

Streamlyne Benefits and Background

April 2023

PI Benefits:

- GoldSheets, Cardinal Sheets, and Cayuse System-to-System (S2S) proposals for Grants.gov submissions will all be replaced with a single system that:
 - reduces the number of systems PIs need to learn
 - decreases duplicate entry
 - enables PIs to view proposal records and attachments in one system
- Use of simplified Quick Proposals (QPs) in Streamlyne for submission of MTA and NDA requests reduces the number of systems PIs need to access.
- Other proposal approvers – in addition to PIs – will be able to return proposals for rework as part of the workflow routing and approval process.
- PIs and Co-PIs will be able to approve proposals at the same time and will no longer have to wait for the prior approver to authorize.
- Proposals can be viewed by the PI at any time once they have been initiated in Streamlyne.
- Ability to see where proposals are in the workflow routing and approval process at any time.
- PIs will be able to view listings of all of their open and historical proposals, and view listings based on varying criteria including sponsor, prime sponsor, title words, proposal status, and lead unit.
- Ability to sort proposal listings by various criteria including sponsor, title, project status, lead unit, deadline date, grants.gov opportunity number, or initiator.
- Ability to copy proposals, including budgets and attachments, when initiating new proposals.
- Proposal budgets will be created within the Streamlyne Budget Development module.
 - Workday HR salary and sup org information is integrated into Streamlyne
- PIs and Co-PIs will be able to document proposal financial credit splits by PI/Co-PI and amount.
- PIs will not need to keep files of submitted proposals; all proposal records will be retained in Streamlyne and accessible by the PI, proposal initiator, and college research administrators.
- ISU has modified the Streamlyne system so that PIs will be able to answer yes/no compliance questions rather than entering the Special Review tab in Streamlyne and manually selecting all of the individual compliance areas that apply to their proposal.
- Consistent review and approval of proposal budgets will help ensure proposals are submitted without budget issues.
- In addition to in-person and webinar trainings, PIs will have access to written instructional documents and videos, allowing for ongoing just-in-time access to Streamlyne how-to materials.

Constraints:

- The current legacy proposal and routing system, which is more than 20 years old, had become antiquated, is no longer fully supported and no longer meets security requirements.
- In-house development of a new proposal and routing system in house was not an option.
- ISU was required to purchase a cloud-based proposal and routing system.
- ISU issued an RFP for a new system and could only consider vendors that responded to the RFP.
- Federal requirements for institutional checks and assurances have increased.

Previous Actions/Campus Outreach:

- Vermeer Kaizen Team in 2018
- Proposal Routing System Committee in 2019
- Establishment of New System Project and Executive Teams in 2021
- RFQ issued and bid responses reviewed in 2021
- Campus Vendor Demonstration Presentations in 2021
- Streamlyne selected as system vendor in May 2022
- VPR Summer Planning Retreat Presentation in July 2022
- OSPA Streamlyne website launched in November 2022
- Inside Iowa State article in November 2022
- E-News for Researchers article in December 2022
- Campus Introductory System Demonstrations in December 2022
- Streamlyne Campus Super User Group Training and Testing initiated in January 2023
- Streamlyne FAQs issued in January and February 2023
- E-News for Researchers article in March 2023
- Campus P&S Council Seminar Live Demonstration and Q&A in March 2023