

Welcome to Streamlyne. This document is a University of New Mexico (UNM) procedure guide to use Streamlyne (SL) for **Proposal Development (PD)** submissions. This document was developed by the UNM Office of Sponsored Projects (OSP) for use by UNM Main and Branch Campuses, to detail the correct workflow in scheduling, routing and approving **PD** sponsored project applications for OSP final submission to a sponsor.

These workflow procedures should be used for all system-to-system (S2S) and non-system-to-system (non-S2S) funding opportunities including all non-federal sponsors. Federal sponsors that use a sponsor-specific submission portal other than Grants.gov are regarded as non-S2S proposal submissions.

CREATE A NEW PROPOSAL RECORD

- 1) Log into SL.
- 2) From the **Main Menu** dropdown select, **Pre-Award, Proposal Development**, “+”, and select **Template**. On the dropdown menu select either **Application Submitted on Grants.gov** or **All Others (Not Submitted on Grants.gov)**. Click the **Continue** button.
- 3) Complete the **Required Fields for Saving Document** panel of the Proposal Development Document. Click **Save** at the bottom of the screen.
- 4) You will now see a **Proposal (PD) Number** in the upper left of the **Required Fields for Saving Document** panel, needed to schedule a proposal review with OSP.

SCHEDULE A PROPOSAL REVIEW WITH OSP

- 1) Log into the OSP scheduling calendar.
- 2) Select an available review date prior to the sponsor deadline date.
- 3) Complete the required fields of the OSP scheduling calendar and enter the **PD Number**. Click **Schedule** at the bottom of the screen.
- 4) The PI and any other contacts listed will receive an emailed confirmation of the scheduled proposal appointment.

FINALIZING THE PROPOSAL DOCUMENTS AND SL RECORD

For instructions on how to develop proposals in Streamlyne, see the Streamlyne Support and Resources page on the OVPR website at: <https://Streamlyne.unm.edu/resources>.

At a minimum the following internal attachments are required with each submission to OSP:

Solicitation Budget Worksheet Budget Justification Statement of Work

1. Once you complete all the TABS in your proposal and upload all applicable documents as attachments, click on the **Proposal Summary** TAB to review the information entered by any proposal editors.
2. Click the **Turn on Validations** button to help determine if all required fields have been completed and click the **Fix** button as necessary. Click **Turn Off Validations** button when all validation errors and warnings have been addressed.

3. Before routing the Streamlyne record, the entire proposal record and all required documents must be fully completed, in final form and attached in the **Attachments & Notes** TAB.
4. Select the **Proposal Actions** TAB and click the **Route for Review** button. The proposal will appear in **INI** the action list.
5. Log out of Streamlyne.

-----Scheduled OSP Proposal Review Appointment Occurs-----

The UNM Office of Sponsored Projects will conduct the scheduled proposal review in compliance with Uniform Guidance, Federal Acquisition Regulations, UNM Policy and other sponsor specific instructions. OSP will upload a draft of the final proposal and click the **Review Complete** button and submit the proposal into Workflow

PROPOSAL PI AND CO-PI(S) APPROVE STREAMLYNE

- 1) Once the OSP proposal review is complete, Streamlyne will notify the PI through a system-generated Streamlyne notification message, to log into Streamlyne. For the PI and Co-PIs, the OSP reviewed proposal will have an **APP** status in their action list for the specific proposal in process. Click on the **Id** number to access the record.
- 2) To locate and review the application approved by OSP, select the **Attachment & Notes** TAB under **Internal Attachments**. Locate the file labeled Draft Proposal and select **View**.
- 3) Once the Draft Proposal has been reviewed and you have determined the proposal packet is in complete form, click on the **Key Personnel** TAB.
- 4) Select the drop-down arrow next to your name and click the **Show** button next to **Proposal Person Certification**. Answer the series of yes/no questions and click the **Save** button.
- 5) Click on the **Proposal Summary** TAB, scroll to the bottom of the screen and click the **Approve** button.
- 6) The proposal will also appear in the **APP** action list for any Co-PI's. They need to also follow these same steps for review of the final application, certifications, and approval.
- 7) Log out of Streamlyne.

DEPARTMENT CHAIR/DEAN/DIRECTOR(S) APPROVE STREAMLYNE

- 1) Once the PI and Co-PI(s) approve the proposal, Streamlyne will notify the routing approvers through a system-generated Streamlyne notification message, to log into Streamlyne. The proposal will appear in the **APP** action list. Click on the **Id** number.
- 2) From the **Proposal Summary** TAB, review the information entered by any proposal editors and review the uploaded Draft Proposal from the OSP Review Specialist.
- 3) Once the Draft proposal has been reviewed and you have determined the proposal packet is in complete form, scroll to the bottom of the screen and click the **Approve** button.
- 4) Log out of Streamlyne.

OSP PROPOSAL SPECIALIST APPROVE STREAMLYNE AND SUBMIT PROPOSAL

- 1) Once the PI, Co-PI(s) and all approvers have approved the proposal, the OSP Proposal Specialist will log into Streamlyne and submit the proposal documents via the sponsor instructions (email, Fastlane, Reserarch.gov, NSPIRES, other) if non-S2S, or S2S if submitting through Grants.gov, upload the final proposal in the attachments, and then click the **Submit to Sponsor** button. The **Document Status** is now **Submitted-Approval Pending**, and the developed proposal record will be assigned an **IP Number**. The IP number is sent via email to the PI/Co-PI(s) through the system-generated Streamlyne notification message.
- 2) Click the **Proposal Actions** TAB, scroll to the bottom of the screen and click the **Approve** button. The Document Status is now **Approved and Submitted**.
- 3) Log out of Streamlyne.

HOW TO LOCATE YOUR SUBMITTED INSTITUTIONAL PROPOSAL USING THE IP NUMBER

- 1) Log into Streamlyne.
- 2) From the **Main Menu** dropdown select, **Pre-Award, Institutional Proposals**, and enter the **Institutional Proposal Id** number. Click the **Search** button. Click **Open**.
- 3) On the **Institutional Proposal** page, click the **STREAMS TAB** and you can review the information entered by any proposal editors and review the uploaded Full Proposal from the OSP Review Specialist.
- 4) Log out of Streamlyne.