

#### **Grant Workflow Administrator Guide**

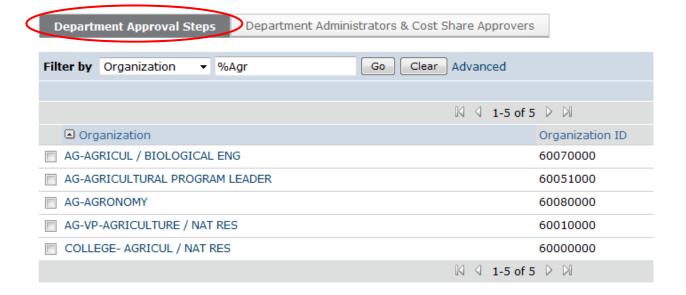
To access the area of the UFIRST site used to manage Department Approval Steps for a specific organization and edit those approval steps, select the GWA Management tab. You'll see two tabs in the main body of the screen: Department Approval Steps and Department Administrators & Cost Share Approvers.



### **Maintaining Department Approval Steps for a Specific Unit**

- 1. Click on the **Department Approval Steps** tab.
- 2. You can search for the department by selecting Organization (which searches by PeopleSoft name) or Organization ID (deptID). Select the filter by and then enter the name or deptID. This field uses "begins with" as the default, so if you want to find Agronomy, you must enter %Agronomy. Select *GO*.
- 3. Click on the **Organization** link in the results list below. The results will launch in a popup box.

## **GWA Management**

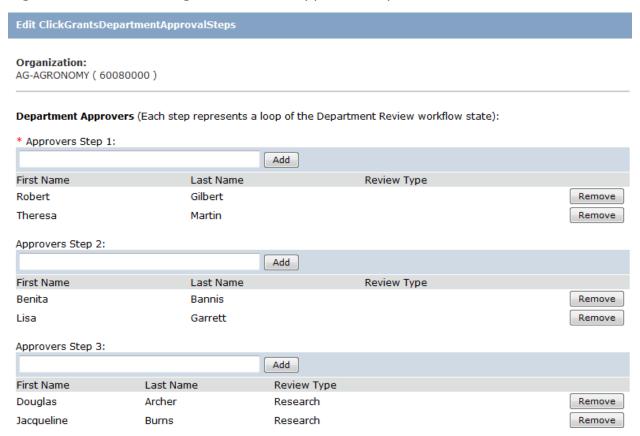


Updated: March 20, 2015



#### **Instruction Guide**

4. The screen shows current approvers by step. Approvers step 1 approvers first in the approval workflow; Approvers step 2 after step 1 has approved and so on. All steps are "pooled" approvers in that only one approver must act. Note there is helpful information in the bottom of the pop up providing information about organizations that roll up to this organization that leverage these same approval steps.



- 5. To **Add** an approver, simply start typing their name into the box. Matching results will start to display below the text box. Once you see the matching name, select it and select the **Add** button. Scroll to the bottom of the Edit box and select **OK**.
  - a. If there are too many like names, select the Add button which launches a person search pop up. Select the Advanced on the top line and enter data in each of the filter by fields, then select go. Once identified, use the check box next to the name of the new approver, scroll down and select OK. Once you return to the Edit approval steps box shown above, select the Add button next to their name. Scroll to the bottom of the Edit box and select ok.
- 6. To **Delete** an approver, simply select the **Remove** button next to their name. Scroll to the bottom of the Edit box and select **OK**.

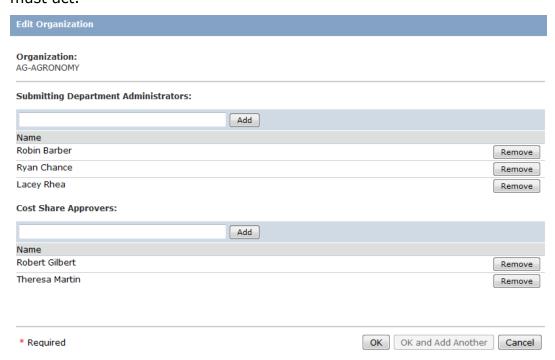


# Maintaining Department Administrators and Cost Share Approvers for a Specific Organization

## **GWA Management**



- 1. Click on the **Department Approval Steps** tab
- 2. You can search for the department by selecting Organization (which searches by PeopleSoft name) or Organization ID (deptID). Select the filter by and then enter the name or deptID. This field uses "begins with" as the default, so if you want to find Agronomy, you must enter **%Agro**. Select **GO**.
- 3. Click on the **Organization** link in the results list below. The results will launch in a popup box. The screen shows current Department Administrators and current Cost Share Approvers. As a reminder, cost share approvers are "pooled" in that only one approver must act.



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## **Instruction Guide**

- 4. To **Add** an administrator or approver, simply start typing their name into the box. Matching results will start to display below the text box. Once you see the matching name, select it and select the **Add** button. Scroll to the bottom of the Edit box and select **OK**.
  - a. If there are too many like names, select the **Add** button which launches a person search pop up. Select the **Advanced** link on the top line and enter data in each of the filter by fields, then select **Go**. Once identified, use the check box next to the name of the new approver, scroll down and select **OK**. Once you return to the Edit approval steps box shown above, select the **Add** button next to their name. Scroll to the bottom of the Edit box and select **OK**.
- 5. To **Delete** an approver, simply select the **Remove** button next to their name. Scroll to the bottom of the Edit box and select **OK**.