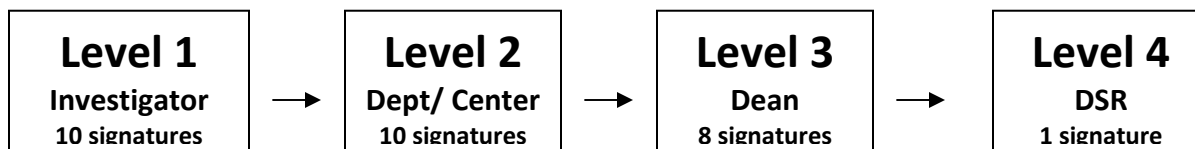


PeopleSoft Pre-Award Workflow for Grants

About Workflow

For Grant Proposals there are four approval levels. Included below is the number of signatures allowed to be obtained at each project level for a proposal



- Investigator may be the PI or Co-PI
- Dept/Center is the Department Chair or Center Director
- Dean is COM, IFAS, or EISES research office or other College Dean
- DSR is the Division of Sponsored Research

Submitting into Workflow

Workflow is based on a series of things that could cause a hang up in the system. To prevent that please ask these simple questions before you submit into workflow:

Do I have multiple projects? (see Workflow Process Map)

1) No.

a) Do I have multiple departments represented?

i. If no, verify with your DSA that everyone listed with a PI or CO-PI role has the correct security. **Required Security Role for PI/Co-PI: UF_GM_PI_CI_OTH_PER**

ii. If yes, you must select one person from each department as Co-PI for routing. NOTE: it is necessary to label one person as a Co-PI from each department to ensure the grant will route to the department chair for signatures. However, if they are not truly a Co-PI please go under the RESOURCES tab and click on the document symbol next to Co-PI. In role description, please type in their true role. i.e. key personnel or other. This person will need to go in and approve the grant so if they are truly not a Co-PI but are given that role for workflow please choose someone who has access to a computer with internet access.

2) Yes.

a) Do I have multiple departments represented on each project?

i. If no, you must select one person to be the PI or Co-PI on each project?

If yes, you must select one person from each department as Co-PI for routing. NOTE: it is necessary to label one person as a Co-PI from each department to ensure the grant will route to the department chair for signatures. However, if they are not truly a Co-PI please go under the RESOURCES tab and click on the document symbol next to Co-PI.

In role description, please type in their true role. i.e. key personnel or other. This person will need to go in and approve the grant so if they are truly not a Co-PI but are given that role for workflow please choose someone who has access to a computer with internet access.

Verify with your DSA that everyone listed with a PI or CO-PI role has the correct security. **Required Security Role for PI/Co-PI:** UF_GM_PI_CI_OTH_PER, and UF_WF_APPROVER_PI_COPI.

NOTE: If they do not have these roles, please get with your department security administrator (DSA) to have the roles added to their profile. **If this is not done before submitting into workflow it will possibly get “hung up” in the system and cause a paper DSR1 to be obtained from that point forward.**

Troubleshooting Workflow

✓ **Check User Security**

- *Does user in question have security to approve?*
- *Does PI/Co-PI have valid UF GM role?*
 - **Required Security Role for PI/Co-PI:** UF_GM_PI_CI_OTH_PER
- *Does Dept have a valid person with correct Grants Dept security?*
 - **Required Security Role for Dept Chair:** UF_GM_DEPT/COLL, and UF_WF_APPROVER_CHAIR
- *Does Dean have a valid person with correct Grants Dean security?*
 - **Required Security Role for Dean:** UF_GM_DEPT/COLL, and UF_WF_APPROVER_DEAN

✓ **Check Proposal WF Approval Page**

- *What level is the proposal sitting at?*
- *What is the next approval level?*

✓ **Check WF Approval History**

- *Who has approved?*