OFFICE OF THE VICE PRESIDENT FOR RESEARCH

Getting Started Guide

Proposal Development in Streamlyne

STREAMLYNE Research

Contents

UNM's Proposal Submission Basics

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

We encourage researchers to engage the services of the **Faculty Research Development Office** (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** (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 <u>required</u> 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.
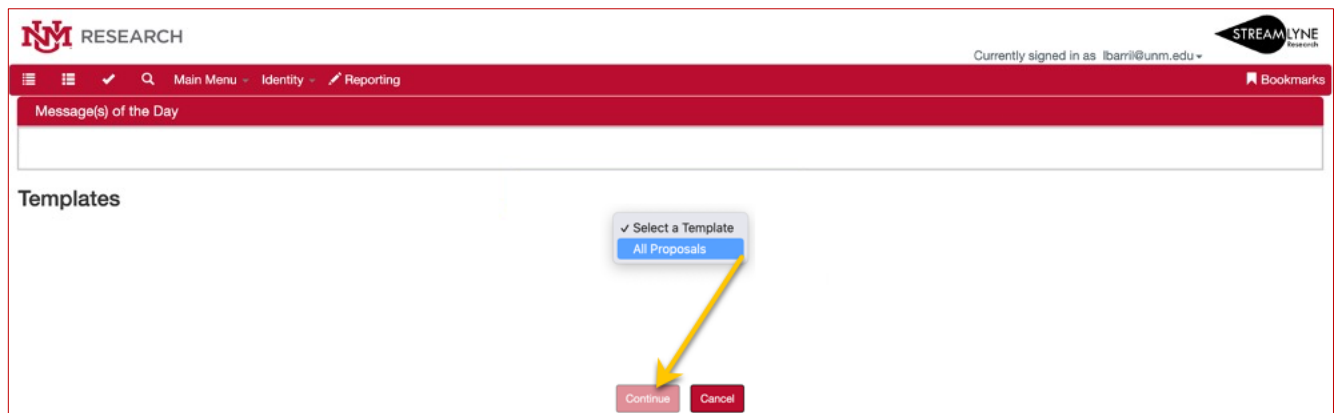
Creating a new proposal

1. Login to Streamlyne with your UNM credentials (https://research.unm.streamlyne.org/).

2. Select **Main Menu** > **Pre-Award** > **+ Create new** button next to **Proposal Development** > **Template**
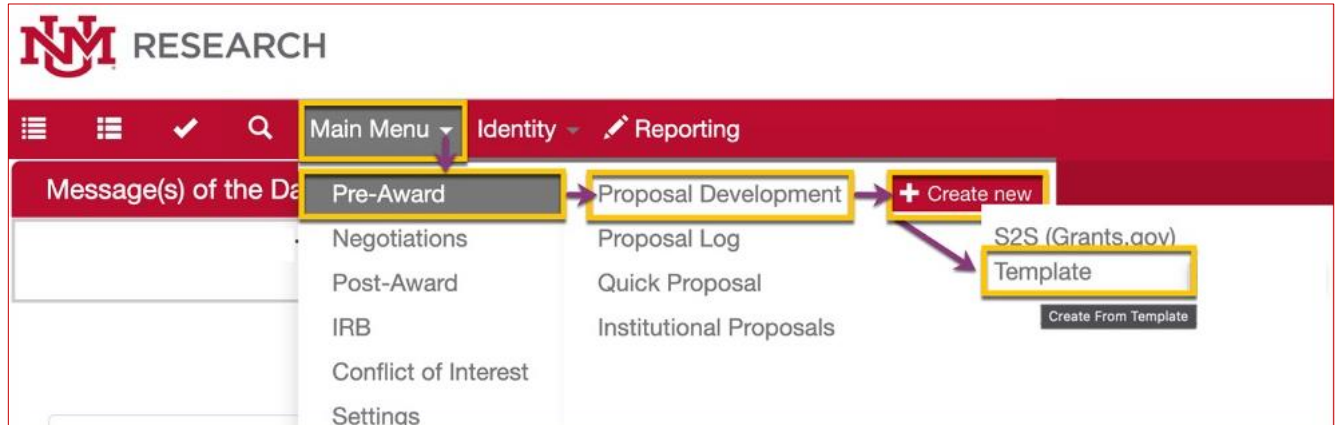
In the following window, select **All Proposals** and click **Continue**.

All Proposals: You will prepare the full proposal using the submission method required by the sponsor and use the "All Proposals" proposal template in Streamlyne to create an abbreviated record for internal use. For example, NSF proposals should be prepared for submission to Research.gov, and only a limited amount of proposal information is required in Streamlyne.

*Tips***: Frequently Accessed Sponsor Websites**
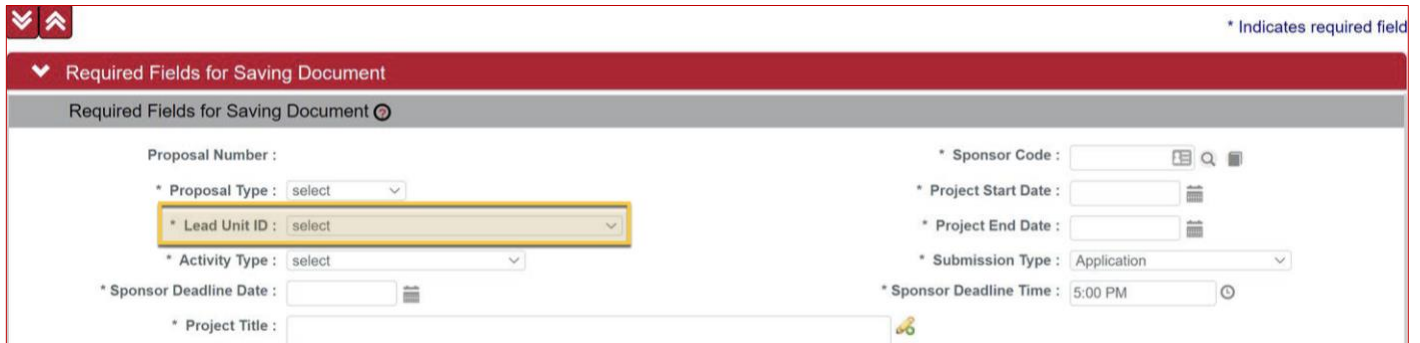
Grants.gov (i.e., DOE, USDA, NASA, AFRL, NEA, NEH): Grants.gov Workspace;

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.
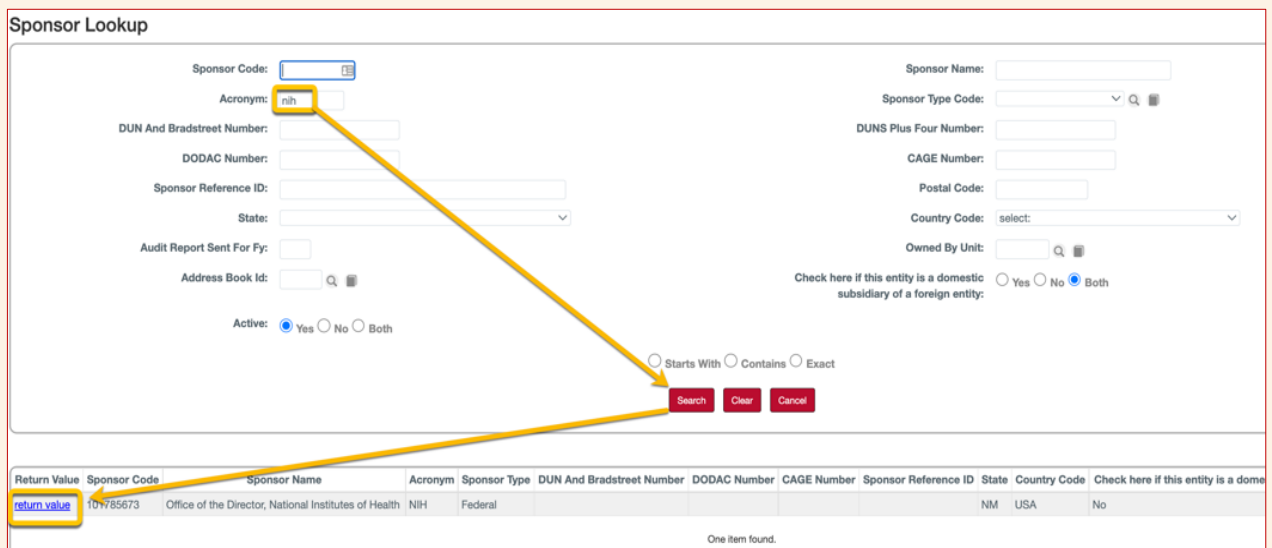
Tips:

o **Project Title** should be the official title of the project for the sponsor.

o All of the proposal information can be edited prior to submission *except* the **Lead Unit ID**. Be sure to select the correct unit/department.

o Please indicate the **Sponsor Deadline Time** in local (Mountain) time.

o **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**.

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

Congratulations! You have created a new proposal. Please make a note of the **Proposal Number** that is generated at the top of the window. You may need this to identify your proposal to the Office of Sponsored Projects (OSP).
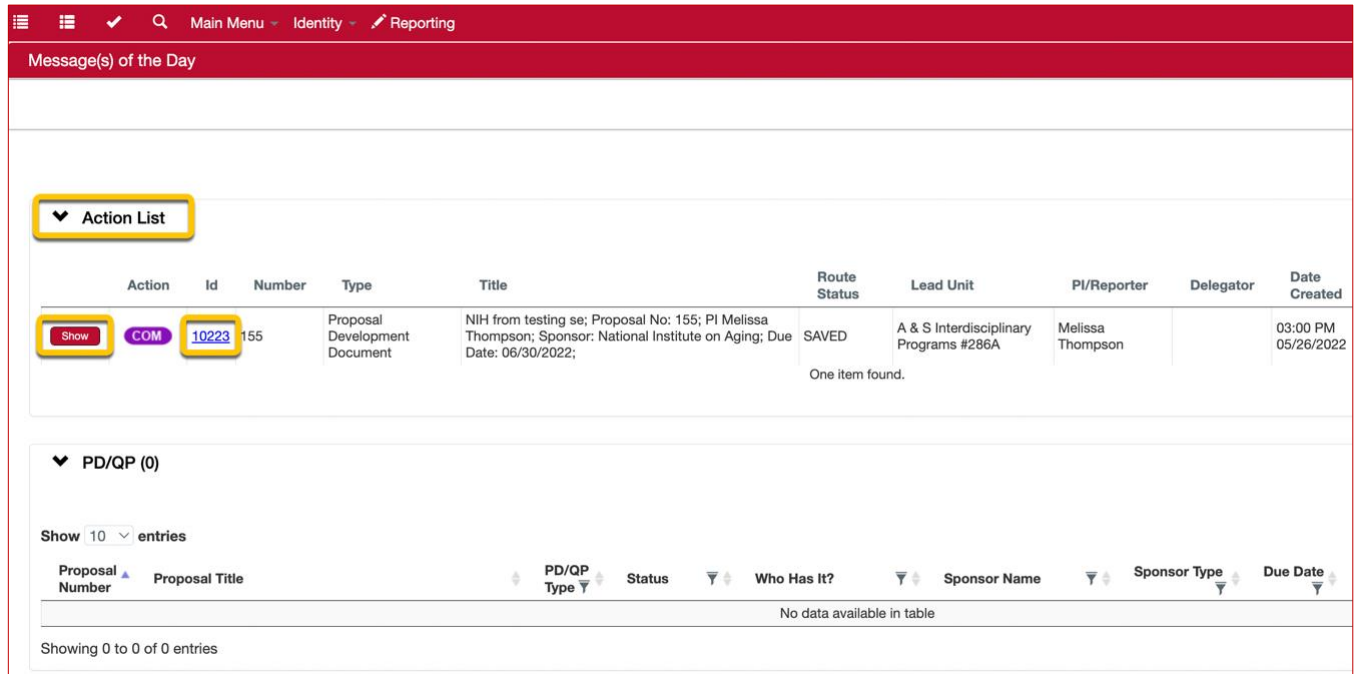

Finding a previously-created proposal

There are two ways to access previously-created proposals.

OPTION A. USING THE DASHBOARD

1. Each time you login to Streamlyne, your personal Dashboard will appear. This provides a menu of all of your proposals under development as well as submitted proposals, awards, IRB protocols, and any actions needed (e.g., proposal certification). You may access the Dashboard at any time by clicking the menu icon that is always visible on the top left of your screen.

2. Proposals available for editing will show up under your **Action List**. Click **Show** to view the details of your proposal click the proposal **ID** or **Open Proposal** to continue your work.
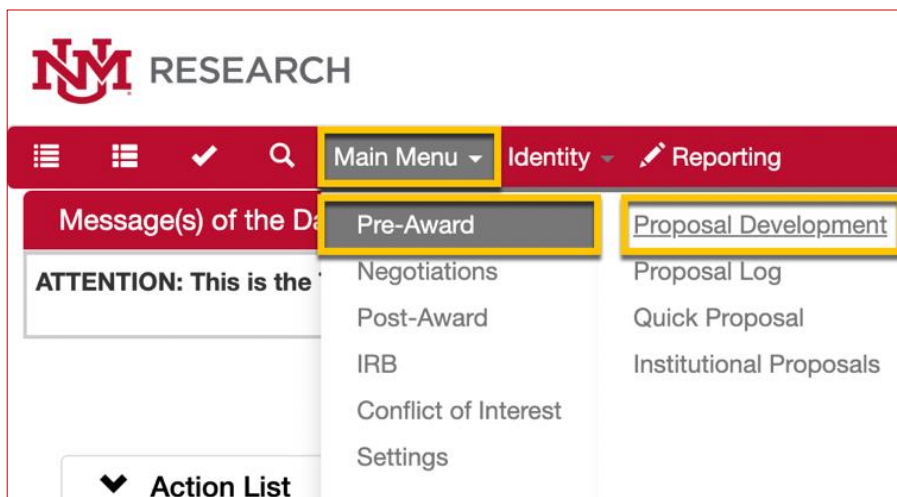

3. The **PD/QP** section also lists all proposals under development in which you are named as a key person. You may click either the **Proposal Number** or **Proposal Title** to access the proposal.

OPTION B. USING THE PROPOSAL SEARCH FUNCTION

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

2.   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**.

> *Tips***:**
> o **Username** is the full UNM email address: xxx@unm.edu
> o Streamlyne uses exact search terms or wildcard search (see "Using Streamlyne's Lookups").
> o 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 cop*

Navigating the Streamlyne Interface

[Save] [Reload] [Close]

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).
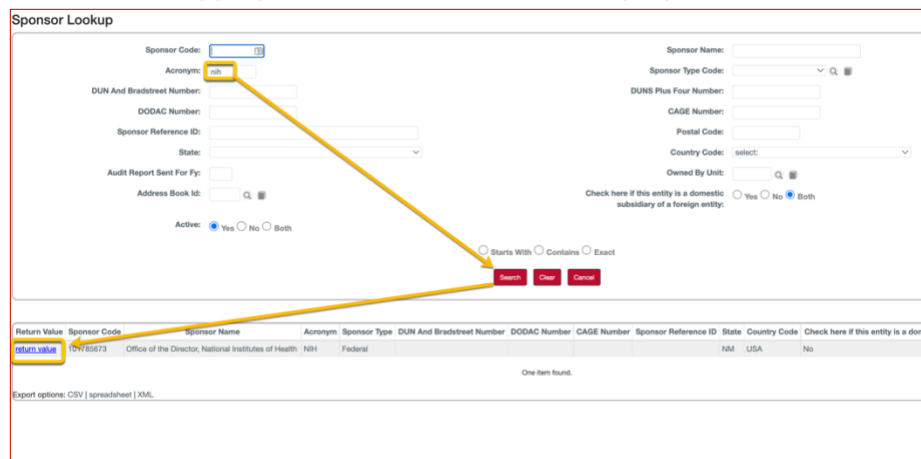
USING STREAMLYNE'S LOOKUPS

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**.

Search Tips:

- o We suggest starting with only one search field, as this maximizes your chances of finding what you are looking for.
- o By default, search fields require either an exact match or a wildcard search.
- o 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*
- o 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"
- o Alternatively, you may change the search parameters to **Contains** or **Starts With**
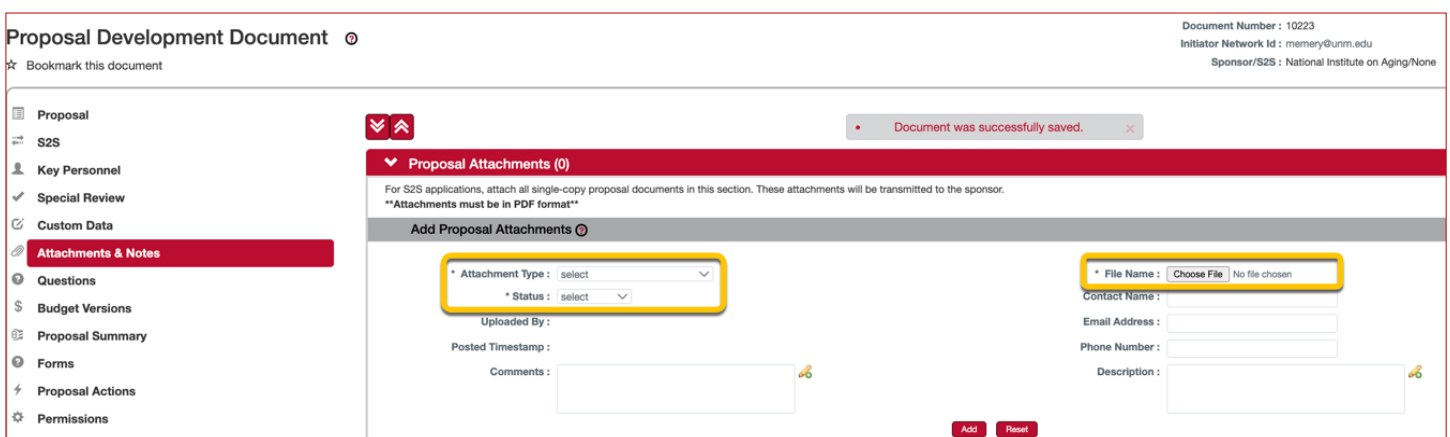
  ⚪ Starts With 🔵 Contains ⚪ Exact

- o Searches for personnel based on **Username** require the entire email address: XXXX@unm.edu.
- o 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.
- o 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.

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) for important information and tools for creating your budget or contact the FRDO (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.