

Quick Guide

Submitting and Approving Streamlyne Proposal

To complete Proposal Submission for approval, log in to proposal by Proposal #, Document #, or PI:



The link can also be found in Tech Express: StreamLn

To find your current Proposal for submission:

- 1) Navigate to the Main Menu, to your main dashboard by clicking on the Main Dashboard icon on the top left.
- 2) Chose the desired Proposal Development Document from your action list and click ID

Action	Id	Number	Type	Title
Show	APP 4116	22	Proposal Development Document	Y12 R&D Contract; Proposal No: 22; PI David Due Date: 12/15/2023;
Show	COM 4416	53	Proposal Development Document	Test; Proposal No: 53; PI Christina Marie Hatli Date: 02/14/2024;
Show	COM 4422	54	Proposal Development Document	Geriatric Education; Proposal No: 54; PI Mary of Health and Human Services; Due Date: 02/14/2024;

- 3) Click on the Proposal Summary tab.

The Proposal Summary tab displays all data for the document in summary form. This is the default tab displayed to approvers while the document is in the review and approval process. This tab is most useful as a way to quickly review all Proposal data in a single place.

This is the screen you will need to review:

Proposal Development Document

Document Number: 5247
Initiator Network ID: 14097
Sponsor: 525 - Cedar University/None

Document Status: In Progress
Creation Timestamp: 11/15 AM 10:04:2024
Principal Investigator: Kelly Kipt

Document was successfully saved.

* Indicates required field

- Proposal Summary
- Budget Summary
- Key Personnel (2)
- Custom Data Information
- Questions
- Attachments
- Validations
- Print

Approval signifies that the proposed project fits within the academic framework and resources of the unit, requirements for new or renovated facilitiespace have been discussed with the appropriate people, contributions listed will be met by the department/college unless otherwise approved, that Conflict of Interest requirements have been addressed, and that Sponsored Programs may process the proposal.

- 4) Review all tabs to ensure information is correct. Pay close attention to attachment additions.

- 5) Open Validation tab and turn on to determine errors or incomplete information.

Turn On Validation

- 6) To see issues needed addressing, click on button at left of screen.

Fix

Review Abstracts & Attachments and Questions.

The Abstracts & Attachments section acts as a repository for the narrative attachments that support or describe aspects of the proposed project and complete questionnaire from Questions tab.

Submit Proposal into Workflow Review

When data entry and budget development for a given Proposal document are complete and correct, the document is ready for submission, review, and approval.

- 1) Click the Submit button at the bottom of the page.

Approval Routing of Proposal for Submission

When a document is submitted into workflow for route approval, each approver will receive an email as an Action List Reminder for the proposal.

If on routing list for submission approval, follow these steps to complete a review of the Proposal:

- 1) Click the link at bottom of the email to access your **Actions List**.
- 2) Review the data in all proposal sections for accuracy, click the Action Button on bottom of screen that corresponds to your decision.

Once all Approvals are submitted, Office of Research will submit to Funding Source.