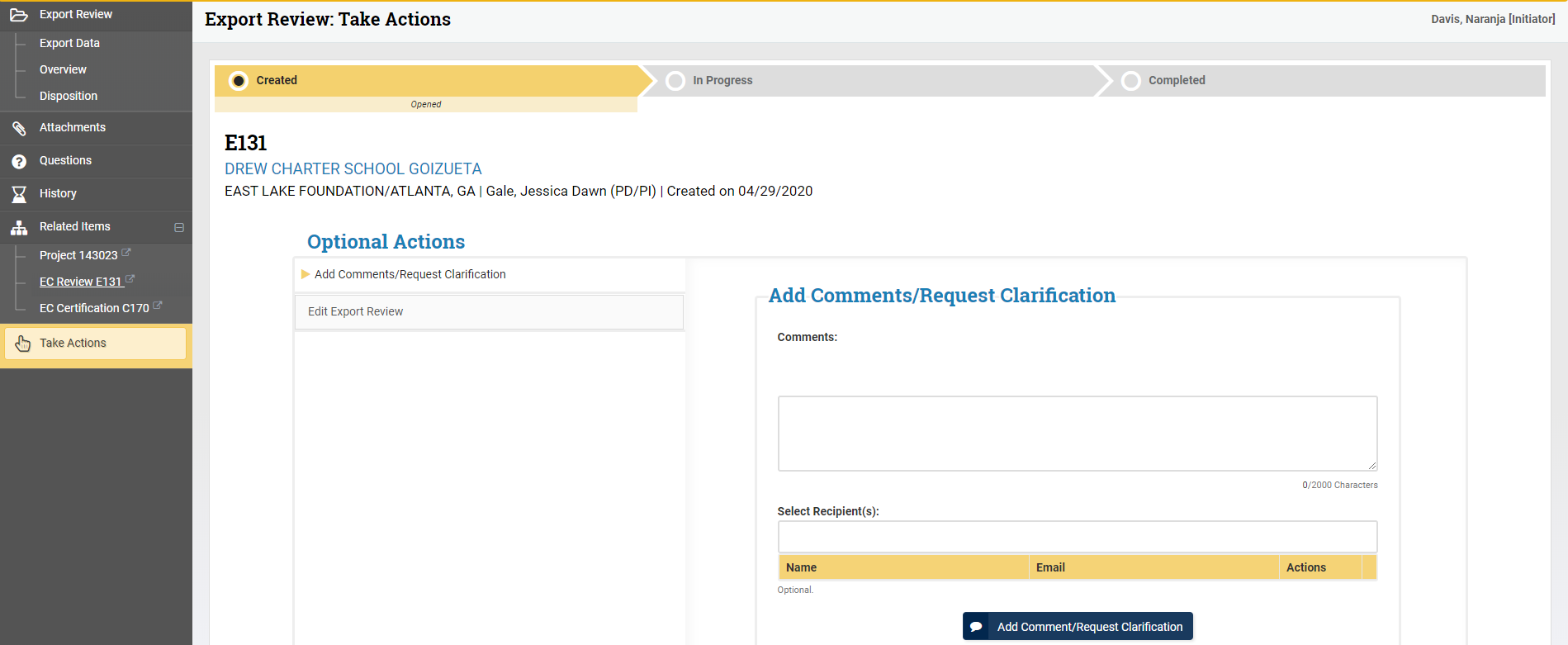
* + The User can view or respond to question(s) within **My Actions**
    - The recipient(s) will see the **Question** and **Response** section screen



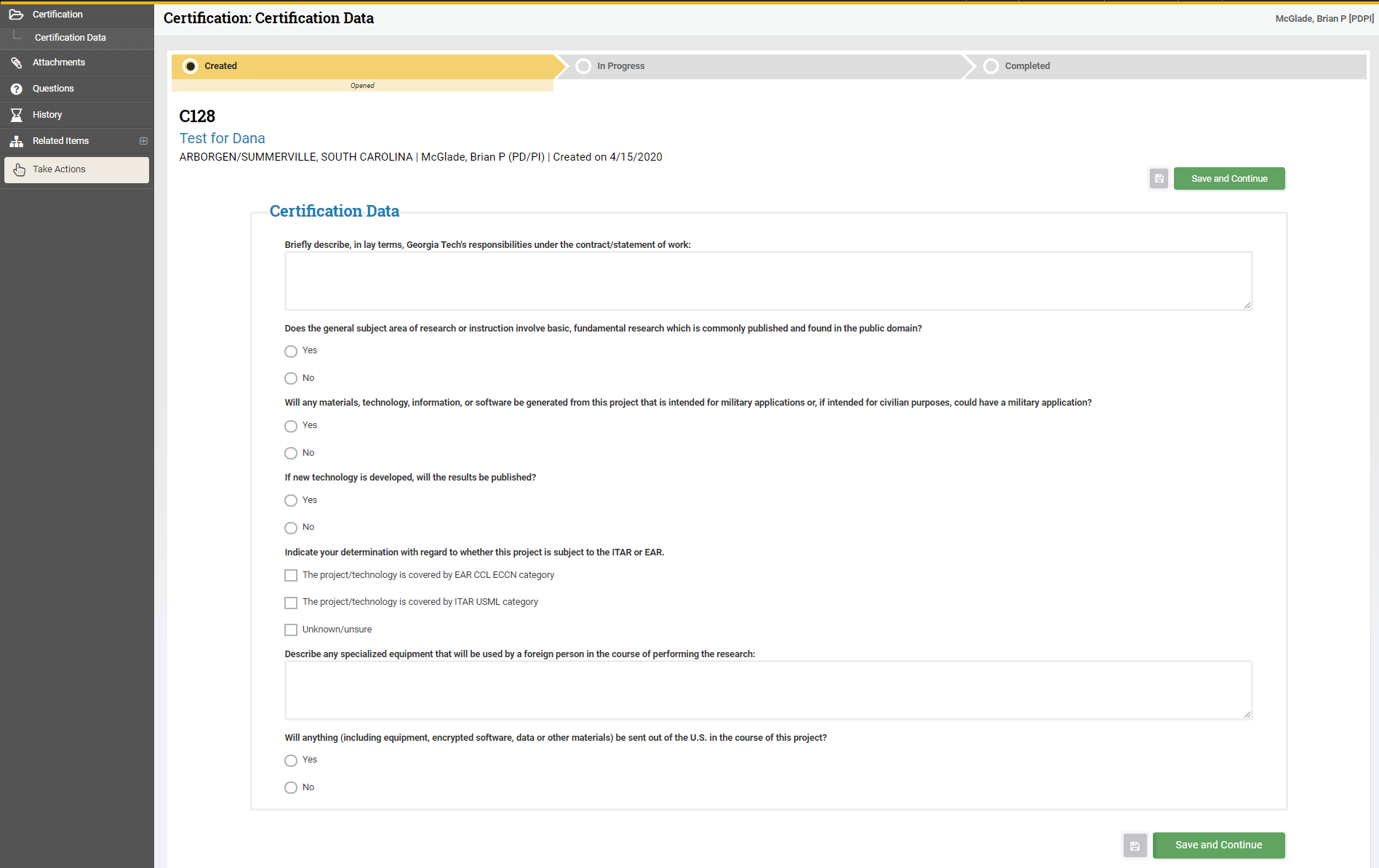
* The **Export Review:** **History** tab will show all actions taken on a review as well as show who performed the action



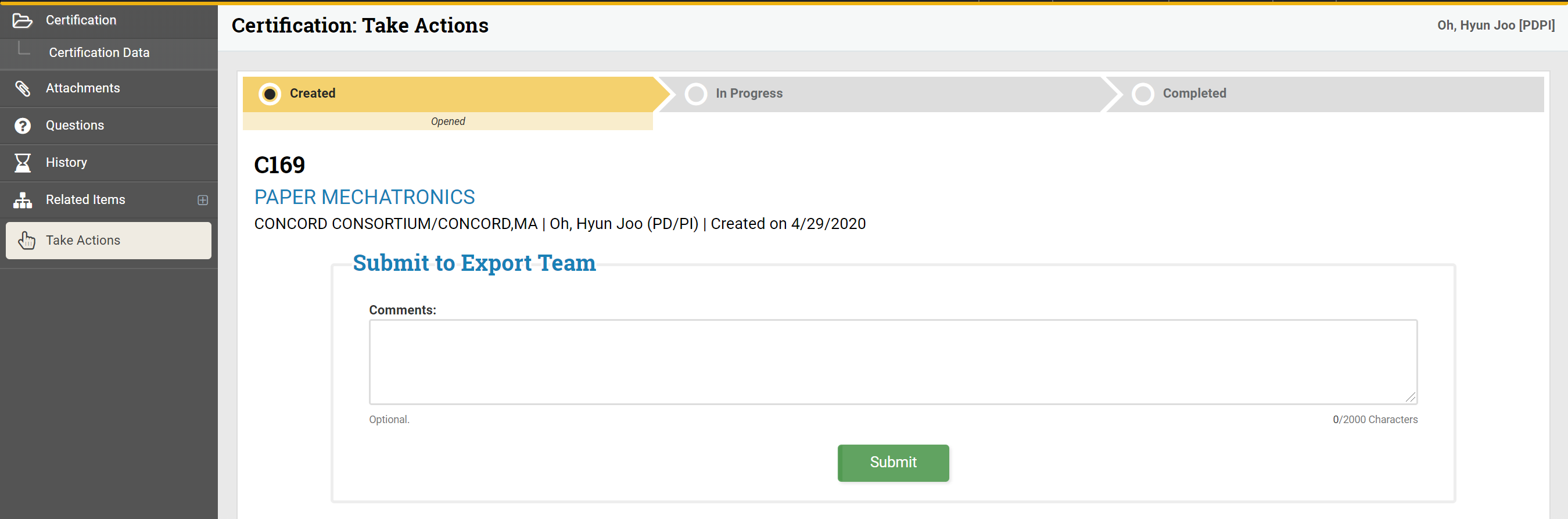
* The **Export Review:** **Take Actions** tab will allow you to:
* **Edit Export Review**, **Add Comments** and **Request Clarification**
* **Related Items** allows the User to toggle between records that have been create on the eRouting platform

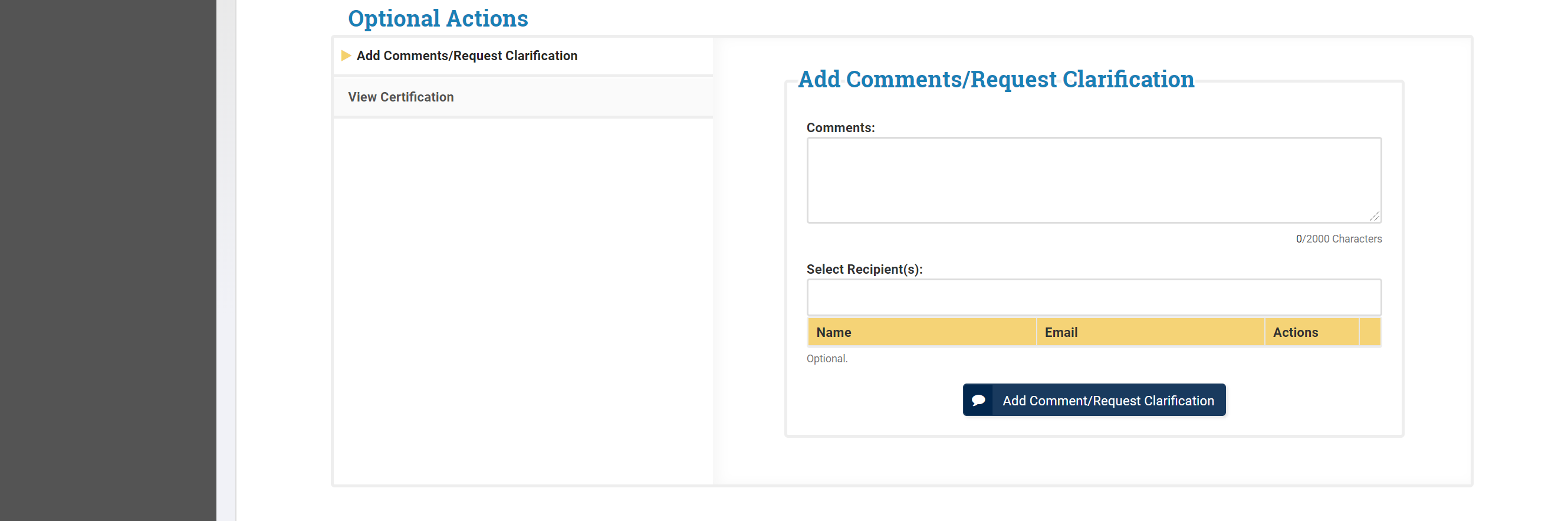


* + **Certification: Certification Data** allows the PD/PI to answer questions relevant to the Export Control review
    - Only the PD/PI can complete this section
    - PD/PI must provide additional information where needed if an answer is “Yes”
    - PD/PI can click the save icon without submitting answer. However, all questions must be answered prior to submitting the review or the system will generate an error message



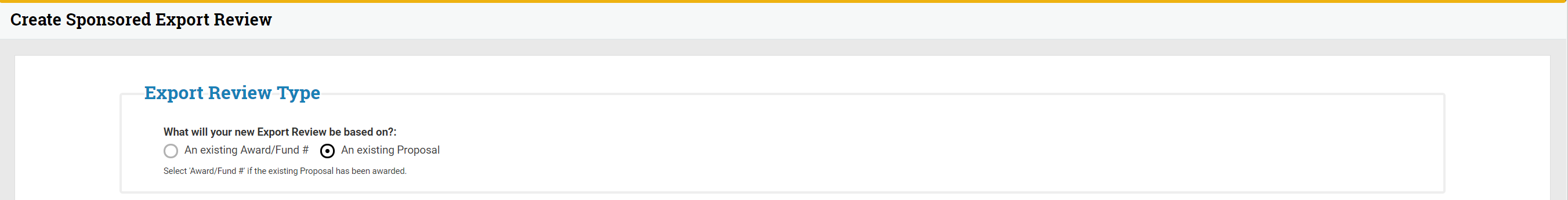
* Upon clicking save and continue on the Certification: Certification Data screen, the PDPI has certified the data. The below screen will appear and the PD/PI has the option to click **Submit, View Certification** or **Add Comments/Request Clarification**
  + The PD/PI must click **Submit** for the Export Team to receive the review



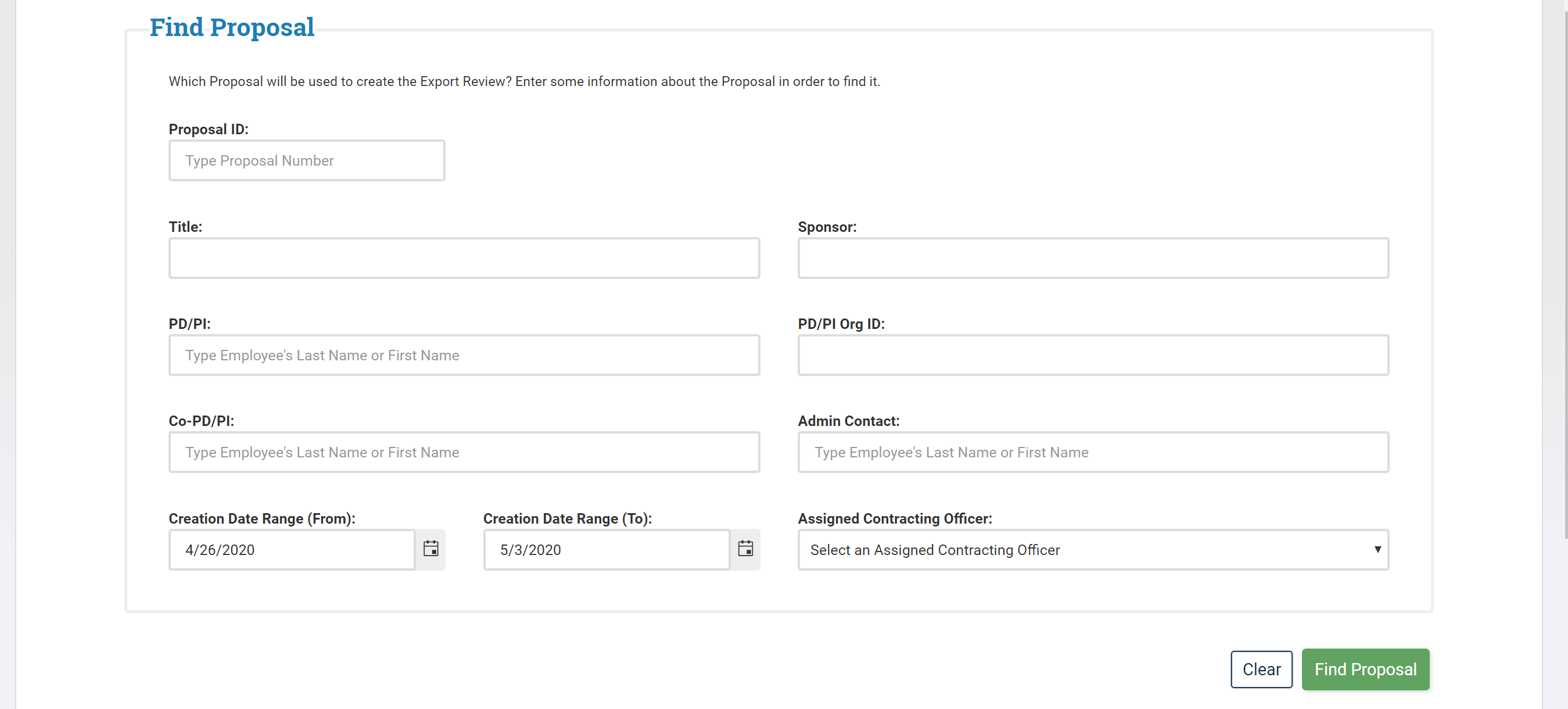


## Create a New Sponsored Export Control Review from an **Existing Proposal**

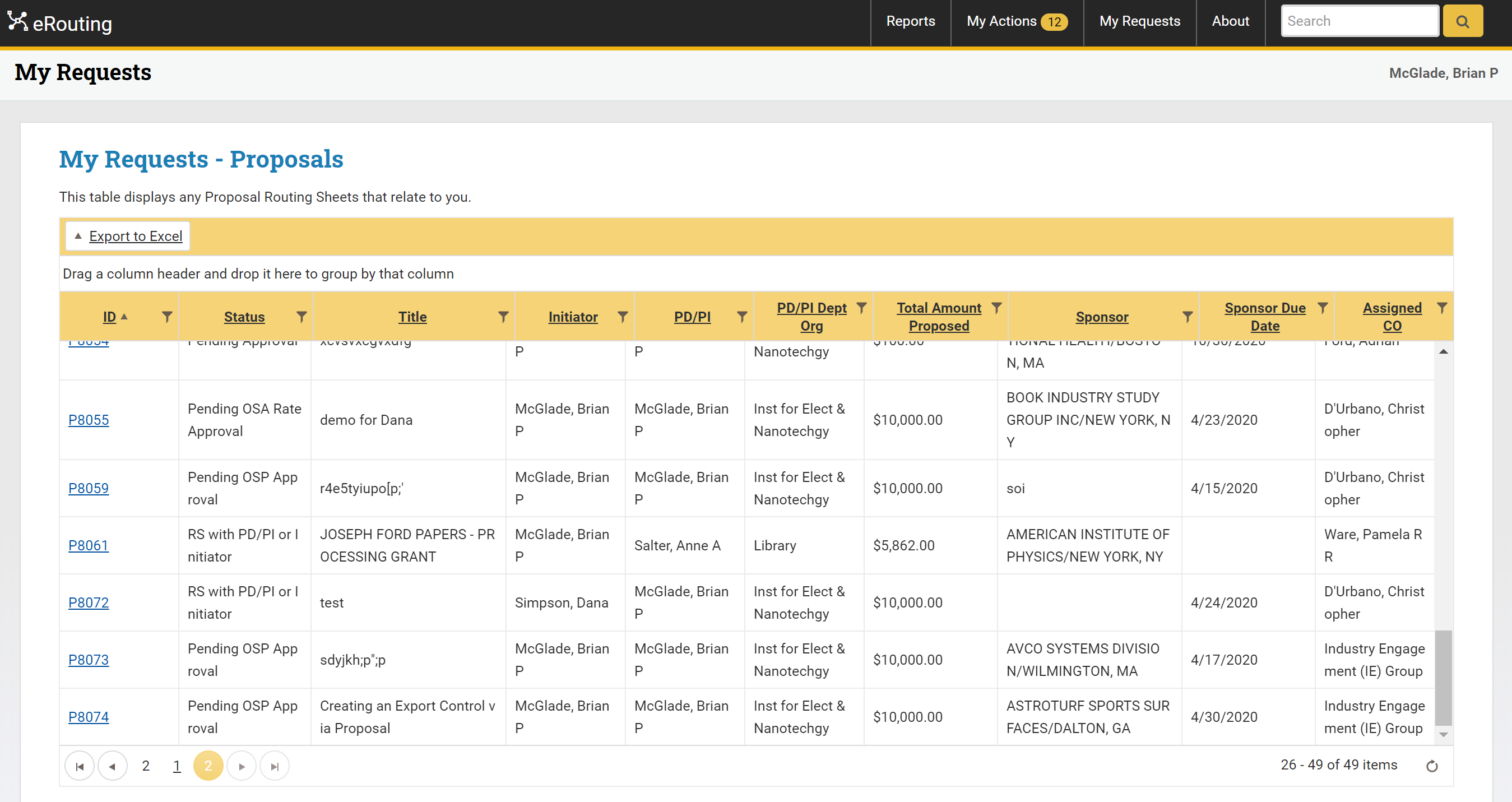
* + Click **An** **existing Proposal**, which gives the User the option to search by the available fields



* The User can search by using the **Proposal ID** and clicking the **Find Proposal** icon



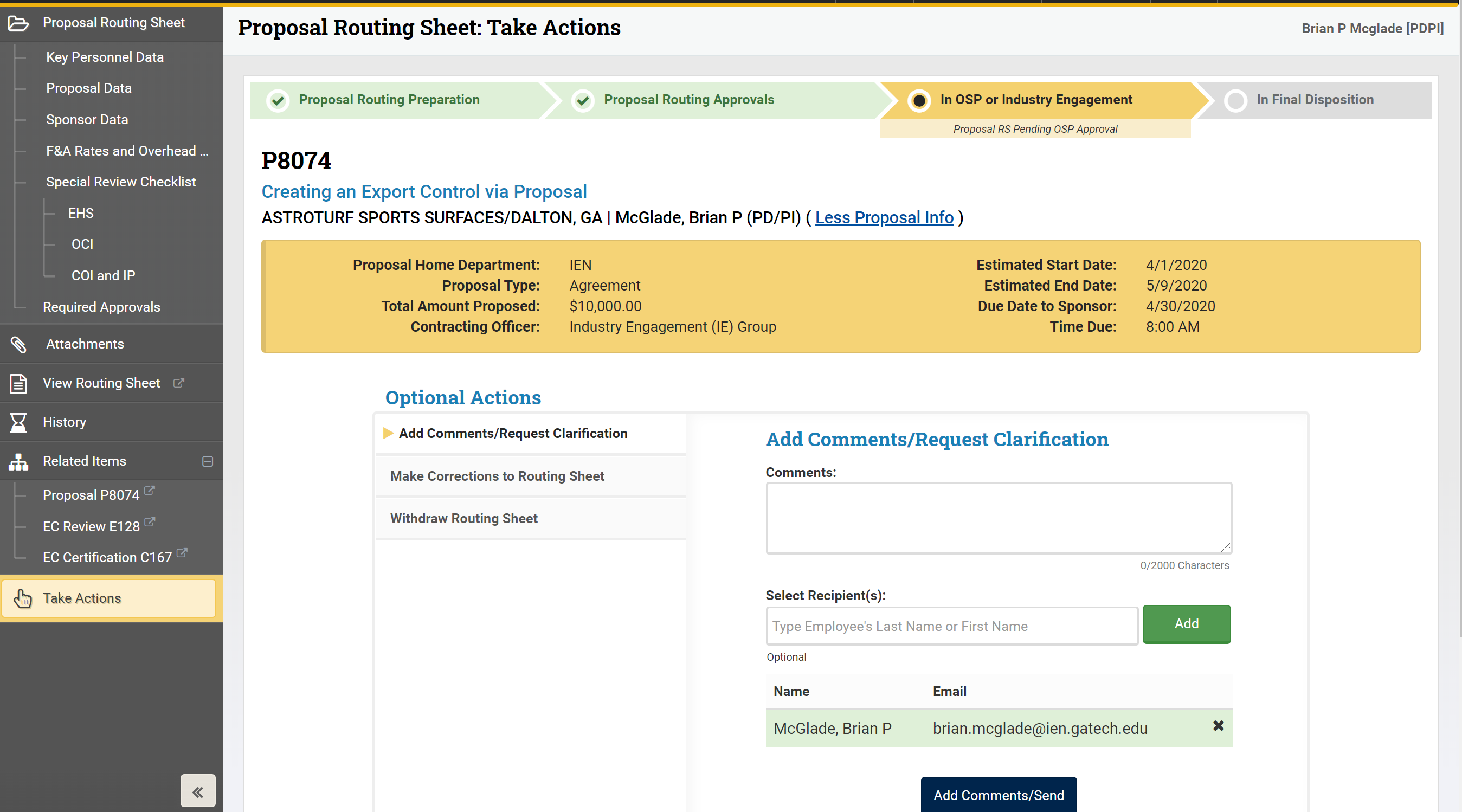
* The User may also search for an existing proposal by clicking **My Request—**Screenshot will be different for GTRI



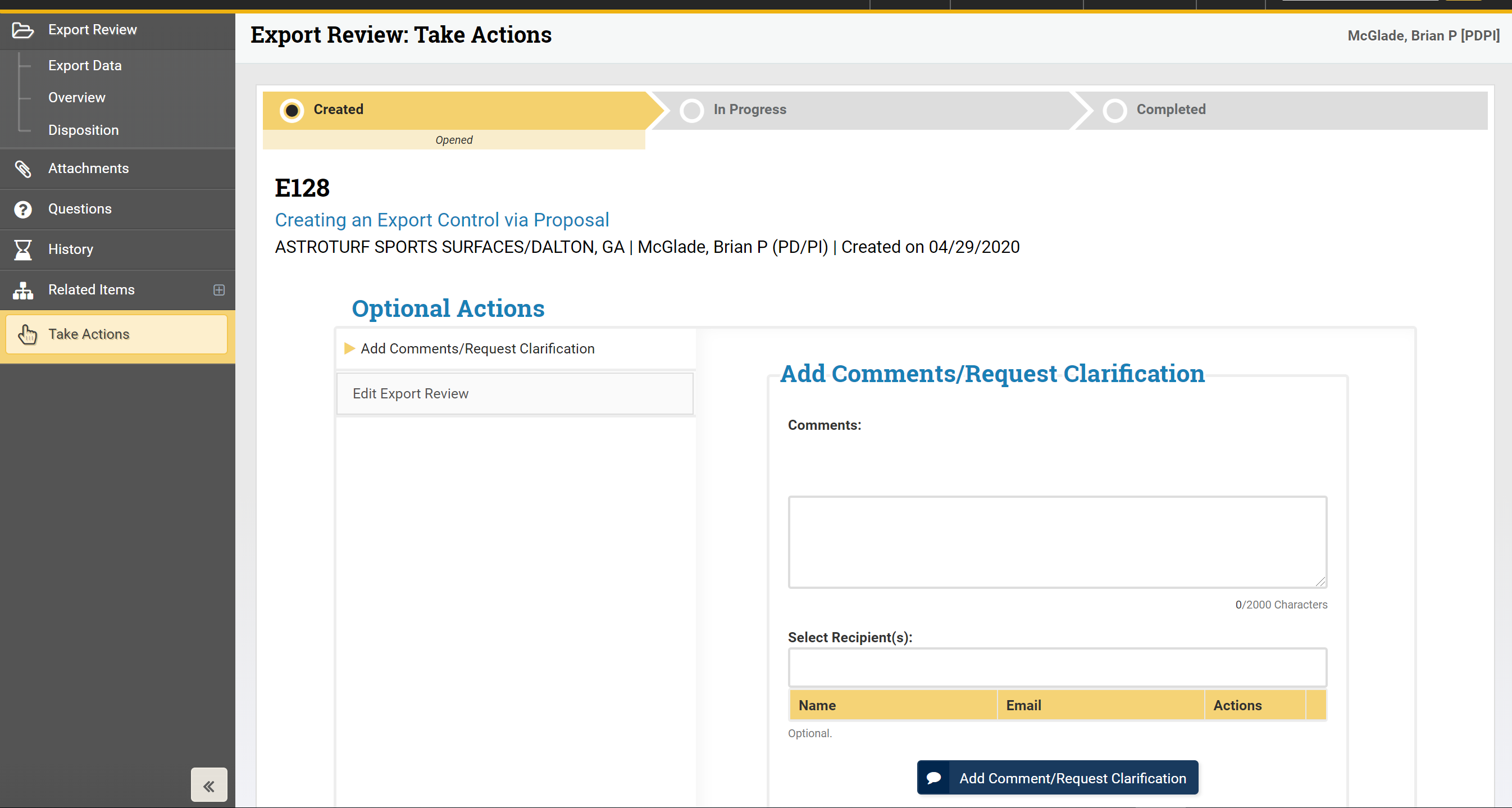
October 6, 2021 notes Sheila

How to get Disposition to work and respond:

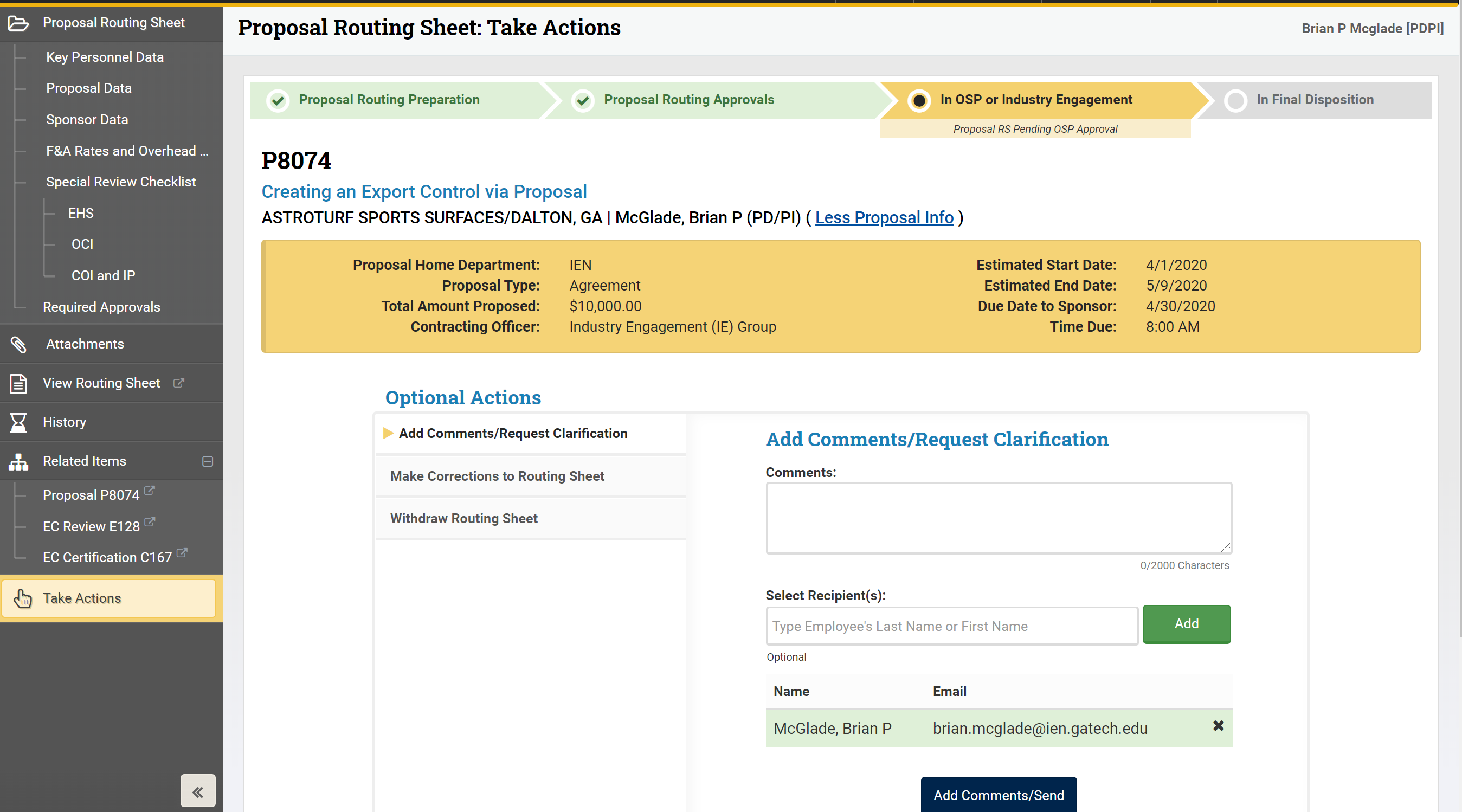
* remember when you look into eRouting file such as E505 and I wanted to add things to Disposition,  I could not get the check marks to move or change anything.
* At the bottom of the Disposition page there is a green button that says submit .
* However, when the page is grayed out and you cannot click anything, the green button says Update.
* If you click Update, the form allows you to make changes.
  + Once the User has located and clicked the proposal, the **Proposal Routing Sheet:** **Take Actions** screen will appear
    - **Note:** The User is in the Proposal Module in eRouting at this point
    - The User will navigate to the **EC Review** under **Related Items** on the navigation tool bar



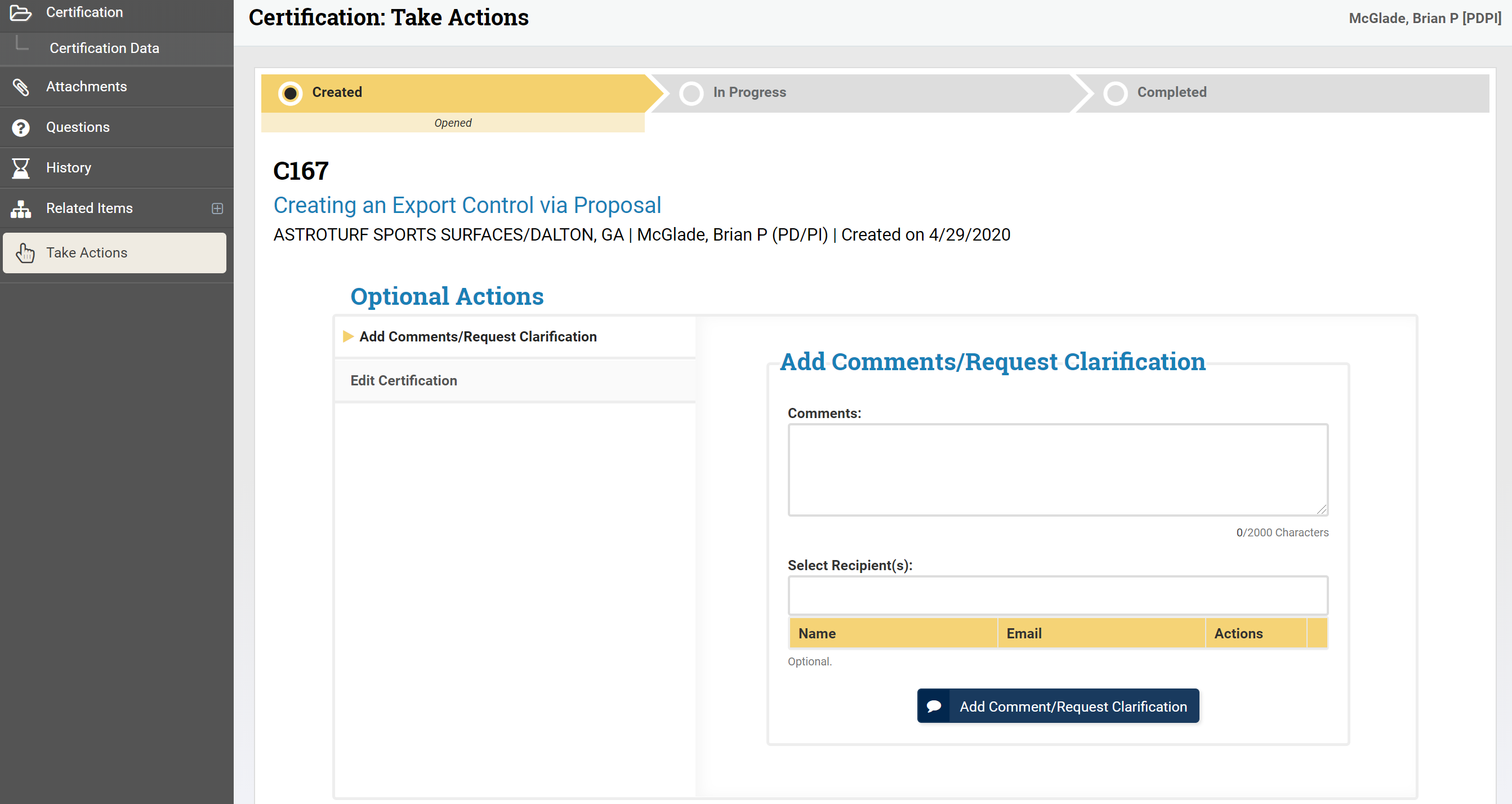
* Once the User clicks EC Review (instructions above), the **Export Review: Take Actions** tab will appear
  + The User can click **Edit Export Review** to review and/or edit data entered or **Add Comments/Request Clarification** for select recipient(s)



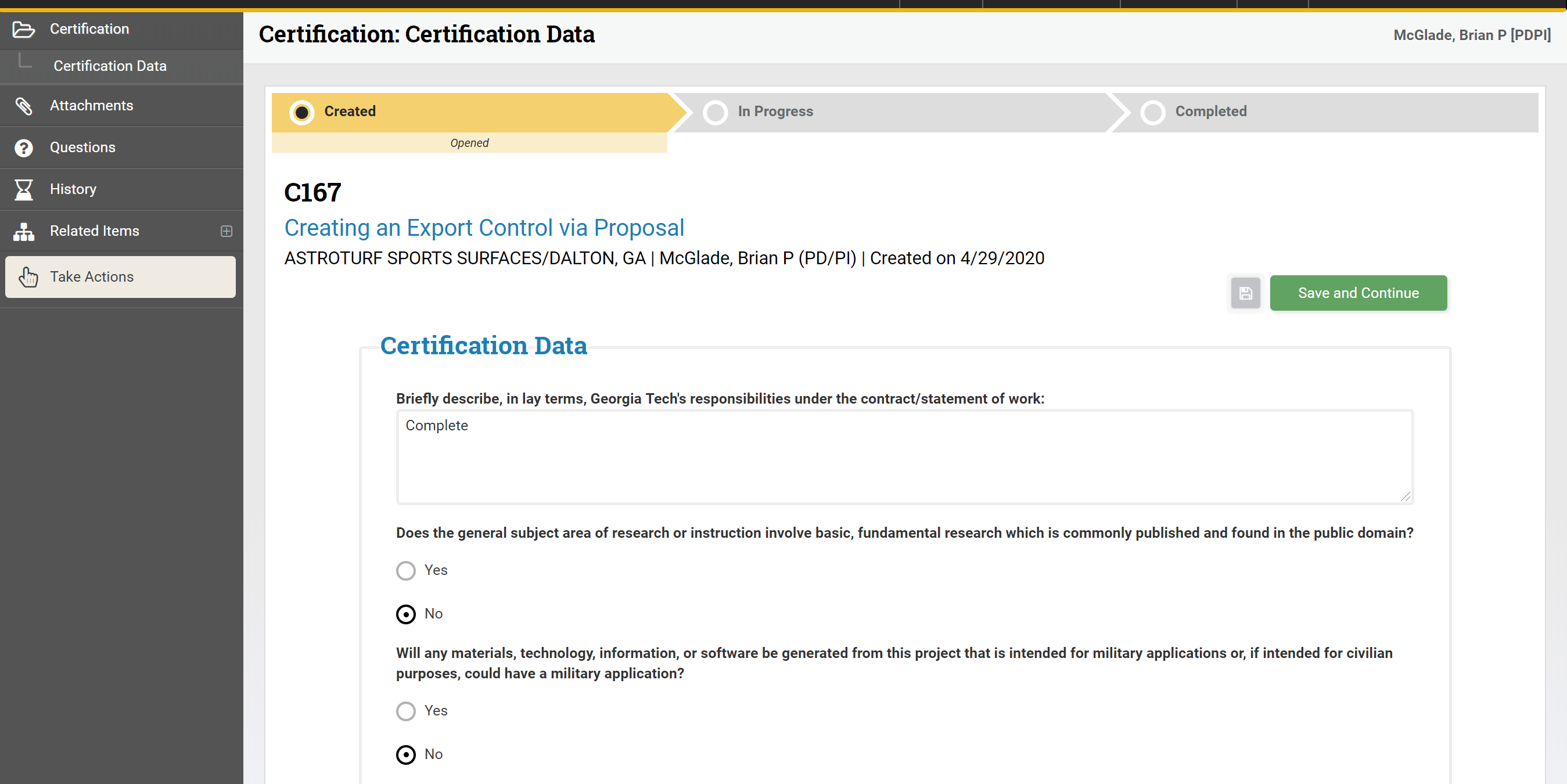
* The PD/PI will click **EC Certification** to certify the data

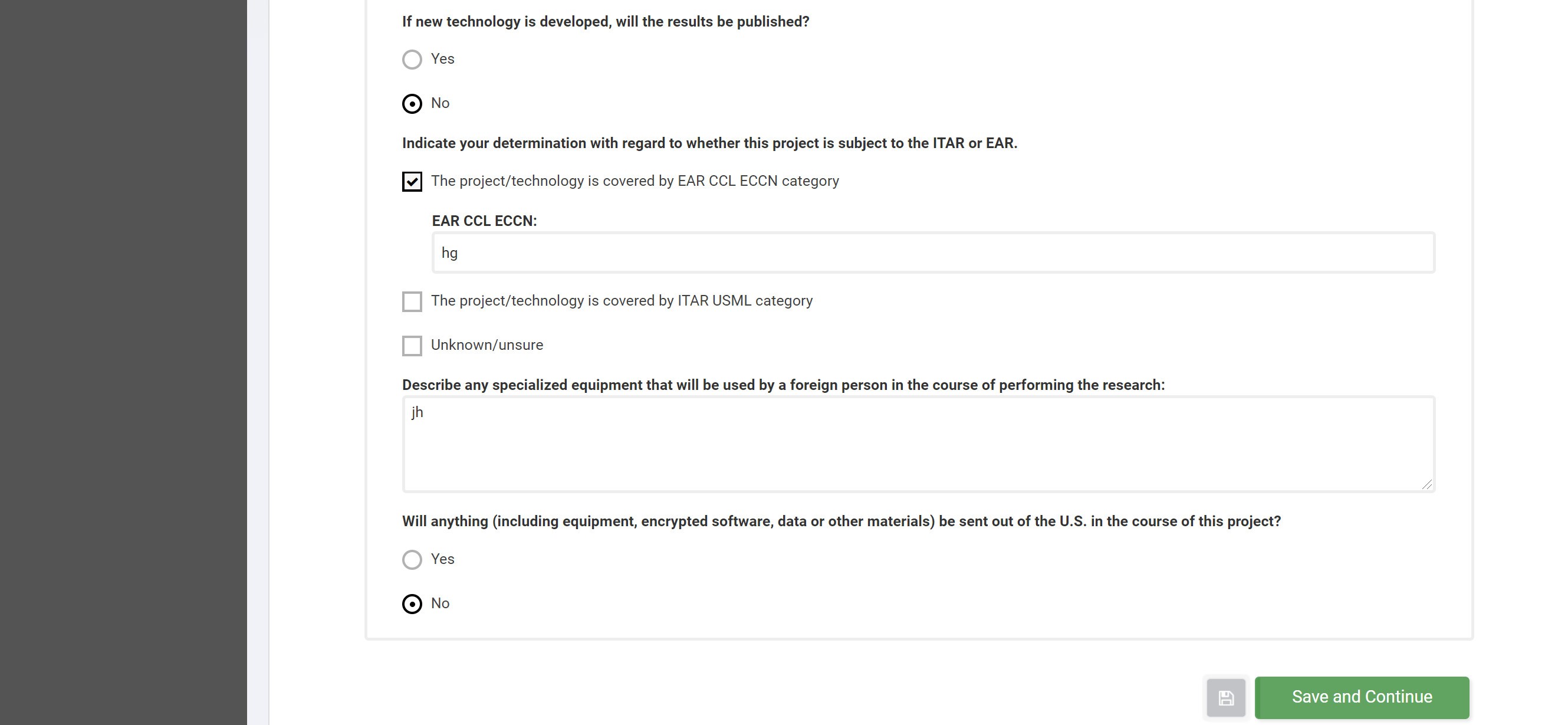


* Once the PD/PI clicks EC Certification (instructions above), the **Certification: Take Actions** screen will appear
  + The PD/PI will click **Edit Certification** to review and/or edit data entered or **Add Comments/Request Clarification** for select recipient(s)

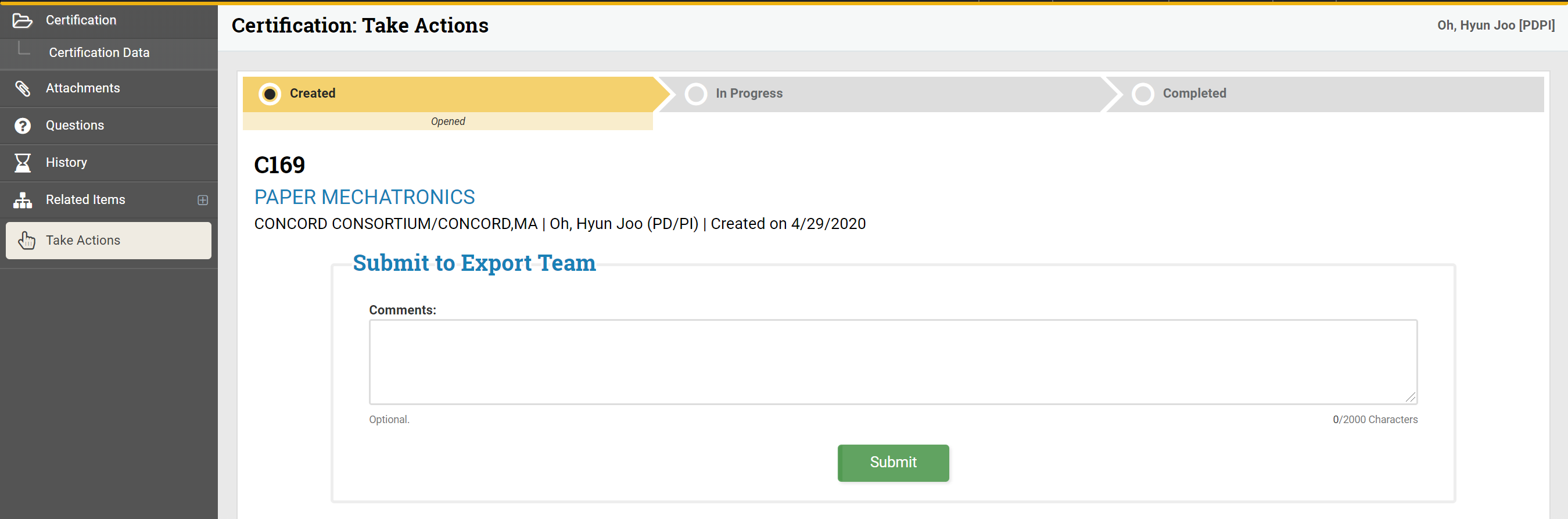


* + Review and/or edit the data entered
  + Click **Save and Continue**



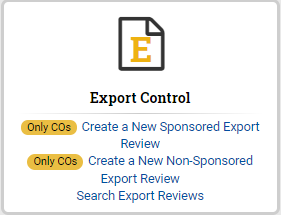


* + The PD/PI must click **Submit** for the Export Team to receive the review

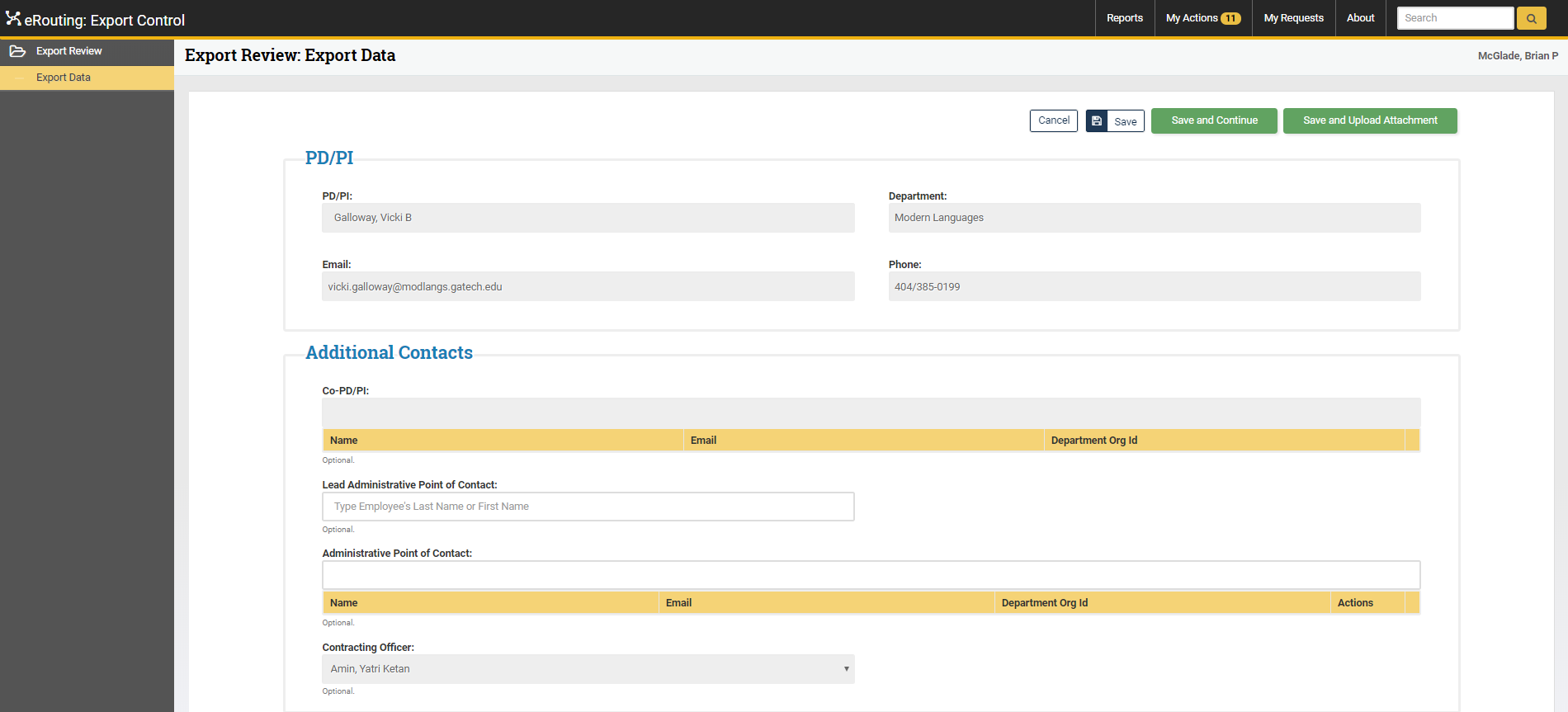


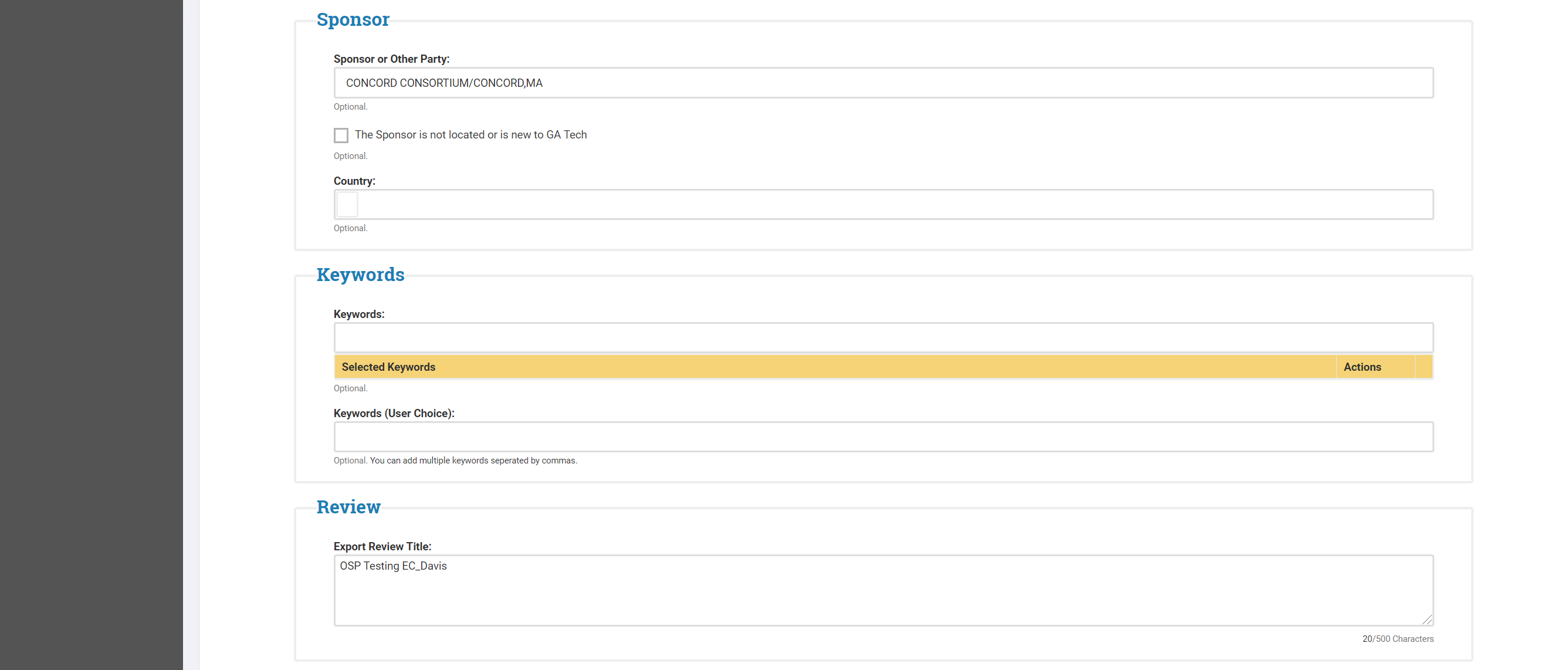
## Create a New Non-Sponsored Export Control Review

* Click **Create a New Non-Sponsored Export Control Review** to create a review:
  + The Office of Sponsored Programs (OSP) will be the initiator

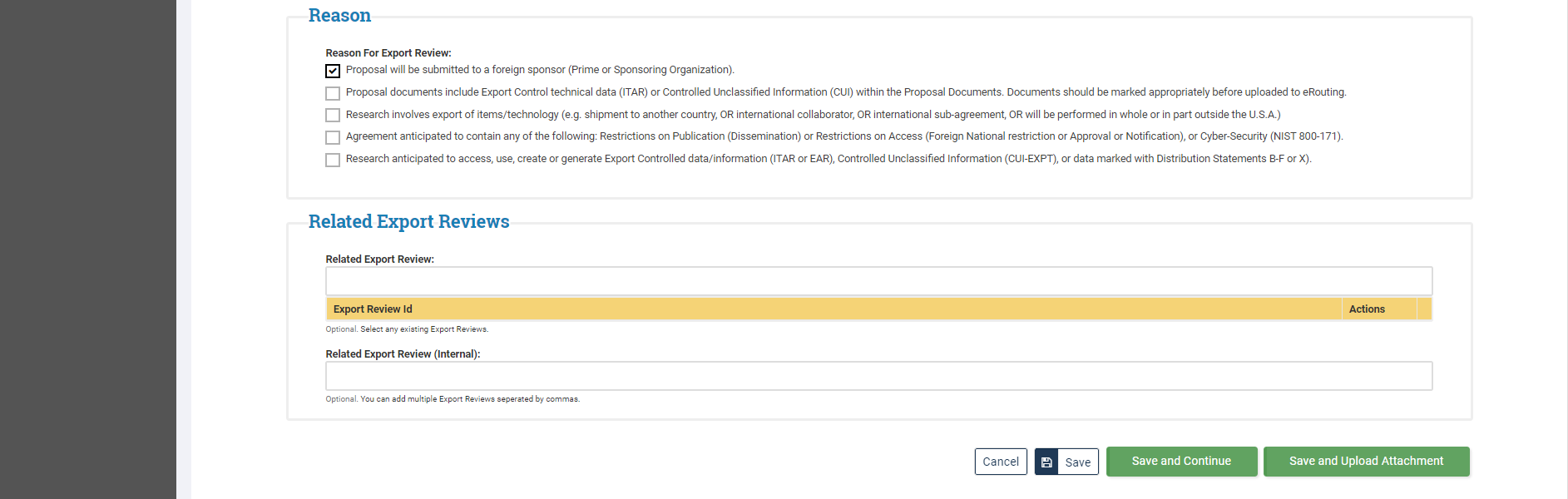


* Upon clicking **Create a New Non-Sponsored Export Control Review**, the below **Export Review: Export Data** screen will appear
  + **NOTE:** If the PD/PI is different from the Initiator then the User performing the actions will be given the Initiator Role





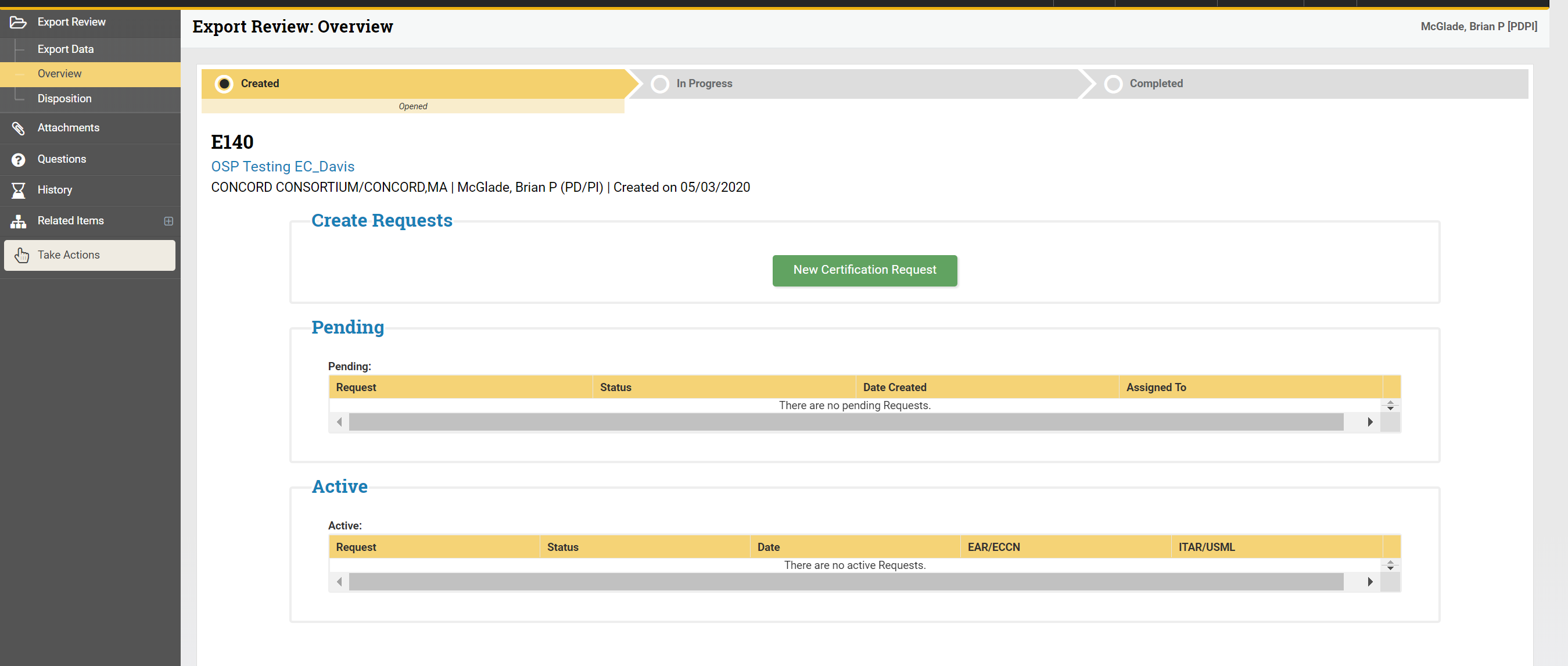
* The **Reason** sectionis pre-populated by information that was entered in the Proposal eRouting Module but should be updated to reflect any changes
* Related **Export Reviews** may be identified if relevant to the current review (e.g. a review completed for a previous phase of the project)
  + The User may type the Export Control number



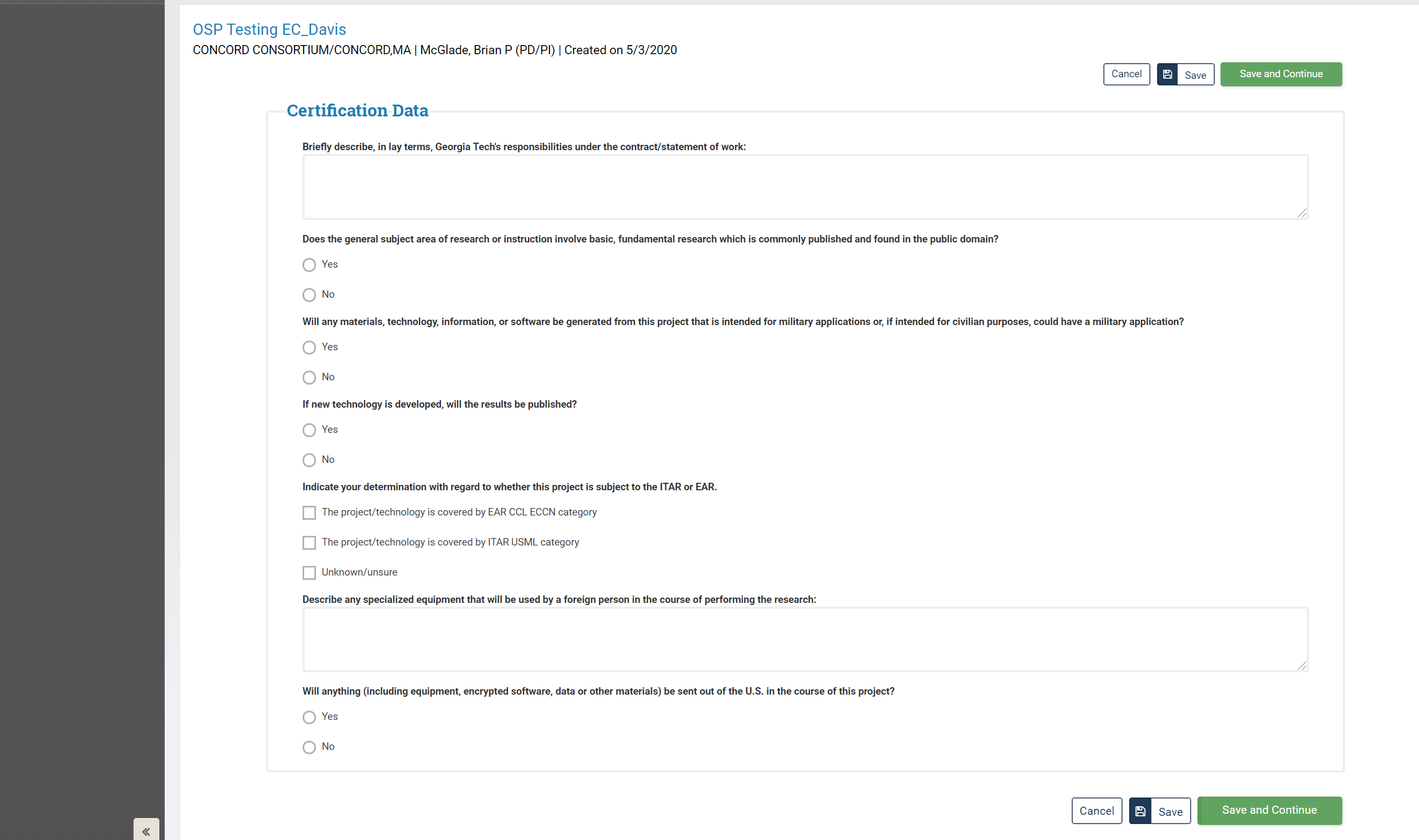
* Upon saving the Export Data
  + New tabs will appear on the left under **Export Review**
    - Navigation between the tabs is allowable at this point
  + The ORIA Team will request a **New Certification Form** on the **Export Review: Overview** if needed
    - Remember, this step is needed if “Proposal will be submitted to a foreign sponsor (Prime or Sponsoring Organization)” is not selected in the **Reason** section of the **Export Data** tab
    - **NOTE:** PD/PI will receive the below email to complete the Certification Data:

From: exportcontrol-admin@gtri.gatech.edu <exportcontrol-admin@gtri.gatech.edu>  
Sent: Monday, May 11, 2020 4:20 PM  
To: Erouting Export Control Test <erouting\_exportcontrol-test@gtri.gatech.edu>  
Subject: (TEST) Export Control:New Certification Request Created  
  
supposedly to:nick.mulkey@gtri.gatech.edu supposedly cc:  
  
  
A New Certification Request E147.C201 has been created. To access the Export Review, please click on the following link:  
  
<https://testerouting.gatech.edu/exportcontrol/cert/ecCert?certid=C201>  
  
Status: Created  
  
Export Review Title: Click Safe Mobile App develelopment  
  
PD/PI: Nicholas Mulkey

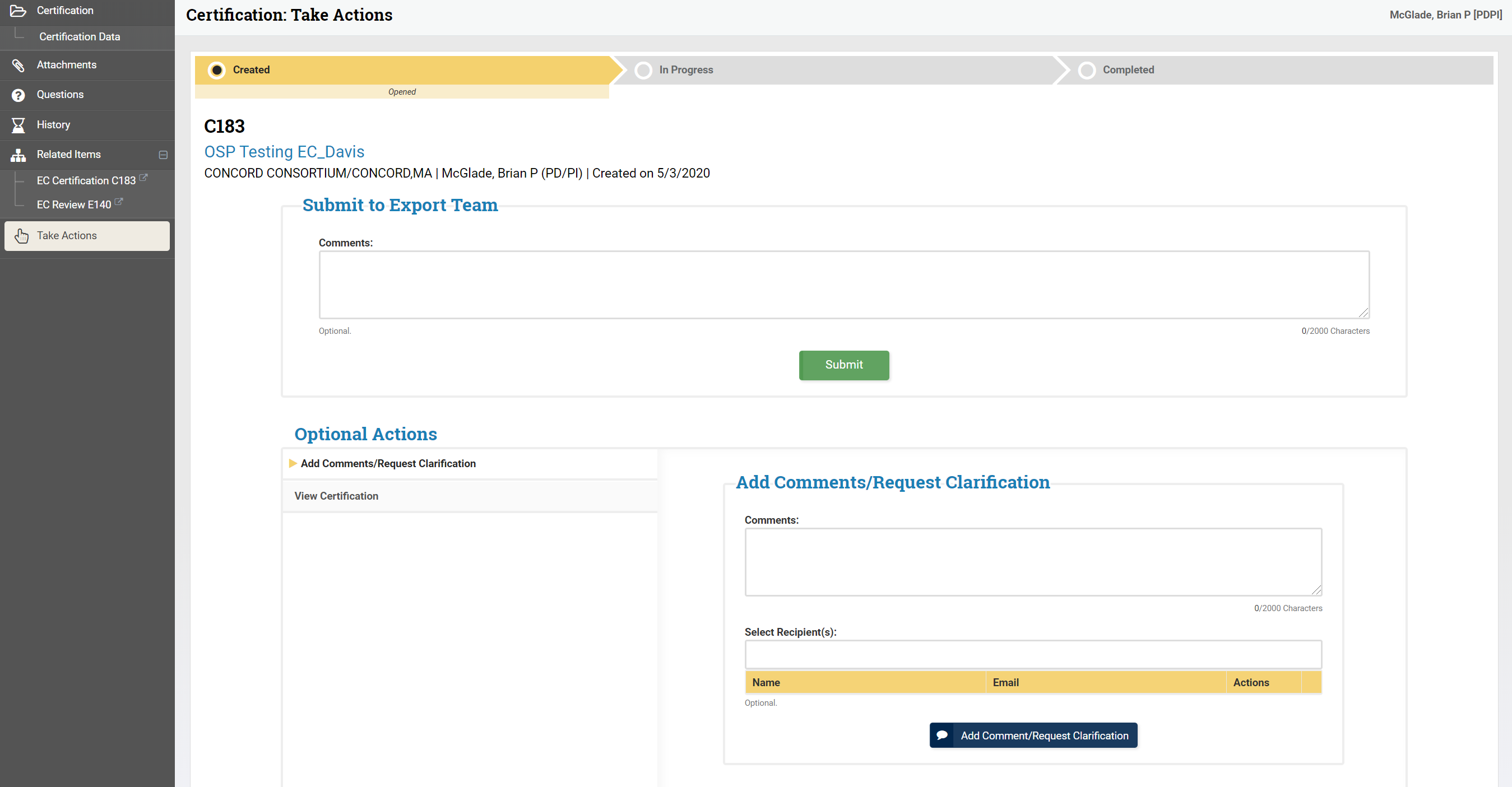
* + - Once the request have been approved by ORIA it will then become **Active**



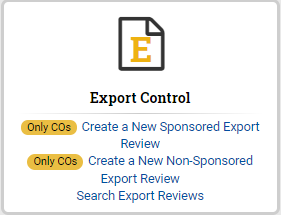
* + The **Certification Data** tab will allow
    - Only the PD/PI can complete this section
    - PD/PI must provide additional information where needed if an answer is “Yes”
    - PD/PI can click the save icon without submitting answers. However, all questions must be answered prior to submitting the review or the system will generate an error message at submission



* Once all Certification Data questions have been answered, the **Certification: Take Actions** screen will appear and the PD/PI has the option to click **Submit, View Certification** or **Add Comments/Request Clarification**
  + The PD/PI must click **Submit** for the Export Team to receive the review



## Search Export Reviews



* The User will click Search Export Reviews to search by **Export Review Type**: Sponsored, Non-Sponsored or All
  + Enter known information in a search fieldand click **Search**

