OMNI Sponsored Research

INSTRUCTIONS
OMNI PROPOSAL APPROVAL WORKFLOW
SETUP/UPDATE ALTERNATES
Last updated 5/29/2008

The terms "Chair" and "Dean" are used generically to represent unit hierarchy.

A new page (Grants > Departments > General Information, Workflow Approvers tab) has been created in OMNI to display chair and dean approvers for each DEPTID. The approvers identified on that page are specific to Grants proposal approval workflow only. Notify SRS when new chairs or deans appointed.

Each chair and dean may have one or more alternates to assist with approving proposals electronically within OMNI. A chair will be "pooled" with his/her alternates. A dean will be "pooled" with his/her alternates. "Pooled" means that only one user in the pool has to approve (or send back) the proposal. Once that's done, the worklist item will drop off the other pool members' worklists.

The following instructions may be used to set up alternates initially and to update alternates when necessary.

SET UP ALTERNATE(S)
Navigation: Grants > Departments > Add/Update Chair/Dean Alts

- Click **Add a New Value**.

- Enter SHARE for SetID if not prepopulated.

- Search for and select the OMNI Userid of the chair/dean for whom alternates will be set up initially. (e.g., JTRAVIS). The following page will appear.

- Do not change Eff Date or Status.

- Search for and select the OMNI Userid of the alternate to be added. (e.g., CBLEE). HINT: You may get better results if you change the criteria from "begins with" to "contains."

- Click the [+] icon to add another row for another alternate if desired.

- Click [Save] when done.

- Changes are effective for any proposal submitted to workflow after the changes are made. Proposals already in workflow will not be affected.

UPDATE ALTERNATE(S)

Navigation: Grants > Departments > Add/Update Chair/Dean Alts

- Enter SHARE for SetID

- Enter the UserID of the chair/dean for whom you want to update alternates.

- Click **Search**.

- Click **Correct History**.

- Click the **+** icon to add another row to add another alternate.

- Click the **−** icon to delete an alternate.

- Click **Save** when done.

- Changes are effective for any proposal submitted to workflow after the changes are made. Proposals already in workflow will not be affected.