OMNI PROPOSAL APPROVAL WORKFLOW
INSTRUCTIONS FOR PROPOSAL APPROVERS
Last updated 5/29/2008

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

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

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

PI AND CO-PI APPROVAL STEPS

• Log in to OMNI > Financials > Worklist (upper right corner on gold bar)
• Click on worklist item’s hyperlink.
Check one of the boxes under the headings explained below:

- **Approve** - to give approval of the proposal and allow the proposal to move on to the next level of approvers. A Comment is optional.

- **Send Back** - to send the proposal back to the Originator. A Comment is required as to why the proposal was sent back. The Originator can edit and make any necessary corrections. The Originator will have re-submit the proposal and start the approval process over again.

- Click [Save] when done.

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

![Approval Certification Page]

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

- Click [Yes] to approve the proposal. Click [No] to return to the previous page.

### CHAIR AND DEAN APPROVAL STEPS

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

![Chair's Worklist Example]

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

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

- **Approve** - to give approval of the proposal and allow the proposal to move on to the next level of approvers. A **Comment** is optional.

- **Send Back** - to send the proposal back to the Originator. A **Comment** is required as to why the proposal was sent back. The Originator can edit and make any necessary corrections. The Originator will have re-submit the proposal and start the approval process over again.

- **Reassign** - to require approval of another user. You must enter the person in the “Assign To” field in which you want to reassign the proposal. A **Comment** is optional. A sample is shown below:

```
<table>
<thead>
<tr>
<th>Role</th>
<th>Required</th>
<th>Submit</th>
<th>Approve</th>
<th>Send Back</th>
<th>Review</th>
<th>Reassign</th>
<th>Assign To</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Chair</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>James Janis</td>
<td></td>
</tr>
<tr>
<td>Dean 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>James Janis</td>
<td></td>
</tr>
<tr>
<td>Project Chair</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>James Janis</td>
<td></td>
</tr>
</tbody>
</table>
```

- Click **Save** when done.

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

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

By approving this proposal, you certify that:

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

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

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

Yes  No
```
• Click [Yes] to approve the proposal. Click [No] to return to the previous page.

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

• Click [Save] when done.

Reviewing Proposal Approval Workflow Status

Any user that has access to the proposal may review and monitor the proposal approval workflow status by opening the proposal and clicking on the Component hyperlink at the bottom of the 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: