

# STREAMLYNE TIP SHEET HIERARCHY PROPOSAL

## CREATING A HIERARCHY PROPOSAL IN STREAMLYNE

### CREATING A HIERARCHY PROPOSAL

This tip sheet is for creating a Hierarchy Proposal, for proposals that have two or more different F&A rates within one proposal, or for budgets within one proposal that need to be submitted or tracked separately. A Proposal Hierarchy should be needed very rarely. We recommend that you check with OSPA before creating these.

### STARTING THE PROCESS- CREATING THE LEAD CHILD AND THE PARENT PROPOSAL (PD)

To start the process, you will initiate a PD and enter the basic required info in the Required Fields for Saving Document, as well as the Anticipated Award type in the Sponsor & Program Information. As with all PDs, more information can be added at this initial stage.

Enter the lead PI and some budget detail. More budget detail can be added at a later point.

Note: the main purpose of a hierarchy proposal is to differentiate budgets. Therefore, you will decide when initiating this proposal which budget detail you will enter in the first PD. The alternate budget detail will be entered and finalized in other parts of this hierarchy.

Once initial information is entered, select save to generate a Proposal Number, and log this number (you will need it for future actions)

In this PD you have started (this is now the Lead Child)

1. Go to Proposal Actions > Proposal Hierarchy > Create Hierarchy

The screenshot displays the Streamlyne web interface for a Proposal Development Document. The document is titled "Proposal Development Document" and is in "In Progress" status. The main content area shows the "Proposal Hierarchy" section, which is currently empty. A message states: "You are currently viewing Proposal # 1342 (Document # 73158), which is currently unlinked to a proposal hierarchy. The following actions are available: Link to Parent Proposal, Link Budget Type, Sub-Budget, Link to Hierarchy, and Create Hierarchy." The "Create Hierarchy" button is highlighted with a red box. The left sidebar contains navigation options such as "Proposal", "S2S", "Key Personnel", "Special Review", "Custom Data", "Abstracts & Attachments", "Questions", "Budget Versions", "Proposal Summary", "Forms", and "Proposal Actions". The top right corner shows document details: "Document Number: 73158", "Initiator Network Id: schreck1", "Sponsor/S2S: NSF-NATIONAL SCIENCE FOUNDATION/No ne", and "Principal Investigator: ". A "Document was successfully saved." notification is visible at the top.

HELP EMAIL: [streamlyne@iastate.edu](mailto:streamlyne@iastate.edu)

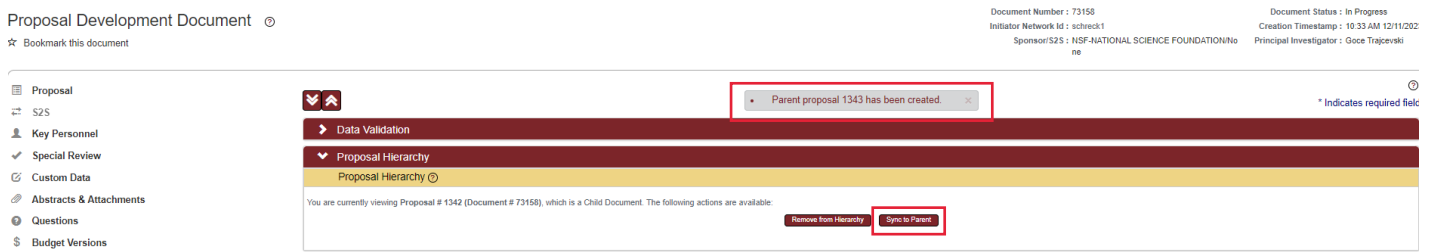
WEBSITE: <https://www.ospa.iastate.edu/streamlyne>


UPDATED: 02/2024


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This action will create the Parent Proposal. That PD number will be generated and displayed at the top of the Proposal Actions area.





Proposal Development Document  Document Number : 73150  
Initiator Network Id : schrock1  
Sponsor: S2S : NSF-NATIONAL SCIENCE FOUNDATION/No  
ne Document Status : In Progress  
Creation Timestamp : 10:33 AM 12/11/2022  
Principal Investigator : Goce Trajceviski

 Bookmark this document

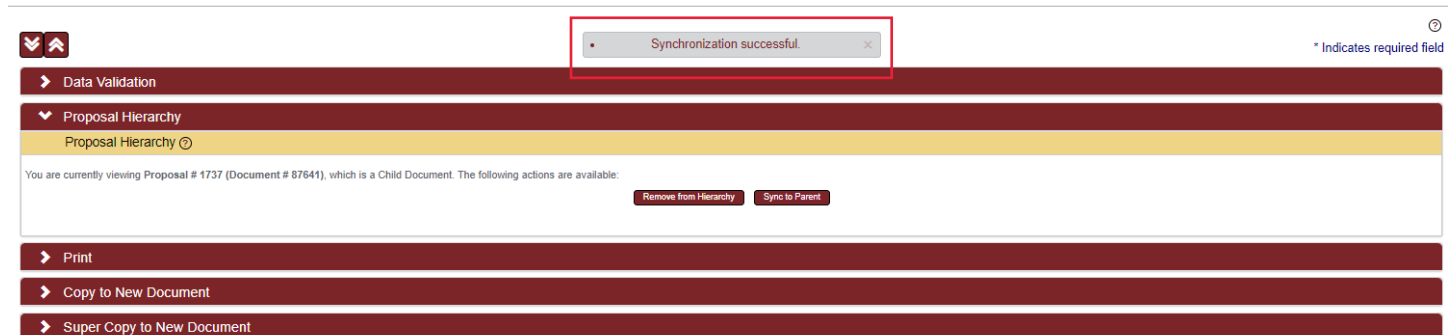
**Proposal**  \* Indicates required field



-  Data Validation
-  Proposal Hierarchy  Proposal Hierarchy  \* Indicates required field





You are currently viewing Proposal # 1342 (Document # 73158), which is a Child Document. The following actions are available:



Once that message is generated, DO NOT navigate away from the page. Select Sync to Parent to link that parent with this (Lead) Child Proposal. You will see a message at the top of this page indicating that the synchronization was successful.






  \* Indicates required field

-  Data Validation
-  Proposal Hierarchy  Proposal Hierarchy  \* Indicates required field

You are currently viewing Proposal # 1737 (Document # 87641), which is a Child Document. The following actions are available:

-  Print
-  Copy to New Document
-  Super Copy to New Document

After confirming that this synchronization was successful, select Save and Close.

### CREATING A CHILD PROPOSAL:

To create the second budget scenario, you will need to add another PD, known as a “Child”.

1. Go to the Lead Child, already created.
2. Within that Lead Child, go to Proposal Actions and Copy to a New Document
3. PLEASE NOTE: If you are copying from Lead Child with a full budget that is not intended to be replicated in Child, do not select the box next to the Budget. If you have only baseline

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information entered into this budget, and you want this copied, you can select that box and easily edit the copied budget later.

4. Select the **same Lead Unit** as is in the Lead Child and the Parent proposal.
5. Select **Copy Proposal** (DO NOT SELECT Copy Hierarchy)

The screenshot shows the 'Copy to New Document' form. The 'Lead Unit' dropdown menu is set to 'ENG-ECPE'. The 'Copy Proposal' button is highlighted with a red box, while the 'Copy Hierarchy (incl. Budgets)' button is not.

Once this new PD is generated (you will automatically be in it), note the PD number.

1. Go to Proposal Actions > Proposal Hierarchy > Link to Parent Proposal and enter the Parent Proposal PD number.
2. Select Sub Budget as the Link Budget Type, and Link to Hierarchy.

The screenshot shows the 'Link to Parent Proposal' form. The search box contains the number '1343'. The 'Link Budget Type' dropdown is set to 'Sub-Budget'. The 'Link to Hierarchy' button is highlighted with a red arrow.

Note: If you had not identified the Lead Child budget or this budget as final, you may get this warning:

### Warnings for this Section:

- Budget for proposal 1348 does not have a final version. The latest version will be used in the hierarchy.

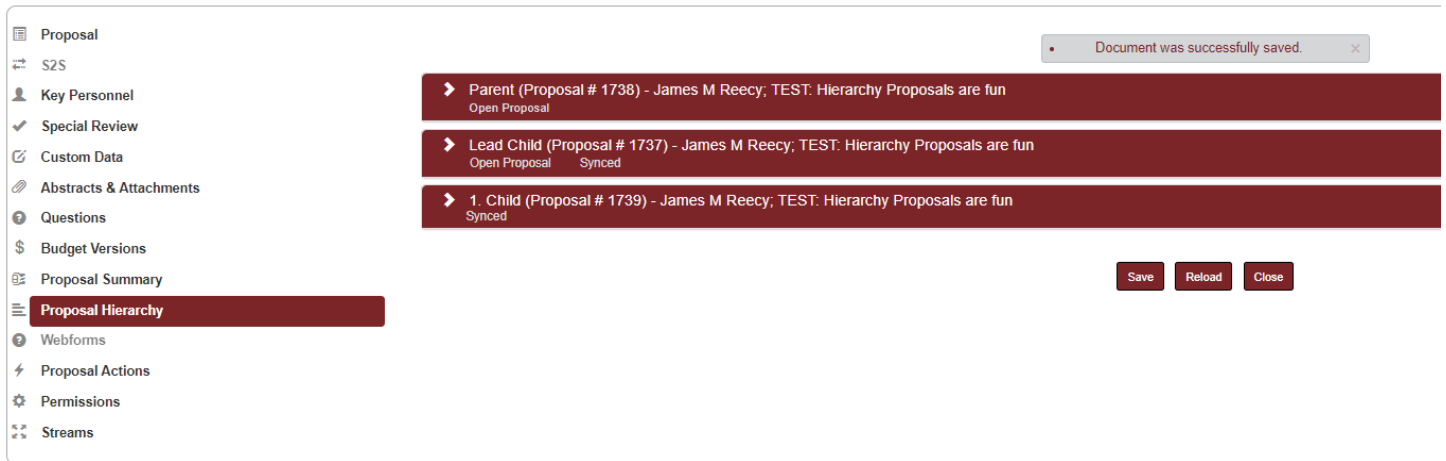
# STREAMLYNE TIP SHEET HIERARCHY PROPOSAL (CONT.)

## CREATING A HIERARCHY PROPOSAL IN STREAMLYNE

This warning be disregarded at this time, as long as you intend to go back and make final budget edits and eventually mark this budget as final.

You now have a Parent PD, a Lead Child PD, and a Child PD. You can add more Child PDs by repeating the steps outlined in Creating a Child Proposal.

You can confirm which PD is which by going to the Proposal Hierarchy tab in any of these PDs and viewing the roles.



The screenshot shows the Streamlyne Proposal Hierarchy interface. On the left is a navigation menu with items: Proposal, S2S, Key Personnel, Special Review, Custom Data, Abstracts & Attachments, Questions, Budget Versions, Proposal Summary, Proposal Hierarchy (highlighted), Webforms, Proposal Actions, Permissions, and Streams. The main content area displays a hierarchy of three proposal levels:

- Parent (Proposal # 1738) - James M Reecy; TEST: Hierarchy Proposals are fun (Open Proposal)
- Lead Child (Proposal # 1737) - James M Reecy; TEST: Hierarchy Proposals are fun (Open Proposal, Synced)
- 1. Child (Proposal # 1739) - James M Reecy; TEST: Hierarchy Proposals are fun (Synced)

At the top right, a notification states "Document was successfully saved." At the bottom right, there are buttons for "Save", "Reload", and "Close".

The PDs created and their roles allow for specific functionality, as described below:

### HIERARCHY ROLES AND FUNCTIONS:

**Parent:** This is your main PD. The Parent will be submitted to OSPA for review and route into Workflow for approvals. The Parent captures everything that is in the other two PDs (aka the children) as long as you *SYNC each time you make an update within them (read further for Sync instructions)*. You can edit FIELDS in the Parent, which includes entering the abstract, but you cannot add attachments and cannot edit the budgets.

**Lead Child:** This where one of your budgets reside, and where you CAN add attachments.

**Child:** This functions the same as the Lead Child for the Budget. You CANNOT add attachments from this PD- attachments can only be added from within the Lead Child PD.

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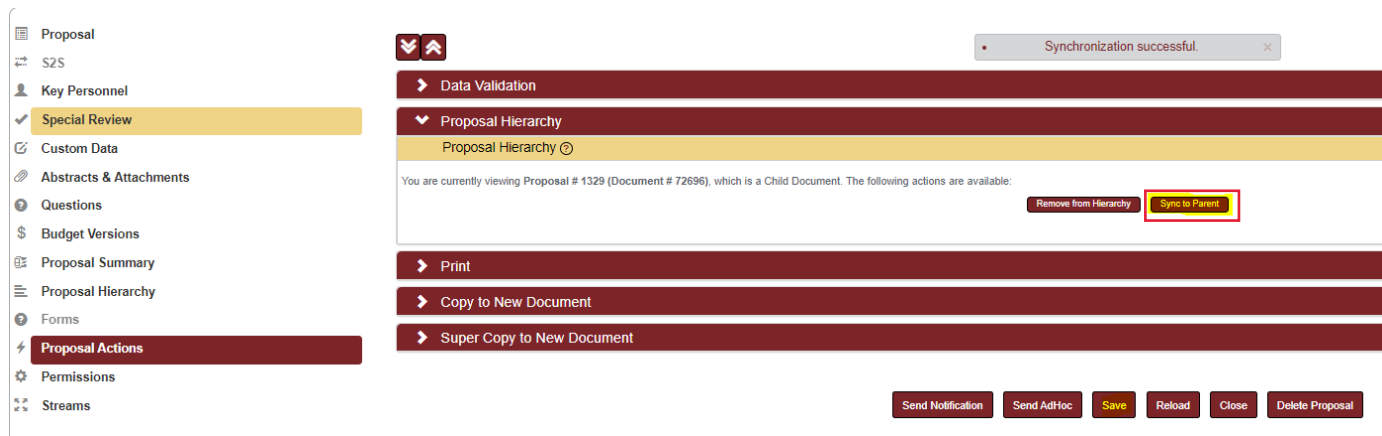
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### SYNC BUDGET TO PARENT PD:

As budgets are developed or edited, they need to be Synced to the Parent PD to ensure the Parent PD reflects all up-to-date budget info.

In the PD which contains the/any budget

1. go to Proposal Actions > Proposal Hierarchy > Sync to Parent.



The screenshot shows the Streamlyne interface with a sidebar on the left containing navigation options like Proposal, S2S, Key Personnel, Special Review, Custom Data, Abstracts & Attachments, Questions, Budget Versions, Proposal Summary, Proposal Hierarchy, Forms, Proposal Actions, Permissions, and Streams. The main content area displays a 'Proposal Hierarchy' section with a 'Sync to Parent' button highlighted in yellow. A notification at the top right indicates 'Synchronization successful.' Below the hierarchy section, there are buttons for 'Remove from Hierarchy' and 'Sync to Parent'. At the bottom of the interface, there are buttons for 'Send Notification', 'Send AdHoc', 'Save', 'Reload', 'Close', and 'Delete Proposal'.

The Parent Proposal will be the PD which is routed for approvals. It is best practice to make a note in the notes section alerting reviewers to the fact that this is Proposal Hierarchy so that they can understand that additional steps may be required to review all elements fully.

Be sure that all Child PDs are Synced to the Parent PD one more time before routing, or if changes are made during any time in the process of review and routing.