Streamlyne Intent to Submit Proposal Guide

Pre-award

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Introduction

This Guide is not intended to replace the complete Streamlyne Development Guide, it is to cover basic setup of grant information needed for a portion of a complete Streamlyne submission.

The **Intent to Submit** document is intended to record basic institution, sponsor, and project information for any application Tennessee Tech is submitting for external funding. The data entered on the Intent to Submit is validated, routed for workflow approvals, and added into the Streamlyne workflow for proposal development. Please provide as much readily available information as possible.

This guide designed to give basic direction to facilitate immediate productivity for Pre-Award proposal development of the basic proposal and budget only. Additional Guides will cover further processes and procedures for completing proposal for submission. The processes will be broken down into manageable chunks with the steps to each process laid out sequentially. By practicing the steps and experimenting in the application at the detail level, you will gain the knowledge you need to design high-level processes that meet your (and Tennessee Tech) needs.

For more detailed Streamlyne instructions refer to the Proposal Development & Budget Development Guide.
NOTE It may be helpful to open Guide and have it handy for reference.

Follow the detailed instructions provided by the funding agency and PI for info used to begin your Streamlyne proposal. The preparer must complete the submission according to the sponsoring agency's guidelines, which can be on paper, via email, directly to a proprietary online portal, etc.

There are 4 guides total to help you through the entire pre-award process – Links at end of each guide.

Initiating an Intent to Submit Proposal – Pre-Award

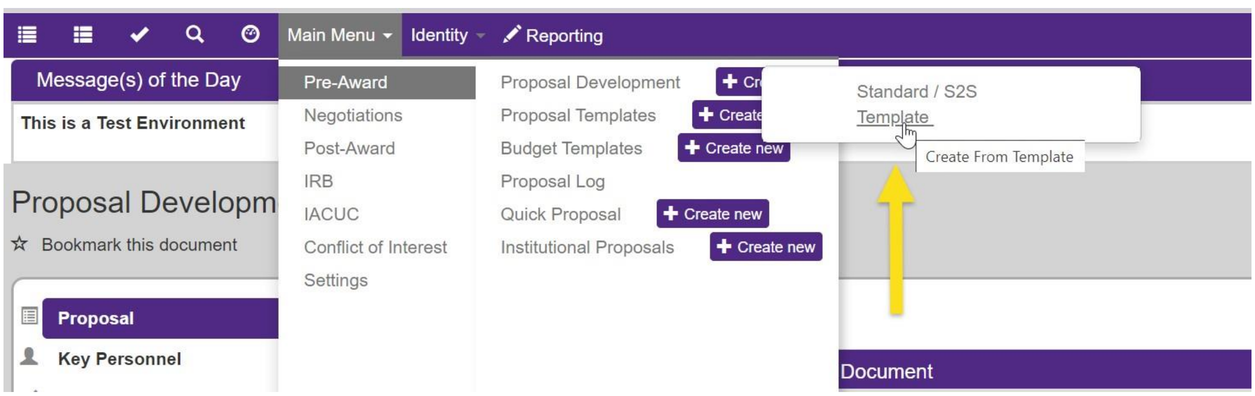
First, log in to Streamlyne:

https://research.tntech.streamlyne.org/

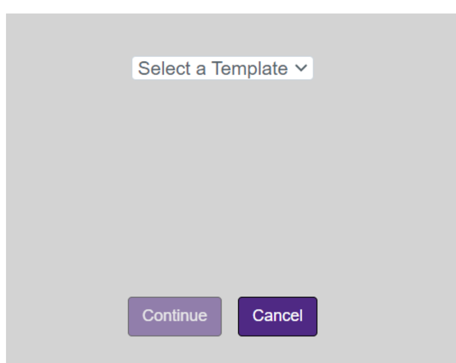
The link can also be found in Tech Express:

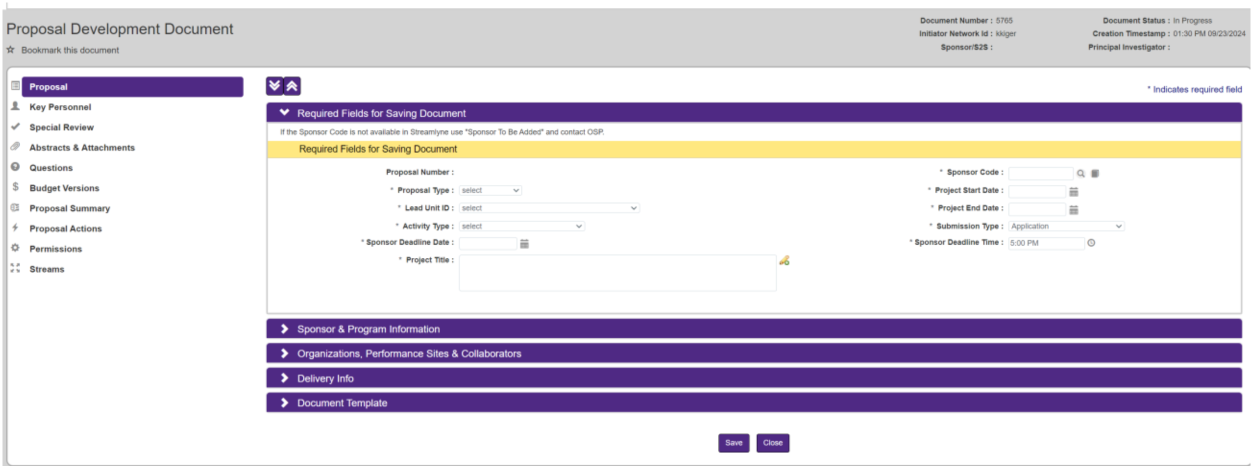
Every Intent to Submit is initiated with the same steps:

1) Navigate to the "create" button on Main Menu, Pre-Award, Proposal Development. Move cursor to TEMPLATE for an **Intent to Submit** template (or various TBD templates).



On this screen select INTENT TO SUBMIT from the dropdown, and then click CONTINUE:





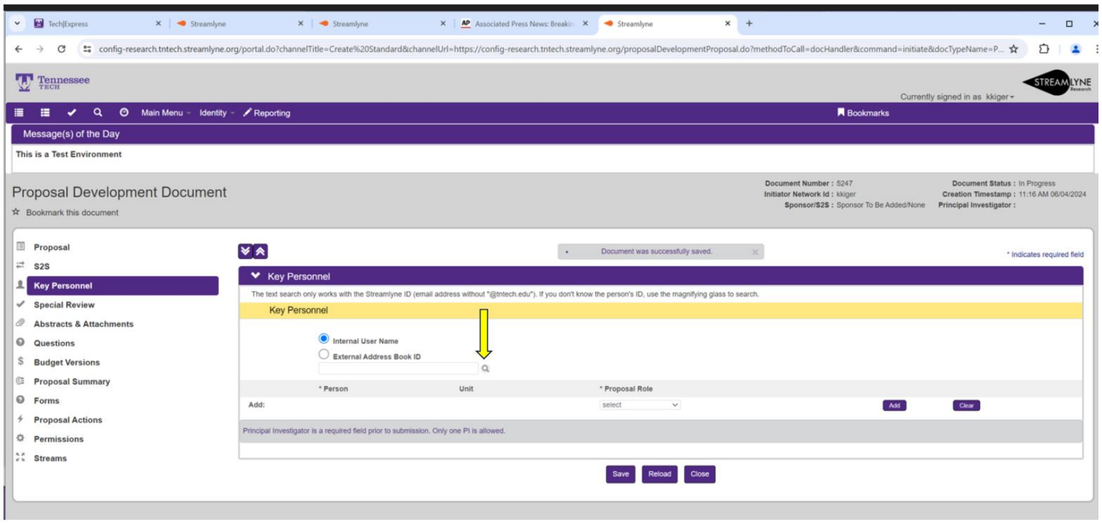
2) Using grant information and Key Personnel info, enter the required fields for saving (fields with asterisks are required). Note: If the Sponsor Code is not available in Streamlyne use "Sponsor To Be Added" and contact OSP.
3) When all required fields are completed, click the Save button. The Intent to Submit form is now in the system and has an associated document number.
4) Continue with adding Personnel and Budget Information.

NOTE Other items (sponsor & program info, Org, Performance sites, etc.) are not currently required.

Updating the Key Personnel Tab:

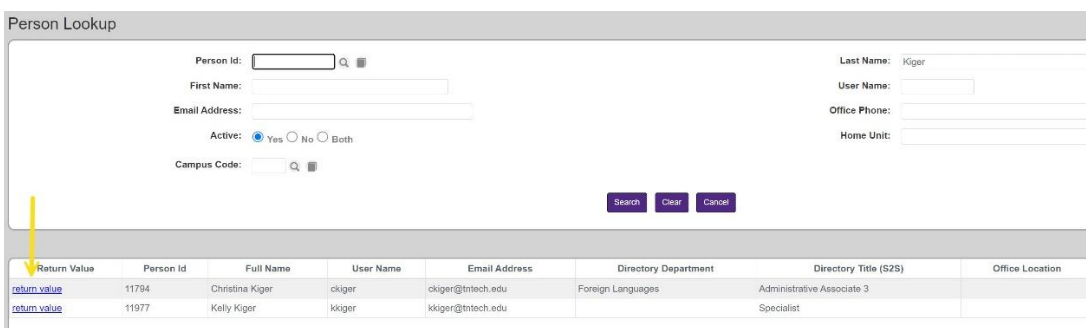
This information can be determined by communication with grant initiator.

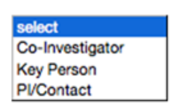
This is the screen to populate:



1) Click Magnifier icon to open new screen and find PI name by typing name and hit search. A Proposal must have only one person with the PI/Contact role. Additional investigators can be added as Co-Investigators.

2) On next screen, click on "return value" on the left beside the correct personnel name. Name and attributes will then auto-populate Key Personnel screen.



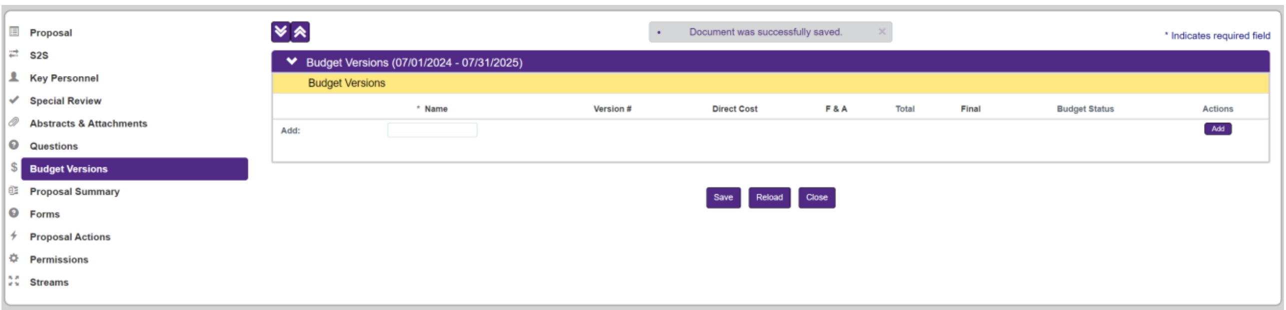
3) Find Proposal Role on drop down, then click ADD button to right of name.  SAVE.

4) Add all key Personnel.

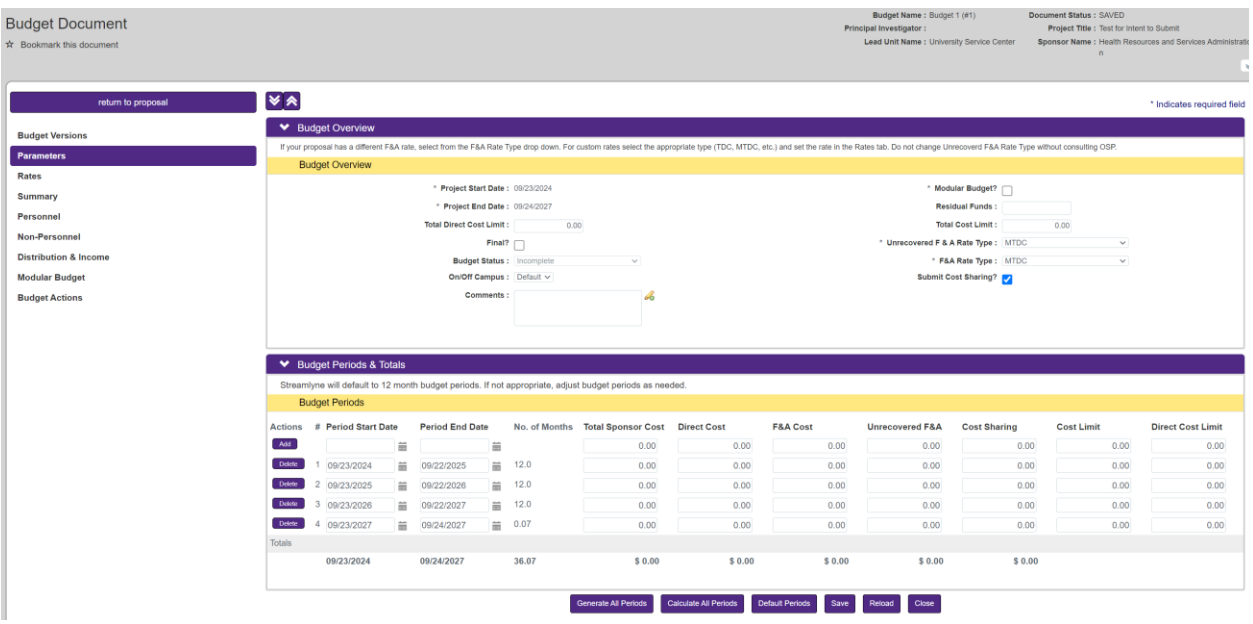
Adding Initial Budget Information

The Proposal Budget allows you to develop multiple versions of a proposed budget to explore various what-if scenarios during the development of the Proposal. Prior to review and approval, one budget must be selected as the final version that will be submitted to the sponsor.

To create budget, open $Budget Versions on left of screen. Create a budget name ADD and then Save.



Open budget to provide budget periods with totals and F&A rate type (if available).



Note Once an initial budget version has been created, you can create additional budget versions by copying and renaming an existing budget. Copy a budget to a new budget version by clicking on the Copy button next to an existing budget.

Save information for creating full proposal in Streamlyne once all pertinent information has been gathered and added.

Additional SOPs will cover further processes and procedures for completing proposal for submission.

CLICK FOR STREAMLYNE GUIDELINES

Guide 1 – Streamlyne Proposal Development & Budget Guide
For recording all project application information when submitting for external funding.

Guide 2 – Streamlyne S2S Proposal Development & Budget Pre-Award
For Use with S2S service provided by grants.gov (Grant must be submitted through grants.gov)

Guide 3 – Streamlyne Quick Proposal & Institutional Proposal Guide
For QP (simple proposal tracking document) / IP (iterative, versioned document used to track history)

Guide 4 – Submitting Streamlyne Proposal / S2S Submission
For approval by all required reviewers in the approval workflow to final submission to the sponsor.