

OMNI GRANTS PROPOSAL APPROVAL WORKFLOW

OVERVIEW

Training/Reference Material

- **Proposal Development Guide** - creating & submitting a proposal
- **Job Aids** - short instructions for accomplishing a specific task
- **Overview** of OMNI Grants Proposal Approval Workflow (this document)

<http://www.research.fsu.edu/contractsgrants/workshops.html> or
<http://www.research.fsu.edu/contractsgrants/omniinfo.html>

Types of Proposal Approvers

- Principal Investigator
- Co-Principal Investigator

Types of Proposal Approvers (cont'd)

Chair (including Alternates)

- **Chair** associated with PI/Co-PI on **Proposal Resources**
 - Chair 1, Chair 2, etc.
- **Chair** associated with **Project Department**
 - Project Chair 1, Project Chair 2, etc.
- **Chair** associated with **Department Credit**
 - Credit Chair 1, Credit Chair 2, etc.

Types of Proposal Approvers (cont'd)

Dean (including Alternates)

- **Dean** associated with **PI/Co-PI on Proposal Resources**
 - Dean 1, Dean 2, etc.
- **Dean** associated with **Project Department**
 - Project Dean 1, Project Dean 2, etc.
- **Dean** associated with **Department Credit**
 - Credit Dean 1, Credit Dean 2, etc.

Types of Proposal Approvers (cont'd)

Central Office

- Sponsored Research Services (SRS)
- FSU Research Foundation (FSURF)
- Ad Hoc Approvers

Types of Proposal Reviewers

- Compliance and Facility Use Offices
(e.g., Human Subjects, Marine Lab, etc.)
- Sponsored Project Manager listed on Proposal Resources page
- Department Rep listed on Proposal Resources page

"Chair" and "Dean" Approvers

- Terms are used generically to represent unit hierarchy.
- New page in OMNI displays chair and dean approvers for each DeptID.
 - Note: Approvers identified here are specific to Grants proposal approval workflow only. Notify SRS when new chairs or deans appointed.

"Chair" and "Dean" Approvers (cont'd)

Grants > Departments > General Information,
Workflow Approvers

Department	Address	Attribute	Workflow Approvers
SetID: SHARE	Department: 075000	Description: Chemistry & Biochemistry	
Workflow Approvers			
Effective Date:	01/15/2008		Customize
Type of Approver	EmplID	Name	
1 Chair Level Approver	000001669	Joseph Schlenoff	
2 Dean Level Approver	000001431	Joseph Travis	

Alternates

- ❑ Chair and Dean may have one or more alternates.
- ❑ Chair and Alternates are pooled.
- ❑ Dean and Alternates are pooled.
- ❑ New page in OMNI provided to maintain alternates.

Alternates (cont'd)

Grants > Departments > Add/Update Chair/Dean Alternates

SetID: SHARE User ID: JTRAVIS TRAVIS, JOSEPH
*Eff Date: 05/28/2008 *Status: Active

Alternat Detail Scroll Bar			Customize	Find	View All	First	1 of 1	Last
Alternate User ID	Description	*Status						
1 CBLEE	LEE, CHERYL	Active						

4 Levels of Workflow

□ Level 1

- Approvers - worklist item and email notification
 - Principal Investigator
 - Co-Principal Investigator
- Reviewers - email notification
 - Compliance and Facility Use Offices
 - Sponsored Project Manager
 - Department Rep
 - Central Office (SRS or FSURF)

4 Levels of Workflow (cont'd)

□ Level 2

- Approvers - worklist item and email notification
 - Chair(s) associated with PI/Co-PI on Proposal Resources
 - Chair(s) associated with Project Department
 - Chair(s) associated with Department Credit
- Each Chair pooled with his/her Alternates

4 Levels of Workflow (cont'd)

□ Level 3

- Approvers - worklist item and email notification
 - Dean(s) associated with PI/Co-PI on Proposal Resources
 - Dean(s) associated with Project Department
 - Dean(s) associated with Department Credit
- Each Dean pooled with his/her Alternates

4 Levels of Workflow (cont'd)

□ Level 4

- **Approvers** - worklist item and email notification
 - Sponsored Research Services
 - Business Unit FSU01
 - FSU Foundation
 - Business Unit FSRF1
 - Ad Hoc Approvers as needed
 - e.g., Cost Sharing approval

Worklist Items

Worklist items are added to approvers' worklists when a proposal is ready for approval.

PI Worklist example.

From	Date From	Work Item	Worked By Activity	Priority	Link	
SIMS, LINDA	05/29/2008	Approve Review Proposal	Submit Component for Approval/Review		FSU01_0000016263_V1_024210_PG_2008-05-29_ADMINISTRATIVE_7_PI_A	Mark Worked Reassign

Chair/Dean Worklist example.

CHASE, PRESCOTT	05/29/2008	Approve Review Proposal	Submit Component for Approval/Review		FSU01_0000016263_V1_024210_PG_2008-05-29_ADMINISTRATIVE_8_CCR1_A	Mark Worked Reassign
CHASE, PRESCOTT	05/29/2008	Approve Review Proposal	Submit Component for Approval/Review		FSU01_0000016263_V1_024210_PG_2008-05-29_ADMINISTRATIVE_11_CCR1_A	Mark Worked Reassign
CHASE, PRESCOTT	05/29/2008	Approve Review Proposal	Submit Component for Approval/Review		FSU01_0000016263_V1_024210_PG_2008-05-29_ADMINISTRATIVE_13_FCH1_A	Mark Worked Reassign

Worklist Items (cont'd)

Worklist item is added to originator's worklist when a proposal is sent back for correction.

Email Notifications

Email is sent to reviewers at Level 1 when the proposal approval process is started.

The following proposal is available for your review. Your approval is not required.

Proposal ID: 0000015229
Version ID: V1
PI: Chase, Prescott B
Sponsor: National Science Foundation
Due Date: 2008-05-15

Click the hyperlink for details:

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=0000015229&VERSION_ID=V1

Email Notifications (cont'd)

Email is sent to approvers at each level.

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/sqnafl2/EMPLOYEE/ERP/c/ESTABLISH_PROPOSAL_GM_PROPOSAL_GBL?Page=GM_PROPOSAL&Action=U&BUSINESS_UNIT=FSU01&PROPOSAL_ID=0000015243&VERSION_ID=V1

Email Notifications (cont'd)

Email is sent to originator when proposal is sent back for correction.

The following proposal is being sent back without approval. Please resubmit once corrections are made.

Proposal ID: 0000015242 / V1
PI: Chase, Prescott B
Sponsor: National Science Foundation
Due Date: 2008-05-08

Click hyperlink for details:

https://financialtest.fsu.edu:10205/psp/ststfl/EMPLOYEE/ERP/c/ESTABLISH_PROPOSAL_GM_PROPOSAL_GBL?Page=GM_PROPOSAL&Action=U&BUSINESS_UNIT=FSU01&PROPOSAL_ID=0000015242&VERSION_ID=V1

Email Notifications (cont'd)

Email is sent to approve when worklist item has been sitting on the worklist without action (approval or send back) after four hours.

The following worklist that is currently assigned to you has timed out:

Business Process Name:

GM_GRANTS_BPWorklist Name:

Approve Review Proposal

Instance ID: 539

Email Notifications (cont'd)

Email is sent to PI, Co-PI, SP Managers and Dept Reps when proposal has been approved for submission to the sponsor.

The following proposal has been approved for submission to the Sponsor:

Proposal ID : 0000015231

PI : Chase,Prescott B

Sponsor : National Science Foundation

Due Date : 2008-05-21

Title : TEST

Click the hyperlink for details:

https://qa.financials.omni.fsu.edu/psp/sqna/2/EMPLOYEE/ERP/c/ESTABLISH_PROPOSAL_GM_PROPOSAL_GBL?Page=GM_PROPOSAL&Action=U&BUSINESS_UNIT=FSU01&PROPOSAL_ID=0000015231&VERSION_ID=V1

My System Profile

- Any OMNI user may change his/her My System Profile to turn off receipt of worklist items or email notifications. However, turning off these items affects *all* workflow in OMNI (requisitions, travel, proposal approval, etc.).

- My System Profile is a blue hyperlink at the bottom of the left navigation pane after logging into OMNI Financials. Uncheck the Email User and/or Worklist User checkboxes (under Workflow Attributes) if you do not want to receive ANY email or worklist items.

Security

- Any employee may create a proposal and submit it for approval.
- Only the following users will be able to view the proposal:
 - Professionals entered on the Proposals Resources page,
 - Approvers and Reviewers added by the workflow program, or
 - Users set up in Grants Security.
- There is no need to request special roles.



Go Live

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