

## Getting Started Guide

### Proposal Development in Streamlyne

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## UNM's Proposal Submission Basics



All external funding proposals must be submitted using the **Streamlyne** electronic research administration system. [Login to Streamlyne](https://research.unm.streamlyne.org/) with your UNM credentials (<https://research.unm.streamlyne.org/>).

We encourage researchers to engage the services of the [Faculty Research Development Office](https://frdo.unm.edu/) (FRDO <https://frdo.unm.edu/>), which can guide you through all aspects of project development, including completing the Streamlyne submission process.

The [Office of Sponsored Projects](https://osp.unm.edu/) (OSP <https://osp.unm.edu/>) has a wealth of information available on their website, including forms, tools, rates, and commonly-required information.

In order to be submitted successfully, proposals must be **certified** by all principal investigators and by relevant administrators (e.g., department chairs and deans).

*When a researcher “submits” a proposal for Review in Streamlyne, the proposal is not submitted to the agency. It will be submitted for review by OSP.*

Final proposal submission requires a **review by OSP** to ensure that your proposal is complete, accurate, and in compliance with all sponsor and legal requirements. This review occurs during a required scheduled appointment in advance of the submission deadline.

Schedule your proposal review

*Please ensure that ALL proposal attachments are uploaded prior to your appointment. You will work with an OSP proposal expert to make any necessary changes and submit a final approved proposal at the end of the appointment.*

All research requires **compliance** with one or more legal or sponsor requirements. Please ensure that you have completed the necessary compliance steps for your research.

- All investigators must submit a **Conflict of Interest** (COI) disclosure. Proposals to the Dept. of Energy and Public Health Service Agencies, such as the NIH, require all investigators to complete a project-specific disclosure *before a proposal is submitted*. Other projects require COI disclosures before the award can be made.

See also: Submitting COI disclosures

- Proposals involving **Human or Animal Subjects** require approval by UNM's [Institutional Review Board](#) or [Institutional Animal Care and Use Committee](#) (IACUC) before data collection can begin. At the proposal stage, you will need to answer pertinent questions about your research and indicate the status of your IRB or IACUC approval in the “Special Review” section in Streamlyne.

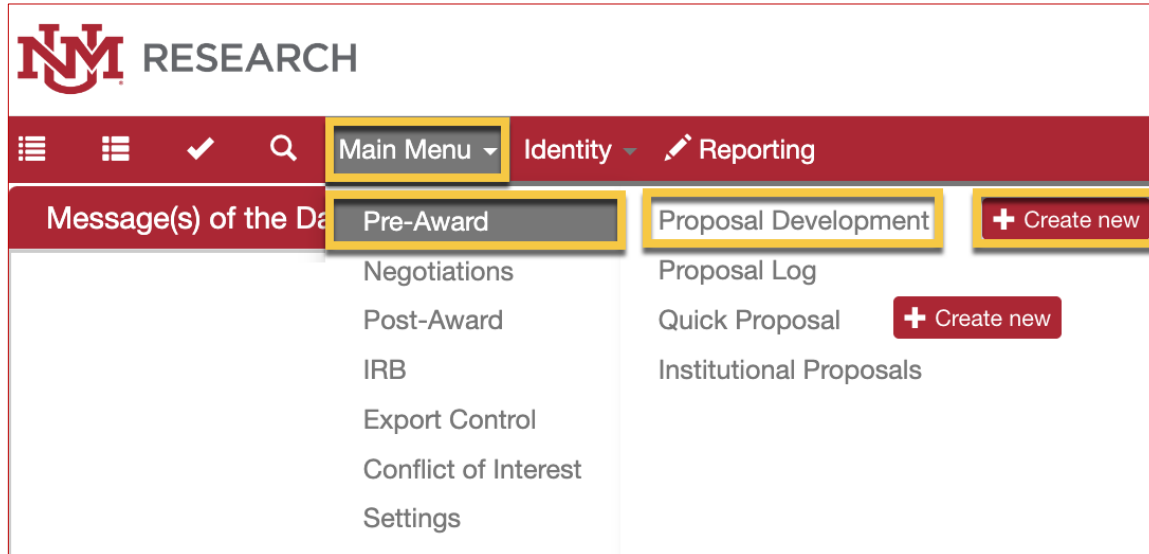
See also: Submitting IRB protocols

- Additional compliance requirements may apply if your work involves biological or hazardous materials, patents, work conducted outside of the U.S., cybersecurity concerns, or sponsor restrictions. A questionnaire in Streamlyne will help you identify these cases and provide more information. Be sure to answer these questions accurately and follow up with the appropriate campus offices.



## Creating a new proposal

1. [Login to Streamlyne](https://research.unm.streamlyne.org/) with your UNM credentials (<https://research.unm.streamlyne.org/>).
2. Select **Main Menu** > **Pre-Award** > **+ Create new** button next to **Proposal Development**



### Tips: Frequently Accessed Sponsor Websites

Grants.gov (i.e., DOE, USDA, NASA, AFRL, NEA, NEH): [Grants.gov Workspace](#);

NIH-specific [NIH Assist](#)

NSF/Research.gov submissions: [Research.gov](#)

3. In order to create and save a new proposal record, you will need to enter a small amount of information under **Required Fields for Saving Document**. All fields marked with a \* must be completed.



## Tips:

- **Project Title** should be the official title of the project for the sponsor.
- All of the proposal information can be edited prior to submission *except* the **Lead Unit ID**. Be sure to select the correct unit/department.
- Please indicate the **Sponsor Deadline Time** in local (Mountain) time.
- **Sponsor Code Lookup**: Click on the magnifying glass to bring up an advanced lookup form (see example image below).
  - 1) Enter one or more search terms and click **Search**. See [Search tips](#) for more information. Your search results will appear below the lookup window.
  - 2) To select the appropriate item and return to the proposal, select **return value**.

**Sponsor Lookup**

Sponsor Code:

Acronym:

DUN And Bradstreet Number:

DODAC Number:

Sponsor Reference ID:

State:

Audit Report Sent For Fy:

Address Book Id:

Active: ☒ Yes ☐ No ☐ Both

Sponsor Name:

Sponsor Type Code:

DUNS Plus Four Number:

CAGE Number:

Postal Code:

Country Code:

Owned By Unit:

Check here if this entity is a domestic subsidiary of a foreign entity: ☐ Yes ☐ No ☒ Both

Starts With ☐ Contains ☐ Exact ☐

**Search** **Clear** **Cancel**

Return Value	Sponsor Code	Sponsor Name	Acronym	Sponsor Type	DUN And Bradstreet Number	DODAC Number	CAGE Number	Sponsor Reference ID	State	Country Code	Check here if this entity is a dome
<b>return value</b>	104785673	Office of the Director, National Institutes of Health	NIH	Federal					NM	USA	No

One item found.

4. Scroll to the bottom of the screen and click **Save**.

Required Fields for Saving Document

Sponsor & Program Information

Organizations, Performance Sites & Collaborators

Delivery Info

Keywords

Document Template

**Save** **Close**

Proposal Number : 21

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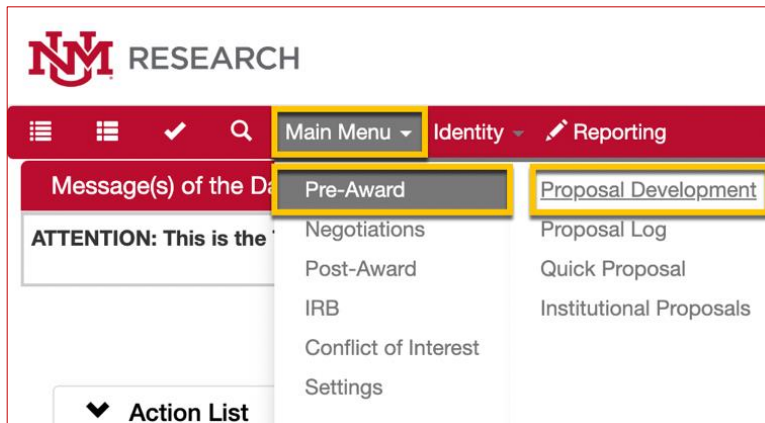
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- The **PD/QP** section also lists all proposals under development in which you are named as a key person. You may click either the **Proposal Number** or **Proposal Title** to access the proposal.

## OPTION B. USING THE PROPOSAL SEARCH FUNCTION

- From the Main Menu, Select **Pre-Award > Proposal Development**.



- This will bring up a lookup with several options for finding your proposal by **Username**, **Principal Investigator Name**, etc. You will only need to enter one search term in order to access a list of all available proposals. Click **Search**.

Development Proposal Lookup

Principal Investigator Username: <input type="text"/> All Personnel Full Name: <input type="text"/> Initiator Full Name: <input type="text"/> Proposal Number: <input type="text"/> Proposal State: <input type="text"/> Sponsor Deadline Date From: <input type="text"/> OSP Appointment Date From: <input type="text"/> Sponsor Code: <input type="text"/> Prime Sponsor Code: <input type="text"/> Lead Unit ID: <input type="text"/> Award ID: <input type="text"/> Hierarchy Status: <input type="text"/>	Principal Investigator Full Name: <input type="text"/> Initiator Username: <input type="text"/> Proposal Type: <input type="text"/> Proposal Document Number: <input type="text"/> Project Title: <input type="text"/> Sponsor Deadline Date To: <input type="text"/> OSP Appointment Date To: <input type="text"/> Sponsor Name: <input type="text"/> Prime Sponsor Name: <input type="text"/> Lead Unit Name: <input type="text"/> Grants.gov Opportunity: <input type="text"/>
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☐ Starts With ☐ Contains ☐ Exact

### Tips:

- Username** is the full UNM email address: xxx@unm.edu
- Streamlyne uses exact search terms or wildcard search (see “Using Streamlyne’s Lookups”).
- The **Initiator** is the person who created the proposal record. Until key personnel are added, try searching using the **Initiator Full Name** or **Username**.



3. Search results will appear below the search window with available **Actions**, such as *edit*, *view*, or *copy*

**Development Proposal Lookup**

Principal Investigator Username:

All Personnel Full Name:

Initiator Full Name:

Proposal Number:

Proposal State:

Sponsor Deadline Date From:

OSP Appointment Date From:

Sponsor Code:

Prime Sponsor Code:

Lead Unit ID:

Award ID:

Hierarchy Status:

Principal Investigator Full Name:

Initiator Username:

Proposal Type:

Proposal Document Number:

Project Title:

Sponsor Deadline Date To:

OSP Appointment Date To:

Sponsor Name:

Prime Sponsor Name:

Lead Unit Name:

Grants.gov Opportunity:

☐ Starts With ☐ Contains ☐ Exact

You have entered the primary key for this table (Proposal Number) in the search criteria. Since these fields are used to uniquely identify a row in this table, the other search criteria entered will be ignored.

**Results**

Actions	Proposal Number	Proposal Type	Proposal State	Project Title	Sponsor Code	Sponsor Name	Initiator Username	Principal Investigator	Lead Unit ID	Lead Unit Name	Prime Sponsor Code	Prime Sponsor Name	Sponsor Deadline Date	Award ID	Original Institutional Proposal ID	Grants.gov Opportunity	Hierarchy Status	Proposal Document Number
<a href="#">edit</a> <a href="#">view</a> <a href="#">stream</a>	155	New	In Progress	NIH from testing session 05/26/2022	100000452	National Institute on Aging	memery@unm.edu	Melissa Thompson	286A	A & S Interdisciplinary Programs			06/30/2022			PA-GN-R01	Not in a hierarchy	10223

One item found.

## Navigating the Streamlyne Interface

### ALWAYS SAVE YOUR WORK!

There is a **Save** button at the bottom of each window in Streamlyne. Streamlyne will save automatically as you navigate between windows, but it is always advisable to save your work.

If you are finding that something, such as a budget calculation, is not working correctly, pressing **Save** will usually solve the problem.

### ALWAYS CLOSE BEFORE LEAVING!

There is a **Close** button at the bottom of each window in Streamlyne. Before leaving the document, you should press **Close**. This will ensure that the proposal does not become locked for editing by other users.

### RED BUTTONS

Pay particular attention to the red buttons on the screen. It is often necessary to click **Add** or **Save** or **Sync** in order for the information you entered to be processed. **Add** confirms a new entry within a panel (e.g., a person, organization, or budget item). **Save** updates information on the current page and checks for errors. **Sync** updates any references to data entered on other pages (e.g., from Key Personnel to the Budget).

### USING STREAMLYNE'S LOOKUPS

Many of the fields in Streamlyne include a search or "lookup" capability to assist in proposal development. These lookup fields find existing investigators, sponsors, institutions, etc., in our database and assist in proposal development by bringing in relevant information (e.g., salaries, addresses).

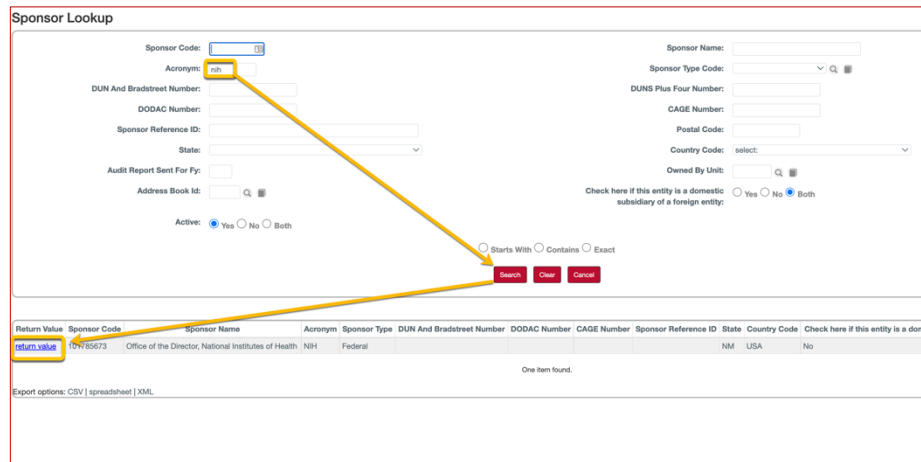
Lookup fields can be identified by the magnifying glass icon.





Exact search terms may be entered directly into the space and pressing the TAB key. Alternatively, click on the magnifying glass to bring up an advanced lookup form. Below is an example of the lookup form for entering the **Sponsor**.

1. Enter one or more search terms and click **Search**. Your search results will appear below the lookup window.
2. To select the appropriate item and return to the proposal, select **return value**.



**Sponsor Lookup**

Sponsor Code:

Acronym:

DUNS Plus Four Number:

DODAC Number:

Sponsor Reference ID:

State:

Audit Report Sent For Fy:

Address Book ID:

Active: ☒ Yes ☐ No ☐ Both

Sponsor Name:

Sponsor Type Code:

DUNS Plus Four Number:

CAGE Number:

Postal Code:

Country Code:

Owned By Unit:

Check here if this entity is a domestic subsidiary of a foreign entity: ☐ Yes ☐ No ☒ Both

☐ Starts With ☐ Contains ☐ Exact

Return Value	Sponsor Code	Sponsor Name	Acronym	Sponsor Type	DUNS Plus Four Number	DODAC Number	CAGE Number	Sponsor Reference ID	State	Country Code	Check here if this entity is a domestic subsidiary of a foreign entity
<b>return value</b>	00125573	Office of the Director, National Institutes of Health	NH	Federal					NM	USA	No

One item found.

Export options: CSV | spreadsheet | XML

## Search Tips:

- We suggest starting with only one search field, as this maximizes your chances of finding what you are looking for.
- By default, search fields require either an exact match or a wildcard search.
- A wildcard search uses \* to find all results matching the given partial criteria. For example, to find the National Science Foundation, you could use any of the following search terms: **National Science Foundation**, **National\***, **\*Foundation**, **\*Science\***
- Note that **\*Science** will only return results that end with the word “Science”, while **Science\*** will only return results that begin with the word “Science”. When in doubt, adding the asterisk to both sides: **\*Science\*** will return all results that include the word “Science”
- Alternatively, you may change the search parameters to **Contains** or **Starts With**

☐ Starts With ☒ Contains ☐ Exact

- Searches for personnel based on **Username** require the entire email address: **XXXX@unm.edu**.
- The first search field is often for a “Code” or “ID” that is a unique identifier for each record. Most users will not know these codes, nor will they need them. We recommend using the search fields that are most familiar to you.
- Some of Streamlyne’s tables allow blank searches which will return up to 100 records. Click **Search** without entering any search criteria, or search using \* in any available field.





## REQUIRED FIELDS

In many sections of the proposal development document, there are both required and optional fields. Required fields are marked with an \*, meaning that you will not be able to submit a proposal without completing them. For example, in the screenshot below, a proposal attachment requires you to indicate the **Attachment Type**, to choose a file to upload in **File Name**, and to select **Status** (*complete* or *incomplete*). Other fields, such as **Contact Name** or **Description**, are not required.

Remember that some “optional” fields may be required for specific sponsors. Be sure to review your sponsor requirements carefully.

## INLINE HELP

To assist our users in navigating Streamlyne, we provide detailed written documentation and training videos on the [Resources](#) page. Additionally, there are several ways to find quick help access within the Streamlyne system.

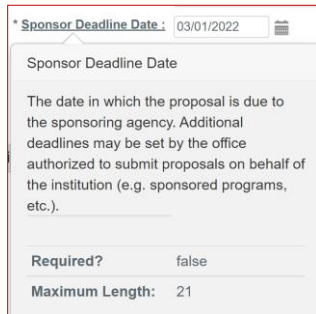
### Help with Proposal Panels

Most red panels in Streamlyne show some custom help text.




## Help with Specific Fields

Most fields in the proposal development module have help text which is accessible by hovering your mouse/pointer over the field name.

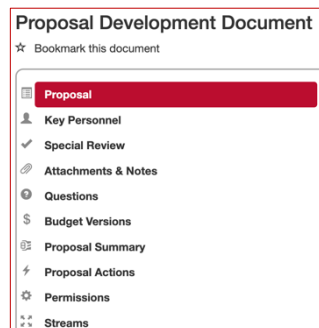


Each section of the proposal development module also includes a link to the user documentation, accessible using the question mark icon, as below.

Key Personnel 

## PROPOSAL DEVELOPMENT MAIN SECTIONS

When a proposal is opened, a navigation pane or “quick menu” appears on the left side of your screen to access the major proposal tabs. The following is a brief summary of the function of each menu item. Detailed information on each section is provided in other guides.



**Proposal:** Information that would generally be included on the cover sheet of a proposal. Includes project title and start/end dates, the type of proposal, identification of the sponsor and opportunity, and where the research will be conducted. Also includes information on proposal deadlines and method of proposal submission.

**Key Personnel:** Identifies all senior or key persons collaborating on the proposal, their project roles, and unit/department affiliations. This section also includes a short series of questions that each PI or co-PI will need to fill out to certify the proposal for submission.

**Special Review:** Identifies project components that may have additional compliance requirements, including conflict of interest (COI) disclosures that are required for all research proposals. For IRB and COI review, users can link to records from the Streamlyne IRB and COI modules. For other special review components (e.g., animal use), select and add those components, as applicable.



**Attachments & Notes:** Only internal documents are required in Streamlyne. See required, minimum attachments in Budget Versions section below; notes, short text internal communications, may also be submitted in this panel.

**Questions:** Required questions for proposal submission. Includes internal UNM questions that ensure research compliance and enhanced support.

**Budget Versions:** Enter only the total costs, total direct costs, and F&A costs per budget period in the provided entry fields and, at a minimum, attach the following **required** documents for UNM (**Attachments & Notes > Internal Attachments**):

- Solicitation
- Budget Worksheet
- Budget Justification
- Statement of Work

Note that you can create multiple draft budgets, but you must check the “Final” box next to the budget intended for submission. Please visit [OSP](https://osp.unm.edu) (<https://osp.unm.edu>) for important information and tools for creating your budget or contact the [FRDO](https://frdo.unm.edu) (<https://frdo.unm.edu>) for assistance in creating your budget.

**Proposal Summary:** At-a-glance summary of proposal items, including budget totals. Can be used to access completed and incomplete proposal components and to print components of the proposal.

**Proposal Actions:** Copy or delete a proposal document, print proposal items, perform a validation check to identify errors prior to submission. Route log identifies which institutional approvals are completed or pending. Submit proposal for review.

**Permissions:** Assign additional users (e.g., collaborators or administrative support personnel) that may edit components of the proposal. User roles: “Aggregator” may edit any part of the proposal; “Budget creator” may create and edit budgets but may not edit other proposal items. “Narrative writer” can upload proposal attachments but not edit the budget; “Viewers” can view all proposal components but cannot edit.

**Streams:** No work is required in this area. All related components of the project (e.g., Awards, IRB protocols, COI disclosures, agreements) will be linked into a Stream.