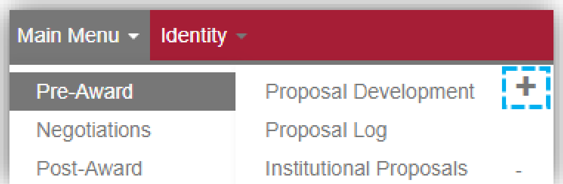
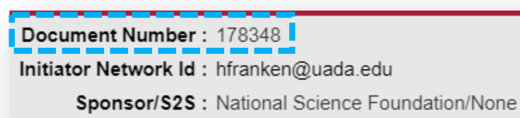
STREAMLYNE: HOW TO CREATE A PROPOSAL – FULL GUIDE

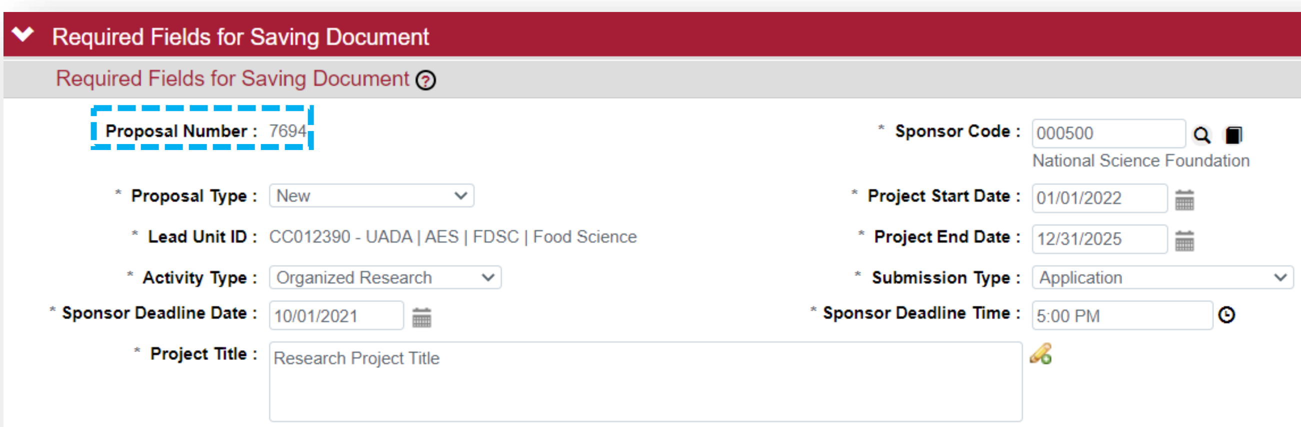
1) Login to **Streamlyne**, then go to:
   Main Menu > **Pre-Award** > click the **+** (plus sign) next to Proposal Development



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
      i. 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



3) 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**.

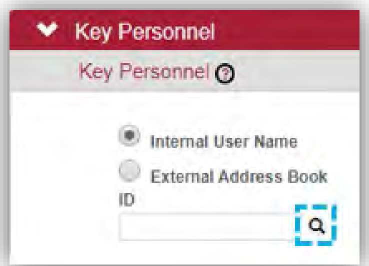


NOTE: If you cannot find the sponsor, contact your Pre-Award Grants person or submit a **Request New Sponsor** form to have them added. Each campus has a Streamlyne webpage with a link to the form.

UAF Streamlyne webpage   UADA Streamlyne webpage   UALR 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.



        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.

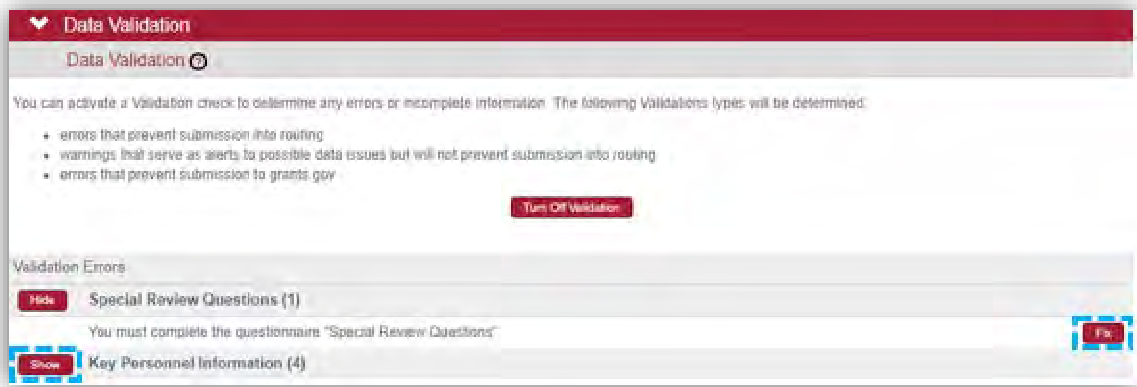
*****You can always contact your Pre-Award Grants person for further support in completing the Streamlyne proposal or you can continue to complete the following sections. Please provide the five-digit Document Number or four-digit Proposal Number. *****

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: **How to Enter a Summary Budget**

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.



    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 **'Id'** number.
    b. Click the **Proposal Actions** tab and click the **Submit** button to start the routing process.