Quick Tips

How to Approve a Proposal in Streamlyne

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 in the main dashboard 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

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.
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**.

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 **Show** button links to directly download attachments or jump to relevant sections of the proposal.

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 that some approvals (e.g., multiple departments) may be concurrent but must all be secured before the routing to the 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 take
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b. Click the magnifying glass icon to search for the person/group to be added. (See *How to Perform Searches in Streamlyne* from the *Quick Tips* section at [https://streamlyne.unm.edu/resources/index.html](https://streamlyne.unm.edu/resources/index.html))

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.