STREAMLYNE - QUICK PROPOSAL: QUICK START GUIDE

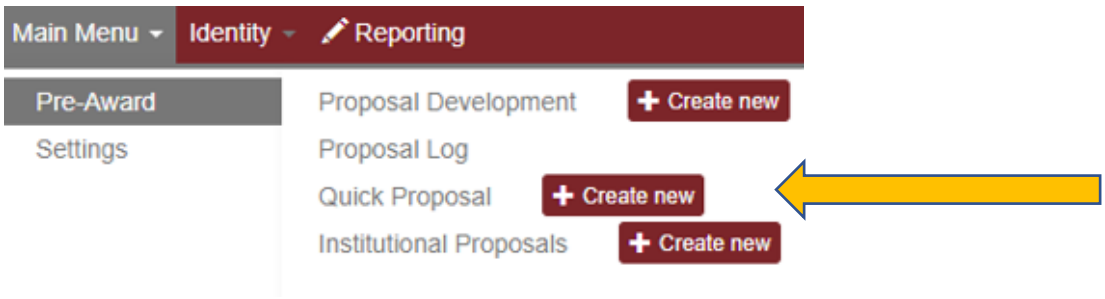
Guide to submitting MTA & NDA requests using Streamlyne's Quick Proposal tool.

Note: *Streamlyne uses wildcard keys to assist in search fields. The asterisk symbol (*) or the percentage symbol (%) are known as the wildcard search keys. By using the asterisk symbol, or the percentage symbol, you are able to search a key term or phrase, which will then populate all results that include the key term or phrase.*

- *Example: searching %Martin%, will find any entry which includes the key word "Martin", (i.e. Lockheed Martin Corporation, Martin Memorial Library, etc.)*

1. Login to **Streamlyne**, then go to:

   Main Menu > Pre-Award > Quick Proposal > click on **+ Create new**



2. On the **Quick Proposa**l tab, complete the **Required Fields** *:

a. Description:
   i. i.e. "MTA / NDA request with "Company / Sponsor" (*example: NDA with Lockheed Martin*)"

b. Quick Proposal Type:
   i. Select, *MTA or NDA*

c. Principal Investigator:
   i. Click the **magnifying glass** to search. Search appropriate field using wild card keys, (example: **%Last Name%, or %email%**). Click "return value" next to the correct PI.

d. Sponsor:
   i. This is the entity / company that you intend to set the MTA / NDA up with. Click the **magnifying glass** to search. Search appropriate field using wild card keys, (**example: %Sponsor Name%**,). Click "return value" next to the correct Sponsor, to select the Sponsor.
   ii. If a Sponsor you search for does not populate, a request will need to be submitted with OSPA to have the Sponsor / Company added. Please use the link below to request that

the Sponsor / Company be added in Streamlyne. Once you have submitted the request, you will receive an email within a couple of days notifying you that the Sponsor has been added in Streamlyne. You will then be able to submit the MTA / NDA request.

New Sponsor Request
https://forms.office.com/r/7NbpqDXHNB

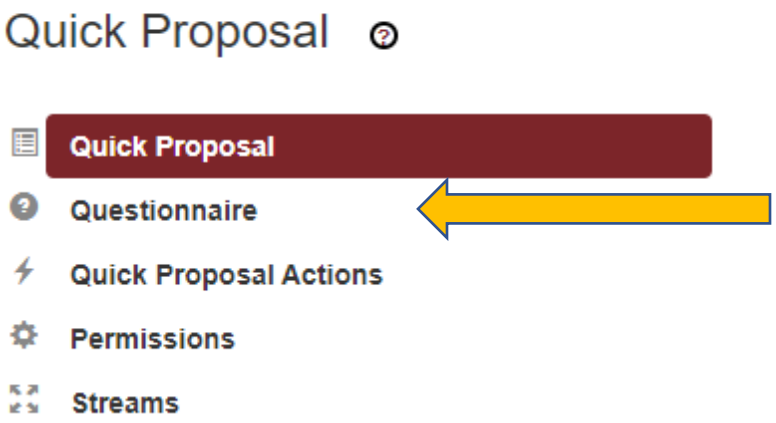
e. Anticipated Award Type:
   i. Select "Unfunded Agreement"

f. Proposal Type:
   i. Generally, you will select "New"

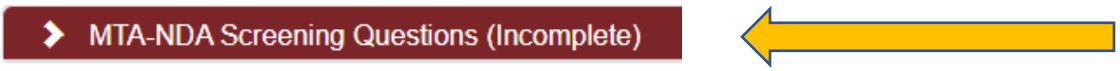
g. Title:
   i. MTA / NDA request with "Company / Sponsor" (*example: NDA with Lockheed Martin*). Feel free to include any additional information that you feel is relevant.

3. Once all required fields are complete, click **Save** at the bottom.

4. At this point, select the **Questionnaire** tab, (Located on the left side of the screen) to complete the required **Questionnaire**.



a. After selecting the Questionnaire tab, click on the drop down (**MTA-NDA Screening Questions - Incomplete**)



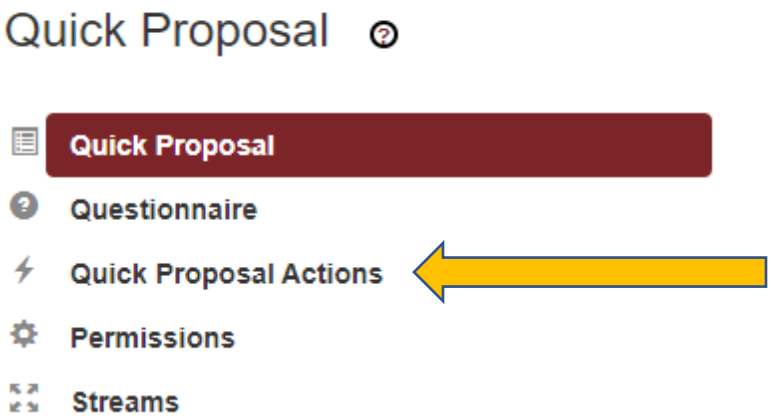
i. **You must answer "No" to question 1**, if you intend to request an MTA or NDA.

1. Answering "Yes" to this question implies that you do not need an MTA or NDA.

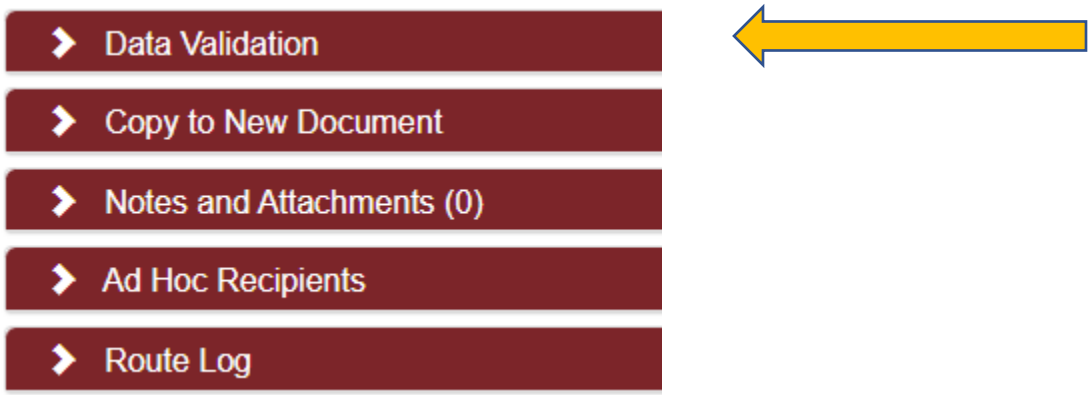
ii. Complete the additional questions

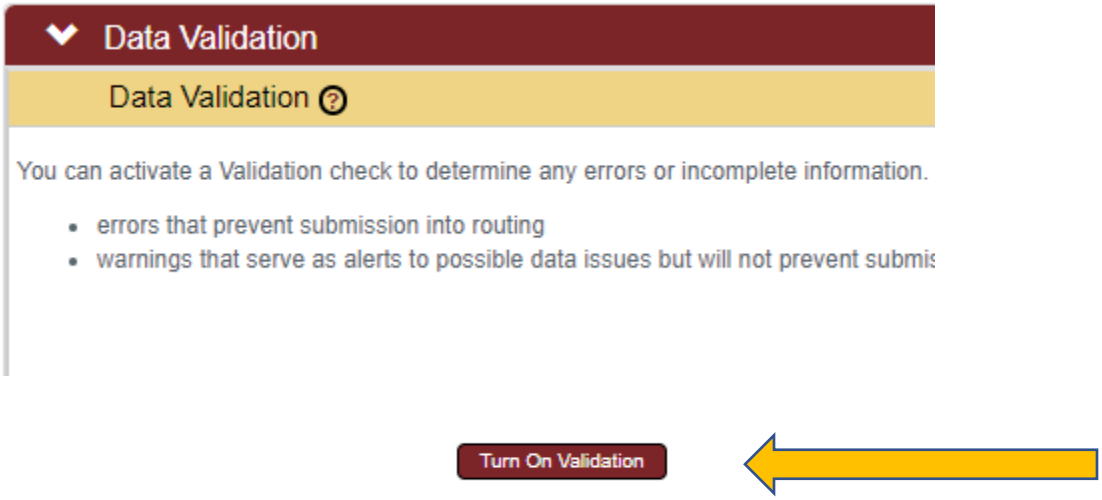
iii. You may be asked to **upload a copy of your compliance approval**. If no compliance approval is necessary, please upload a Word document, stating, "No compliance approval necessary for this request".
   i. Upload the file, and select the “Add” button.

5. **To complete and submit** your request, the last step is to select the **Quick Proposal Actions** tab (Located on the left side of the screen)



a. After selecting the **Quick Proposal Actions** tab, select "**Data Validation**" - Click the "**Turn on Validation**" button.





i. The Data Validation will determine if any fields or questions were left blank and will direct you to complete them if necessary.

ii. If no errors are found on the page, select "**Save**" at the bottom of the screen, and then select "**Submit**".

iii. You should receive a message stating “Your Document is being Processed”, followed by a confirmation, stating the document was successfully submitted.

6. <u>You have now submitted the Quick Proposal Request, and your MTA / NDA request has been routed to the OIPTT office for review.</u>

Contact Us:

Email: indctnt@iastate.edu
Phone: 515-294-4740

***For additional assistance, a detailed Streamlyne Quick Proposal User Manual can be accessed by selecting the Streamlyne dropdown from the OSPA website (**www.ospa.iastate.edu**) ***