

Streamlyne: Quick Proposal Overview for Unfunded Agreements

Melissa Sanchez, Sr. Sponsored Projects Officer

Office of Sponsored Projects

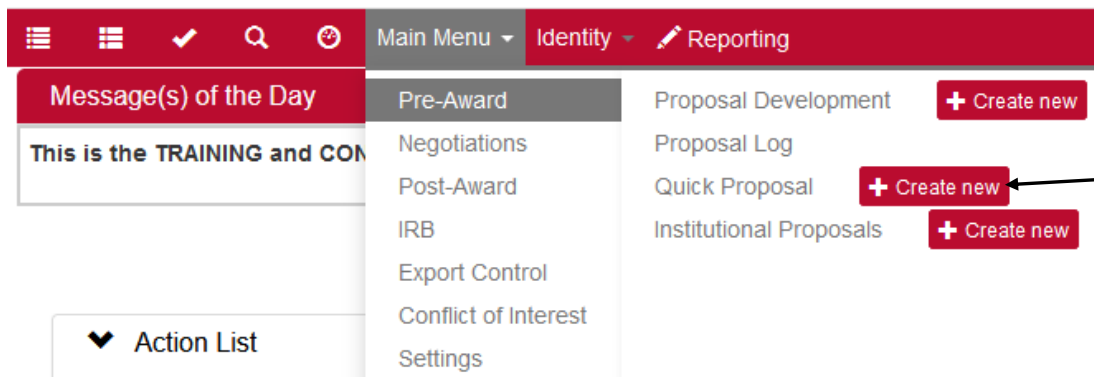
RAN meeting - June 13, 2023

Streamlyne Quick Proposals for Unfunded Agreements

- Non-Disclosure Agreements (NDAs)
- Material Transfer Agreements (MTAs)
- Data Transfer/Sharing/Use Agreements (DUAs)
 - Unfunded Collaboration Agreements
- Unfunded Memoranda of Understanding (MOUs)
 - Master Agreements (MAs and BOAs)
 - Other Unfunded Agreements

Streamlyne Quick Proposals

- Create New Record



From the Main Menu drop-down, under Pre-Award, select 'Create New' next to Quick Proposal

Streamlyne Quick Proposals

- Quick Proposal Tab

Quick Proposal

☆ Bookmark this document

- Quick Proposal
- Questionnaire
- Quick Proposal Actions
- Streams

Document Overview

* Description :

Explanation :

Organization Document Number :

Quick Proposal Details

Quick proposals may be used for letters of intent, white papers, pre-proposals, unfunded agreements, task orders, supplements, active award Administrative Changes, Subawards on a main award (new and modifications). Quick proposal may not be used for solicited proposal submissions. See Main Menu > Proposal Development.

Quick Proposal

Quick Proposal Number : 00072587

Fiscal Month / Year : 11 / 2023

* Quick Proposal Type : Unfunded Agreements

Quick Proposal Status : Pending

Proposal Merged With :

* Proposal Type : Unsolicited Contract

Principal Investigator (Internal User Name) :

Principal Investigator (External Address Book ID) :

* Lead Unit :

* Title :

Sponsor :

Anticipated Award Type : select

Comments :

Deadline Date :

Deadline Time : 5:00 PM

Created By : mmarti47@unm.edu

Log Create Date : 05/30/2023 12:29 AM

Updated By :

Last Update Date :

Description and Title are both required fields. These fields can be used to describe the type of contract or arrangement being set up between UNM and the Sponsor

For example: NDA between UNM and Lockheed Martin

Quick Proposal Type = Unfunded Agreements

Proposal Type = Unsolicited Contract

Using these two selections will help identify the record as an unfunded agreement for assignment to a Contract Specialist

Streamlyne Quick Proposals

- Quick Proposal Tab

Quick Proposal

☆ Bookmark this document

Quick Proposal

Questionnaire

Quick Proposal Actions

Streams

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* Quick Proposal Type : Unfunded Agreements Quick Proposal Status : Pending

Proposal Merged With : * Proposal Type : Unsolicited Contract

Principal Investigator (Internal User Name) : Principal Investigator (External Address Book ID) :

* Lead Unit : * Title :

(select)

Sponsor :

Anticipated Award Type : select

Comments :

Deadline Date : Deadline Time : 5:00 PM

Created By : mmarti47@unm.edu Log Create Date : 05/30/2023 12:29 AM

Updated By : Last Update Date :

Principal Investigator should match the PI who will be responsible for oversight of the agreement. If a PI is named in the contract itself, that PI needs to be the PI of record in the QP record

Lead Unit populates automatically with PI selection

Sponsor – this MUST be completed for OSP to approve the record; Please ensure Sponsor is in Streamlyne before routing the record to OSP

Please fill out Comments and Deadline Date as applicable

Streamlyne Quick Proposals

- Requesting New Sponsor in Streamlyne

If a Sponsor is not in Streamlyne, submit a request to add the Sponsor via this link:

https://forms.unm.edu/forms/new_sponsor_and_subrecipient_requests

This link can also be found on the OSP Website Homepage and under the PI Resources in the Procedures and Guidelines



Provide the following information about the Sponsor in the request:

1. Full legal name
2. Mailing Address
3. General Telephone Number
4. Website address

Streamlyne Quick Proposals

- Completing Quick Proposal Tab

➤ Financial

Save

Close

Once all information has been populated in the Quick Proposal Tab, select 'Save' at the bottom of the screen to continue to the next tab

Streamlyne Quick Proposals

- Questionnaire Tab

Quick Proposal

☆ Bookmark this document

Document number
Initiator Network

Quick Proposal

Questionnaire

Quick Proposal Actions

Streams

Document was successfully saved.

- Proposal Actions (Incomplete)
- Unfunded Agreements (Incomplete)
- Award Modification Actions (Incomplete)
- Subaward Administration (Incomplete)
- Principal Investigator Certification (Incomplete)
- MTA - Inbound (Incomplete)
- MTA - Outbound (Incomplete)

Save Reload Close Cancel

The following sections will not apply to unfunded agreements; however, the initial question for each section must indicate 'No' in order for each section to reflect '(Complete)':

- Proposal Actions
- Award Modification Actions
- Subaward Administration

Principal Investigator Certification is required for all agreements

Streamlyne Quick Proposals

- Questionnaire Tab

➤ Proposal Actions (Complete)

▼ Unfunded Agreements (Incomplete)

Questions [Print](#)

1. Is this record for an Unfunded Agreement action?

Yes No

The Unfunded Agreements questions **MUST** be completed for all unfunded agreements

There are a total of 14 questions and, depending on the response, additional sub questions and embedded forms may become available.

This section includes questions OSP typically requests on additional forms so is intended to reduce administrative burden by collecting:

- the agreement
- Sponsor contact information
- IT PSQ (if applicable)
- DSQ (if applicable)
- ECES (if applicable)
- IRB or IACUC information (if applicable)
- Additional compliance requirements (if applicable)

Streamlyne Quick Proposals

- Questionnaire Tab

The screenshot shows the 'Quick Proposal' interface. At the top left, it says 'Quick Proposal' with a refresh icon and a 'Bookmark this document' option. On the top right, it displays 'Document number' and 'Initiator Network'. A notification bar at the top right states 'Document was successfully saved.' The main content area is divided into a left sidebar and a main panel. The sidebar contains 'Quick Proposal', 'Questionnaire' (highlighted in red), 'Quick Proposal Actions', and 'Streams'. The main panel features a list of red buttons with white text and right-pointing chevrons, all labeled '(Incomplete)'. The buttons are: 'Proposal Actions', 'Unfunded Agreements', 'Award Modification Actions', 'Subaward Administration', 'Principal Investigator Certification', 'MTA - Inbound', and 'MTA - Outbound'. At the bottom right of the main panel are four buttons: 'Save', 'Reload', 'Close', and 'Cancel'. A vertical arrow points from the 'Questionnaire' tab in the sidebar to the top of the main panel.

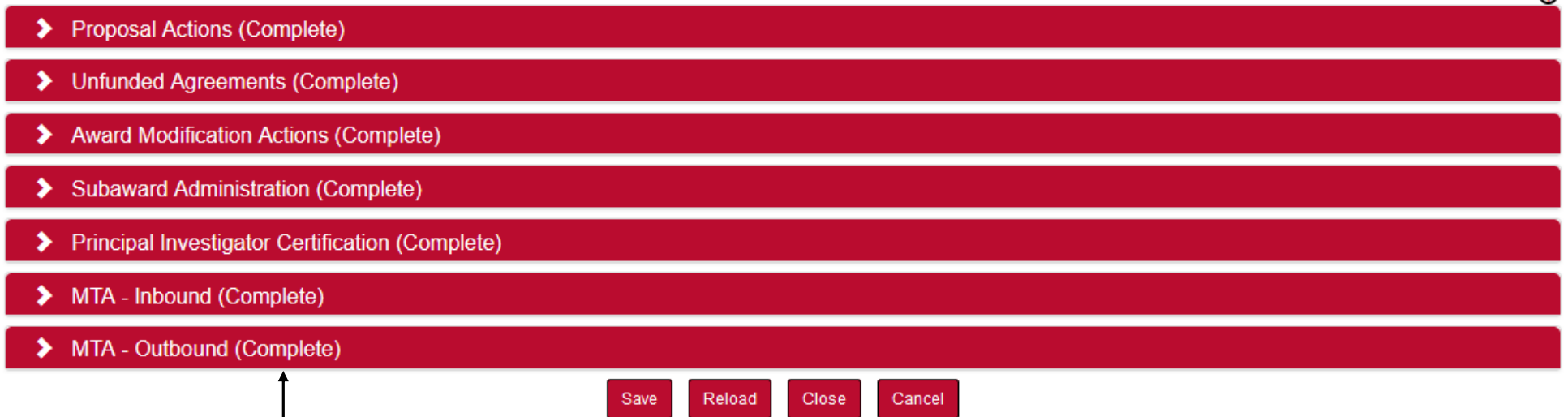
These sections will apply to Material Transfer Agreements only. The questions are intended to replace the MTA Questionnaires sent to PIs for completion.

MTA – Inbound = when materials are incoming to UNM from another entity

MTA – Outbound = when materials are outgoing from UNM to another entity

Streamlyne Quick Proposals

- Questionnaire Tab



The screenshot displays a vertical list of seven red navigation bars, each with a white right-pointing chevron and the text '(Complete)'. The sections are: Proposal Actions, Unfunded Agreements, Award Modification Actions, Subaward Administration, Principal Investigator Certification, MTA - Inbound, and MTA - Outbound. Below the list are four red buttons: Save, Reload, Close, and Cancel. A small heart icon is visible in the top right corner of the interface.

- ▶ Proposal Actions (Complete)
- ▶ Unfunded Agreements (Complete)
- ▶ Award Modification Actions (Complete)
- ▶ Subaward Administration (Complete)
- ▶ Principal Investigator Certification (Complete)
- ▶ MTA - Inbound (Complete)
- ▶ MTA - Outbound (Complete)

Save Reload Close Cancel

↑
All sections of the
Questionnaire tab must
indicate '(Complete)' for
the record to move forward

Streamlyne Quick Proposals

- Quick Proposal Actions Tab

Quick Proposal ⓘ

☆ Bookmark this document

Document Number : 545/22

Document Status : SAVED

Initiator Network Id : mmarti47@unm.edu

Creation Timestamp : 12:29 AM 05

Quick Proposal

Questionnaire

Quick Proposal Actions

Streams



Data Validation

Data Validation ⓘ

You can 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

Turn On Validation

Turning on Data Validation will identify if any required sections have not been completed

Data Validation errors will keep the record from being submitted and routed to OSP

* Indicates required field

Streamlyne Quick Proposals

- Quick Proposal Actions Tab


Quick Proposal 

☆ Bookmark this document

 Quick Proposal

 Questionnaire

 Quick Proposal Actions

 Streams

If there are any additional attachments that go with the agreement, or communications that will be helpful to processing the agreement, they can be uploaded in the Notes and Attachments section

▼ Notes and Attachments (0)

Notes and Attachments

Posted Timestamp	Author	* Note Text	Attached File	Actions
add:		<input type="text"/>	<input type="button" value="Browse..."/> No file selected.	<input type="button" value="Add"/>
			<input type="button" value="Cancel"/>	

➤ Ad Hoc Recipients

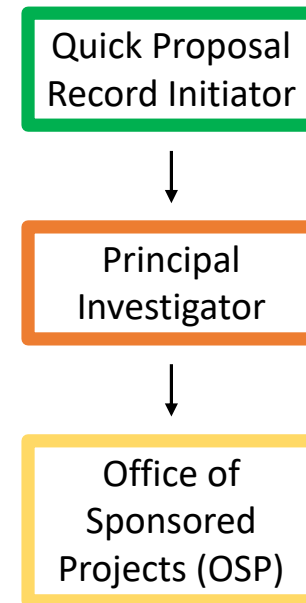
➤ Route Log

Once the record is complete and no validation errors exist, select 'Submit' to route the record

Streamlyne Quick Proposals

- QP Record Routing

- Quick Proposal records route from the Initiator (person creating the record) to the PI identified on the record, unless the PI is the record Initiator
- Once the PI approves the record from their Action List it will route to OSP's Action List
- OSP monitors the Action List throughout the week for new records that need to be assigned



Streamlyne Quick Proposals

- QP Record Routing

Route Log refresh

Route Log

▼ ID: 73478

QuickProposalDocument

Title	Quick Proposal - Brearley MTA	Created	09:05 AM 04/10/2023
Type	Quick Proposal	Last Modified	01:45 PM 04/10/2023
Initiator	Kavka, Jennifer	Last Approved	
Route Status	ENROUTE	Finalized	
Node(s)	QuickProposalOspApprover		

▼ Actions Taken

Action	Taken By	Time/Date	Annotation
SAVED	Kavka, Jennifer	09:09 AM 04/10/2023	
COMPLETED	Kavka, Jennifer	01:26 PM 04/10/2023	
APPROVED	Brearley, Adrian	01:45 PM 04/10/2023	

▼ Pending Action Requests

Action	Requested Of	Time/Date	Annotation
IN ACTION LIST APPROVE	OSPStaffGroup OSPAdmin OSPProposalGroup	01:45 PM 04/10/2023	KC-UNT OSP Administrator Y 000001

The Route Log in the Quick Proposal Actions tab will allow you to see whose queue the record is pending action with

Streamlyne Quick Proposals

- QP Record Assignment

- Once a record is assigned to a Contract Specialist, the Specialist reviews the record to ensure that all information and documents needed have been provided and the questions have been completed
- If there is any missing information in the record, attachments are not uploaded, or OSP needs additional information to move forward, the Contract Specialist will reach out via email to obtain clarification and/or may send the record back to the Initiator and PI for correction

Streamlyne Quick Proposals

- QP Record Return to Department

Route Log

Route Log refresh

ID: 64471

QuickProposalDocument

Title	Quick Proposal - Seidel NPUA-23-001 LANL		
Type	Quick Proposal	Created	12:36 PM 02/15/2023
Initiator	Bishop, Steven	Last Modified	11:04 AM 04/17/2023
Route Status	FINAL	Last Approved	11:04 AM 04/17/2023
Node(s)	QuickProposalOspApprover	Finalized	11:04 AM 04/17/2023

Actions Taken

Action	Taken By	Time/Date	Annotation
SAVED	Bishop, Steven	12:45 PM 02/15/2023	
COMPLETED	Bishop, Steven	12:57 PM 02/15/2023	
APPROVED	Seidel, Sally	01:19 PM 02/15/2023	
RETURNED TO PREVIOUS ROUTE LEVEL	Sanchez, Melissa	10:54 AM 04/11/2023	DOCUMENT REJECTED: Please complete all questionnaires in the Questionnaires tab of this record. The Unfunded Agreement tab will be the most relevant one for this transaction. Contact Melissa Sanchez, mmarti47@unm.edu, with any questions.
APPROVED	Bishop, Steven	11:15 AM 04/11/2023	
APPROVED	Seidel, Sally	03:55 PM 04/11/2023	
APPROVED	Sanchez, Melissa	11:04 AM 04/17/2023	

- QP records that are returned for correction route back to the record Initiator.
- Once the Initiator has made the necessary changes communicated by the Contract Specialist via email, the Initiator will 'Approve' the record.
- The record then routes to the PI to also 'Approve' it.
- After the PI approves the record, it routes back to OSP's Action List.
- Once OSP approves the record, this will show in the Route Log history.

Streamlyne Quick Proposals

- Negotiation Record Notification of QP Approval

Prior to the approval of the QP record, the Contract Specialist will send out a notification to the PI and record Initiator to inform them that the QP record will be approved and moved forward to contract review and, if necessary, negotiations.

Please be advised that approval of the QP record does not mean the agreement has been signed, just that it is moving forward in the contract process.

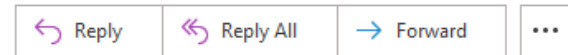


Contract Negotiations for QP Record 00072505



Streamlyne Research <production-research@unm.streamlyne.org>

To Melissa Sanchez; Christos Christodoulou; Isela Roeder



Mon 12/19/2022 11:17 PM

[EXTERNAL]

Negotiation record 53 has been created to process the Teaming Agreement with Metis received under QP Record 00072505. The QP record will be approved as all documentation has been received at this point to proceed with processing the contract. Please note that this 'Approval' does not mean the contract has been executed, only that it is moving forward to the next step for negotiation. Please reach out to Melissa via email mmarti47@unm.edu if you have any questions. To open, [click here](#).

Negotiator: Melissa Sanchez
Negotiation Status: In Progress
Title: Metis Teaming Agreement
Principal Investigator: Christos Christodoulou
Lead Unit: COSMIAC (282A)

To access the Negotiation record identified, click on the hyperlink in the notification