OMNI GRANTS
PROPOSAL APPROVAL
WORKFLOW

OVERVIEW
Training/Reference Material

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

http://www.research.fsu.edu/research-offices/sra/resources-and-training/training/
Types of Proposal Approvers

- Principal Investigator
- Co-Principal Investigator
Types of Proposal Approvers (cont’d)

Chair (including Alternates)

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

- **Chair** associated with Project Department
  - Project Chair 1, Project Chair 2, etc.

- **Chair** associated with Department Credit
  - Credit Chair 1, Credit Chair 2, etc.
Types of Proposal Approvers (cont’d)

Dean (including Alternates)

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

- **Dean** associated with Project Department
  - Project Dean 1, Project Dean 2, etc.

- **Dean** associated with Department Credit
  - Credit Dean 1, Credit Dean 2, etc.
Types of Proposal Approvers (cont’d)

Central Office

- Sponsored Research Administration (SRA)
- FSU Research Foundation (FSURF)
- Ad Hoc Approvers
Types of Proposal Reviewers

- Compliance and Facility Use Offices
  (e.g., Human Subjects, Marine Lab, etc.)

- Sponsored Project Manager listed on Proposal Resources page

- Department Rep listed on Proposal Resources page
“Chair” and “Dean” Approvers

- Terms are used generically to represent unit hierarchy.

- New page in OMNI displays chair and dean approvers for each DeptID.

  - Note: Approvers identified here are specific to Grants proposal approval workflow only. Notify SRA when new chairs or deans appointed.
“Chair” and “Dean” Approvers (cont’d)

Grants > Departments > General Information, Workflow Approvers

![Workflow Approvers Screen](image-url)
Alternates

- Chair and Dean may have one or more alternates.
- Chair and Alternates are pooled.
- Dean and Alternates are pooled.
- New page in OMNI provided to maintain alternates.
Alternates (cont’d)

Grants > Departments > Add/Update Chair/Dean Alternates
4 Levels of Workflow

- **Level 1**
  - **Approvers** - worklist item and email notification
    - Principal Investigator
    - Co-Principal Investigator
  - **Reviewers** - email notification
    - Compliance and Facility Use Offices
    - Sponsored Project Manager
    - Department Rep
    - Central Office (SRA or FSURF)
4 Levels of Workflow (cont’d)

- **Level 2**
  - **Approvers** - worklist item and email notification
    - Chair(s) associated with PI/Co-PI on Proposal Resources
    - Chair(s) associated with Project Department
    - Chair(s) associated with Department Credit
  - Each Chair pooled with his/her Alternates
Level 3

- **Approvers** - worklist item and email notification
  - Dean(s) associated with PI/Co-PI on Proposal Resources
  - Dean(s) associated with Project Department
  - Dean(s) associated with Department Credit
- Each Dean pooled with his/her Alternates
4 Levels of Workflow (cont’d)

- Level 4
  - **Approvers** - worklist item and email notification
    - Sponsored Research Administration
      - Business Unit FSU01
    - FSU Foundation
      - Business Unit FSRF1
    - **Ad Hoc Approvers as needed**
      - e.g., Cost Sharing approval
Worklist Items

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

PI Worklist example.

Chair/Dean Worklist example.
Worklist Items (cont’d)

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

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

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

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

Click the hyperlink for details:
https://qa.financials.omni.fsu.edu/psp/sqnafi2/EMPLOYEE/ERP/c/ESTABLISH_PROPOSAL_GM_PROPOSAL_GBL?
Page=GM_PROPOSAL&Action=U&BUSINESS_UNIT=FSU01&PROPOSAL_ID=0000015229&VERSION_ID=V1
Email Notifications (cont’d)

Email is sent to approvers at each level.

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

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

Click the hyperlink for detail
https://qa.financials.omni.fsu.edu/psp/sqnafi2/EMPLOYEE/ERP/c/ESTABLISH_PROPOSAL.GM_PROPOSAL.GBL?
Page=GM_PROPOSAL&Action=U&BUSINESS_UNIT=FSU01&PROPOSAL_ID=0000015243&VERSION_ID=V1
Email Notifications (cont’d)

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

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

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

Click hyperlink for details:
Email Notifications (cont’d)

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

The following worklist that is currently assigned to you has timed out:
Business Process Name:
GM_GRANTS_BPWorklist Name:
Approve Review Proposal
Instance ID: 539
Email Notifications (cont’d)

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

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

Proposal ID : 0000015231
PI            : Chase, Prescott B
Sponsor       : National Science Foundation
Due Date      : 2008-05-21
Title         : TEST

Click the hyperlink for details:

My System Profile

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

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

- Any employee may create a proposal and submit it for approval.

- Only the following users will be able to view the proposal:
  - Professionals entered on the Proposals Resources page,
  - Approvers and Reviewers added by the workflow program, or
  - Users set up in Grants Security.

- There is no need to request special roles.
Contact Info

Esther Wheeler
SRA Data Manager II
Sponsored Research Administration
(850) 644-5260
ejwheeler@fsu.edu
or
SRA-Pre.fsu.edu