



THE FLORIDA STATE UNIVERSITY
OMNI + FINANCIALS

PROPOSAL DEVELOPMENT GUIDE



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INTRODUCTION

This guide should be used to create a proposal in the OMNI Grants module and submit it for electronic approval. This document is structured as follows:

- Basic OMNI navigation and entry tips
- Overview of the section or page requiring data entry
- Snapshot of page where data is viewed or entered
- Table listing fields on the page with explanation of the data in the field
- Data entry specifics
- Appendices

Appendix A provides basic instructions on the following:

- Logging into OMNI
- Navigation basics for Grants
- Description of icons, navigation tips

Understanding Grants Proposal Preparation

A proposal in Grants consists of a statement of work, research plans, technical reports, and a proposal budget, as well as administrative, personnel, and submission information. Each proposal requires at least one project. A single proposal may, however, have multiple projects.

Any employee may create a proposal and submit it for approval. Only those employees entered on the Proposals Resources page or added by the workflow program will be able to view the proposal. One exception is that a user may be set up on Grants Security to be able to view any proposal related to a particular department or college. Contact Sponsored Research Administration if a department-level user needs such access.

If a departmental support person enters a proposal on behalf of a PI, that user must be added to the Proposal Resources page with the role of Sponsored Project Manager or Department Rep. Otherwise, that user will not be able to access the proposal later.



Creating a New Proposal

Navigation: **OMNI Financials > Grants > Proposals > Maintain Proposal**

- Select the Add a New Value tab. The following screen will appear:

BEFORE PROCEEDING, read the data entry information provided below about choosing the appropriate Business Unit.

<i>Field Name</i>	<i>Field Explanation</i>	<i>Data Entry Required</i>
Business Unit	The Business Unit designates which legal entity will administer the award—Florida State University or the FSU Research Foundation.	<p>CRITICAL DECISION: Selection of the appropriate Business Unit (BU) is a critical decision. If a proposal is created under the wrong BU, the proposal will be rejected and unusable. It cannot be copied to another BU. This field will determine which central office will approve the proposal. (SRA or FSU RF)</p> <p>The BU may default into the field if your user preferences are set to do so. If required, change the BU as explained below:</p> <p><u>Select FSU01</u> if it is anticipated that public funds will be awarded as a result of this proposal—even if money flows through a non-public entity.</p> <p><u>Select FSRF1</u> if it is anticipated that private funds will be awarded as a result of this proposal.</p>
Proposal ID	The Proposal ID is one of the key identifiers of the proposal. It is automatically assigned once the proposal is saved.	NEXT is defaulted into this field.
Version ID	The Version ID is another key identifier of the proposal along with the Proposal ID.	The Version ID of “V1” defaults in. It is recommended that the first draft of a proposal be identified as V1. Should multiple drafts be needed, the user may assign any version ID that begins with a “V.” Version ID’s beginning with an “F” are reserved for SRA/RF use.

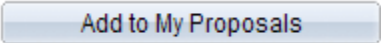
Click



Users are encouraged to complete the minimum fields required to save the proposal first, and then go back to the beginning to complete the remaining fields as needed. The required fields are listed below. Complete entry instructions for these fields are provided further in this document.

- a. Proposal Tab
 - i. Title
 - ii. PI ID
 - iii. Title
 - iv. Sponsor ID
 - v. Proposal Type
 - vi. Start Date
 - vii. End Date
- b. Projects Tab
 - i. Title (if not automatically filled in from Proposal tab)
 - ii. Department
 - iii. Subdivision
 - iv. Institution ID
- c. Budgets Tab
 - i. Budget ID
- d. Resources Tab, Professional Section
 - i. Add EMPLID and select role of each person who needs access to the draft proposal.
 - ii. Enter credit distribution for PI and all Co-PI's.
- e. Location Hyperlink
 - i. Location

Click  Save Make note of the Proposal ID assigned to proposal.

	<p>After proposal is saved and the Proposal ID is created, the user has the option of adding this proposal to My Proposals. My Proposals is like a "favorites" page.</p>	<p>OPTIONAL. Click to add to the My Proposals list. The proposal must be saved before it may be added to My Proposals.</p>
---	--	--



Click on **My Proposals** under the Grants menu.

Favorites Main Menu > Grants > Proposals > Maintain Proposal

Proposal Projects

Proposal ID:

Description:

*Title:

Long Description:

- Proposals
- Awards
- Institutions
- Departments
- Professionals
- Sponsors
- Subrecipients
- Interactive Reports
- Grants Center
- My Proposals

Continued on next page.



Proposal Tab

Navigation: OMNI Financials > Grants > Proposals > Maintain Proposal, Proposal tab

The **Proposal** page stores a variety of proposal-specific information that is used in proposal review and approval and for institutional reporting.

Proposal | Projects | Budgets | Resources | Certifications | Reports | Attachments

Proposal ID: NEXT Version ID: V1
 Description: Insulin & Rats Currency: USD Business Unit: FSU01

[Add to My Proposals](#)

*Title: The Effects of Insulin on Rats [Start Approval Process](#)

Long Description: The Effects of Insulin on Rats Over a Decade

*PI ID: 000068100 Gilbert, David M
 *Sponsor ID: 975 National Science Foundation
 Pre-Award Administrator: 000012510 Key, Diana L
 Purpose: RES
 *Proposal Type: New
 Confidence %:

Status 14

*Proposal Status: Draft
 Submit Status: Not Submitted
 Generate Status: Not Generated
 In Approval Process

Facilities & Admin Requested Work Flow By Pass
 Foreign Application/Component Template Proposal
 NIH Modular Grant

[Due By](#) [Additional Information](#) [CFDA](#)

*Start Date: 10/01/2011 *End Date: 09/30/2014 No. Periods: 3 [Build Periods](#)

Period	*Start Date	*End Date	Target Sponsor Budget
1	10/01/2011	09/30/2012	
2	10/01/2012	09/30/2013	
3	10/01/2013	09/30/2014	


Target Sponsor Budget:

Go To: [Location](#) Protocols [Component](#) Setup Level [Keywords](#) [Gender & Minority Study](#) [Trainee](#) [Attributes](#)

[Return to Grants](#)

Return To: [My Proposals](#)



Item #	Field Name	Field Explanation	Data Entry Required
1	Description (Mini Title)	This is a user-defined personal reference for the proposal.	OPTIONAL
2	Title (Short Title)	This is the title that will be used in institutional reporting and will be seen in proposal search results. If funded, SRA may change the title to match the one listed on the award document.	Enter a short title for the proposal in title case. See Appendix J for guidance on title case rules.
3	Long Description (Long Title)	This can be a longer title or brief description of the proposal.	Enter a long title for the proposal in title case. See Appendix J for guidance on title case rules.
4		This button will become active when proposal is saved.	N/A
5	PI ID (principal investigator EMPLID)	This employee is considered the Principal Investigator or Project Director.	Select the appropriate EMPLID.
6	Sponsor ID	This is the ID of the organization that is sponsoring the research.	Look up and select the appropriate Sponsor ID. Contact SRA/FSURF if the sponsor cannot be found.
7	Pre-Award Administrator	This is the ID of the SRA/RF employee who will be reviewing the proposal.	Select SRA/RF employee who will be reviewing the proposal. If unknown, leave blank.
8	Purpose	This represents the type of activity proposed.	Select a proposal purpose from the list of options shown in Appendix B .
9	Proposal Type	This represents the type of proposal that is being submitted.	Select a proposal type from the list of options shown in Appendix C . The default type is "New."
10	Confidence %	The system translates the number entered here to a color-coded icon that represents the confidence level as high, medium, or low. The colored icon (red, yellow, green) next to this field indicates the confidence level of this proposal.	Enter a number between 1 and 100 to reflect the level of confidence that the proposal will be approved--where 1 equals "no confidence of funding" and 100 equals "absolute confidence of funding."



11	Due By	This is the date the proposal is due to be received by the sponsor or postmarked. This could also represent the date by which the PI wants to have the proposal approved.	Click the hyperlink to access the Due By page. Enter due date and time information for the proposal. WARNING: The system uses the current date as the default date. If there is no specific due date, enter a date at least four (4) business days from the current date to comply with FSU's Proposal Submission Policy. The policy website is http://www.research.fsu.edu/contractsgrants/documents/submissionpolicy.pdf .
<p>Due By</p> <p>Proposal ID: 0000021034 Version ID: V1 Business Unit FSU01</p> <p>Description: Insulin & Rats Currency: USD</p> <div data-bbox="224 915 1422 1110"><p>Due By</p><p>Due By: <input type="text"/> <input type="button" value="v"/></p><p>Due Date: 01/14/2011 <input type="button" value="31"/></p><p>Due Time: <input type="text"/></p><p>Due Timezone: <input type="text"/> <input type="button" value="v"/></p></div> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Refresh"/></p>			
12	Additional Information	The Additional Information page is to be used to capture important information about the proposal such as whether it is Federal flow-through funding or if cost sharing is involved.	NOTE: Proposal must be saved before any values can be selected. Click to access the Additional Information page. Select all Comment Types (e.g. Cost Share) that apply to this proposal by adding a row for each. Then click the Additional Details icon to the right to enter details. The Comments box is optional. See Appendix D for an explanation of the values available.



Additional Information

Proposal ID: 0000021034 **Version ID:** V1 **Business Unit:** FSU01
Description: Insulin & Rats **Currency:** USD

Additional Information Find | View All First 1 of 1 Last

*Type

Comments:

13	CFDA	This is the Catalog of Federal Domestic Assistance (CFDA) number assigned by the Federal sponsor.	If the original source of funding for this proposal is a direct Federal or Federal Flow-through <i>assistance program</i> , enter all CFDA numbers that are related to the proposal. The CFDA website is http://www.cfda.gov/ . Contact SRA/FSURF for assistance if needed.
----	------	---	--

CFDA

Proposal ID: 0000021034 **Version ID:** V1 **Business Unit:** FSU01
Description: Insulin & Rats **Currency:** USD

CFDA	Program Title	Primary
<input type="text"/>		<input type="checkbox"/>

14	Proposal Status	This value describes the status of the proposal.	Campus users may change the Proposal Status for one reason only: When the proposal is to be discarded (draft never to be submitted), change the status to “Discontinued.” A discontinued proposal will not be reported in any institutional reports.
	Submit Status	This status will change once SRA/FSURF approves the proposal for submission to the sponsor.	N/A
	Generate Status	Displays the status of the proposal in the generate process. Values include <i>Not Generated</i> and <i>Generated</i> .	N/A



	In Approval Process	The box will be checked when the Proposal Status is <i>Pending Approval</i> and the proposal is in the approval workflow process. It is unchecked when the proposal completes the approval process.	N/A
15	Foreign Application/Component	A check mark indicates that the proposal includes work in a foreign country.	Check yes if applicable.
16	NIH Modular Grant	A check mark indicates that the proposal is being submitted for a National Institutes of Health modular grant.	Check yes if applicable.
17	Work Flow By Pass	A check mark indicates that the proposal approval workflow will be by passed.	This box will be grayed out for all users except Sponsored Research staff. Sponsored Research staff will check this box to override workflow when a paper Proposal Transmittal Form has been received.
18	Template Proposal		Select to create a template proposal. This option is available only when the proposal is first created. The template may be used to create new proposals based on information in the template which can be edited. This option disappears once the proposal is saved.
19	Start Date and End Date	This represents the start and end dates for the entire proposed performance period.	Enter appropriate start and end dates.
20	No. Periods	This represents the number of 12-month budget periods being proposed.	Enter the appropriate number depending on the anticipated schedule of sponsor funding obligation.



21	Build Periods	<p>When the proposal is first created, the Budget Period grid contains blank start and end dates. After the proposal start and end dates (19) are entered, enter a value in No. Periods, and click the Build Periods button, the system automatically inserts a row into the grid for each period. The first period start date and the last period end date are supplied by default from the proposal start and end dates. After the budget details on the Budget Detail page are saved, the Target Sponsor Budget will reflect the budget for each period. The Target Sponsor Budget amount displayed below the grid reflects the sum of all budget periods.</p> <p>Delete all rows in the grid to reactivate the Build Periods button.</p>	Click to build the budget periods for the proposal.
22	Target Sponsor Budget	Each line of the Budget Periods grid represents the total of all budgets for all of the projects under this proposal for a particular period. An amount will display once the budget details are entered later on.	N/A



Projects Tab

Navigation: OMNI Financials > Grants > Proposals > Maintain Proposal, Projects tab

The Projects page stores project-specific information that is used in proposal review and approval, indirect cost distribution, institutional reporting, award/project setup if funded, etc. Each Proposal ID may have one or more Project ID's; however, it is the normal practice to have only one project at this point. More projects can be added after the award is received to meet financial management needs.

Proposal
Projects
Budgets
Resources
Certifications
Reports
Attachments

Proposal ID: NEXT Version ID: V1 Business Unit: FSU01
 Description: Insulin & Rats Currency: USD

Find | View All | First 1 of 1 | Last

1 Project ID: Primary + -

3 *Title:

4 Long Description:

5 *Department: 6 Dept Contact:

7 *Subdivision: 8 Dept Rep:

9 *Institution: 10 [Other Contacts](#) [Department Credit](#) 11

12 SPO: 13 SPO Contact:

14

Customize | Find | First | Last

Department	Location	Comments	Percent Share
Research Control			100.00

Project Percent Share: 100.00

Go To: [Location](#) [Protocols](#) [Component](#) [Setup Level](#) [Keywords](#) [Gender & Minority Study](#) [Trainee](#) [Attributes](#)

Proposal Projects

Item #	Field Name	Field Explanation	Data Entry Required
1	Project ID	When the proposal is created, the system automatically creates the first project and budget header with ID of <i>Next_1</i> . Once the proposal is saved, a project ID will be assigned.	N/A
2	Primary	The first project created is automatically selected as the primary project.	Normally no entry or change is required.
3	Title	Defaults from the proposal short title.	Change as desired.
4	Long Description	Defaults from the proposal long title.	OPTIONAL. Click to enter a long description for the project.



5	Department	This is the department that will be responsible for administering the proposal project if awarded. The system automatically defaults in the home department value from the PI's HR data.	Change the Department as needed by entering the DeptID or searching for the department name via the look up icon. See note below for special DeptID's.
<p>Note: Some departments have special "sponsored projects" DeptID's.</p>		<p>071003 GFDI Sponsored Projects 072004 Anthropology Sponsored Proj 073002 IMB Sponsored Projects 074012 Biology Sponsored Projects 076002 Classics Sponsored Projects 069000 Geology Sponsored Projects 079002 History Sponsored Projects 080003 Comp Sci Sponsored Projects 081003 Mathematics Sponsored Projects</p>	<p>082003 Mod Lang Sponsored Projects 083001 Philosophy Sponsored Projects 084009 Physics Sponsored Projects 085002 Martech Sponsored Projects 069000 Meteorology Sponsored Projects 088004 Statistics Sponsored Projects 089009 Psychology Sponsored Projects 090001 Humanities Sponsored Projects 069000 Oceanog Sponsored Projects</p>
6	Dept. Contact (department contact)		OPTIONAL
7	Subdivision	This is the same as the administering department identified above.	The value that was entered according to instructions of Item 5 should automatically populate in the Subdivision field. If not, enter (or copy/paste) the same value that was used in the Department field above.
8	Dept Rep		OPTIONAL
9	Institution	This is the legal entity associated with the Business Unit.	If Business Unit FSU01 was selected when creating the proposal, "Florida State University" will be automatically populated. If Business Unit FSRF1 was selected when creating the proposal, "FSU Research Foundation, Inc" will be automatically populated.
10	Other Contacts	N/A.	N/A.



11	Department Credit	This is the department credit split that will be used in institutional reporting and in SRAD distributions.	Click the hyperlink to enter the credit DeptID and appropriate percentage split. Enter % in whole numbers only. The total credit percentage must equal 100%.
----	-------------------	---	---

Departmental Credit Percentage

Proposal Project: 029353

Details				Customize Find First 1 of 1 Last
*Department	Department	*Credit %		
<input type="text" value="074012"/>	Biology Sponsored Projects	<input type="text" value="100.00"/>	+	-

12	SPO (sponsored projects office)	N/A	N/A
13	SPO Contact (sponsored projects office contact)	N/A	N/A
14	F&A Distribution	N/A. The Dept Credit information entered above will be used for SRAD distributions.	N/A



Budgets Tab

Navigation: OMNI Financials > Grants > Proposals > Maintain Proposal, Budgets tab

The **Budgets** tab sets up project-specific values that will facilitate entry of budget details.

The screenshot shows the 'Budgets' tab interface. At the top, there are navigation tabs: Proposal, Projects, **Budgets**, Resources, Certifications, Reports, and Attachments. Below these, proposal details are shown: Proposal ID: NEXT, Version ID: V1, Business Unit: FSU01, Description: Insulin & Rats, Currency: USD.

The main section is titled 'Budget Header' and contains the following fields:

- 1**: *Budget ID: 1
- 2**: Description: Budget
- 3**: Start Date: 10/01/2011
- 4**: End Date: 09/30/2014
- 4**: Include in Proposal

Below the header is a 'Budget Period' table with columns: Period, Start Date, End Date, Amount, Program Income, and Number of Participant/Trainees. A grid shows one period with '1' in the Period column.

At the bottom, there is a 'Total:' field and a link for 'F & A and Pricing Setup'.

Item #	Field Name	Field Explanation	Data Entry Required
1	Budget ID	This Budget ID translates to Activity ID when the proposal is generated to an award. FSU Activity ID's are always "1."	Always use Budget ID "1".
2	Description		Enter any description or enter "Budget."
3	Start Date and End Date		Displays the start and end dates that are entered on the Proposal page.
4	Include in Proposal		Select to include the budget header data in the proposal. This option is helpful if building multiple scenarios to choose from.
5	Period	Displays the budget periods. The periods are the same as on the Proposal page. Budget Period, Start and End Date and Amounts on this grid are display only.	Click a period number to access the Budget Detail page. See information on page 28 regarding detailed proposal budgets.
6	Start Date and End Date	Displays the start and end dates that are selected for the budget periods on the Proposal page.	N/A



7	Amount	Displays the total amount for the Budget Period from the Budget Detail page.	N/A
8	Program Income	If program income is anticipated, this hyperlink goes to a page to record the details of the income.	Click hyperlink and complete all fields on the page.
<p style="text-align: center;">Program Income</p> <p>Allowable Anticipated Amount: <input type="text"/></p> <p>Not Allowable Anticipat Amount: <input type="text"/></p> <p>Source: <input type="text"/></p> <p>Comments: <input style="width: 450px; height: 40px;" type="text"/></p> <p style="text-align: center;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Refresh"/> </p>			
9	Number of Participant/ Trainees	This is the number of participants or trainees supported under this project.	OPTIONAL.
10	F&A and Pricing Setup	Determines how F&A (indirect costs) is calculated on the budget.	Data cannot be entered on this page until proposal has been saved. Skip to page 20 to continue entry and return to this page after proposal is saved.
11	Total	Displays the grand total for all budget periods within a project.	N/A



F&A and Pricing Setup Hyperlink

Data cannot be entered on this page until proposal has been saved. Skip to page 20 to continue entry and return to this page after proposal is saved.

F & A and Pricing Setup

Proposal ID: 0000021034 **Version ID:** V1
Description: The Effects of Insulin on Rats **Budget ID:** 1
Project ID: 029353

1 Institution Minus Funded **2** Sponsor Minus Funded

3 *Pricing Method: As Incurred
 *Product: CRB

4 *Rate Type: ONRES

The values in the **Institution** and **Sponsor** sections default in once the Rate Type is selected. Do not change these values.

5 FA Base: MD Modified Total Direct (new)

Institution Rates	
Effective Date: 12/01/2010	FA Rate %: 47.00
Effective Date: 07/01/2006	FA Rate %: 47.00

Same as Institution

FA Base: MD Modified Total Direct (new)

Sponsor Rates	
Effective Date:	FA Rate %:

FA Base: MD Modified Total Direct (new)

Budget Rates	
*Effective Date: 12/01/2010	FA Rate %: 47.00
*Effective Date: 07/01/2006	FA Rate %: 47.00

6

Item #	Field Name	Field Explanation	Data Entry Required
1	Institution Minus Funded	Waived F&A is the difference in FSU's negotiated rate and the rate we use on the budget. Sometimes waived F&A is used as cost sharing. These two fields determine how waived F&A is calculated by the system based on post-award expenditures.	Select to use FSU's negotiated F&A rate for calculating waived F&A.
2	Sponsor Minus Funded	Waived F&A is the difference in FSU's negotiated rate and the rate we use on the budget. Sometimes waived F&A is used as cost sharing. These two fields determine how waived F&A is calculated by the system based on post-award expenditures.	Select to use the sponsor-limited F&A rate for calculating waived F&A.
3	Contracts Related	Pricing Method and Product determines how billing will occur if proposal is awarded.	Leave as defaulted. SRA/FSURF will enter appropriate information.



4	Rate Type	This important selection helps determine the appropriate F&A rate to use in budget calculations.	Select a rate type. Refer to FSU F&A Rate Agreement at http://www.research.fsu.edu/contractsgrants/documents/rateagreement.pdf
5	Budget FA Base (facilities and administration base)	This important selection helps determine the appropriate F&A rate to use in budget calculations.	Select an FA base applicable <u>to this proposal</u> . Refer to FSU F&A Rate Agreement. If F&A is not allowed, enter NA as the FA Base. Do not delete the Effective Date.
6	Budget FA Rate % (facilities and administration rate percentage)	This important selection helps determine the appropriate F&A rate to use in budget calculations.	The Institution's negotiated rate defaults into this field. If the rate to be applied <u>to this proposal</u> is different, enter the appropriate rate. This is the rate that will be used to compute the F&A on the Budget Detail. Refer to FSU F&A Rate Agreement. If F&A is not allowed, leave the FA Rate % blank. If desired, the row with the oldest effective date may be deleted.



Resources Tab

Navigation: OMNI Financials > Grants > Proposals > Maintain Proposal, Resources tab

The Resources page captures information related to project resources like space and non-space needs, subrecipient information, and project personnel.

[Favorites](#) | [Main Menu](#) > [Grants](#) > [Proposals](#) > [Maintain Proposal](#)

Proposal | Projects | Budgets | Resources | Certifications | Reports | Attachments | Location

Proposal ID: NEXT Version ID: V1 Business Unit: FSU01
 Description: test Currency: USD

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

Project ID: NEXT_1 Title:

Resource Find | View All | First | 1 of 1 | Last

*Type: + -

Comments:

2 Subrecipient Find | View All | First | 1 of 1 | Last

Subrecipient: + -


3 Professional Customize | Find | First | 1-3 of 3 | Last

Research	Employee ID	Name	*Other Role	Credit %	Reporting Role	Include in Award Header	Added by Workflow	Workflow Eligible	Details	4
<input checked="" type="checkbox"/>	000000100	Thistle, David E	Principal Investigator	50	Principal Investigator	<input checked="" type="checkbox"/>	N	<input checked="" type="checkbox"/>		+
<input checked="" type="checkbox"/>	000000250	Taylor, Kenneth A	Co-PI	50	Co-PI	<input checked="" type="checkbox"/>	N	<input checked="" type="checkbox"/>		+
<input checked="" type="checkbox"/>	000017149	Hodges, Beth E	Sponsored Project			<input type="checkbox"/>	N	<input checked="" type="checkbox"/>		+

Go To: [Location](#) | [Protocols](#) | [Component](#) | [Setup Level](#) | [Keywords](#) | [Gender & Minority Study](#) | [Trainee](#) | [Attributes](#)

Item #	Field Name	Field Explanation	Data Entry Required
1	Resource	PeopleSoft delivered certain codes to print on PHS forms. FSU has created additional codes for internal reporting purposes.	See Appendix E for data entry guidance.
2	Subrecipient	Information about subcontractors.	Leave blank. Not required.
3	Professional – See A-I below for a description of each column in this section.		
A	Research	Distinguishes between research project employees and administrative employees.	A checked box means employee is a member of the research team. <u>An unchecked box means employee is listed on the proposal for administrative purposes only.</u>
B	Employee ID	FSU Employee ID.	Select the ID of the employee to be added to the proposal.



C	Name	Displays the name of the employee who is associated with the EMPLID.	N/A
D	Other Role	Click the lookup icon  to see list of role choices. Many roles shown are for workflow purposes only. Most commonly used roles: Principal Investigator, Co-Principal Investigator, Sponsored Project Manager or Department Rep.	Select the employee's role in the project. See Appendix F for information related to proposal project roles.
E	Credit %	This information is for internal reporting purposes only. This data may be used however the department or college chooses.	This does not represent SRAD distributions. Enter the percent credit for each employee with the role of PI or Co-PI. Co-pi's must receive a minimum of 1% credit. The sum of the credit percent on all the rows cannot exceed 100 percent for each project.
F	Reporting Role	This role is identical to the Other Role field.	When the "Other Role" of PI or Co-PI is entered, this Reporting Role field will be populated automatically. For other rows, select the same role that was entered under Other Role field.
G	Include in Award Header	If this box is checked, the employee name will be carried over to the award record.	Check the box ONLY for employees with the role of Principal Investigator or Co-PI.
H	Added by Workflow	A checkmark indicates that the workflow program added the employee for workflow purposes.	N/A. Auto-populated by workflow program.
I	Workflow Eligible	This checkbox is used for proposal approval workflow.	N/A. FSU has a customized proposal approval workflow program. Leave the checkboxes as they default in. If a box is manually unchecked, an error message will appear.
4	Details	Details about the employee.	OPTIONAL



Certifications Tab

Navigation: **OMNI Financials > Grants > Proposals > Maintain Proposal, Certifications tab**

The **Certifications** page stores the three certifications required by FSU plus any other proposal-project specific details (e.g., use of human subjects, hazardous materials, etc.).

*Certification Code	Certification Date	Indicator	Certified By	Approval Date	Expiration Dt	Assurance Number	Exemption Number
WAV1		Yes					
SFINT		No					
NSFF2		Yes					
ICWAV		No					

Most of the certifications available for selection are only required to fill in a form (a functionality not used at FSU). Some certifications are required by FSU when a project involves certain activities (e.g. Human Subjects). Four certifications are required to be selected on every proposal project.

- **The three required Certifications are:**
 - **Graduate Tuition Waiver**
 - **Significant Financial Interest**
 - **NSF Report Code**
 - **Indirect Cost (F&A) Waiver**
- **Enter these and other certification codes as described in Appendix G.**



Reports Tab

Navigation: **OMNI Financials > Grants > Proposals > Maintain Proposal, Reports tab**

The **Reports** page stores the abstract of the proposal, which is a required entry.

Proposal	Projects	Budgets	Resources	Certifications	Reports	Attachments	Location
Proposal ID:	NEXT	Version ID:	V1	Business Unit:	FSU01		
Description:	Insulin & Rats						
Proposal Project Find View All First 1 of 1 Last							
Project ID:	NEXT_1	Title:					
Report Find View All First 1 of 1 Last							
*Type:	Abstract <input type="button" value="+"/> <input type="button" value="-"/>						
Comments:	Type, or cut/paste, the proposal abstract here. This is a required field. <input type="button" value="P"/>						
Go To: Location Protocols Component Setup Level Keywords Gender & Minority Study Trainee Attributes							

Type and Comments	<p>Abstract is an FSU-required field for all proposals. Select Abstract from the dropdown list of Types. Insert an abstract about the proposal in the Comments field either by typing it or cutting/pasting it in the box. Abstract cannot be in an attachment.</p> <p>No other Report Types are needed.</p>
--------------------------	---



Attachments Tab

Data cannot be entered on this page until proposal has been saved. Skip to page 25 to continue entry and return to this page after proposal is saved.

Navigation: OMNI Financials > Grants > Proposals > Maintain Proposal, Attachments tab

The Attachments page stores documents the researchers prepare, such as the technical statement of work, budget and personnel information. Multiple documents may be attached to the proposal. There are no file type limitations but there are certain size limitations. If upload fails, try dividing the document into smaller files. **See Appendix H for FSU-specific requirements and recommendations related to proposal attachments, including file naming conventions.**

Attachment		Customize Find First 1 of 1 Last
Requests	Attached File	
1		

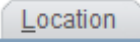
Attachment					Customize Find First 1-4 of 4 Last
Requests	Attached File	Delete	View		
1	028278_Solicitation_01-14-2011.docx				
3	028278_FinalProposal_01-14-2011.docx				
4	028278_BudgetWorksheets_01-14-2011.docx				
5	028278_CSCCommForm_01-14-2011.docx				

	Click the Add Attachment icon to attach/upload a document to the proposal.
	Click to search for the document to be attached to the proposal. This button appears after the Add Attachment button is clicked.
	Click to attach the file to the proposal and return to the Documents page. This button appears after the Add Attachment button is clicked.
	Click the Delete Attachment button to delete a document. This button appears only after a document is attached to the page.
	Click the View Attachment button to view the attachment. This button appears only after a document is attached to the page. Some browser settings may require holding down the Shift key until the documents opens.
	Click the Add button to add more rows to insert additional documents.
	Click the Delete button to remove unwanted rows.



Locations Hyperlink/Tab

Navigation: OMNI Financials > Grants > Proposals > Maintain Proposal, Locations hyperlink (see bottom of page).

The [Location](#) page stores address information where the project is conducted. Once the hyperlink is selected, a  tab will appear at the top of the page.

Proposal Projects Budgets Resources Certifications Reports Attachments Location
Proposal ID: NEXT Version ID: V1 Business Unit: FSU01 Description: Insulin & Rats
<div style="border: 1px solid black; padding: 5px;"> <div style="border: 1px solid black; padding: 2px;"> Find View All First 1 of 1 Last </div> <div style="border: 1px solid black; padding: 2px;"> <div style="border: 1px solid black; padding: 2px;"> Find View All First 1 of 1 Last </div> <div style="border: 1px solid black; padding: 2px;"> Find View All First 1 of 1 Last </div> </div> </div>
Go To: Location Protocols Component Setup Level Keywords Gender & Minority Study Trainee Attributes

Location	Select a code to display the information from the location control table. When a site is selected, the system populates the address information fields. New locations may be entered manually in the specific address and phone fields. If a specific location cannot be found, use 00010001 as a default.
Foreign	Select to indicate that this location is outside the United States.



Keywords Hyperlink/Tab

Navigation: OMNI Financials > Grants > Proposals > Maintain Proposal, Keywords hyperlink
(see bottom of page).

The [Keywords](#) page stores the keywords that apply to this proposal. At least one keyword is required and multiple keywords are allowed. Once the hyperlink is selected, a **Key Words** tab will appear at the top of the page. Keywords will be used by University administration to identify faculty areas of interest or University projects in a particular science or non-science area.

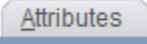
Proposal	Projects	Budgets	Resources	Certifications	Reports	Attachments	Key Words	
Proposal ID:	0000021034	Version ID:	V1	Business Unit:	FSU01			
Description:	Insulin & Rats							
Key Word Detail Customize Find First 1 of 1 Last								
*Key Word	Description						+	-
1	DI_DIABETES						+	-
Go To: Location Protocols Component Setup Level Keywords Gender & Minority Study Trainee Attributes								

Key Word	<p>Click the Look up button to select a value from the list of available key words that best fits the proposed project.</p> <p>Contact SRA/FSURF if a new keyword needs to be added. A complete list of proposal keywords may be viewed at http://www.research.fsu.edu/contractsgrants/documents/keywords.xls.</p>
-----------------	---



Attributes Hyperlink/Tab

Navigation: OMNI Financials > Grants > Proposals > Maintain Proposal, Attributes hyperlink
(see bottom of page).

The [Attributes](#) page stores the attributes that apply to this proposal. Once the hyperlink is selected, a  tab will appear at the top of the page.



The screenshot shows the 'Attributes' tab selected in a navigation menu. Below the menu, the following information is displayed:

- Proposal ID: 0000021034
- Version ID: V1
- Business Unit: FSU01
- Description: Insulin & Rats

A 'Detail' window is open, showing:

- *Attribute Type: BASIC_RES (Basic Research)
- Attribute Value: (empty text box)
- Comments: (empty text area)

At the bottom, there is a 'Go To:' section with links for Location, Protocols, Component, Setup Level, Keywords, Gender & Minority Study, Trainee, and Attributes.

- Enter Attributes as described in Appendix K. Value and Comments are not required.

Click  .

Go back to page 16 and 18 to enter information on F&A and Pricing Setup and add proposal attachments.

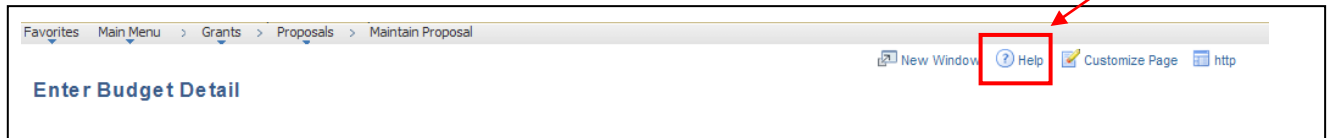


Proposal Budgets

Entry of budget details is not required IF

- Data entry is completed on the Budgets Tab (including the F&A and Pricing Setup) according to the instructions starting on page 16; **and**
- Detailed budget information including justification is uploaded into OMNI via the Attachments Tab.

If desired, **Budget Details** may be entered. Follow the online instructions provided under the [? Help](#) hyperlink in the upper right corner of the page.





Checking for Data Entry Errors

Once all proposal data has been entered but **before** starting the proposal approval process, check the proposal for data entry errors.

- Run the **Proposal Exception Report**. See Appendix L for instructions.
- Review the **Proposal Checklist** below. Only the most critical fields are included on the checklist; however, reviewing the checklist will help alleviate common data entry errors.

PROPOSAL CHECKLIST

Proposal Tab

- Business Unit is correct
- Short Title typed in title case
- Sponsor ID is correct (e.g. Use SponsorID for *National Cancer Institute*, instead of *National Institutes of Health*.)
- Purpose is correct
- CFDA # entered if Federal or Federal Flow Through
- Due By
 - Due Date: changed to correct date.
 - Receipt/Postmark selected
 - Time entered
 - Time Zone entered
- Additional Information
 - Cost Sharing selected if applicable
 - Flow Through selected if applicable; enter Federal agency sponsor ID.
 - Previous Award selected if applicable; enter award number.
 - Solicitation selected if applicable; enter solicitation number and/or title
- Start Date
- End Date (reflects the entire proposed period of performance)

Projects Tab

- Department and Subdivision accurate and match
- Department Credit entered in whole numbers and totals to 100%

Budgets Tab

- Budget ID equals "1"
- Budget Description is "Budget"

F&A and Pricing Setup Hyperlink

- Rate Type correct
- F&A Base (Under Budget section at bottom of page) changed if appropriate. If rate is 0%, entered NA.
- F&A Rate % changed if appropriate.

Resources Tab

- Resource section:
 - ADDL selected if additional non-space related resources are requested
 - ANSPC selected if additional animal space is requested
 - SPACE selected if additional non-animal space is requested
 - ICWAV selected on all new V1 proposals.
 - OFFLO selected if more than 50% of the project to be conducted in facilities not owned by FSU. Entered location address in Comments box.
- Professionals section as applicable:
 - Co-PI(s) Employee ID, Role and Credit % at least 1%



- Sponsored Project Manager Employee ID and Role, if applicable
- Department Representative Employee ID and Role, if applicable
- Other Role and Reporting Role match for PI and Co-PIs.

Certifications Tab

All four of the following required certifications have been entered.

- *Graduate Tuition Waiver Code*: WAV1, WAV2, WAV3, or WAV4;
 - Indicator Yes
- *Significant Financial Interest*: SFINT
 - Indicator Yes or No as applicable
- *NSF Report Code*: NSFxx
 - Indicator Yes
- *ICWAV Code*
 - Indicator Yes or No as applicable
- If using animal subjects, entered ANIMA and ANPRO; and entered protocol number in Assur Nbr block on ANPRO row.
- If using human subjects, entered HUMAN
- If using DNA/RNA, entered DNARN
- If using hazardous materials, entered HZCHM
- If using select agents, entered SLAGT
- If using nanomaterials, entered NANOM
- If using radioactive material, entered RADIO
- If workshops or conferences proposed, entered WKCNF and COLFEE. Answered yes or no if collecting fees. Entered CEU and answered yes or no if COLFEE answer is yes.
- If using Marine Lab, entered MRINE
- If using Academic Diving facilities, entered CADIV
- If faculty overload proposed, entered OVRLD
- If dual compensation proposed, entered DCOMP

Reports Tab

- Selected Abstract and entered abstract in the Comments field.

Attachments Tab

Attached all that apply:

- Proposal (one file that includes technical narrative, sponsor forms, administrative narrative, budgets, appendices, vitae, third-party support letters, etc.)
- Internal budget work papers
- SRA/FSURF Animal Use Form
- Cost Sharing Commitment Form
- F&A Waiver Justification or Approval
- Restricted Costs Waiver Justification or Approval (OMB Circular A-21)
- Solicitation
- Additional Resources Request/Justification or Approval (animal and non-animal space, and other requested resources)

Keywords Tab

- Entered at least one keyword.

Attributes Hyperlink/Tab

- If Proposal Purpose is Research, selected Basic Research, Applied Research, Development Research).
- ARRA_FUNDS, if Recovery Act source of funds



Start Proposal Approval Process

Note to Sponsored Research Administration staff: Skip this step and check Work Flow By Pass on the Proposal tab.

Any employee may create a proposal and submit it for approval. Only those employees entered on the Proposals Resources page or added by the workflow program will be able to view the proposal. One exception is that a user may be set up on Grants Security to be able to view any proposal related to a particular department or college. Contact Sponsored Research Administration if a department-level user needs such access.

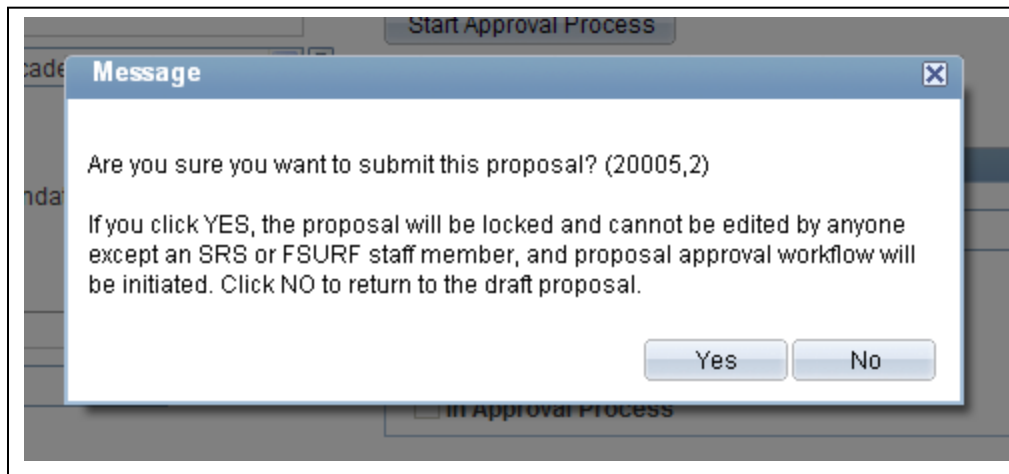
If a departmental support person enters a proposal on behalf of a PI, that user must be added to the Proposal Resources page with the role of Sponsored Project Manager or Department Rep. Otherwise, that user will not be able to access the proposal later.


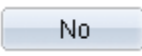
Once all proposal data has been entered and attachments loaded, it is ready to be approved by PI's, chairs/directors, deans and FSU's authorized representative (SRA/FSURF).

Open the proposal (if not already open) and click on the  tab.

To initiate the workflow process, click .

The following message will appear:



Click  to proceed with workflow, or  to return to the draft proposal.

Once Yes is clicked, the proposal is frozen and may not be edited by anyone unless denied back to the originator. SRA may make minor changes after the proposal is approved and submitted.



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 [Proposal](#) page.

Click [Approval Info](#), 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	Comment
1	Originator	Key,Diana L	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Submitted	01/14/2011 3:18:46PM	
2	Central Off. Reviewer	Key,Diana L	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Notified	01/14/2011 3:18:47PM	
3	Central Off. Reviewer	Thompson,Gregory W	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Notified	01/14/2011 3:18:47PM	
4	Central Off. Reviewer	Wammack,Julie V	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Notified	01/14/2011 3:18:47PM	
5	Central Off. Reviewer	Fletcher,Kathleen F	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Notified	01/14/2011 3:18:47PM	
6	Central Off. Reviewer	Lentz,Russell D	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Notified	01/14/2011 3:18:47PM	
7	Co-PI	Taylor,Kenneth A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pending		
8	Principal Investigator	Gilbert,David M	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pending		
9	Sponsored Project Manager	Hodges,Beth E	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Notified	01/14/2011 3:18:47PM	

OK Cancel Refresh

Appendix I provides an overview of OMNI Grants Proposal Approval Workflow for further information. Job Aids for reviewers and approvers are available as a supplement to this Proposal Development Guide. These documents are posted on the Sponsored Research website at: <http://www.research.fsu.edu/contractsgrants/workshops.html>.



Proposal Audit Logs

Navigation: OMNI Financials > Grants > Proposals > Review Proposal Audit Logs

Proposal audit logs provide an audit trail of changes to important data elements in the proposal. Here is some general information about audit logs:

- The audit trail accumulates automatically whenever one of the key data elements are added, deleted, or changed.
- All audit pages identify the user who made the change, the type of change (add, change, or delete) made, and the date and time of change.

Header						
Projects		Resources				
Unit: FSU01		Proposal: 0000021034		V1		Insulin & Rats
Proposal Authorization						
Customize Find First 1-2 of 2 Last						
Log Info		More Log Info				
User	Action	Date/Time	Empl ID	Name	Short Title	Sponsor
DKEY	Add	01/14/2011 11:45:27.740841AM	000068100	Gilbert,David M	The Effects of Insulin on Rats	975
DKEY	Change Old (PPR Only)	01/14/2011 3:18:48.410272PM	000068100	Gilbert,David M	The Effects of Insulin on Rats	975
Note: Change and Delete actions reflect field values prior to modification.						



Copy Proposal

Navigation: OMNI Financials > Grants > Proposals > Copy Proposal

Copy Proposal Unit: FSU01

From Proposal: 0000021034 *To Proposal: NEXT

From Version ID: V1 To Version: V1

From Start Date: 10/01/2011 To Start Date: 10/01/2011

From End Date: 09/30/2014 To End Date: 09/30/2014

Budget Period				
Budget Period	From Start Date	From End Date	To Start Date	To End Date
1	10/01/2011	09/30/2012	10/01/2011	09/30/2012
2	10/01/2012	09/30/2013	10/01/2012	09/30/2013
3	10/01/2013	09/30/2014	10/01/2013	09/30/2014

Project: From Project ID: 029353 The Effects of Insulin on Rats To Project ID: NEXT

Primary Project

Budget		
Copy	From Budget ID	To Budget ID
<input checked="" type="checkbox"/>	1	1

Copy

To copy proposals:

1. In the search dialog box, select the business unit and the proposal ID from which to copy information. If a Template Proposal is copied, the resulting proposal will not be marked as a template.
2. The Proposal ID in the *To Proposal* field will be system generated.
3. The Version ID in the *To Version* field, "V1" will be system generated.
4. Use the From Project ID and From Budget fields to select the projects and budget IDs to be copied to the new proposal. Note that the default setting is for all the projects and activities to be copied. Multiple projects and budget IDs are allowed as needed.
5. Use the To Project ID and To Budget fields to select the projects and budget IDs to be copied to the new proposal, or accept the system defaults.
6. Select the Primary Project check box to indicate which project should be the primary project in the copied proposal.
7. Click Copy.



By default, the target proposal has the same dates as the source proposal from which it is copied. However, the dates may be changed on the target proposal before or after it is copied. However, it is easier to change the dates before copying the proposal.

If the proposal to be copied has been through workflow, the target proposal will show all the workflow participants on the Resources page. The Resources page will be adjusted to reflect appropriate workflow participants when changes are made and saved on the new proposal.



GENERAL OMNI INFORMATION

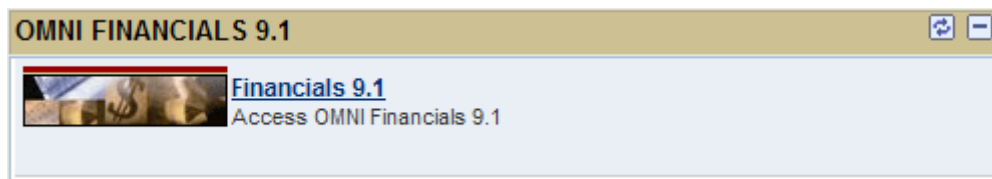
LOG IN: www.fsu.edu, click Quick Links > OMNI. Enter your FSUID and password.

FSUID :

Password:

If you have any problems logging in, call 850-644-HELP (4357) for assistance.

Click on Financials 9.1 hyperlink.



MENU (aka, left navigation)





Click on a menu item to expand. Click on **Grants** to see a menu similar to the one below. A user's security roles drive what is displayed in OMNI.

Favorites | Main Menu > Grants

Grants

Access Grants Management.

<p>Grants Center Access the grants management center.</p>	<p>Proposals Define or maintain proposal information. Maintain Proposal Enter Budget Detail Submit Proposal 8 More...</p>	<p>Awards Define or maintain Grants Management award information. Award Profile Project Project Activity 9 More...</p>
<p>Institutions Define or maintain Grants Management institution information. General Information Contacts Facilities Admin Rates 3 More...</p>	<p>Departments Define or maintain Grants Management department information. General Information Contacts Add/Update Chair/Dean AIts</p>	<p>Professionals Define or maintain Grants Management professional profile information. Professional Data Job and Employment Data Advisor / Advisee 14 More...</p>
<p>Sponsors Define or maintain Grants Management sponsor profile information. General Information Forms Facilities Admin Rates 2 More...</p>	<p>Subrecipients Define or maintain Grants Management subrecipient profile information. General information</p>	<p>Interactive Reports Run Grants Management inquiries. Award Inventory Project Forecast Project Variance 3 More...</p>
<p>My Proposals Manage proposals from a personal list.</p>		

Click the **Proposals** Define or maintain proposal information. hyperlink to see the expanded Proposals menu.

Favorites | Main Menu > Grants

Proposals
Define or maintain proposal information.

<p>Maintain Proposal Define and update proposal information.</p>	<p>Enter Budget Detail Enter or review budget line information.</p>	<p>Submit Proposal Submit a proposal to approving authorities for printing.</p>
<p>Print Proposal Print a proposal for submission to a sponsor.</p>	<p>Generate Award Create award management entities.</p>	<p>Copy Proposal Create a new proposal from an existing proposal.</p>
<p>Copy Proposal Version Create a new Proposal Version from an existing Proposal Version</p>	<p>Copy Budget Period Copy data from a previous budget period to a future budget period.</p>	<p>Review Pre-Award Budget Review the total budget by proposal, projects, or cost share.</p>
<p>Review Proposal Audit Logs Track changes to proposal short title, sponsor, begin/end date and other fields.</p>	<p>Proposal Component Approval Proposal Component Approval/Submit</p>	





 **Maintain Proposal**
Define and update proposal information.

Click the [Maintain Proposal](#) hyperlink to create a new proposal or to view an existing proposal.

NOTE: From this point, navigate via the “**breadcrumbs**” menu along the top of the page. Sample breadcrumb menu shown below:

[Favorites](#) | [Main Menu](#) > [Grants](#) > [Proposals](#) > [Maintain Proposal](#)

Frequently used icons and navigation tips:

	Sometimes referred to as a spyglass. Look up the list of values allowed to be selected.
Description	This is an example of a hyperlink on a page. Click the hyperlink to go to another page.
<input type="text" value="New"/>	This is an example of a dropdown list. Click to see the list of values allowed to be selected.
	This is a “details” icon. Click the icon to go to another page.
<input type="button" value="Add to My Proposals"/>	Save the proposal to your personal list of proposals.
<input type="button" value="Start Approval Process"/>	Start the proposal approval workflow process.
<input type="button" value="Save"/>	Save the data entered.
<input type="button" value="Return to Search"/>	Return to search results page.
<input type="button" value="Notify"/>	Send an email about the proposal.



	Add a new proposal.
	Customize the display of the section under the blue header.
	Find specific information in the data below the blue header.
	Download the information displayed below the blue header to an Excel spreadsheet.
	Displays all values or jumps to the next or last value.
	Add a row.
	Delete a row.
	Opens a new OMNI page in new browser window.
	Displays PeopleBooks information about the page.
	Customize the display of the page.
Home	Returns to the main menu.
Worklist	Displays worklist items.
Process Monitor	Quick link to the Process Monitor page.
Report Manager	Quick link to the Report Manager page.
Add to Favorites	Adds the current component to the Favorites menu.
Sign out	Click to log out of OMNI.
	Move to the next value displayed in search results.
	Move to the previous value in search results.
	Deletes proposal attachment.
	View proposal attachment.
	If page has effective dates, clicking this button will display history of page changes.
	Click to correct the existing page even though page is effective dated.
Menu	Refresh, minimize or remove menu.
	Starts the search for the values entered in the search criteria.
	Deletes all search criteria.
- OMNI Portal Home	Return to Portal.
- My Personalizations	Allows user to set personal navigation options.
- My System Profile	Allows user to set workflow options.
- My Dictionary	Access the Spell Check Personal Dictionary page.



PROPOSAL PURPOSES

Purpose: <input type="text"/>

The values that campus users may select are:

- **RES** – Research
- **OSA** – Other Sponsored Activity
- **INS** – Instruction

DEFINITIONS:

RESEARCH - Sponsored research means all research and development activities that are sponsored by Federal and non-Federal agencies and organizations. This term includes activities involving the training of individuals in research techniques (commonly called research training) where such activities utilize the same facilities as other research and development activities and where such activities are not included in the instruction function.

OTHER SPONSORED ACTIVITY - Other sponsored activities means programs and projects financed by Federal and non-Federal agencies and organizations which involve the performance of work other than instruction and organized research. Examples of such programs and projects are health service projects, and community service programs. However, when any of these activities are undertaken by the institution without outside support, they may be classified as other institutional activities.



INSTRUCTION - Instruction means the teaching and training activities of an institution. Except for research training as provided in subsection b, this term includes all teaching and training activities, whether they are offered for credits toward a degree or certificate or on a non-credit basis, and whether they are offered through regular academic departments or separate divisions, such as a summer school division or an extension division. Also considered part of this major function are departmental research, and, where agreed to, university research.

The following values are restricted to SRA/RF use:

- **SRAD** – Sponsored Research Administration Trust Fund.
- **CNTRL** – Control/Clearing not subject to PARS. Reserved for Central Office Use:
- **CNTPR** – Control/Clearing subject to PARS. Reserved for Central Office Use:




PROPOSAL TYPES

*Proposal Type:  

CRITICAL DECISION: Selection of the appropriate Proposal Type is a **critical** decision. This field, in conjunction with the Business Unit selected, will determine which central office will approve the proposal. Selections are listed below:

- **Competing Continuation** - A competing continuation proposal reports on progress made during a portion of the project period and requests continuation funding for the next portion of the project period. Competing continuation proposals have to compete for funding and are normally subjected to peer review.
- **Internal-CRCCS** - This type is used on proposals submitted to internal funding programs sponsored by the Council on Research and Creative Activity (CRC).
- **Internal-FSU** - This type is reserved for use by central office staff to identify proposals used to establish administrative budgets for Control/Clearing or SRAD.
- **Internal-RF** - This type is reserved for use by central office staff to identify proposals used to establish administrative budgets for Control/Clearing or SRAD.
- **NRSA** – A request for funding under NIH’s National Research Service Award program.
- **New** - This is the default value when a proposal is created. This type should be used when a proposal is being submitted to a sponsor for the first time.
- **No-Cost Extension** - The proposal requests a no-cost extension to the project or budget period of an award. A proposal for an extension is not normally required. A signed letter endorsed by the Authorized Institutional Representative is usually sufficient. Consult with Sponsored Research Administration.
- **Non-Competing Continuation – Do not select this value. Instead, use Renewal.**
- **Pre-Proposal** - A brief description, usually 2-10 pages, of research plans and estimated costs (normally not a detailed budget) that is sometimes submitted to determine the interest of a particular sponsor prior to submission of a formal proposal. Also termed Preliminary Proposal.
- **Renewal** - A request for continued funding of a program. Renewals generally include new work based on the results of the existing grant, and are competing with other proposals and subject to peer review.
- **Research Career Award** – A request for funding under NIH’s Research Career Award program.
- **SBIR I*** - A request for funding under a Small Business Innovative Research program.
- **SBIR II*** - A request for funding under a Small Business Innovative Research program.
- **STTR I*** - A request for funding under a Small Business Technology Transfer program.
- **STTR II*** - A request for funding under a Small Business Technology Transfer program.
- **Supplemental** - A request for additional funds for an ongoing project. A supplemental proposal may result from increased costs due to modifications in design or a desire to add a closely related component to the ongoing project. A supplemental proposal may or may not include a request for additional time.
- **Revised** - Agency asks for a revised proposal to be submitted officially by the University.

*The  icon indicates necessary details for SBIR/STTR proposals only.



ADDITIONAL INFORMATION TYPES

This field contains additional information about topics relevant to a particular proposal. Select as many values as necessary to document the proposal. However, a single type may be used only once. Comments boxes below each type provide free-form fields to capture information about each of the proposal issues in the list. In addition, many of the Additional Information selections have icon links () to extra fields in which detailed information should be entered.

The Additional Information types are listed below and each are explained in detail below the list:

Application Identifier	Major Goals
Allocation Percentage	Other
Concurrent Submissions	PI Change
Conflict of Interest	Pre-Award Spending
Cost Sharing	Previous Award
Express Proposal	Related Proposals
Flow Through	Solicitation
Institution Change	Unobligated Balance
Intellectual Property	

Application Identifier – This option is not used at FSU.

Allocation Percentage – This option is not used at FSU.

Concurrent Submissions – Select this value if the proposed is being submitted concurrently to another agency. Both proposals should be entered and saved first. Then go back into each proposal and click on the Concurrent Submissions Details icon, and search for and select the other proposal’s OMNI Proposal ID. Certain sponsor forms printed from OMNI will require selection of this value.



Conflict of Interest – Select this value if any investigator on the proposal has a conflict of interest related to the work to be performed. Information regarding compliance with institutional policy on Conflict of Interest may be reviewed at <http://www.fsu.edu/~dof/Faculty-Handbook/Ch7/Ch7.45.html>. Enter information about the conflict in the Comments box. Then click on the Details icon and enter the following information. Check the Compliance with Inst. Policy if the conflict has been managed in compliance with FSU policy. Check "Review Completed" if the appropriate institutional officials have reviewed the circumstances of the conflict. Enter the date the officials approved the submission of the proposal where the conflict exists.

Conflict of Interest

Compliance with Inst. Policy


Review Completed


Approval Date: 

Cost Sharing – Select this value if voluntary or mandatory cost sharing funds are included in the proposed budget. Details about cost sharing are stored in the fields of this selection. Check the Required by Sponsor checkbox when proposing mandatory cost sharing. Do not check the box if the cost sharing is voluntary. The FSU cost sharing policy may be viewed at <http://www.research.fsu.edu/contractsgrants/costsharing.html>. Certain sponsor forms printed from OMNI will require selection of this value.

Cost Sharing

Required by Sponsor

Approved By: 

Date of Approval: 


Source:

Express Proposal – This value may be selected if the proposal should be reviewed on a “fast track” or rush basis.

Flow Through – Select this value if the proposal is to be submitted to an entity that has a Federal prime agreement, under which a subcontract would be issued to FSU.

If Flow Through is selected, click on the Details icon to the right of the box. Search for and select the prime Federal sponsor’s ID.

Flow Through

Primary Sponsor: 



Intellectual Property – Information about intellectual property disclosures may be entered in the fields for this selection. Certain sponsor forms printed from OMNI will require selection of this value.

Intellectual Property

Intellectual Property Reported

Description [?]

Other –The comments field is available to record comments for other additional information about the proposal.

PI Change – Information about a change in Principal Investigator for the proposal can be stored in the fields for this selection. Certain sponsor forms printed from OMNI will require selection of this value.

PI Change

PI Change

Previous PI:

Pre-Award Spending – This value may be selected if the PI anticipates the need for pre-award spending to be authorized. Contact a Sponsored Research Administration administrator for specific information on pre-award spending.

Pre-Award Spending

Pre-award Spending Allowed

Guaranteed Source of Funding:



Previous Award – Information about the prior award for a continuation or renewal proposal may be entered in the fields for this selection.

Certain sponsor forms printed from OMNI will require selection of this value.

If Previous Award is selected, click on the Details icon beside the box and enter the following information:

Previous Award

Business Unit:

Previous Award:

Renewal in Progress

Accomplishment Based Renewal

Related Proposals – Information about previously submitted proposals related to the current one can be stored in this selection. If Related Proposals is selected, click on the Details icon beside the box and enter the following information:

Related Proposal

Pre-Proposal Number:

Information Find | View All First 1 of 1 Last

*Proposal Business Unit:

*Related Proposal ID:

Version ID:

Solicitation – Select this value if the proposed is being submitted in response to a solicitation. If Solicitation is selected, click on the Details icon to the right of the box. Enter number and title of the solicitation. Certain sponsor forms printed from OMNI will require selection of this value.

Solicitation

Solicitation/RFP Number:

Solicitation Title:



RESOURCE TYPES

Proposal Resources are listed in the top section of the [Resources](#) page.

The screenshot shows a web form titled "Resource". At the top right, there are navigation links: "Find | View All | First | 1 of 1 | Last". Below the title, there is a field labeled "*Type:" with an empty input box and a magnifying glass icon. To the right of this field are two small buttons, a plus sign and a minus sign. Below the "*Type:" field is a larger text area labeled "Comments:" with an empty input box and a magnifying glass icon.

Resource Type and Comments: Enter all Resource Types applicable to this project and complete the Comments box according to the instructions below. Click the sign to add additional rows if more than one Type is needed.

Values added specifically for FSU:

ADDL – This code stands for **Additional Resources Requested**. Select this value if additional non-space related resources are being requested—or have been approved already—for this particular project. Enter a brief explanation in the Comments section to the right of this value. Attach/upload the detailed request or approval document on the Attachments tab of this proposal.

ANSPC -- This code stands for **Animal Space Requested**. Select this value if additional animal space is being requested—or has been approved already—for this particular project. Enter a brief explanation in the Comments section to the right of this value. Attach/upload the detailed request or approval document on the Attachments tab of this proposal.

OFFLO – This code stands for **Off Campus Location**. Select this value if more than 50% of the project is to be conducted in facilities not owned by FSU. (F&A costs should be included in the proposal budget at the off-campus rate. Also see Budget Header instructions.) Enter the address of the off-campus performance site in the Comments box.

The screenshot shows the same "Resource" form as above, but with data entered. The "*Type:" field now contains the text "OFFLO". The "Comments:" field contains the text "575 Main Street, Miami, FL". The navigation links at the top right remain the same.

SPACE – This code stands for **Non-Animal Space Requested**. Select this value if additional non-animal space is being requested—or has been approved already—for this particular project. Enter a brief explanation in the Comments section to the right of this value. Attach/upload the detailed request or approval document on the Attachments tab of this proposal.

All other values were delivered by PeopleSoft specifically for printing the PHS398 forms. Do not select any value other than those listed above.



PROPOSAL PROJECT PROFESSIONALS

Proposal Professionals are listed at the bottom of the [Resources](#) page.

Research	Employee ID	Name	*Other Role	Contact PI	Primary PI	Credit %	Reporting Role	Include in Award Header	Added by Workflow	Workflow Eligible	Details		
<input checked="" type="checkbox"/>	000052192	Strouse, Geoffrey F	Principal Investigator	<input type="checkbox"/>	<input type="checkbox"/>	55.00	Principal Inv	<input checked="" type="checkbox"/>	N	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	000076758	Paravastu, Anant K	Co-PI	<input type="checkbox"/>	<input type="checkbox"/>	45.00	Co-PI	<input checked="" type="checkbox"/>	N	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	000007420	Maybin, Patricia M	Sponsored Project Manager	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	N	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	000003332	Rinkel, Terry S	Sponsored Project Manager	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	N	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	000043821	Baxley, Debra R	Sponsored Project Manager	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	N	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

The four Professionals roles listed below are the only roles (other than workflow roles) that have any use or purpose for OMNI Grants. The first two are the only roles included in faculty activity reporting. All four roles are used for proposal security purposes. The PI and SP Manager are authorized to spend project funds when included on the post-award Project Team.

Please limit the selection to one of these four roles:

1. Principal Investigator
2. Co-Principal Investigator
3. Sponsored Project Manager
4. Department Representative

The role for the *Principal Investigator* defaults from the Proposal page. More rows must be added to identify other employees with one of the roles shown above. To add rows, click the at the end of the row. To delete unwanted rows, click .

- PI** – There can be only one Principal Investigator per project. Anyone with this role will have access to view and edit the proposal at any time prior to starting the approval process (workflow).
- Co-PI** – This role designates project co-investigators. There is no limit on the number of Co-PI’s that can be identified. Anyone with this role will have access to view and edit the proposal at any time prior to starting the approval process (workflow).
- SP Mgr** — An employee assigned this role (Sponsored Project Manager) has the same access, authority, and responsibility as a principal investigator when included on the post-award Project Team. Anyone with this role will have access to view and edit the proposal at any time prior to starting the approval process (workflow).
- Dept Rep** – An employee who is assigned this role (Department Representative) will have access to view and edit this proposal at any time prior to starting the approval process (workflow).



PROPOSAL CERTIFICATIONS

*Certification Code	Certification Date	*Indicator	Certified By	Approval Date	Expiration Dt	Assurance Number	Exemption Number		
WAV1		Yes							+ -
SFINT		No							+ -
NSFF2		Yes							+ -
ICWAV		No							+ -

This page is used for a variety of purposes at FSU. Please follow these guidelines carefully.

- Four of the certifications are required to be selected on every proposal project.
- Some are required when a project involves certain activities or facilities.
- The remaining certification codes should be ignored.

CODES TO BE SELECTED ON EVERY PROPOSAL

The following codes are required on every proposal. Detailed entry notes follow below:

- Graduate Tuition Waiver Certification
- Significant Financial Interest Certification
- NSF Report Code Certification
- Indirect Cost (F&A) Waiver

GRADUATE TUITION WAIVER CERTIFICATION

One Graduate Tuition Waiver certification is **required** to be selected on every proposal. Choose one of the following:

- ▶ Select **WAV1 - Graduate Tuition Waiver 1** if the proposal meets the following qualifications. Select "Yes" under Indicator and leave all other fields blank:
 - This Contract/Grant will pay the matriculation fee for graduate assistants and out-of-state tuition for engineering majors; **OR**
 - No qualifying graduate students proposed. (NOTE: This account will be coded to the effect that matriculation fees/tuition waivers will be direct charged in the event qualifying graduate students are appointed at a later date.); **OR**
 - Sponsor does not allow payment of graduate assistant salaries; therefore, there will be no matriculation fee liability.
- ▶ Select **WAV2 - Graduate Tuition Waiver 2** if the matriculation waivers are covered by the College/School Waiver Allocation. Select "Yes" under Indicator. Leave all other fields blank.



- ▶ Select **WAV3 - Graduate Tuition Waiver 3** if an alternate source will be charged for the waivers. Select "Yes" under Indicator. Leave all other fields blank. The department is responsible for processing departmental billings to pay tuition for all students paid from this project. If the dept does not process a departmental billing, the tuition will be charged automatically to the College/School Waiver Allocation.
- ▶ Select **WAV4 - Graduate Tuition Waiver 4** if this Contract/Grant will pay **only** the matriculation fee for graduate assistants, even if, engineering majors are involved in this project.

SIGNIFICANT FINANCIAL INTEREST

This code, *SFINT*, is **required** to be selected on every proposal. Select "Yes" if all significant financial interests have been disclosed to the institutional reviewer. Select "No" if there were no significant financial interests to be disclosed by any investigator. Leave all other fields blank

NSF REPORT CODE CERTIFICATION

One NSF Report Code is **required** to be selected on every proposal. Only one code allowed. Select the appropriate code from the following list, select "Yes" under the Indicator and leave all other fields blank.

NSFA1	Aeronautical & Astronautical
NSFA2	Bioeng/ Biomedical Eng
NSFA3	Chemical
NSFA4	Civil
NSFA5	Electrical
NSFA6	Mechanical
NSFA7	Metallurgical Materials
NSFA8	Other Engineering
NSFB1	Astronomy
NSFB2	Chemistry
NSFB3	Physics
NSFB4	Other Physical Sciences
NSFC1	Atmospheric
NSFC2	Earth Sciences
NSFC3	Oceanography
NSFC4	Other Environmental Sciences
NSFD1	Mathematical Sciences
NSFE1	Computer Sciences
NSFF1	Agricultural

NSFF2	Biological Sciences
NSFF3	Medical Sciences
NSFF4	Other Life Sciences
NSFG1	Psychology
NSFH1	Economics
NSFH2	Political Science
NSFH3	Sociology
NSFH4	Other Social Sciences
NSFI1	Other Sciences
NSFJ1	Interdisciplinary
NSFK1	Humanities
NSFL1	Education
NSFM1	Business & Management
NSFN1	Social Work
NSFP1	Law
NSFQ1	Communications
NSFQ2	Journalism
NSFQ3	Library Science
NSFR1	Visual & Performing Art
NSFS1	Non-Science



Indirect Cost (F&A) Waiver

This code, *ICWAV*, is **required** to be selected on every proposal.

- ◆ If a waiver has been approved via FSU's *F&A Waiver Request Form* (or in rare cases via email or memo in lieu of the form), upload the approval document to Proposal Attachments using naming convention: [Project ID]_FAWaiverApproval_[date], select the Certification Code *ICWAV*, and enter Certification data as follows:
 - *Certification Date* auto-populates the current date. However, you may see an older date if the proposal was copied. If an older date exists, replace with the current date.
 - *Indicator* must be "Yes".
 - *Certified By* must be the person who approved the waiver request—meaning the person that actually made the decision to allow the waiver. At this time only Gary Ostrander and Olivia Pope have authority to waive F&A.
 - *Approval Date* is the date the request was approved.
 - Submit proposal for electronic approvals.

Example 1

Proposal	Projects	Budgets	Resources	Certifications	Reports	Attachments
Proposal ID:	0000021222	Version ID:	V1	Business Unit	FSU01	
Description:	Continuous Synthesis	Currency:	USD			

Project																							
Project ID:	029554	Title:	Continuous Synthesis of Pharmaceutical Agents: Efficient																				
<table border="1"> <thead> <tr> <th>*Certification Code</th> <th>Certification Date</th> <th>*Indicator</th> <th>Certified By</th> <th>Approval Date</th> <th>Expiration Dt</th> <th>Assurance Number</th> <th>Exemption Number</th> </tr> </thead> <tbody> <tr> <td>ICWAV</td> <td>02/07/2013</td> <td>Yes</td> <td>Ostrander, Gary Kent</td> <td>01/31/2013</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>								*Certification Code	Certification Date	*Indicator	Certified By	Approval Date	Expiration Dt	Assurance Number	Exemption Number	ICWAV	02/07/2013	Yes	Ostrander, Gary Kent	01/31/2013			
*Certification Code	Certification Date	*Indicator	Certified By	Approval Date	Expiration Dt	Assurance Number	Exemption Number																
ICWAV	02/07/2013	Yes	Ostrander, Gary Kent	01/31/2013																			

- ◆ In all other cases (no waiver, reduced state rates, sponsor policy restricted F&A recovery, etc.), enter data as follows:
 - *Certification Date* auto-populates the current date. However, you may see an older date if the proposal was copied. If an older date exists, replace with the current date.
 - *Indicator* must be "Not Applicable."
 - *Certified By* should be the person who enters the proposal.

Example 2

Proposal	Projects	Budgets	Resources	Certifications	Reports	Attachments
Proposal ID:	0000021222	Version ID:	V1	Business Unit	FSU01	
Description:	Continuous Synthesis	Currency:	USD			

Project																							
Project ID:	029554	Title:	Continuous Synthesis of Pharmaceutical Agents: Efficient																				
<table border="1"> <thead> <tr> <th>*Certification Code</th> <th>Certification Date</th> <th>*Indicator</th> <th>Certified By</th> <th>Approval Date</th> <th>Expiration Dt</th> <th>Assurance Number</th> <th>Exemption Number</th> </tr> </thead> <tbody> <tr> <td>ICWAV</td> <td>02/07/2013</td> <td>Not Applicable</td> <td>James, Janis M</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>								*Certification Code	Certification Date	*Indicator	Certified By	Approval Date	Expiration Dt	Assurance Number	Exemption Number	ICWAV	02/07/2013	Not Applicable	James, Janis M				
*Certification Code	Certification Date	*Indicator	Certified By	Approval Date	Expiration Dt	Assurance Number	Exemption Number																
ICWAV	02/07/2013	Not Applicable	James, Janis M																				



In no case will “No” or “Pending Approval” be allowed.

CODES TO BE SELECTED IF APPLICABLE TO PROPOSAL

NON-FACULTY SUPPORT:

Select any of the following **Head Count** codes on the proposal project **when applicable**. Identify the total number of Undergraduate Students, Graduate Students, Postdoctoral Associates, Non-Student/Non-Ranked Faculty to be supported by this grant (funds included in budget). Numbers should be based on Headcount, not FTE. Select “Yes” under Indicator. Enter head count information into the Assurance Number field as described below. Leave all other fields blank.

UGRAD	Select UGRAD - Undergraduates Supported
GRADS	Select GRADS - Graduate Students Supported
PSTDC	Select PSTDC - Post-Docs Supported
NSNRF	Select NSNRF- Non-Student/Non-Ranked Faculty

Entering Head Count information (described above) in the Assurance Number field: For each of the four head count certifications selected, enter the total number of people supported by this grant during each year of the proposed project. For instance, if the proposal contains support for two graduate students in each of the three years of a project, enter “3,3,3” (without quotes; no spaces). Do not select a head count code if not supporting a particular type of position. A screenshot sample is provided below:

*Certification Code	Certification Date	*Indicator	Certified By	Approval Date	Expiration Dt	Assurance Number	Exemption Number
GRADS		Not Applicable				2,2,2	



COMPLIANCE AND FACILITY USE INDICATORS

The following codes are required to be selected **if applicable** to the proposal. Select any of the following as appropriate. Select “Yes” under Indicator unless otherwise noted below. Leave all other fields blank except as noted under ANPRO.

<i>Cert Code</i>	<input type="checkbox"/> <i>Field Description/Purpose</i>
ANIMA	If the project includes the use of animal subjects. ANPRO must also be selected.
ANPRO	If the project includes the use of animal subjects. Enter Protocol # (format YYYY-####) in the <i>Assurance Number</i> field.
CADIV	If the project involves the Compressed Air Diving Program.
CEU	CEU is required to be selected if WKCNF is selected. Use the Indicator field to answer the question: Will Continuing Education Units (CEU's) be issued to attendees of the workshop(s) or conference(s)?
COLFEE	COLFEE is required to be selected if WKCNF is selected. Use the Indicator field to answer the question: Will fees be collected at the proposed workshop(s) or conference(s)?
CSHND	CSHND is required to be selected if the answer to the COLFEE question is “Yes.” Use the Indicator field to answer the question: Is the collecting department a Certified Cash Handling Site?
DCOMP	If the project proposes dual compensation for any employee.
DNARN	If the project includes the use of DNA/RNA.
HUMAN	If the project includes the use of human subjects.
HZCHM	If the project includes the use of hazardous chemicals.
MRINE	If the project includes the use of Marine Lab/Diving Facilities.
NAMOM	If the project involves use of nanomaterials.
OVRLD	If the project proposes faculty overload.
RADIO	If the project includes the use of radioactive materials
SLAGT	If the project includes the use of select agents.
WKCNF	If the project includes workshops or conferences. COLFEE and CEU must also be selected. If COLFEE answer is “Yes”, CSHND must also be selected.



PROPOSAL ATTACHMENTS

Attachment				
Requests	Attached File	Delete	View	
1	028278_Solicitation_01-14-2011.docx			

This **Attachments** page is used to upload documents (files) related to the proposal to facilitate approvals and for historical reference. Attachments should include any of the following, as applicable:

- Proposal – A copy of the entire proposal should be uploaded (attached) to the proposal. If the proposal is also being submitted through a sponsor’s electronic proposal submission system, download the proposal from that system (if possible), and upload it here. A draft technical proposal may be added to obtain approvals. However, the final version must be provided to SRA/FSURF to upload at the time the proposal is submitted to the sponsor. All parts of the proposal should be combined into one file prior to upload.
 - technical narrative
 - sponsor forms
 - administrative narrative
 - budgets (plus internal working documents)
 - attachments
 - appendices
 - vitae
- SRA/FSURF Animal Use Form
- Cost Sharing Commitment Form
- Third-Party Support Letters
- F&A Waiver Justification or Approval
- Restricted Costs Waiver Justification or Approval (OMB Circular A-21)
- Solicitation
- Additional Resources Request/Justification or Approval (animal and non-animal space, and other requested resources)

ATTACHMENT NAMING CONVENTIONS

The following naming convention shall be used to identify documents attached to OMNI Proposal Attachments or Project Attachments pages.

[ProjectID]_[DocumentType]_[Date]

- **ProjectID** means the OMNI Project ID.
- **DocumentType** means the type of document being attached. Use capital letters instead of spaces between words. Some standard document types are shown in the table below.
- **Date** means a date that is appropriate to the situation. For a draft proposal, use date it is received. For a final proposal (and transmittal form), use date proposal was approved and submitted. For an award, use date it was received. Human subject approval, use date it was received. Format of the date is MM-DD-YYYY (always use “-”).



Due to the complexity of the research administration business, it is impossible to develop a definitive list of document types. The following is a list of document types normally encountered and the standard document-type name that should be used when naming the file. For documents not listed, follow the convention **[Project ID]_[DocumentType]_[Date]**.

DOCUMENT TYPE	STANDARD NAME	SAMPLE FILE NAME
Entire proposal application package in one file. All documents of a proposal shall be scanned as one file. For large files:	DraftProposal FinalProposal FinalProposalPart[#]	025645_DraftProposal_10-01-2009 025645_FinalProposal_10-01-2009 025645_FinalProposalPart1_10-01-2009 025645_FinalProposalPart2_10-01-2009
Supplemental Proposal	SupplementalProposal	025645_SupplementalProposal_10-01-2009
Revised Proposal	RevisedProposal	025645_RevisedProposal_11-29-2009
ContinuationProposal	ContinuationProposalYear3	025645_ContinuationProposalYear3_10-01-2009
Proposal Transmittal Form	Transmittal	025645_Transmittal_10-01-2009
SRA Animal Use Form	ASUForm	025645_ASUForm_10-01-2009
Cost Sharing Request/Justification/Approval	CSRequest CSApproval	025645_CSRequest_10-01-2009 025645_CSApproval_10-01-2009
FSU Cost Sharing Commitment Form	CSCommForm	025645_CSCommForm_10-01-2009
Human Subjects approval letters or email.	HumanSubjApproval	025645_HumanSubjApproval_10-01-2009
Animal Subjects approval letters or email.	AnimalSubjApproval	025645_AnimalSubjApproval_10-01-2009
Third-Party Support Letters (if not already in proposal attachment/appendix). If multiples, scan all to one file.	ThirdPartyCSLtrs	025645_ThirdPartyCSLtrs_10-01-2009
Third-Party Cost Sharing Commitment Form	ThirdPartyCSCommForm	025645_ThirdPartyCSCommForm_10-01-2009
F&A Waiver Justification or Approval and/or sponsor's published policy if not in solicitation.	FAWaiver	025645_FAWaiver_10-01-2009
Restricted Costs (CAS) Waiver Justification or Approval (OMB Circular A-21)	CASWaiver	025645_CASWaiver_10-01-2009
Solicitation	Solicitation	025645_Solicitation_10-01-2009
Additional Resources Request/Justification or Approval	AddlResourcesRequest AddlResourcesApproval	025645_AddlResourcesRequest_10-01-2009 025645_AddlResourcesApproval_10-01-2009
Spreadsheets showing how submitted budgets were calculated (e.g., NIH Modular Budget)	BudgetWorksheets	025645_BudgetWorksheets_10-01-2009



Tabulator).		
Proposal denial notification	ProposalDenial	025645_ProposalDenial_10-01-2009
Proposal Just-In-Time correspondence	ProposalJITRequest	025645_ProposalJITRequest_10-01-2009
Award Document	Award	025645_Award_10-01-2009
Award clarification documents (Notices to Proceed, etc.)	AwardNoticeToProceed	025645_AwardNoticeToProceed_10-01-2009
Award Amendment ¹	AwardAmendment[#] or AwardAmenmdent, if amendment is not numbered	025645_AwardAmendment4_11-30-2009 025645_AwardAmendmentP00004_11-30-2009 025645_AwardAmendment_11-30-2009
Basic Agreement	BasicAgreement	025645_BasicAgreement_10-01-2009
Basic Agreement Amendment	BasicAgreementAmendment[#]	025645_BasicAgreementAmendment3_10-01-2009
Task Order	TaskOrder[#]	025645_TaskOrder3_10-01-2009
Task Order Amendment	TaskOrder[#]Amendment[#]	025645_TaskOrder3Amendment1_10-01-2009
Budget Summary Form	BudgetSummaryForm	025645_BudgetSummaryForm_10-01-2009
Budget Amendment Form	BudgetAmendmentForm	025645_BudgetAmendmentForm_10-01-2009
Request for Advance	RequestForAdvance	025645_RequestForAdvance_10-01-2009
Prior Approval Request Form	PriorApprovalRequestForm	025645_PriorApprRequestForm_10-01-2009
Unfavorable Terms Form	UnfavorableTermsMemo	025645_UnfavorableTermsMemo_10-01-2009
Grants/Projects Personnel Change Form or similar correspondence	ProjectTeamChange	025645_ProjectTeamChange_10-01-2009
Other internal request/approval /correspondence	ChangeCreditDistribReq ChangeWaiverCodeReq	025645_ChangeCreditDistribReq_10-01-2009
Change of Grantee Request/Approval – transferring to or from FSU	AwardTransferNotice	025645_AwardTransferNotice_10-01-2009
Select Agents Registration Approval (from CDC/USDA for NIH only)	SelectAgentsApproval	025645_SelectAgentsApproval_10-01-2009
Indirect Cost Waiver /Approval	ICWaiver	025645_ICWaiver_10-01-2009
Non-disclosure Agreement	NondisclosureAgreement	025645_NondisclosureAgreement_10-01-2009
Award final technical report	FinalTechReport	025645_FinalTechReport_10-01-2009
Award final inventions report	FinalInventionsReport	025645_FinalInventionsReport_10-01-2009
Award final property report	FinalPropertyReport	025645_FinalPropertyReport_10-01-2009
Request to change DeptID on project	ProjectDeptIDChangeRequest	025645_ProjectDeptIDChangeRequest_10-01-2009



Sometimes a proposal or award will contain confidential information and should not be attached in OMNI. In its place, prepare a single Word document with the language shown below, and name it as shown on right.	ConfidentialProposal	025645_ConfidentialProposal_10-01-2009
	ConfidentialAward	025645_ConfidentialAward_10-01-2009
<p>CONFIDENTIAL [date]</p> <p>This [insert type of document] contains confidential information and will not be stored in OMNI.</p> <p>Contacts: Principal Investigator [insert PI name] Sponsored Research Services: [insert administrator's name]</p>		

¹ In rare circumstances, an “award” may receive an amendment for different purposes and the sponsor will name one an “amendment” and another a “modification.” Only in these circumstances should you deviate from the standard use of “amendment.”



**OVERVIEW
OMNI GRANTS
PROPOSAL APPROVAL WORKFLOW**

Training/Reference Material: <http://www.research.fsu.edu/contractsgrants/workshops.html>

Types of Proposal Approvers:

- Principal Investigator
- Co-Principal Investigator
- Chair (including Alternates)
 - Chair associated with PI/Co-PI listed on Proposal Resources page.
 - Chair 1, Chair 2, etc.
 - Chair associated with administering Project Department.
 - Project Chair 1, Project Chair 2, etc.
 - Chair associated with distribution of credit.
 - Credit Chair 1, Credit Chair 2, etc.
- Dean (including Alternates)
 - Dean associated with PI/Co-PI listed on Proposal Resources page.
 - Dean 1, Dean 2, etc.
 - Dean associated with administering Project Department.
 - Project Dean 1, Project Dean 2, etc.
 - Dean associated with distribution of credit.
 - Credit Dean 1, Credit Dean 2, etc.
- Central Office (plus Ad Hoc Approvers)
 - Sponsored Research Administration (SRA)
 - FSU Research Foundation (FSURF)

Type 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.

Determining “Chair” and “Dean”

- Terms are used generically to represent unit hierarchy.
- The following page in OMNI displays chair and dean approvers for each DEPTID. The approvers identified on that page are specific to Grants proposal approval workflow only. Notify SRA when new chairs or deans appointed.



Grants > Departments > General Information, Workflow Approvers tab

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 (SRA or FSURF)
- Level 2
 - Approvers (Chair pooled with his/her Alternates) – worklist item and email notification
 - Chair associated with PI/Co-PI listed on Proposal Resources
 - Chair associated with administering Project Department
 - Chair associated with distribution of credit
- Level 3
 - Approvers (Dean pooled with his/her Alternates) – worklist item and email notification
 - Dean associated with PI/Co-PI listed on Proposal Resources
 - Dean associated with administering Project Department
 - Dean associated with distribution of credit
- Level 4
 - Approvers– worklist item and email notification
 - Sponsored Research Administration (for Business Unit FSU01)
 - FSU Foundation (for Business Unit FSRF1)
 - Ad Hoc Approvers as needed (e.g., cost sharing approval)

Worklist Items

Each approver will have a worklist item added to his/her worklist when a proposal is ready for approval.

Email Notifications

- Email is sent to everyone at Level 1 when a proposal is submitted for approval through workflow.
- Email is sent to everyone at next level when approvals are complete at each level.
- Email is sent to PI, Co-PI, Sponsored Project Managers and Department Reps when proposal has been approved for submission to the sponsor.

Turn Off Worklist or Email

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 the user does not want to receive ANY email or worklist items.

Security

Any employee may create a proposal and submit it for approval. Only those employees entered on the Proposals Resources page or added by the workflow program will be able to view the proposal. One exception is that a user may be set up on Grants Security to be able to view any proposal related to a particular department or college. Contact Sponsored Research Administration if a department-level user needs such access.

The Proposal Approval Workflow program manages security automatically based on information entered into the proposal. There is no need to request special roles.



APPENDIX J

Capitalization in Titles

The general rules for capitalizing words in document titles are set out in *The Chicago Manual of Style*:

1. Always capitalize the first and the last word.
2. Capitalize all nouns, pronouns, adjectives, verbs, adverbs, and subordinate conjunctions ("as", "because", "although").
3. Lowercase all articles, coordinate conjunctions ("and", "or", "nor"), and prepositions regardless of length, when they are other than the first or last word.
4. Lowercase the "to" in an infinitive.

Most writers are familiar with these general rules. But some have difficulty identifying the various parts of speech, while others have internalized incorrect "rules" taught in elementary school. These individuals are therefore prone to making mistakes when capitalizing or lowercasing words in titles. The most common mistakes are presented below.

Two-Letter Words

Some writers lowercase all two-letter words, probably by extrapolation from the short prepositions "of", "to", "up", and so on, and the word "to" in infinitives. But if a two-letter word is acting as a noun, pronoun, adjective, or adverb, it must be capitalized. For example:

Go Tell it on the Mountain

(wrong; "it" is a pronoun and should be capitalized)

When is a Spade a Spade?

(wrong; "is" is a verb and should be capitalized)

Multipurpose Words

Some writers lowercase words that can function as prepositions when those words are currently functioning in other capacities. For example:

The Man in the Moon Owns a Yellow Balloon

(correct; "in" is functioning as a preposition and should be lowercased)

Bringing in the Sheaves

(wrong; "in" is functioning as an adverb and should be capitalized)

Phrasal Verbs

Some writers find it hard to decide how to capitalize a title containing a phrasal verb. Phrasal verbs are verbs whose meaning is completed by a word called a *particle*. For example, the verb "to give" has a different meaning than the phrasal verb "to give up".

Like other multipurpose words, words functioning as particles must be distinguished from the same words functioning as prepositions. Particles are always capitalized because they form part of the verb. For example:

My Travels up Nova Scotia's South Shore

(correct; "up" is functioning as a preposition and should be lowercased)

Setting up Your Computer

(wrong; "up" is functioning as a particle and should be capitalized)

Mistaken Notions

Grammar just doesn't sink naturally into everyone's head. To some writers, the fact that one word resembles another is enough reason to treat those words equally when it comes to capitalization in a title. For example:

The Time of their Lives

(wrong; "their" is an adjective and should be capitalized—the writer probably extrapolated from "the")



APPENDIX K

Proposal Attributes

The following codes are required to be selected **if applicable** to the proposal. Select any of the following as appropriate.

<i>Attribute Type</i>	<input type="checkbox"/> <i>Description</i>	<input type="checkbox"/> <i>Purpose</i>
APPLIED_RES	Applied Research	Select when Purpose is Research and type of research is Applied.
ARRA_FUNDS	American Recovery & Reinvestmt	Select when fund source is the American Recovery and Reinvestment Act.
ARRA_INFRA	ARRA Infrastructure Award	Select when fund source is the American Recovery and Reinvestment Act and funds are to cover infrastructure expenses.
ARRA_NONINF	ARRA Non-Infrastructure Award	Select when fund source is the American Recovery and Reinvestment Act and funds are to cover non-infrastructure expenses.
BASIC_RES	Basic Research	Select when Purpose is Research and type of research is Basic.
CAGE	Commercial and Gov't Entity	N/A
COLLAB_RES	Collaborative Research	N/A
DEVELOP_RES	Development Research	Select when Purpose is Research and type of research is Development.
DUNS	DUNS Institution Number	N/A
FICE	Fed Interagency Comm on Educ	N/A
NSF_EXMPT_2	Exempt from NSF 2-Months Rule	Select when award is funded by the National Science Foundation and is not subject to the NSF 2-months salary limitation.
NSFIC	NSF Institutional Code	N/A
PI_RES_SUPP	PI Research Support SRAD Acct	Select if applicable.
PRGINC_CS	Program Inc as Cost Shr	Select if applicable.
PRGINC_DED	Program Inc Deductive Method	Select if applicable.
SRAD_SPEC	Special Purpose SRAD Acct	Select if applicable.



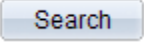
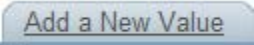
Proposal Exception Report

This report shall be run after proposal data entry to identify any errors made during entry. There are two ways to run this report: **Run to Screen** and **Print Report**. These instructions describe both ways to run the report. Once the report is run, all errors identified must be corrected. Evidence that the report was run must be included in the proposal file. Evidence can be: (1) copy of printed report showing no errors or (2) Process Instance number written on Proposal Transmittal Form.

Table of Contents:

- [Run to Screen](#)
- [Print Report](#)
- [Get Process Instance Number](#)

Navigation: Grants > Interactive Reports > GM Query Exception Report

- Click  for an existing Run Control ID.
- If none exists, click . A Run Control ID can have any name but can have no spaces.

GM Qry Exception Report



GM Qry Exception Report

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

The value you tried to add already exists.
Select it below if you'd like to update it,
or specify a new value in the fields above.

Search Results

View All First 1 of 1 Last

Run Control ID	Language Code
Diana	English

[Find an Existing Value](#) | [Add a New Value](#)

- Click the hyperlink on the Run Control ID you just created (or an existing one) to open the Run Control page.

This is the Run Control page:

Favorites | Main Menu > Grants > Interactive Reports > GM Query Exception Report

Qry Exception Rpt

Run Control ID: Diana [Report Manager](#) [Process Monitor](#)

Exception Report Type

Proposal Awards Run to screen

*Business Unit

- OPTIONAL: To add this page to your Favorites, click Add to Favorites under the Favorites menu.

Favorites | Main Menu > Grants > Interactive R

Recently Used

- GM Query Exception Report
- GM Qry Exception Rpt Setup
- Project
- Award Profile
- Query Manager

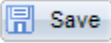
My Favorites

- Add to Favorites
- Edit Favorites
- Query Manager
- Proposal
- Award
- Projects
- Professionals
- Job Data
- Departments
- Sponsors
- Budgets Overview
- Tree Manager
- ChartField Values



RUN TO SCREEN

Use *Run to Screen* to display all data entry errors on the current page.

- Click the Proposal radio button. Additional data entry fields will appear.
- Enter the Business Unit.
- Click  Save, so the Business Unit will always be populated when you open this page.
- Enter the Proposal ID.
- Enter the Version ID. Tab out of the field to activate the *Run to Screen* functionality.

Qry Exception Rpt

Run Control ID: Diana [Report Manager](#) [Process Monitor](#) [Run](#)

Exception Report Type

Proposal Awards [Run to screen](#)

*Business Unit Florida State University

*Proposal ID Office of Economic and Demographic Research, The Florida

*Version ID

[Save](#) [Return to Search](#)

- Click the hyperlink [Run to screen](#)

The program runs all of the exception queries related to the proposal and displays the errors that were found on the current page.

Favorites | Main Menu > Grants > Interactive Reports > GH Query Exception Report [New Window](#) [Help](#) [Customize Page](#) [http](#)

Qry Exception Rpt

Run Control ID: Diana [Report Manager](#) [Process Monitor](#) [Run](#)

Exception Report Type

Proposal Awards [Run to screen](#)

*Business Unit Florida State University


*Proposal ID Office of Economic and Demographic Research, The Florida

*Version ID

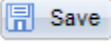
Query Name	Exception Description
FSU_SP_GM_EXCP_PRE_AWD_26	If cost sharing is mandatory, the Required by Sponsor checkbox must be checked on the details page for Additional Info value CGT.
FSU_SP_GM_EXCP_PRE_AWD_28	The Project Department must match the Subdivision for this Proposal Project.
FSU_SP_GM_EXCP_PRE_AWD_43	Use of the Proposal Certification ANIMA requires the attachment of an ASU Form.
FSU_SP_GM_EXCP_PRE_AWD_44	Use of the Certification Code ANIMA requires selection of the Certification Code ANIPRO.
FSU_SP_GM_EXCP_PRE_AWD_55	The Proposal Attachments are missing. See the Proposal Development Guide for requirements.
FSU_SP_GM_EXCP_PRE_AWD_56	At least one Keyword is required. Multiple keywords may be entered.
FSU_SP_GM_EXCP_PRE_AWD_59	The Pre-Award Administrator name is missing.

[Save](#) [Return to Search](#)



- Click  New Window
- Navigate to the proposal and correct each error. Please note that some of the exception queries are meant as *warnings* and may not indicate an error. For instance, the first query on this list states: "If cost sharing is mandatory, the Required by Sponsor checkbox must be checked on the details page for Additional Info value CST." This message prompts the user to consider whether the box should be checked or not.

Period	*Start Date	*End Date	Target Sponsor Budget
1	07/01/2011	06/30/2012	249,999.00

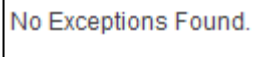
- Correct all errors.
- Click  Save
- Return to the window for the GM Query Exception Report. If you use tabs, it might look like this:



Back on the Run Control page:

- Click the hyperlink  Run to screen again.

If all errors were corrected, you will see the message

 No Exceptions Found.



Qry Exception Rpt

Run Control ID: Diana [Report Manager](#) [Process Monitor](#)

Exception Report Type
 Proposal Awards [Run to screen](#)

*Business Unit Florida State University
*Proposal ID Contact Mechanisms and System-Level Characterization of
*Version ID

No Exceptions Found.

PRINT REPORT

Use *Print Report* to create a report of errors for printing.

- Enter proposal criteria.

Qry Exception Rpt

Run Control ID: Diana [Report Manager](#) [Process Monitor](#)

Exception Report Type
 Proposal Awards [Run to screen](#)

*Business Unit Florida State University
*Proposal ID Office of Economic and Demographic Research, The Florida
*Version ID

Query Name	Exception Description
FSU_SP_GM_EXCP_PRE_AWD_04	Proposal Purpose RES requires Attribute of BASIC_RES, APPLIED_RES or DEVELOP_RES.
FSU_SP_GM_EXCP_PRE_AWD_26	If cost sharing is mandatory, the Required by Sponsor checkbox must be checked on the details page for Additional Info value CST.
FSU_SP_GM_EXCP_PRE_AWD_27	When the sponsor is a Federal entity or the Flow Through value is selected under Additional Info, a CFDA number is required.
FSU_SP_GM_EXCP_PRE_AWD_28	The Project Department must match the Subdivision for this Proposal Project -
FSU_SP_GM_EXCP_PRE_AWD_43	Use of the Proposal Certification ANIMA requires the attachment of an ASU Form.
FSU_SP_GM_EXCP_PRE_AWD_55	The Proposal Attachments are missing. See the Proposal Development Guide for requirements.

- Click



Do not change any of the default values on this page.

Process Scheduler Request

User ID: DKEY Run Control ID: Diana

Server Name: PSUNX Run Date: 10/21/2011

Recurrence: Run Time: 9:45:14AM [Reset to Current Date/Time](#)

Time Zone: EST Eastern Time (US)

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Query Exception Reports	FSU_QRY_RPTS	Application Engine	Web	TXT	Distribution

[OK](#) [Cancel](#)

- Click [OK](#)

Qry Exception Rpt

Run Control ID: Diana [Report Manager](#) [Process Monitor](#) [Run](#)

Process Instance: 2394549

Exception Report Type
 Proposal Awards [Run to screen](#)

*Business Unit: FSU01 Florida State University

*Proposal ID: 0000022000 Office of Economic and Demographic Research, The Florida

*Version ID: V1

- Click [Process Monitor](#)



The top row shows the program currently in queue to run.

Process List | Server List

View Process Request For

User ID: DKEY Type: Last 1 Years Refresh

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2394551		Application Engine	FSU_QRY_RPTS	DKEY	10/21/2011 9:49:02AM EDT	Queued	N/A	Details
<input type="checkbox"/>	2394549		Application Engine	FSU_QRY_RPTS	DKEY	10/21/2011 9:45:14AM EDT	Success	Posted	Details
<input type="checkbox"/>	2394509		Application Engine	FSU_QRY_RPTS	DKEY	10/20/2011 2:23:06PM EDT	Success	Posted	Details
<input type="checkbox"/>	2394508		Application Engine	FSU_QRY_RPTS	DKEY	10/20/2011 2:21:44PM EDT	Success	Posted	Details
<input type="checkbox"/>	2394506		Application Engine	FSU_QRY_RPTS	DKEY	10/20/2011 2:12:31PM EDT	Success	Posted	Details
<input type="checkbox"/>	2394505		Application Engine	FSU_QRY_RPTS	DKEY	10/20/2011 2:11:59PM EDT	Success	Posted	Details
<input type="checkbox"/>	2394444		Application Engine	FSU_QRY_RPTS	DKEY	10/19/2011 9:56:37AM EDT	Success	Posted	Details
<input type="checkbox"/>	2394354		Application Engine	FSU_QRY_RPTS	DKEY	10/17/2011 1:07:38PM EDT	Success	Posted	Details

Go back to GM Qry Exception Report

Save Notify

Wait for about 30 seconds then—

- Click Refresh

Process List | Server List

View Process Request For

User ID: DKEY Type: Last 1 Years Refresh

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2394551		Application Engine	FSU_QRY_RPTS	DKEY	10/21/2011 9:49:02AM EDT	Success	Posted	Details

The top row must show “Success” under Run Status and “Posted” under Distribution Status.

- Click Details
- Click View Log/Trace
- Click the file with the “.txt” extension (example: [DKEY Proposal Exceptions.txt](#))

View Log/Trace

Report

Report ID: 2288935 Process Instance: 2394551 Message Log

Name: FSU_QRY_RPTS Process Type: Application Engine

Run Status: Success

Query Exception Reports

Distribution Details

Distribution Node: SQNAFI Expiration Date: 11/04/2011

Name	File Size (bytes)	Datetime Created
AF_FSU_QRY_RPTS_2394551.log	158	10/21/2011 9:49:33.355092AM EDT
DKEY_Proposal_Exceptions.txt	2,175	10/21/2011 9:49:33.355092AM EDT
Query_Process_Log	65,131	10/21/2011 9:49:33.355092AM EDT

Distribute To

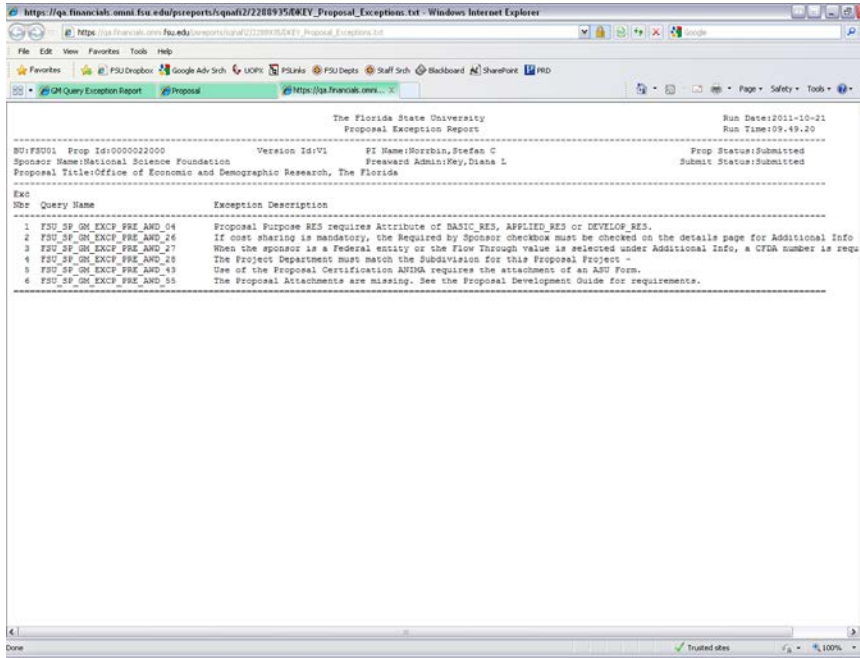
Distribution ID Type: Distribution ID


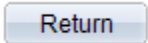
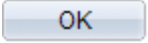
User: DKEY

Return

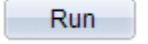
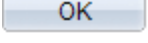


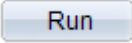
A new window will open with the Proposal Exception Report displayed like so:



- Click the Print button  on your browser to print the document directly to a printer, or select Print from the File menu to print to PDF.
- Go back to the Run Control window.
- Click 
- Click 
- Click [Go back to GM Qry Exception Report](#)

GET PROCESS INSTANCE NUMBER

- Enter proposal criteria.
- Click 
- Click 

The Process Instance Number will be displayed under the  button.

