

Streamlyne FAQs
January 2023

Note: The following information is to the best of our knowledge at this time.

1. Do all Key Personnel added have full access and can edit the Proposal Development Document and Budget Document?

The Proposal Initiator and the PI can each edit the Proposal Development Document and the Budget Document. Additional roles may be granted to others under the Proposal Development Document/Permissions tab/Users panel for either set of documents.

2. If a proposal is routed as a grant and it is determined that it should have been routed as a gift, is it possible to change this on the fly in Streamlyne or will the user have to start the proposal again from scratch?

If the routed proposal has not been finalized by OSPA and is still in routing, the proposal can be returned by the next approver to the Proposal Initiator for changes (and subsequent rerouting for approvals from the beginning). If the proposal has been finalized by OSPA, then the initial Proposal Development document will need to be copied and a new Proposal Development document will need to be routed for approvals.

3. When new faculty members come to ISU, are they automatically populated into Streamlyne from Workday?

Streamlyne receives nightly weekday updates from Workday HR, so any new faculty or P&S staff added to Workday should be available in Streamlyne the following business day.

4. If we add Key Personnel to Proposal Development Document, does it automatically populate their department (Streamlyne Unit) and RRC (Streamlyne Reporting Unit) based on the most recent Costing Allocation? Also, will centers automatically appear? After initiation, will a PI be able to change the Lead Unit, department (Streamlyne Unit), RRC (Streamlyne Reporting Unit) or contribution percentages?

Faculty and P&S staff employees entered as Key Personnel are populated with a Streamlyne Unit that corresponds to their Workday HR Sup Org. Proposal Initiators and/or the PI will be able to add centers and other departments (Streamlyne Units) to Key Personnel Unit Details as needed. Incentive, contribution and financial percentages can be entered or changed by the Proposal Initiator or the PI for all Key Personnel prior to the Proposal Development Document being submitted into routing for approvals. The Lead Unit may only be changed before the Proposal Development Document is first saved in Streamlyne. However, a Proposal Development Document may be copied from a previous Proposal Development Document to change the Lead Unit.

5. What responsibilities do the administering department (Streamlyne Lead Unit) and RRC (Streamlyne Reporting Unit) approvers have after OSPA has performed an Initial Review and approved the budget?

OSPA's approval of the budget with the Initial Review process should not be confused with OSPA's final approval of the Proposal Development Document after the Proposal Development Document has been submitted into routing for approvals. A responsibility matrix for proposals will be distributed to campus prior to Streamlyne's go live date.

6. Does a Proposal Initiator have the option to retrieve a proposal during routing and then reroute the proposal after uploading corrected documents (for instances where certain documents were not ready at time of routing)?

A Proposal Initiator cannot retrieve a Proposal Development Document once it has been submitted for initial review. However, a Proposal Initiator can retrieve a Proposal Development Document after it has been submitted into routing for approvals, or anyone can ask the next Approver to return the Proposal Development Document for changes.

7. Is there a concern about Proposal Initiators being risky since they start creating the proposal?

The use of a Proposal Initiator in Streamlyne is no different from the current ISU systems which allow individuals other than the PI to initiate both GoldSheets and proposals in Cayuse.

8. How does a new Sponsor Code get added? What is the lead time for these requests? Does Streamlyne require the sponsor code to be selected from a drop-down menu? How can we get new sponsor codes added for Industry sponsors?

Requests for new Streamlyne sponsors should be sent to ospa-proposals@iastate.edu. OSPA requests up to 24 hours to add a new sponsor to Streamlyne. Streamlyne uses a Sponsor Code and has an associated Sponsor Lookup to determine the correct Sponsor Code. Streamlyne does not use a drop-down menu for Sponsors.

9. Are abstracts required to be entered for all sponsors or just Federal sponsors? There was no mention of any other type of sponsor than Federal in the December 2022 Streamlyne demonstration. If no abstract exists, can a statement of work or other similar document be added in place of an abstract? Where and when is this required to be added?

Abstracts will be required for all proposals with the implementation of the Streamlyne Proposal Development system. This information is entered into the Abstracts panel on the Abstracts & Attachments tab in the Proposal Development Document. It is not necessary for a formal abstract to be created, as a Statement of Work or Executive Summary or Project Summary can be pasted into the 50,000-character Abstract Details field for the Project Summary.

10. What attachments will be required in Streamlyne if the proposal is not being submitted using grants.gov? Can it link to Research.gov? This would eliminate double work.

There are three types of Proposal Development Document attachments on the Abstract & Attachments tab: Proposal Attachments, Personnel Attachments and Internal Attachments. Proposal and Personnel Attachments are sponsor-required items. Internal Attachments will include approved F&A Waivers, approved Cost Share Request Forms, and other internal to ISU items. NSF does not allow Research.gov to link to an outside data provider as the Federal Government does with grants.gov. Budgets will be prepared in a Streamlyne Budget Document. For NSF proposals, required documents will be uploaded into the Streamlyne Proposal

Development Document, and will also need to be entered and/or uploaded into Research.gov as is currently done. All ISU proposals will utilize the Streamlyne Proposal Development system.

11. How will documents for non-Federal proposals be processed and approved? (Such as cover sheets that requires an OSPA approval signature.) These signed cover sheets are currently emailed back to me for inclusion in the proposal submission handled by the PI. Will this process remain the same once Streamlyne is implemented?

All proposal attachments needing an OSPA signature will be uploaded into the Streamlyne Proposal Development system. OSPA will review and sign these attachments, and then upload all signed documents into the Streamlyne system as well, where they can be retrieved by the PI and/or Proposal Initiator as needed.

12. How will subcontract documents be handled when ISU is the subcontractor to an industry sponsor who submits to a Federal agency as the prime funder?

All proposals attachments, including subcontract documents, will be uploaded into the Streamlyne Proposal Development system. PIs will continue to submit these subcontract documents to the ISU sponsor.

13. Since "Key Personnel Person Details" are auto-generated, can they be corrected at any time (e.g. if the job title changes from assistant professor to associate professor)? Will this Person Details information be updated automatically in Streamlyne?

Person Detail information in Streamlyne has nightly weekday updates from Workday HR. Once a Streamlyne Proposal Development Document has been created, any person's title that needs to be changed can be updated manually within a proposal under the individual's Person Details on the Key Personnel tab.

14. Will there be a test environment for us to use for training before go-live?

Training will be provided for all users prior to go-live.

15. When we are a subrecipient on another institution's proposal, after routing an OSPA template budget spreadsheet, budget justification, and SOW as GoldSheet attachments, I will often use a partial Cayuse file (that OSPA doesn't see) to enter the budget and produce an SF424 budget PDF to email to the prime recipient. Will I be able to do this in Streamlyne?

Budgets and SF424 forms may be printed from the Streamlyne Proposal Development system, and may be sent to the prime recipient that is ISU's sponsor.

16. For a subaward proposal in Streamlyne, will I be able to upload only the bare minimum SOW, budget, and justification for review and approval—because all the documents including biosketches will be emailed to the prime—and then use Streamlyne only to download a PDF of the SF424 budget form?

No. All proposal information required to be submitted to the proposed prime recipient will need to be entered and attached into Streamlyne, including all Key Personnel documents required by the prime sponsor. All proposal documents will need to be uploaded into Streamlyne before OSPA's final approval is made.

17. Does the Streamlyne Proposal Development system indicate if a Key Person is a foreign national? Or will proposal initiators still need to track down this information?

The Streamlyne Proposal Development system will indicate the Citizenship Type of the PI, Co-PI, or Key Person in the individual's Extended Details panel. All Citizenship Types other than "US Citizen or Noncitizen National" should be considered a Foreign National.

18. It sounds like this Streamlyne system will be used for proposal preparation, internal routing and approvals, amassing final proposal documentation, and in some cases final proposal submission. Will the Streamlyne system automatically take a snapshot of what Proposal Development Document information and attachments were current at the time the document was submitted into routing for approval?

When a Proposal Development Document is submitted into routing for approvals (submit button), then all information fields in the Proposal Development Document and Budget Document are locked and cannot be changed. The Proposal Development Document does not have versioning. After a Proposal Development Document is submitted into routing for approvals, only notes and attachments may be added.

19. Will it be obvious to Proposal Initiators which Streamlyne Proposal Development Document and Budget Document fields are required for Initial Review, as opposed to which form fields are required for routing the proposal for approvals?

Additional information on the requirements for Initial Review of the proposal budget will be provided at a later date. No changes can be made to the Proposal Development Document and Budget Document fields after the proposal budget has been routed for Initial Review until the Budget Document has been reviewed and approved by OSPA. Attachments can be uploaded and notes made during this time. Once OSPA has approved the proposal budget using Initial Review, then additional changes can be made to the Proposal Development Document. Required Proposal Development Document fields will be marked, and must be completed to pass validation requirements before the Proposal Development document is routed for review and approvals, including OSPA's final approval.

20. Will the maximum number of PI and Co-PIs allowed on one proposal change between the current GoldSheet system and the Streamlyne Proposal Development system?

The Streamlyne Proposal Development system has no limit for the number of Key Personnel (PI, Co-PIs and Key Persons) on one proposal. However, as PI Incentive is distributed in Workday using whole integers, no more than 15 Key Personnel are able to receive PI Incentive for one proposal.

21. Historically, confusion has surrounded the routing approvals for PIs and Co-PIs that have appointments with multiple departments/centers (Streamlyne Units) and/or multiple RRCs (Streamlyne Reporting Units). Will the routing-auto-populate for each Key Person based on the annual "FY costing allocation" to ensure proper routing?

Faculty and P&S staff are populated with a Streamlyne Unit that corresponds to their Workday HR Sup Org. Proposal Initiators and/or the PI will be able to add additional departments/centers

(Streamlyne Units) to Key Personnel Unit Details as needed. The Proposal Development Document is approved by the Lead Unit, and by the RRCs (Streamlyne Reporting Units) associated with the Key Personnel's 10/31/xx payroll costing allocations. Non-lead unit departments/centers entered on the Proposal Development Document will receive an FYI. Proposals that require review and approval in addition to the system-generated approvals may be added on an ad-hoc basis.

22. Is there a field within the Streamlyne Proposal Development Document to indicate whether a sponsor deadline is "soft" (as opposed to a firm submission deadline)? This would be useful for industry, unsolicited, and year-round opportunities in particular.

The Sponsor Deadline Date is a required field in the Required Fields for Saving Documents panel on the Proposal tab. You can indicate a Sponsor Deadline Type of "Target" on the Sponsor & Program Information panel on the Proposal tab to indicate soft deadlines.

23. In the past, there have been instances when it is unclear if a funding opportunity is a "gift" as opposed to "sponsored funding". When the "Applicant Organization" is listed as the ISU Foundation, will ISU OSPA be notified to confirm the proposed treatment as a gift?

An optional questionnaire will be included in the Streamlyne Proposal Development Document for Proposal Initiators and PIs to determine whether the proposed funding should be treated as a gift (ISUF) or sponsored project (ISU). Both applicant organizations (ISUF and ISU) will use Streamlyne for proposal creation, routing, and approvals. There will be times when a "gift" submission will need to be changed to a "sponsored project" and vice versa, as not all determination information may be available at the proposal stage.

24. In the current GoldSheet system there is a rather limited number of characters that can be provided in the "notes" section before the notes system will crash. Will Streamlyne contain any hidden character limits that would cause similar issues?

In the Notes panel on the Abstracts & Attachments tab, there is an 800-character limit for each note entered in Streamlyne. You will easily be able to tell in Streamlyne if you have hit a character limit. Streamlyne will not crash due to the quantity of notes. Nothing prevents a person from adding multiple notes in Streamlyne.

25. For determining each Key Person's Financial Credit Split in the Combined Credit Split panel on the Key Personnel tab, will any features or functionality be added to assist in dividing the budget by Key Person?

There is no requirement that each Key Person's financial responsibility be listed within Streamlyne. All funding could be allocated to the PI, if so desired. This is an optional feature, requested by college research administration and faculty, so that these amounts can be determined without additional work. If it is known how much of the proposed budget will be allocated to each PI and Co-PI, then these percentages should be used.

26. Use of the Streamlyne term Institutional Proposal, "IP", seems like it will confuse faculty due to the acronym's similarity to Intellectual Property, "IP".

The Streamlyne Institutional Proposals system has been implemented in many institutions using the same language without difficulty. Streamlyne Institutional Proposals will contain records for proposals approved by ISU and ISUF. OSPA will use the acronym SL IP for Streamlyne Institutional Proposals to limit confusion.

27. Will Streamlyne have the capability to S2S with eGrants or IowaGrants?

Neither eGrants nor IowaGrants have chosen to allow external access portals to their systems. Additional S2S options would first need to be allowed by the owner of the receiving system (e.g., IowaGrants, eGrants, Research.gov, ezFedGrants, etc.), and then created and built.

28. If the proposal is not an S2S, we do not need an Opportunity ID, correct?

Incorrect. All proposals that have an Opportunity ID, regardless of submission method, should have the Opportunity ID entered in the Sponsor & Program Information panel on the Proposal Tab. The Opportunity Title should also be entered on this same panel.

29. On Proposal Actions, can the Ad Hoc Recipients be a department (Streamlyne Unit) or RRC (Streamlyne Reporting Unit), or do they need to be a person?

Ad Hoc recipients in Streamlyne can be entered for a Person, a Streamlyne Unit approver group or a Streamlyne Reporting Unit approver group.

30. On the Main Dashboard Action List, will there be a # indicating the number of actions that need to be taken? I noticed the PD/QP and IP headers each had #s listed but no number was listed next to the Action List header.

On the Main Dashboard Action List, the total number of items on the Action List is indicated at the bottom of the Action List panel.

31. Does the Sponsor Deadline Time entered in the Required Fields for Saving Document on the Proposal tab reflect local time or the sponsor's location time?

The Sponsor Deadline Time entered should always reflect Ames' local time (Central Time).

32. Is the Sponsor Deadline Date adjustable if a PI is going to be unavailable on the deadline date?

The Sponsor Deadline Date is a required field in the Required Fields for Saving Documents panel on the Proposal tab, and the actual sponsor due date should be entered. You can indicate an Internal Deadline Date on the Sponsor & Program Information panel to list an earlier date. Additional information can be entered in the Notes panel on the Abstract & Attachments tab to indicate when the PI will be unavailable.

33. Must Personnel Attachments be attached prior to routing the Proposal Development Document for approvals? It seems that we can simultaneously route the proposal and continue to work in the system adding additional proposal documents, such as personnel C&Ps. Am I understanding this correctly?

All types of attachments, Proposal Attachments, Personnel Attachments, and Internal Attachments, can continue to be added by the Proposal Initiator to the Abstracts & Attachments tab for the proposal after the Proposal Development Document has been submitted into routing for approvals. No changes can be made to the Proposal Development Document or Budget Document after the proposal has been submitted into routing for approvals.

34. Is the Proposal Development Document locked to edits during the routing/approval steps? Is it possible to add attachments at any time?

When a Proposal Development Document is submitted into routing for approvals (submit button), then all information fields in the Proposal Development Document and Budget Document are locked and cannot be changed. However, attachments and notes can continue to be added by the Proposal Initiator to the Abstracts & Attachments panel for the proposal.