



Quick Tips

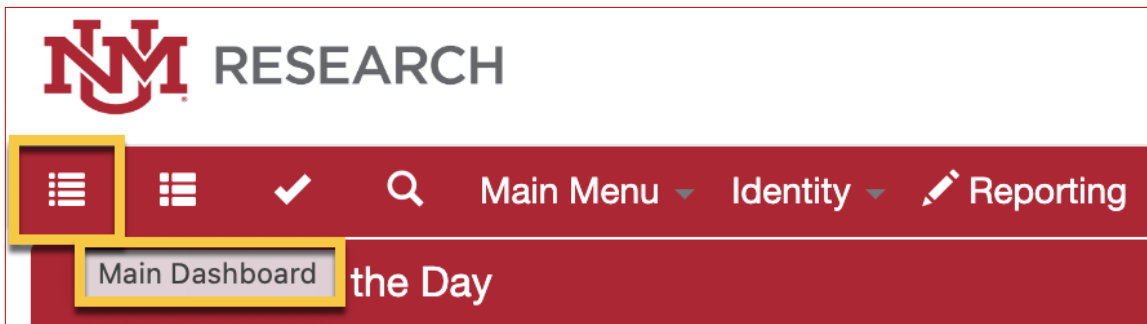
How to Approve a Proposal in Streamlyne

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.

Action List							
Action	Id	Number	Type	Title	Route Status	Lead Unit	
Show COM	27019	63	Proposal Development Document	not a real proposal; Proposal No: 63; PI Melissa Thompson; Sponsor: National Science Foundation; Due Date: 11/01/2022;	SAVED	Anthropology Department #045A	
Show COM	28413	102	Proposal Development Document	not a real proposal; Proposal No: 102; PI Melissa Thompson; Sponsor: National Science Foundation; Due Date: 11/01/2022;	SAVED	CULLS OILS #375C	
Show APP	28417	104	Proposal Development Document	not a real proposal; Proposal No: 104; PI Melissa Thompson; Sponsor: National Science Foundation; Due Date: 11/01/2022;	SAVED	VP Resrch & Econ Devlpmnt VPRED #798A	

3 items found, displaying all.



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

Click on column header labels to sort

Action	Id	Number	Type	Title	Route Status	Lead Unit	PI/Reporter	Delegator	Date Created	Submission Date	Group Request	Log
Show	COM	28417	104	Proposal Development Document	not a real proposal; Proposal No: 104; PI Melissa Thompson; Sponsor: National Science Foundation; Due Date: 11/01/2022;	SAVED	VP Resrch & Econ Devlpmt VPRED #798A		06:16 PM 11/11/2022			
Show	COM	28413	102	Proposal Development Document	not a real proposal; Proposal No: 102; PI Melissa Thompson; Sponsor: National Science Foundation; Due Date: 11/01/2022;	SAVED	CULLS OILS #375C	Melissa Thompson	05:51 PM 11/11/2022			
Show	APP	27019	63	Proposal Development Document	not a real proposal; Proposal No: 63; PI Melissa Thompson; Sponsor: National Science Foundation; Due Date: 11/01/2022;	SAVED	Anthropology Department #045A	Melissa Thompson	10:35 AM 10/25/2022			

3 items found, displaying all.

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

NMU RESEARCH

Currently signed in as lbarril@unm.edu

Streamlyne Research

Main Menu - Identity - Reporting

Message(s) of the Day

Refresh Filter

▼ Action List

Action	Id	Number	Type	Title	Route Status	Lead Unit	PI/Reporter	Delegator	Date Created	Submission Date	Group Request	Log
			Proposal	not a real proposal; Proposal No: 102; PI Melissa Thompson; Sponsor: National Science Foundation; Due Date: 11/01/2022;	SAVED	CULLS OILS	Melissa Thompson		05:51 PM			

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 ☐ Exclude?

Document Route Status All ☐ Exclude?

Action Requested APPROVE ☐ Exclude?

Action Requested Group No Filtering ☐ Exclude?

Document Type ☐ Exclude?

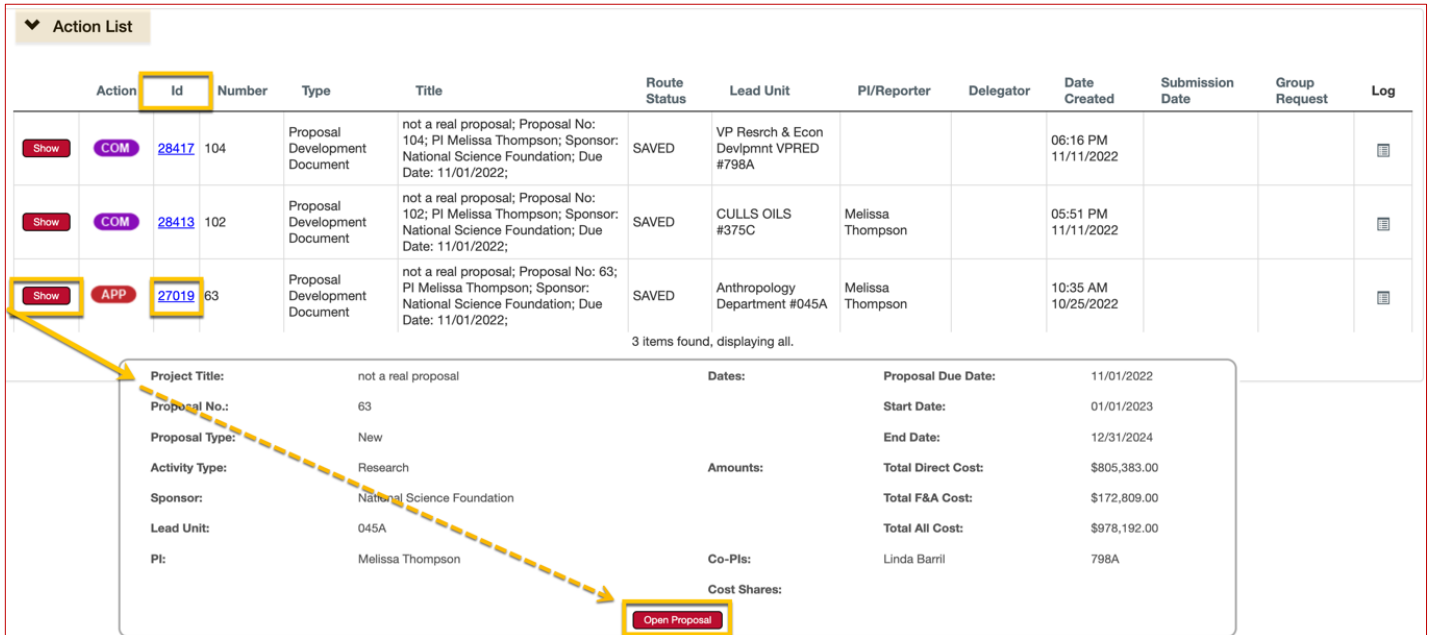
Date Created from: to: ☐ Exclude?

Date Last Assigned from: to: ☐ 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 List

Action	Id	Number	Type	Title	Route Status	Lead Unit	PI/Reporter	Delegator	Date Created	Submission Date	Group Request	Log
Show	COM	28417	104	Proposal Development Document	not a real proposal; Proposal No: 104; PI Melissa Thompson; Sponsor: National Science Foundation; Due Date: 11/01/2022;	SAVED	VP Resrch & Econ Devlpmnt VPRED #798A			06:16 PM 11/11/2022		
Show	COM	28413	102	Proposal Development Document	not a real proposal; Proposal No: 102; PI Melissa Thompson; Sponsor: National Science Foundation; Due Date: 11/01/2022;	SAVED	CULLS OILS #375C	Melissa Thompson		05:51 PM 11/11/2022		
Show	APP	27019	63	Proposal Development Document	not a real proposal; Proposal No: 63; PI Melissa Thompson; Sponsor: National Science Foundation; Due Date: 11/01/2022;	SAVED	Anthropology Department #045A	Melissa Thompson		10:35 AM 10/25/2022		

3 items found, displaying all.

Project Title: not a real proposal

Proposal No.: 63

Proposal Type: New

Activity Type: Research

Sponsor: National Science Foundation

Lead Unit: 045A

PI: Melissa Thompson

Dates:

Proposal Due Date: 11/01/2022

Start Date: 01/01/2023

End Date: 12/31/2024

Amounts:

Total Direct Cost: \$805,383.00

Total F&A Cost: \$172,809.00

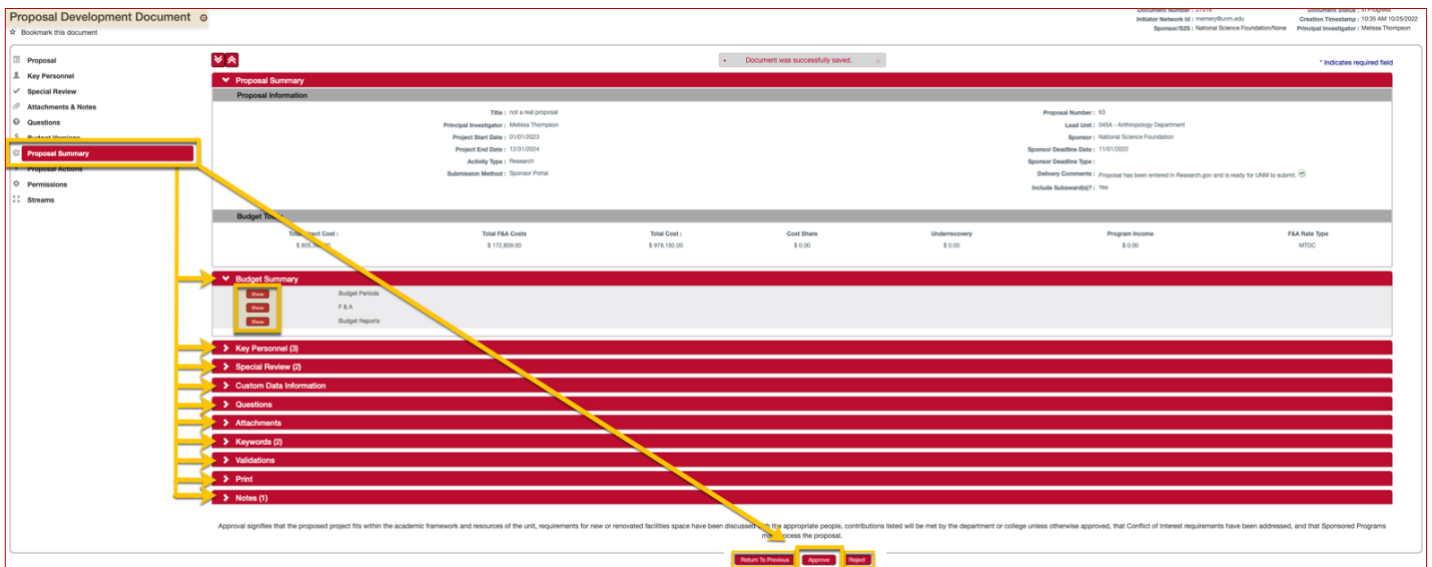
Total All Cost: \$978,192.00

Co-PIs: Linda Barril

Cost Shares: 798A

[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.



Proposal Development Document

Document was successfully saved.

Proposal Summary

Proposal Information

Title: not a real proposal

Principal Investigator: Melissa Thompson

Project Start Date: 01/01/2023

Project End Date: 12/31/2024

Activity Type: Research

Submission Method: Sponsor Portal

Proposal Number: 63

Lead Unit: 045A - Anthropology Department

Sponsor: National Science Foundation

Sponsor Due Date: 11/01/2022

Sponsor Due Date Type: Delivery

Delivery Comments: Proposal has been entered in Research.gov and is ready for NMU to submit.

Include Subaward(s): No

Budget Summary

Document Cost	Total F&A Costs	Total Cost	Cost Share	Unnecessary	Program Income	F&A Rate Type
\$ 805,383.00	\$ 172,809.00	\$ 978,192.00	\$ 0.00	\$ 0.00	\$ 0.00	MTDC

Key Personnel (2)

Special Review (2)

Custom Data Information

Questions

Attachments

Keywords (2)

Validations

Print

Notes (1)

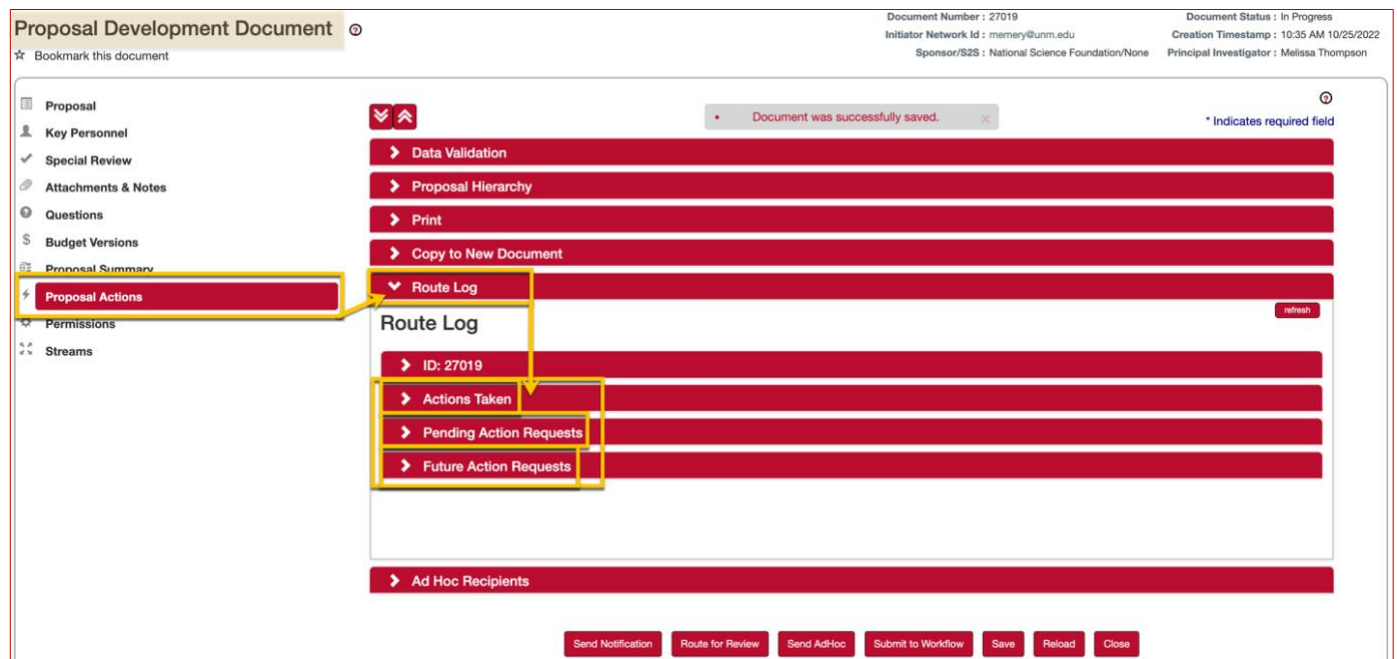
Approval signifies that the proposed project fits within the academic framework and resources of the unit, requirements for new or renovated facilities space have been discussed with the appropriate people, contributions listed will be met by the department or college unless otherwise approved, that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

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



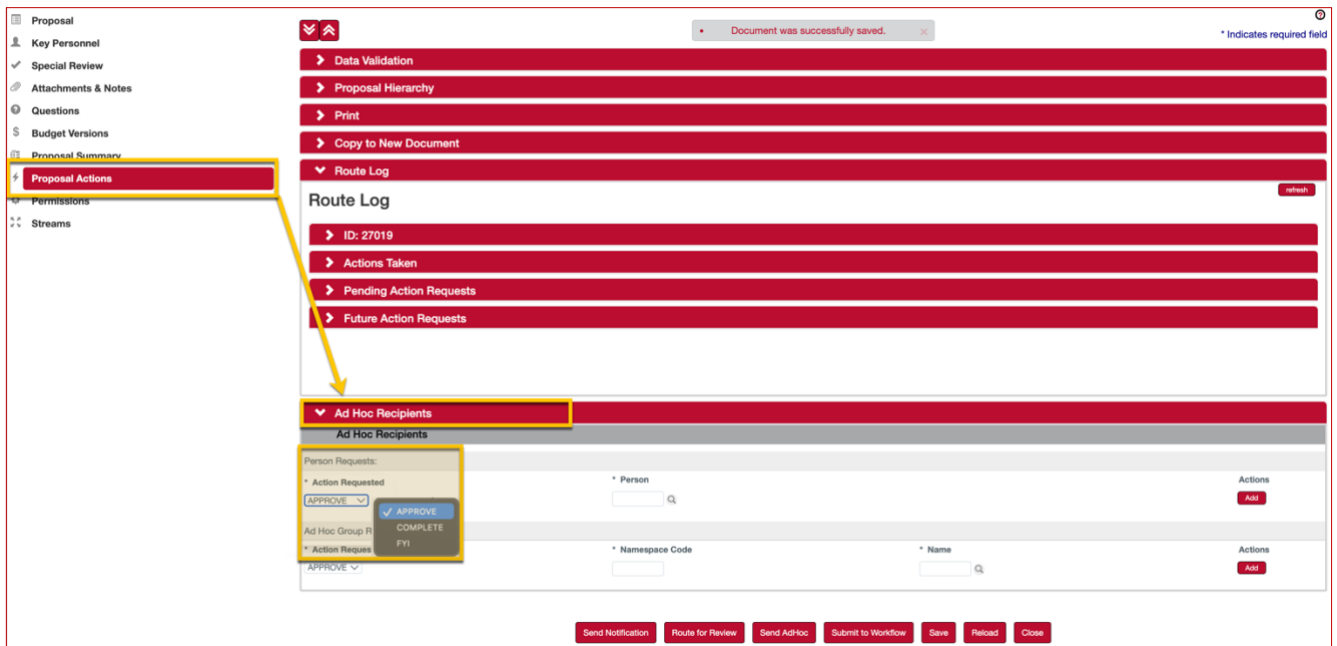
Routing Queue & Notifications

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).

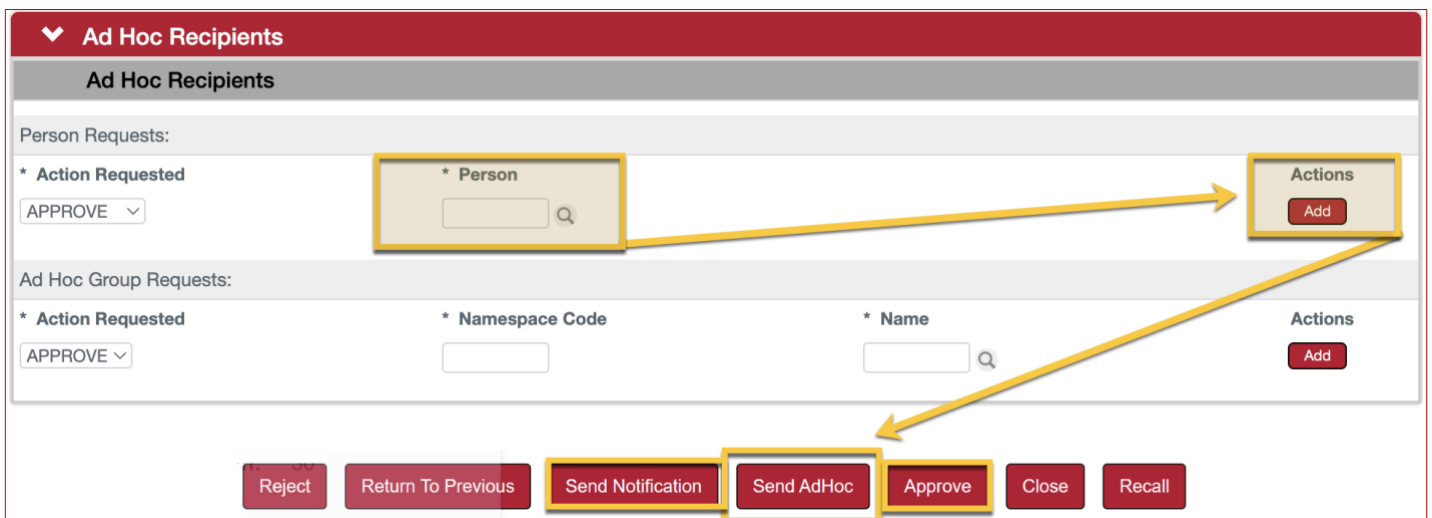


The screenshot shows the 'Proposal Development Document' interface. On the left is a sidebar with a 'Proposal Actions' menu item highlighted. The main content area shows a 'Route Log' section expanded, revealing three sub-sections: 'Actions Taken', 'Pending Action Requests', and 'Future Action Requests'. A yellow box highlights the 'Route Log' header and its sub-sections. At the bottom of the interface are buttons for 'Send Notification', 'Route for Review', 'Send AdHoc', 'Submit to Workflow', 'Save', 'Reload', and 'Close'. A status bar at the top right indicates 'Document Status: In Progress' and 'Creation Timestamp: 10:35 AM 10/25/2022'.

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



- Click the magnifying glass icon to search for the person/group to be added.
(See [How to Perform Searches in Streamlyne](https://streamlyne.unm.edu/resources/index.html) from the *Quick Tips* section at <https://streamlyne.unm.edu/resources/index.html>)
 - Click the red **Add** button to confirm the ad hoc request.
 - Click the red **Send AdHoc** button at the bottom of the screen to send the notification.
- You may also click **Send Notification** to compose a message to one or more users, linking the proposal document.
 - 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.

▼

Action List

Show

FYI

15696

Streamlyne Research Notification

Proposal Development Key Personnel Reminder

FINAL

11:24 AM 09/12/2022

Apply Default

NONE

NONE

NONE

FYI

66 items found, displaying 61 to 66.

«

<

1

2

3

4

5

6

7

>

»

Take Action