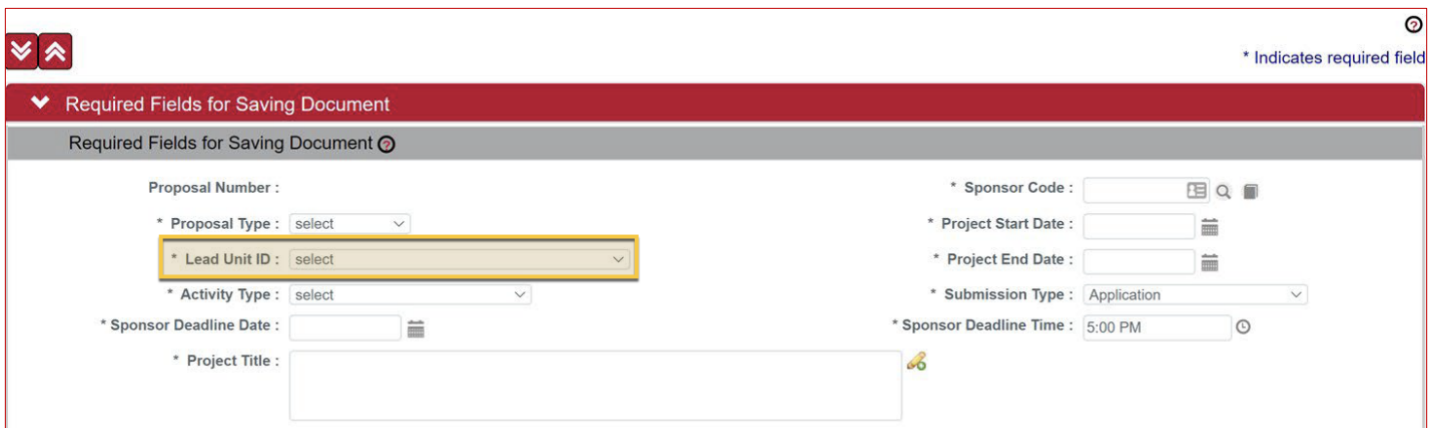




Quick Tips

How to Change Lead Unit on a Proposal in Streamlyne

In order to create a new proposal document, the **Lead Unit ID** is specified in the **Required Fields for Saving Document**. Once the document is saved, this field is not available for editing.



* Indicates required field

Required Fields for Saving Document

Required Fields for Saving Document

Proposal Number :

* Proposal Type : select

* Lead Unit ID : select

* Activity Type : select

* Sponsor Deadline Date : [calendar icon]

* Project Title : [text input]

* Sponsor Code : [input]

* Project Start Date : [calendar icon]

* Project End Date : [calendar icon]

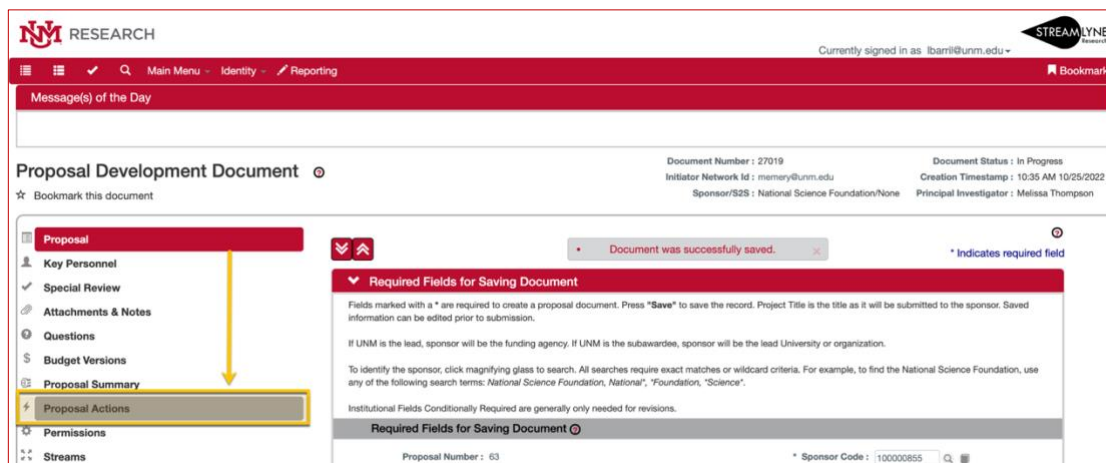
* Submission Type : Application

* Sponsor Deadline Time : 5:00 PM

To change the lead unit on an existing proposal:

Copy the proposal to a new proposal development document

1. [Login to Streamlyne](https://research.unm.streamlyne.org/) with your UNM credentials (<https://research.unm.streamlyne.org/>).
2. Open the existing proposal document
(See *Finding a previously-created proposal* in [Getting Started in Streamlyne](https://streamlyne.unm.edu/resources/getting-started-in-streamlyne.pdf) guide: <https://streamlyne.unm.edu/resources/getting-started-in-streamlyne.pdf>)
3. Navigate to the **Proposal Actions** section.



UNM RESEARCH

Currently signed in as: lbarri@unm.edu

Message(s) of the Day

Proposal Development Document

Document Number : 27019

Initiator Network Id : memery@unm.edu

Sponsor/S2S : National Science Foundation/None

Document Status : In Progress

Creation Timestamp : 10:35 AM 10/25/2022

Principal Investigator : Melissa Thompson

Proposal

Key Personnel

Special Review

Attachments & Notes

Questions

Budget Versions

Proposal Summary

Proposal Actions

Permissions

Streams

Required Fields for Saving Document

Fields marked with a * are required to create a proposal document. Press "Save" to save the record. Project Title is the title as it will be submitted to the sponsor. Saved information can be edited prior to submission.

If UNM is the lead, sponsor will be the funding agency. If UNM is the subawardee, sponsor will be the lead University or organization.

To identify the sponsor, click magnifying glass to search. All searches require exact matches or wildcard criteria. For example, to find the National Science Foundation, use any of the following search terms: National Science Foundation, National, Foundation, Science.

Institutional Fields Conditionally Required are generally only needed for revisions.

Required Fields for Saving Document

Proposal Number : 63

* Sponsor Code : 10000855



4. Click to open the panel labeled **Copy to New Document**.
5. Tick the boxes next to the parts of the proposal you wish to copy. To make an exact copy, tick all of the boxes.
6. Use the drop-down menu labeled **Lead Unit** to designate the new lead unit for the copy.
7. Click **Copy Proposal**.

8. Use the **Main Dashboard** icon at the top left of the screen to access your **Action List** and find the new proposal document.

9. Be sure to verify if these changes impact the Unit/Department Details for Key Personnel.

▼ 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	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

3 items found, displaying all.