Overview:

Describes the process for how to "Approve" a proposal or "Return for Edit", sending the proposal back to the proposal initiator.

Note: By default, everyone in the proposal approval workflow has access to view the proposal. Others approvers can be added using the "ad Hoc" routing feature.

Procedure:

There are two ways to see and approve a proposal,

1. ***Action List*** – from any Menu Screen, allows you to see all proposals waiting for action.

2. ***Email Notification*** – clicking the link in the email takes you directly to the Proposal Summary Page for the Approve or Return buttons, or,

To approve a proposal:

1. From the ***Action List*** – Click the **Open Proposal** button, which takes the user directly to the Summary/Submit section.

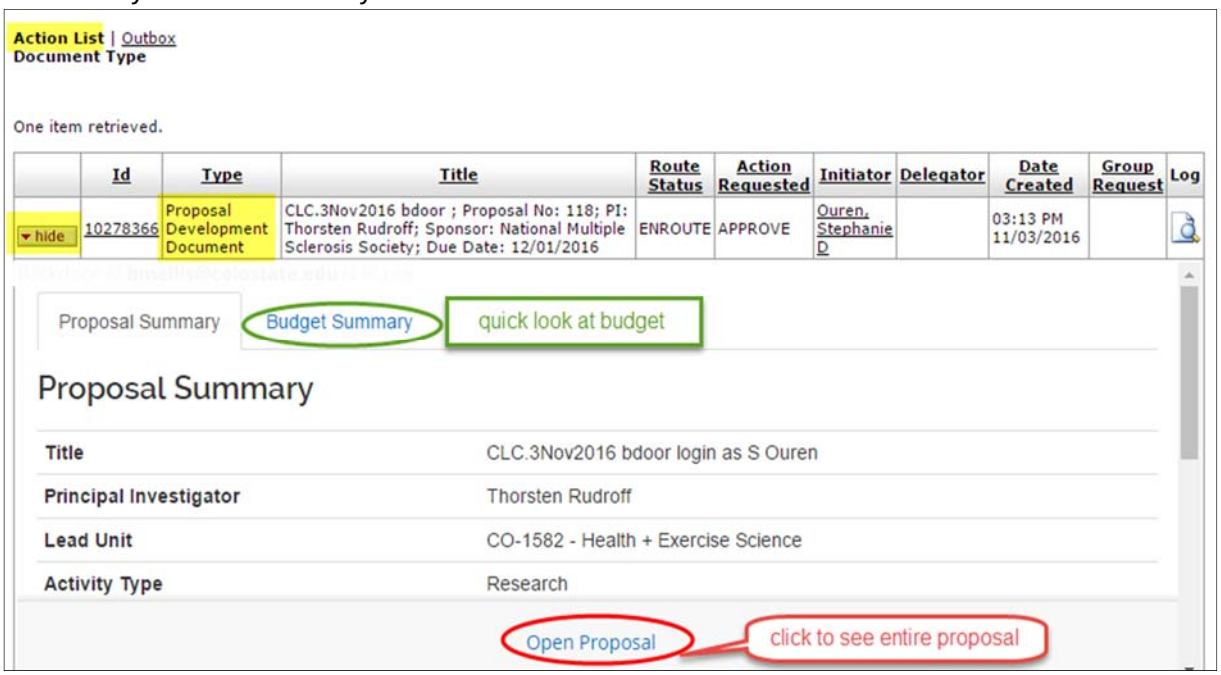


Figure 1 – *Action List* Open Proposal

2. From the ***Email Notification*,** clicking the link in the email takes you directly to the Summary/Submit section.

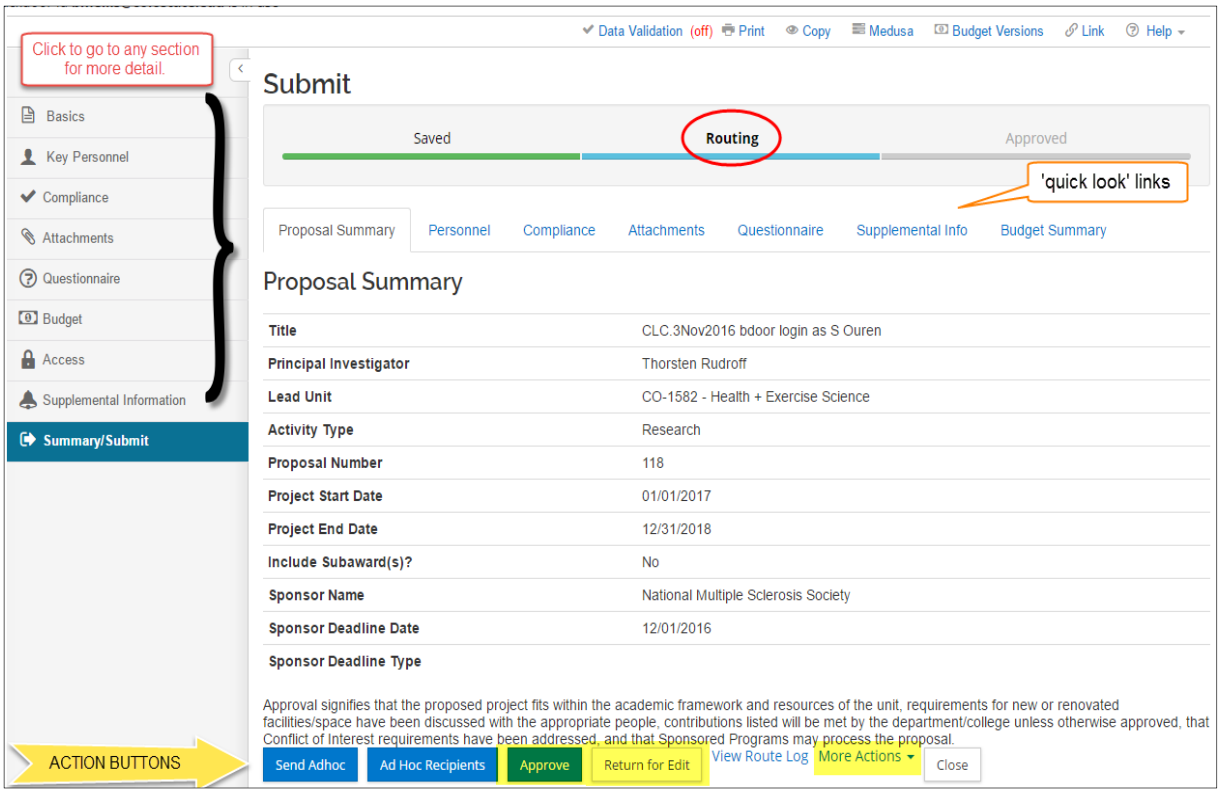
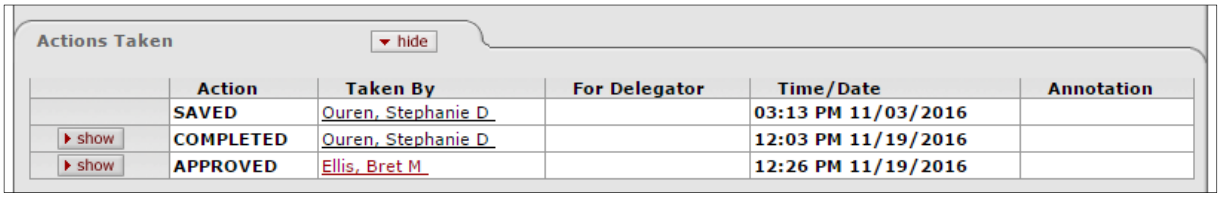


Figure 2 – Proposal Summary and "Approve" or "Return for Edit" button

Approvers can navigate to proposal details, budget or attachments. Note that Approvers only will see approver action button.

3. After approving the proposal, viewing the Proposal Route Log shows the action and date and time stamp.



Actions Taken hide

	Action	Taken By	For Delegator	Time/Date	Annotation
	SAVED	Ouren, Stephanie D		03:13 PM 11/03/2016	
show	COMPLETED	Ouren, Stephanie D		12:03 PM 11/19/2016	
show	APPROVED	Ellis, Bret M		12:26 PM 11/19/2016	

Figure 3 Route Log

4. After approving the proposal, click the "Close" Button.

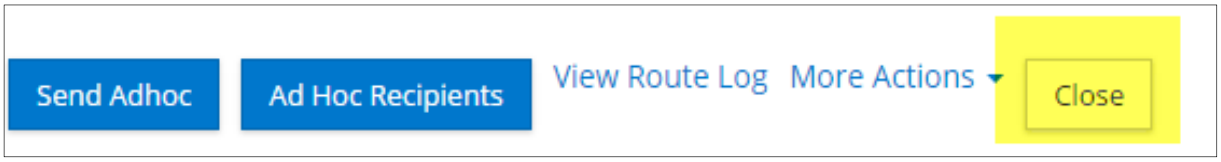


Figure 4 Close Button

Receiving Future Notifications?
If the PI, CO-I, or Key Person is also a Department or College Approver, this question will appear.

- Answer "**Yes**".

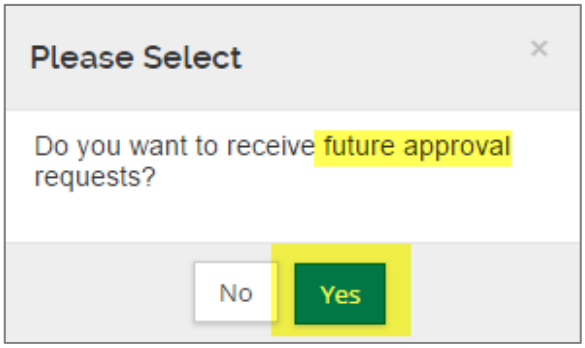
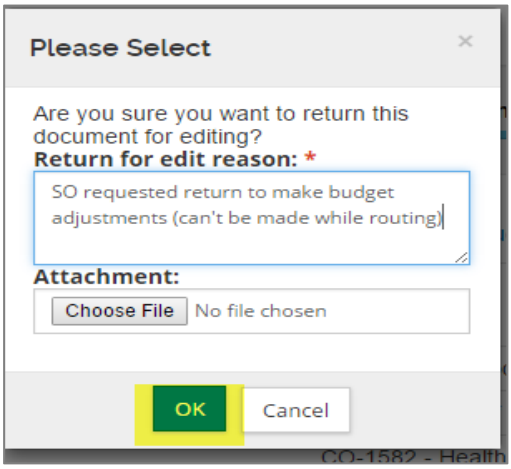


Figure 5 – Future Notifications

What Happens on "Return for Edit"?
If an Approver returns the proposal for edit, proposal is removed from the Routing Chain and sent back to the beginning of the routing and the proposal initiator.

Figure 6 Return for Edit



Approver enters reason for returning the proposal.

Attach file if needed.

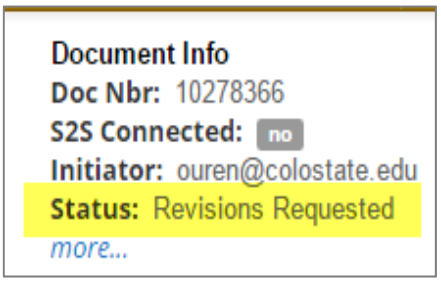


Figure 7 Return for Edit Reason

The proposal is returned to the initiator and the status of the proposal will show "**Revisions Requested**". All elements of the proposal are again editable.

Once corrections have been made, the proposal is re-submitted (by the initiator or a proposal aggregator) to routing (routing starts over).