UF | Training & Organizational Development
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Grants Proposal Workflow Setup

In coordination with the myUFL Financial Systems upgrade, Grants Proposal Workflow will be completely revamped to simplify and reduce setup requirements making approval routing more user friendly. Workflow security will also change. All UF_WF_* workflow security roles will be retired and department Route Control Profiles will be eliminated.

In the new system, users will only need the **UF_GM_PROPOSALS** security role for page access. Additionally UF will use myBETA to load chair and dean approvers initially based on current myUFL route control profiles. DSR will then provide this maintenance through requests sent to ufproposals@ufl.edu. Accordingly all grant fiscal/departmental users should verify that their chair and dean approvers are correct in myBeta by the end of April to facilitate the final load of this data into the new myUFL system.

What do I need for Grants workflow setup if I am a PI?
- Only the UF_GM_PROPOSALS security role

What do I need for Grants workflow setup if I am a department chair or department chair proxy?
- The UF_GM_PROPOSALS security role
- Chair approval setup completed by DSR

What do I need for Grants workflow setup if I am a department dean or department dean proxy?
- The UF_GM_PROPOSALS security role
- Dean approval setup completed by DSR

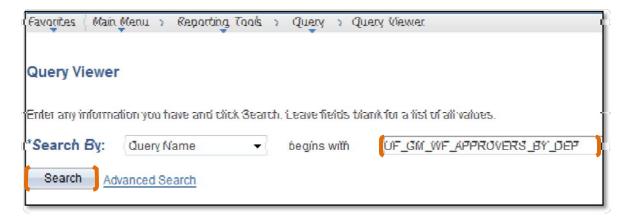**How do I verify my department has the correct approvers listed in myBETA?**
- You can confirm your department setup by running a PeopleSoft Financials query in myBETA. The name of this query is UF_GM_WF_APPROVERS_BY_DEP. Steps for running this query are below.

Steps for Running Grants Workflow Approvers Query

1. You must have the UF_FI_QUERY_VIEWER role in myBETA for access to the PeopleSoft Financials Query Viewer. You can request this role through your DSA if you do not have it currently.

2. From the Nav Bar > Main Menu navigate to PeopleSoft > Financials PeopleTools. This will open a new window. From there select Reporting Tools > Query > Query Viewer.
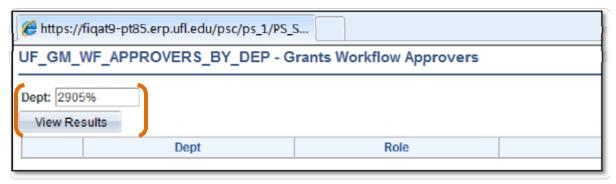
3. Search for the query named **UF_GM_WF_APPROVERS_BY_DEP**.

4. Launch the query be selecting the **HTML** link. This will open a new window.

5. Enter your department ID and click "View Results."

6. Once you verify the chair or dean approvers for your department, you can contact DSR to update the list of workflow approvers and proxies as necessary.