



STREAMLYNE: HOW TO CREATE A PROPOSAL - FULL GUIDE

1) Login to **Streamlyne**, then go to:

Main Menu > Pre-Award > click the + (plus sign) next to Proposal Development

Main Menu 👻	Identity -		
Pre-Award		Proposal Development	+
Negotiations		Proposal Log	
Post-Award		Institutional Proposals	-

- 2) On the **Proposal** tab, complete the following fields under **Required Fields for Saving Document**:
 - a. Proposal Type
 - b. Lead Unit ID -Will auto-populate
 - c. Activity Type
 - d. Project Title
 - e. Sponsor Code
 - Click the magnifying glass and enter one or two words of the Sponsor Name in the Sponsor Name field. Click the 'Contains' radio button and click Search. Then click return value to select the sponsor.

Example sponsor name: national science

- f. Project Start Date
- g. Project End Date
- h. Submission Type
- i. Sponsor Deadline Time

Document Number: 178348 Initiator Network Id: hfranken@uada.edu Sponsor/S2S: National Science Foundation/None

 Once all required fields are complete, click Save at the bottom. Note the five-digit Document Number at the top and four-digit Proposal Number under Required Fields for Saving Document.

Required Fields for Saving Document ⑦			
Proposal Number: 7694	* Sponsor Code :	000500	۹ 🔳
		National Science Foundation	
* Proposal Type : New	* Project Start Date :	01/01/2022	
* Lead Unit ID: CC012390 - UADA AES FDSC Food Science	* Project End Date :	12/31/2025	
* Activity Type : Organized Research	* Submission Type :	Application	
* Sponsor Deadline Date : 10/01/2021	* Sponsor Deadline Time :	5:00 PM	©
* Project Title : Research Project Title		æ	

NOTE: If you cannot find the sponsor, contact your Pre-Award Grants person or submit a **Request New Sponsor** form to have them added. Each campus has a Streamlyne webpage with a link to the form.

UAF Streamlyne webpageUADA Streamlyne webpageUALR Streamlyne webpage





4) Click on the Key Personnel tab on the left side of the screen.

a. Click the **magnifying glass** next to the blank box to search for and add each person that is part of the project. Search for and add a Principal Investigator (PI) and if applicable, Co-Investigator(s) (COI) and/or Key Personnel.

NOTE: If the person is at another institution, you would not add them here as they are not in the system.

💙 Key P	ersonnel
Key P	ersonnel @
۲	Internal User Name
C	External Address Book
ID	
	Q

- 1. On the **Person Lookup** screen, enter the person's **email address**, then click the **Search** button at the bottom of the screen.
- 2. Click return value next to their name to select them.
- 3. Select the person's role on the project in the **Proposal Role** drop-down box, then click **Add** to add them.
- 4. Repeat this step for each Co-Investigator and/or Key Person that should be listed.
- b. If you are the PI entering the proposal, click your name and click **Show** to answer the **Proposal Person Certification** questions. Click **Save**, then scroll to the top of the screen.

***You can always contact your Pre-Award Grants person for further support in completing the Streamlyne proposal or you can continue to complete the following sections. Please provide the fivedigit Document Number or four-digit Proposal Number. ***

- 5) Click on the Abstracts & Attachments tab. Add the necessary documents to each section.
 - a. Choose a **Status** and enter a **Description** for each attachment.
 - b. Under **Proposal Attachments** this should include all documents required by the sponsor, except Biosketch and Current and Pending. <u>Examples are</u>:
 - i. proposal narrative
 - ii. budget justification
 - iii. abstract (save as Project Summary)
 - c. Under **Personnel Attachments** add:
 - i. biosketch (if applicable)
 - ii. current and pending (if applicable)
 - d. Under Internal Attachments add:
 - i. cost share approval email (if applicable)
 - ii. solicitation
 - iii. budget workbook (if applicable and S2S detailed budget is not used)
- 6) Click on the **Questions** tab. Answer the **Proposal Questions** and **Special Review Questions**.
 - a. If the answer to any of the Special Review Questions was 'yes', add the relevant Type (IRB, IACUC, etc.) to the Special Review tab. Select 'not yet applied' as the Approval Status.
 - b. If the answer to all **Special Review Questions** was 'no', no further action needed.





- 7) Click on the **Budget Versions** tab.
 - a. Your Pre-Award Grants person can assist you with the Budget Versions tab or you can continue and enter a Summary Budget. Detailed instructions are on a separate QRG named: <u>How to Enter a Summary Budget</u>
- 8) Click on the **Proposal Actions** tab, if you are ready to submit your proposal click the **Submit** button.
 - a. The system will automatically run **Data Validation**. If any **Validation Errors** exist, you will have to correct them before you can submit.
 - b. Click the **Show** button next to the section with the error, then click the **Fix** button.

*	Data Validation	
	Data Validation 🔿	
You can	n activate a Validation check to determine any errors or incomplete information. The following Validations types will be determined: errors that prevent submission into routing warnings that serve as alerts to possible data issues but will not prevent submission into routing errors that prevent submission to grants.gov Turn Off Validation	
Validati	ion Errors	
Hide	Special Review Questions (1)	
	You must complete the questionnaire "Special Review Questions"	
Show	Key Personnel Information (4)	

- c. The **Fix** button will take you to the section with the error, where you will be able to correct it. Repeat this step until you receive no errors.
- 9) Notify your Pre-Award Grants person so they can review the proposal before you submit it into routing. Send them the five-digit **Document Number** or the four-digit **Proposal Number**.
- 10) Once your Pre-Award Grants person reviews the proposal you can submit it.
 - a. Open the proposal from your Streamlyne **Action List** by clicking the **'ld'** number.
 - b. Click the Proposal Actions tab and click the Submit button to start the routing process.