OFFICE OF THE VICE PRESIDENT FOR RESEARCH

QUICK TIPS

How to Approve a Proposal

Once a proposal for external funding has been completed and reviewed by Office of Sponsored Projects (OSP), the final proposal package must be approved in Streamlyne by:

1. Principal investigators and co-investigators
2. An authorized unit/department approver for all contributing units
3. An authorized approver for all contributing Colleges/Centers
4. Any additional approvers required for special project components (optional)

Find a Proposal in the Action List

Proposals requiring approval will appear in the Approver's **Action List**. The **Action List** appears each time a user logs into Streamlyne. It can also be accessed by clicking the **Action List** icon on the far left of the menu bar

Proposals requiring approval are identified with an **APP** flag in the **Action** column.

Find by Sorting

The **Action List** is shown by default in chronological order with the oldest items first. You may sort the **Action List** by clicking on any of the column headings. We recommend:

- Sort by **Action** to view Approval actions near the top of the list, or
- Reverse sort by **Date Created** to view the newest items first

Action List

	Action	Id	Number	Type
Show	ACK	8226	110	Proposal Development Document
	ACK	12393	000041-00001A	Award
Show	APP	13285	297	Proposal Development Document
	COM	4564	2201000077	IRB Protocol
Show	COM	4725	21	Proposal Development Document

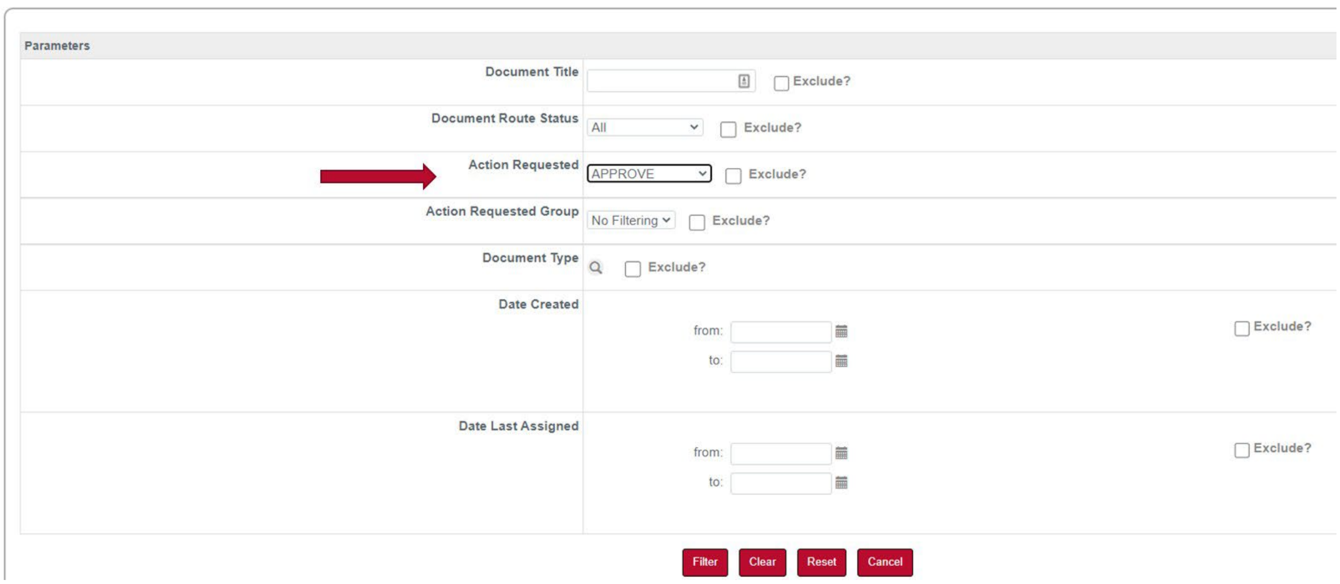
Version: 12 Sept 2022

Find by Filtering

The action list can also be filtered by clicking the **Filter** button located on the upper right above the **Action List**.

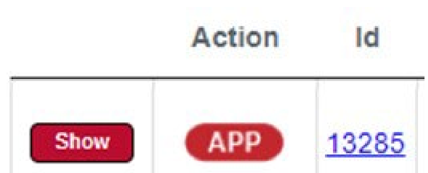
The **Action List Filter** will open. Use the drop-down list in the field **Action Requested** to select “APPROVE” and click the red **Filter** button on the bottom of the screen.

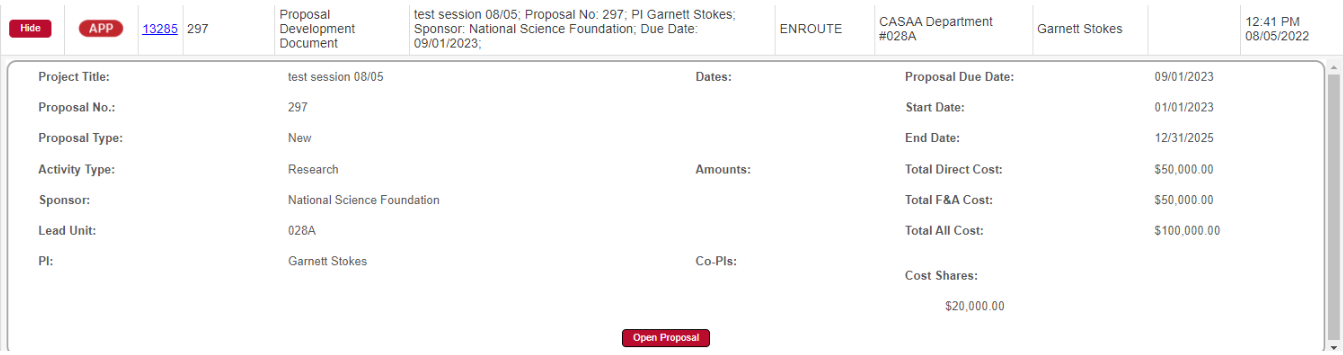
Action List Filter



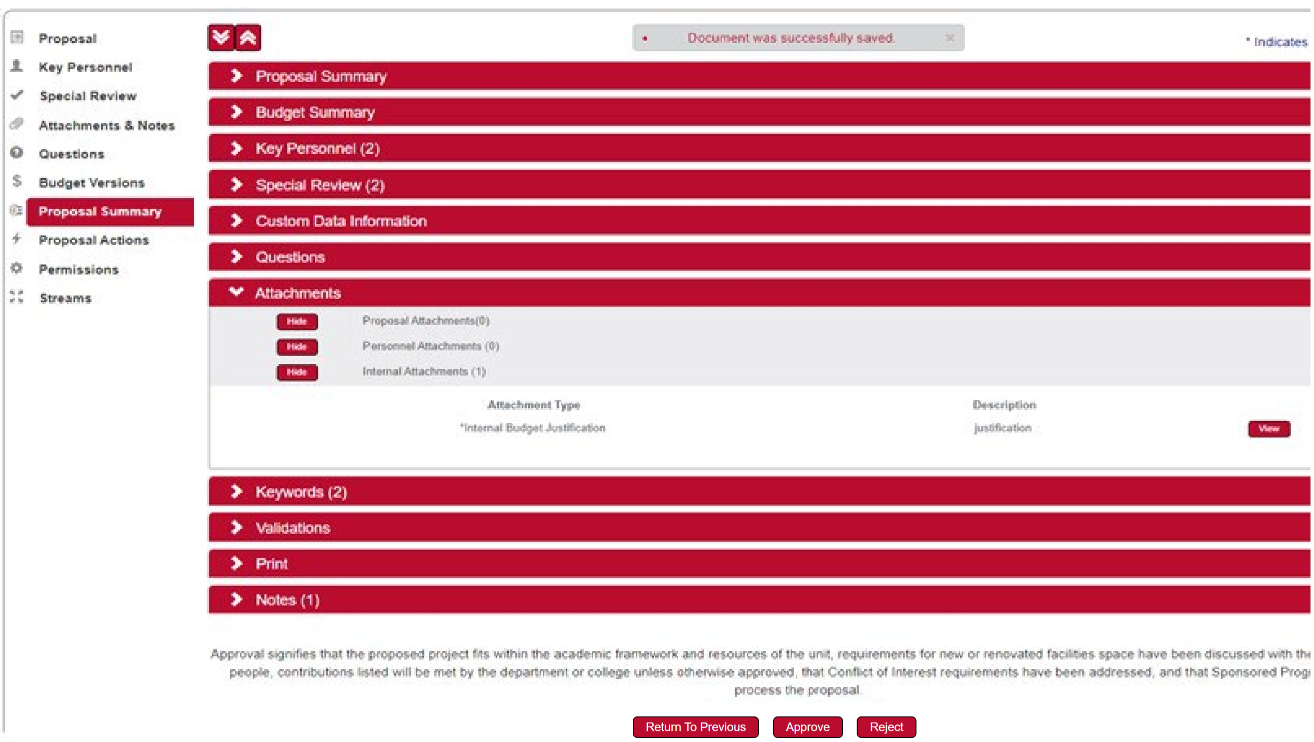
Completing the Approval Action

1. From your **Action List**, click on the linked proposal **Id** to open the proposal. You may also click the **Show** button to preview proposal information and then click **Open Proposal.**



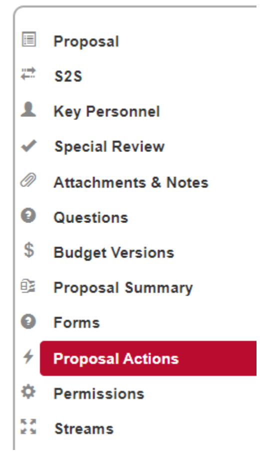


1. Use the Proposal Development quick menu to select **Proposal Summary.** This section provides at-a-glance information about the proposal. Click on any of the red panels to view summary information about these sections of the project. These panels also have **View** links to directly download attachments or jump to relevant sections of the proposal.



2. To <u>approve</u> the proposal, click the red **Approve** button at the bottom of the screen.
   - If you do not approve, you may click **Return to Previous** to return the proposal to the previous approver without removing it from workflow. Click **Reject** to disapprove the proposal. Rejected proposals are returned to the PI for revision and removed from workflow.

Routing Queue & Notifications



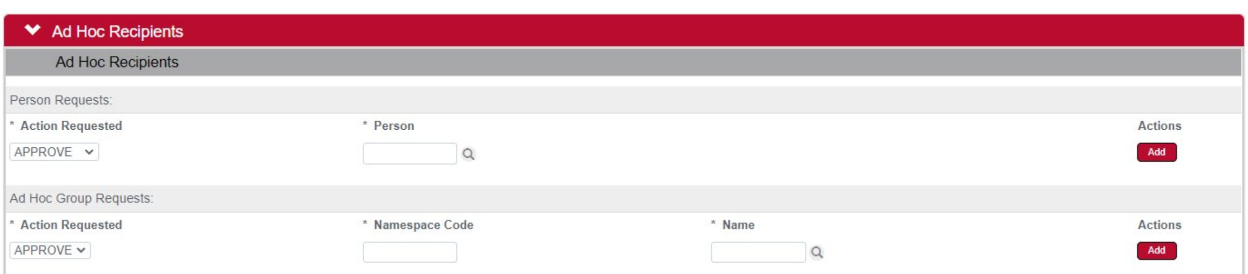
1. Use the Proposal Development quick menu to select **Proposal Actions**.
2. Click to expand the red panel labeled **Route Log** to review:
   a. **Actions Taken**: prior routing history
   b. **Pending Action Requests**: current routing stage. Note some approvals (e.g., multiple departments) may be concurrent but must all be secured before the routing to next administrative level.
   c. **Future Action Requests**: next routing stage(s).

that

the

3. To add additional recipients to the routing queue or generate notifications: click to expand the red panel labelled **Ad Hoc Recipients**.

4. Add a **Person** using the **Person Requests** function, or an approval group (e.g., authorized approvers for a Unit) using the **Ad Hoc Group Requests** function.



   a. Select the **Action Requested**:
      - APPROVE: Adds person/group to routing queue. Approval required for proposal to be submitted.
      - COMPLETE: Generates notification to person/group that work is needed on the proposal and adds the proposal to their action list (this function is normally done prior to routing)

- FYI: Sends a notification to person/group and adds the proposal to their action list but does not require any action to be taken.

b. Click the magnifying glass icon to search for the person/group to be added.

SEE ALSO: HOW TO PERFORM SEARCHES IN STREAMLYNE

c. Click the red **Add** button to confirm the ad hoc request.

d. Click the red **Send AdHoc** button at the bottom of the screen to send the notification.

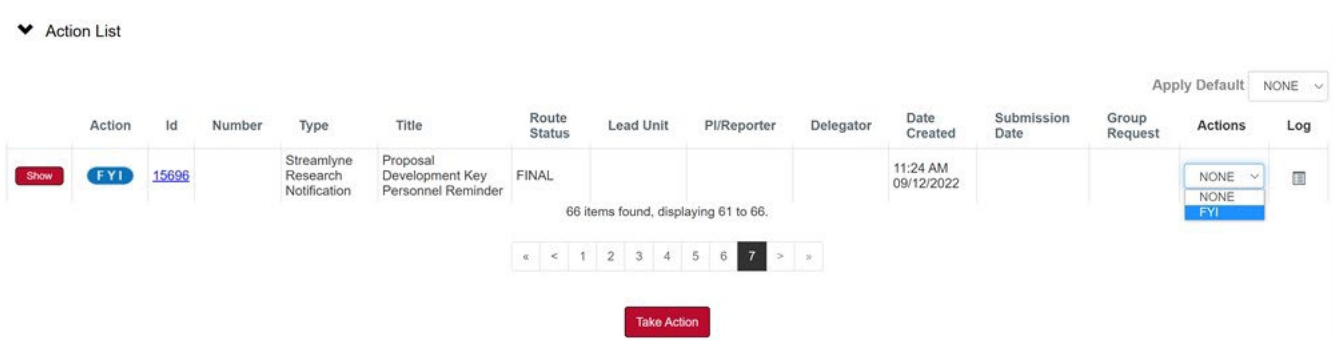
5. You may also click **Send Notification** to compose a message to one or more users, linking the proposal document.

6. You may also **Approve** the proposal on this screen.

Clearing FYI Notices

When an AdHoc notification is sent to you, the proposal will appear in your action list with an **FYI** label. You may view these proposals, but you do not need to take any action.

To clear an FYI from your action list, select **FYI** from the **Actions** drop-down menu. Next, click the red **Take Action** button at the bottom of the screen. You may take action on multiple FYIs at the same time.



Version: 12 Sept 2022