

# 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	<a href="#">8226</a>	110	Proposal Development Document
	ACK	<a href="#">12393</a>	000041-00001A	Award
Show	APP	<a href="#">13285</a>	297	Proposal Development Document
	COM	<a href="#">4564</a>	2201000077	IRB Protocol
Show	COM	<a href="#">4725</a>	21	Proposal Development Document

## 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

Parameters	
Document Title	<input type="text"/> <input type="checkbox"/> Exclude?
Document Route Status	All <input type="checkbox"/> Exclude?
Action Requested	APPROVE <input type="checkbox"/> Exclude?
Action Requested Group	No Filtering <input type="checkbox"/> Exclude?
Document Type	<input type="text"/> <input type="checkbox"/> Exclude?
Date Created	from: <input type="text"/> to: <input type="text"/> <input type="checkbox"/> Exclude?
Date Last Assigned	from: <input type="text"/> to: <input type="text"/> <input type="checkbox"/> Exclude?

Filter Clear Reset Cancel

## Completing the Approval Action

- 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**.

Action	Id
Show	13285

Hide	APP	13285	297	Proposal Development Document	test session 08/05; Proposal No: 297; PI Garnett Stokes; Sponsor: National Science Foundation; Due Date: 09/01/2023;	ENROUTE	CASAA Department #028A	Garnett Stokes	12:41 PM 08/05/2022
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Project Title:	test session 08/05	Dates:	Proposal Due Date:	09/01/2023
Proposal No.:	297		Start Date:	01/01/2023
Proposal Type:	New		End Date:	12/31/2025
Activity Type:	Research	Amounts:	Total Direct Cost:	\$50,000.00
Sponsor:	National Science Foundation		Total F&A Cost:	\$50,000.00
Lead Unit:	028A		Total All Cost:	\$100,000.00
PI:	Garnett Stokes	Co-PIs:	Cost Shares:	\$20,000.00

[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.

- Proposal
- Key Personnel
- Special Review
- Attachments & Notes
- Questions
- Budget Versions
- Proposal Summary**
- Proposal Actions
- Permissions
- Streams

Document was successfully saved.

- Proposal Summary
- Budget Summary
- Key Personnel (2)
- Special Review (2)
- Custom Data Information
- Questions
- Attachments
  - Hide Proposal Attachments (0)
  - Hide Personnel Attachments (0)
  - Hide Internal Attachments (1)
- Keywords (2)
- Validations
- Print
- Notes (1)

Attachment Type	Description	
*Internal Budget Justification	Justification	<a href="#">View</a>

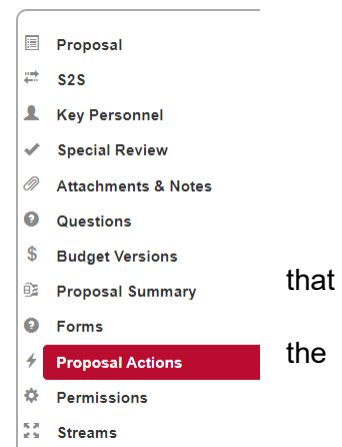
Approval signifies that the proposed project fits within the academic framework and resources of the unit, requirements for new or renovated facilities space have been discussed with the people, contributions listed will be met by the department or college unless otherwise approved, that Conflict of Interest requirements have been addressed, and that Sponsored Program process the proposal.

[Return To Previous](#)
[Approve](#)
[Reject](#)

2. To approve 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).




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.

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

**SEE ALSO: HOW TO PERFORM SEARCHES IN STREAMLYNE**

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.

**FYI**

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.

