



# OMNI PROPOSAL APPROVAL WORKFLOW INSTRUCTIONS FOR PROPOSAL APPROVERS

Last updated 5/29/2008

This job aid outlines the steps to approve a Grants Proposal submitted via workflow.

As an approver, you will receive an email like the one shown below:

The following proposal is ready for your review and approval. Your approval is required.

Proposal ID: 0000015243  
 Version ID: V1  
 PI: Chase,Prescott B  
 Sponsor: Nevada State Department of Edu  
 Due Date: 2008-05-23

Click the hyperlink for detail  
[https://qa.financials.omni.fsu.edu/psp/sqnafi2/EMPLOYEE/ERP/c/ESTABLISH\\_PROPOSAL\\_GM\\_PROPOSAL\\_GBL?Page=GM\\_PROPOSAL&Action=U&BUSINESS\\_UNIT=FSU01&PROPOSAL\\_ID=0000015243&VERSION\\_ID=V1](https://qa.financials.omni.fsu.edu/psp/sqnafi2/EMPLOYEE/ERP/c/ESTABLISH_PROPOSAL_GM_PROPOSAL_GBL?Page=GM_PROPOSAL&Action=U&BUSINESS_UNIT=FSU01&PROPOSAL_ID=0000015243&VERSION_ID=V1)

In addition to the email, a worklist item will be placed on your worklist. An example of a PI's worklist is shown below:

From	Date From	Work Item	Worked By Activity	Priority	Link
SIMS, LINDA	05/29/2008	Approve Review Proposal	Submit Component for Approval/Review		<a href="#">FSU01_0000016263_V1_024210_IPG_2008-05-29_ADMINISTRATIVE_7.PI.A</a>

## PI AND CO-PI APPROVAL STEPS

- Log in to OMNI > Financials > Worklist (upper right corner on gold bar)
- Click on worklist item's hyperlink.

### Proposal Component Approval/Submit

Proposal ID: 0000016263      Business Unit: FSU01  
 Version ID: [V1](#)      Proposal Status: Pending Approval  
 Title: test      [Proposal Summary](#)

**Proposal Project**      Find | View All      First 1 of 1 Last

Project: 024210      Title: test

**Component**      Find      First 1 of 1 Last

Component: ADMINISTRATIVE      Status: In Progress      [Approval Status/History](#)

**Approvals**      Customize | Find |      First 1 of 1 Last

Role	Required	Submit	Approve	Send Back	Review	Reassign	Assign To	Comment
Principal Investigator	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<a href="#">Comment</a>				

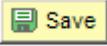
[Save](#)

Click: [V1](#) to view the entire proposal.

Click [Proposal Summary](#) to view summary.

Click [Approval Status History](#) to view the approval history.

**Check one of the boxes under the headings explained below:**

- **Approve** - to give approval of the proposal and allow the proposal to move on to the next level of approvers. A **Comment** is optional.
- **Send Back** - to send the proposal back to the Originator. A **Comment** is required as to why the proposal was sent back. The Originator can edit and make any necessary corrections. The Originator will have re-submit the proposal and start the approval process over again.
- Click  when done.

**When Approve is selected**, the following approval certification page will appear for PI and Co-PIs:

Are you sure you want to approve this proposal? (20005,8)

By approving this proposal, you certify that:

(1) You have reviewed this proposal and approve of this activity.  
 (2) Commitments for Cost Sharing funds or college/school-paid matriculation waivers, if applicable, have been obtained and funds will be made available when the project is funded.  
 (3) You have read and understand FSU's Investigator Financial Disclosure policy and FSU's Conflict of Interest policy and all required disclosures have been made.  
 (4) If this proposal is being submitted directly or indirectly to the National Institutes of Health, you understand and agree to abide by the requirements of NIH's Public Access Policy.  
 (5) Except as explained in detail separately, this application does not obligate the University for funds for additional personnel, facilities, equipment, remodeling, or matching or for the establishment of new organizations or programs not previously approved.  
 (6) You are not, to the best of your knowledge, presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from transactions by any federal department or agency.

Click Yes to certify and No to go back to previous page.

- Click  to approve the proposal. Click  to return to the previous page.

**CHAIR AND DEAN APPROVAL STEPS**

An example of a Chair's worklist is shown below:

CHASE, PRESCOTT	05/29/2008	Approve Review Proposal	Submit Component for Approval/Review	<input type="button" value=""/>	<a href="#">FSU01_0000016263_V1_024210_IPG_2008-05-29_ADMINISTRATIVE_9_CCR1_A</a>	<input type="button" value="Mark Worked"/>	<input type="button" value="Reassign"/>
CHASE, PRESCOTT	05/29/2008	Approve Review Proposal	Submit Component for Approval/Review	<input type="button" value=""/>	<a href="#">FSU01_0000016263_V1_024210_IPG_2008-05-29_ADMINISTRATIVE_11_CHR1_A</a>	<input type="button" value="Mark Worked"/>	<input type="button" value="Reassign"/>
CHASE, PRESCOTT	05/29/2008	Approve Review Proposal	Submit Component for Approval/Review	<input type="button" value=""/>	<a href="#">FSU01_0000016263_V1_024210_IPG_2008-05-29_ADMINISTRATIVE_13_PCH1_A</a>	<input type="button" value="Mark Worked"/>	<input type="button" value="Reassign"/>

- Log in to OMNI > Financials > Worklist (upper right corner on gold bar)
- Click on worklist item's hyperlink. Note: Since chairs and deans could have as many as three distinct workflow roles for proposal approval, the proposal worklist item may be on the worklist three times. Once you have select one of the three links and approve (or send back) the proposal, the other two rows will drop off the worklist.

**Proposal Component Approval/Submit**

Proposal ID: 0000016263      Business Unit: FSU01  
 Version ID: [V1](#)      Proposal Status: Pending Approval  
 Title: test      [Proposal Summary](#)

**Proposal Project**      Find | View All      First 1 of 1 Last

Project: 024210      Title: test

**Component**      Find      First 1 of 1 Last

Component: ADMINISTRATIVE      Status: In Progress      [Approval Status/History](#)

**Approvals**      Customize | Find |      First 1-3 of 3 Last

Role	Required	Submit	Approve	Send Back	Review	Reassign	Assign To	Comment
Credit Chair 1	<input checked="" type="checkbox"/>	<input type="text"/>	<a href="#">Comment</a>					
Chair 1	<input checked="" type="checkbox"/>	<input type="text"/>	<a href="#">Comment</a>					
Project Chair 1	<input checked="" type="checkbox"/>	<input type="text"/>	<a href="#">Comment</a>					



Annotations:  
 - Click: [V1](#) to view the entire proposal.  
 - Click [Proposal Summary](#) to view summary.  
 - Click [Approval Status History](#) to view the approval history.

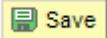
Again, since chairs and deans could have as many as three distinct workflow roles for proposal approval, the Proposal Component Approval page may list all three roles and require approval of each.

**Check all boxes under the headings explained below:**

- **Approve** - to give approval of the proposal and allow the proposal to move on to the next level of approvers. A **Comment** is optional.
- **Send Back** - to send the proposal back to the Originator. A **Comment** is required as to why the proposal was sent back. The Originator can edit and make any necessary corrections. The Originator will have re-submit the proposal and start the approval process over again.
- **Reassign** - to require approval of another user. You must enter the person in the "Assign To" field in which you want to reassign the proposal. A **Comment** is optional. A sample is shown below:

**Approvals**      Customize | Find |      First 1-3 of 3 Last

Role	Required	Submit	Approve	Send Back	Review	Reassign	Assign To	Comment
Credit Dean 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	James, Janis	<a href="#">Comment</a>				
Dean 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	James, Janis	<a href="#">Comment</a>				
Project Dean 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	James, Janis	<a href="#">Comment</a>				

- Click  when done.

**When Approve is selected**, the following approval certification page will appear for Chairs and Deans:

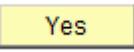
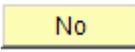
Are you sure you want to approve this proposal? (20005,9)

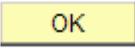
By approving this proposal, you certify that:

You have reviewed this proposal, which is consistent with the education and research objectives of the Department/School/College, and agree:

(1) to release the designated faculty for the effort indicated;  
 (2) that the cost sharing committed, if any, is reasonable and appropriate for this program;  
 and  
 (3) that adequate office, laboratory, or any other space including non-animal space or space for animals required for the performance of this project is available for the proposed program.

Click Yes to certify and No to go back to previous page.

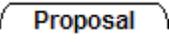
- Click  to approve the proposal. Click  to return to the previous page.

When **Reassign** is selected, you must click the  icon under the **Assign To** column, search for and select the user to whom the proposal will be reassigned. Click . Then copy/paste the same username in all three of the **Assign To** boxes.

Role	Required	Submit	Approve	Send Back	Review	Reassign	Assign To	Comment
Credit Dean 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	James, Janis 	<a href="#">Comment</a>				
Dean 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	James, Janis 	<a href="#">Comment</a>				
Project Dean 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	James, Janis 	<a href="#">Comment</a>				

- Click  when done.

## Reviewing Proposal Approval Workflow Status

Any user that has access to the proposal may review and monitor the proposal approval workflow status by opening the proposal and clicking on the [Component](#) hyperlink at the bottom of the  page.

Click , then [Approval Status/History](#).

The [Component Approval Status/History](#) page shows:

- Names of users involved in Level 1 of workflow,
- Whether they are required approvers,
- Whether they are pooled approvers,
- If a Worklist Item or Email Notification was sent,
- Status of workflow for each user, and
- Date/Time Stamp

An example is shown below:

Component Approval Status/History								
Component: ADMINISTRATIVE								
View By: All								
Component Approval History								
Last Req ID	Routing	Name	Required	Pool List	Workitem	Notification	Status	Date/Time Stamp
1	Originator	Sims,Linda D	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Submitted	05/15/2008 3:35:51PM
2	Central Off. Reviewer	Key,Diana L	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Notified	05/15/2008 3:35:51PM
3	Central Off. Reviewer	Thompson,Gregory W	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Notified	05/15/2008 3:35:51PM
4	Central Off. Reviewer	Lentz,Russell D	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Notified	05/15/2008 3:35:51PM
5	Central Off. Reviewer	Fletcher,Kathleen F	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Notified	05/15/2008 3:35:51PM
6	Central Off. Reviewer	Barton,Brian M	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Notified	05/15/2008 3:35:51PM
7	Principal Investigator	Chase,Prescott B	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pending	
8	Sponsored Project Manager	Sims,Linda D	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Notified	05/15/2008 3:35:51PM