

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 pop-up box.

GWA Management

The screenshot shows the GWA Management interface. At the top, there is a navigation bar with 'Department Approval Steps' and 'Department Administrators & Cost Share Approvers'. The 'Department Approval Steps' tab is circled in red. Below the navigation bar, there is a search bar with 'Filter by' set to 'Organization' and a search field containing '%Agr'. There are 'Go' and 'Clear' buttons, and an 'Advanced' link. Below the search bar, there is a table with 5 rows of results. The table has two columns: 'Organization' and 'Organization ID'. The results are as follows:

Organization	Organization ID
<input type="checkbox"/> AG-AGRICUL / BIOLOGICAL ENG	60070000
<input type="checkbox"/> AG-AGRICULTURAL PROGRAM LEADER	60051000
<input type="checkbox"/> AG-AGRONOMY	60080000
<input type="checkbox"/> AG-VP-AGRICULTURE / NAT RES	60010000
<input type="checkbox"/> COLLEGE- AGRICUL / NAT RES	60000000

At the bottom of the table, there is a pagination bar showing '1-5 of 5'.

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.*

Edit ClickGrantsDepartmentApprovalSteps

Organization:
AG-AGRONOMY (60080000)

Department Approvers (Each step represents a loop of the Department Review workflow state):

* Approvers Step 1:

First Name	Last Name	Review Type	
Robert	Gilbert		Remove
Theresa	Martin		Remove

Approvers Step 2:

First Name	Last Name	Review Type	
Benita	Bannis		Remove
Lisa	Garrett		Remove

Approvers Step 3:

First Name	Last Name	Review Type	
Douglas	Archer	Research	Remove
Jacqueline	Burns	Research	Remove

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**.
- 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

Department Approval Steps | **Department Administrators & Cost Share Approvers**

Filter by: Organization (dropdown) | %Agro (input) | Go | Clear | Advanced

Organization ID (dropdown): Organization, Organization ID

Organization	Organization ID
<input type="checkbox"/> AG-AGRONOMY	60080000
<input type="checkbox"/> MD-AGROMED / OCCUPATIONAL HLTH	29160601

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3. Click on the **Organization** link in the results list below. The results will launch in a pop-up 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.

Edit Organization

Organization:
AG-AGRONOMY

Submitting Department Administrators:

Add

Name	
Robin Barber	<input type="button" value="Remove"/>
Ryan Chance	<input type="button" value="Remove"/>
Lacey Rhea	<input type="button" value="Remove"/>

Cost Share Approvers:

Add

Name	
Robert Gilbert	<input type="button" value="Remove"/>
Theresa Martin	<input type="button" value="Remove"/>

* Required

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**.