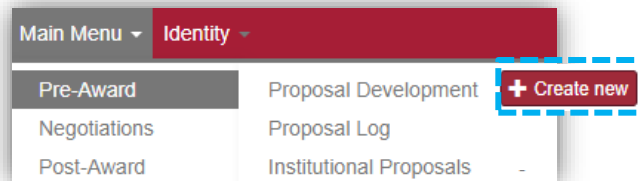
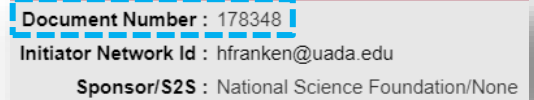


STREAMLYNE: HOW TO CREATE A PROPOSAL – FULL GUIDE

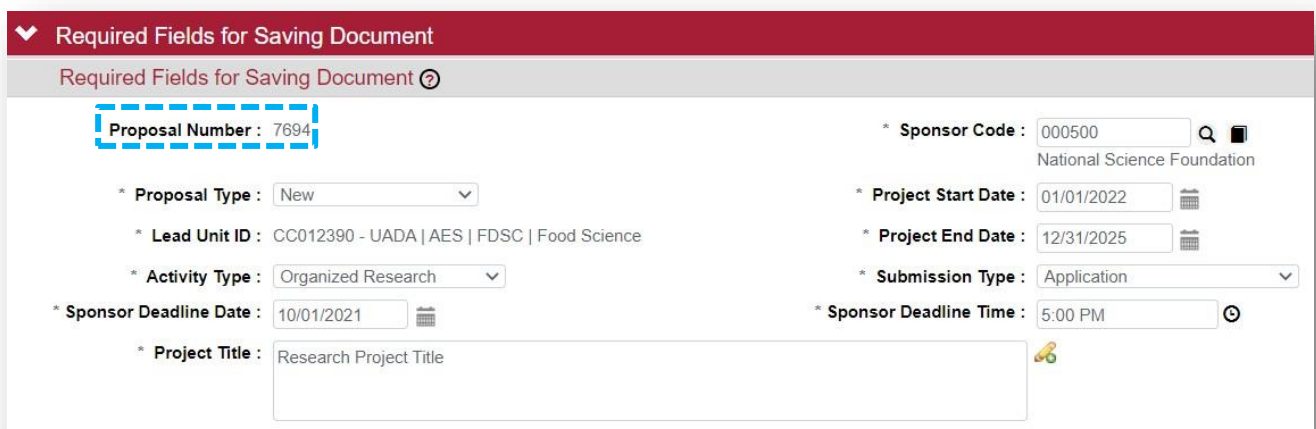
- 1) Login to **Streamlyne**, then go to **Main Menu > Pre-Award >** click the **+ Create new** button next to Proposal Development



- 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



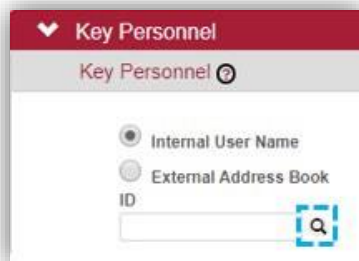
- 3) Once all required fields are complete, click **Save** at the bottom. Note the five-digit **Document Number** at the top and four-digit **Proposal Number** under **Required Fields for Saving Document**.



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.

- 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.

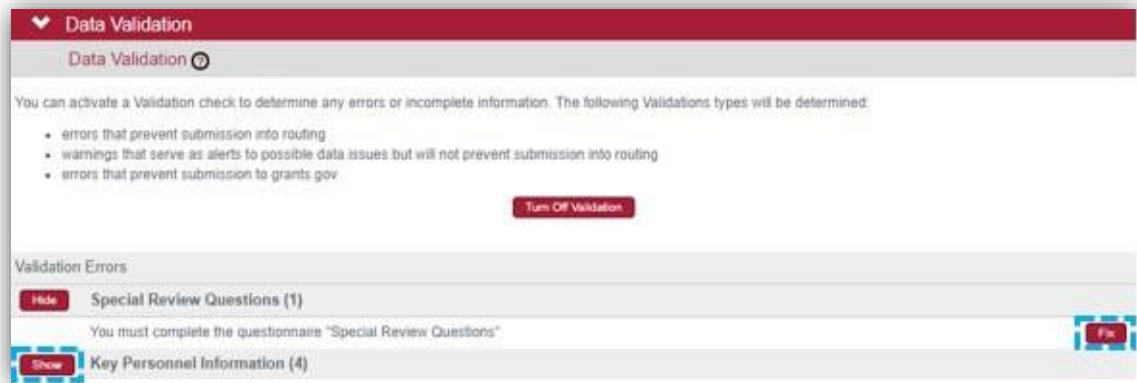


1. On the **Person Lookup** screen, enter the person's **email address**, then click the **Search** button at the bottom of the screen.
 2. Click **return value** next to their name to select them.
 3. Select the person's role on the project in the **Proposal Role** drop-down box, then click **Add** 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. Examples are:
 - 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.