



# MANUAL

Streamlyne Quick Proposal Manual

Updated December 2023

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# Introduction

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## Foundational Concepts in Streamlyne Quick Proposal

The **Quick Proposal (QP)** Document is the proposal document for each application Iowa State University (ISU) or the Iowa State University Foundation (ISUF) submits for Material Transfer and Nondisclosure Agreements. The data entered into the QP is validated, routed for review, and submitted.

### Concurrent Users

Streamlyne allows three concurrent users per document at any time, but never more than one user per section to avoid data conflicts.

### Quick Proposal (QP)

Quick Proposal (QP) allows for the creation of both MTAs and NDAs. MTAs are material transfer agreements and allow for the transfer of materials such as biological organisms, vectors, germ plasm, etc. between entities and specify the rights and responsibilities of each party. NDAs are non-disclosure agreements (also called confidentiality agreements), and specify each party's rights and responsibilities with regard to confidential information.

## Using this Manual

The following information will be helpful when using this manual as a guide to the Streamlyne Quick Proposal and Routing System:

### Net-ID

References to **User Name** or **Internal User Name** refer to an ISU Employee's Net-ID. The ISU Net-ID is the portion of an employee's email address prior to the @iastate.edu (e.g. For the user Wendy Wintersteen whose email address is [wwinters@iastate.edu](mailto:wwinters@iastate.edu) the user name would be wwinters).

### Magnifying Glass Symbol

The image of a magnifying glass indicates search functionality. Clicking the magnifying glass will open a Lookup (or search) feature, so that the applicable text for the field prior to the magnifying glass can be found using a varying set of lookup (or search) terms.

## Wildcards

Wildcards can be used throughout the Lookup (or search) features in Streamlyne. Both the percent symbol % and the asterisk \* function as a wildcard in Streamlyne. To utilize a wildcard (either % or \* interchangeably) in any of the lookup (or search) screen fields:

- Use \*key term (or phrase) to return a search result that ends with the key term or phrase, for example:
  - \*agriculture to find any entry ending with agriculture (e.g. Nebraska Department of Agriculture, Indigo Agriculture, USDA-US Department of Agriculture, etc.)
  - \*ia to find any entry ending with ia (e.g. University of California, University of Georgia, Prosolia, National DHIA, etc.)
- Use key term or phrase\* to return a search result that starts with the key term or phrase, for example:
  - State of\* to find any entry starting with State of (e.g. State of Minnesota, State of Queensland, etc.)
  - Doe\* to find any entry starting with Doe (e.g. Doering, Doebel, Doerder, etc.) □
- Use \*key term or phrase\* to return a search result that contains the key term or phrase, for example:
  - \*Winter\* to find any entry containing the keyword or phrase winter (e.g. Wintermute, Winter, Winters, Wintersteen, etc.)
  - \*Electric\* to find any entry containing the keyword or phrase electric (e.g. Electric Power Research Institute, General Electric, Maquoketa Valley Electric Cooperative, Kenya Electricity Generating Company, etc.)

## Browser Buttons

**Do not use the back button or the refresh button in the browser while in Streamlyne.**

Maneuver through Streamlyne using the Tabs, Panels, and various system buttons, (e.g. Save, Close, Reload, etc.).

### Note

Using the browser buttons in Chrome, Firefox, Safari, or another browser rather than moving through Streamlyne using Streamlyne's built-in features may cause information to save incorrectly or cause system errors that corrupt the quick proposal.

## Navigating Streamlyne

Quick Proposal (QP) is subdivided into Tabs, Panels, Subpanels, and Subsections.

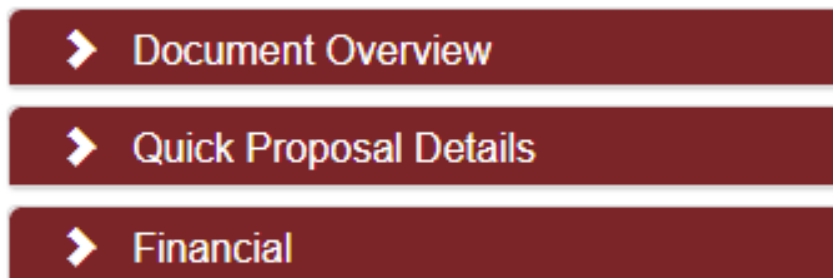
- **Tabs**

- Tabs are found on the left side of the Streamlyne documents and separate the major components of the QP.



- **Panels**

- Panels separate each Tab into categories for different component parts of the QP and appear as red bars.



- **Subpanels**

- Subpanels are divisions between Panels and appear as gold bars (e.g. Project Periods and Amounts)

- **Subsections**

- Subsections are divisions of Panels or Subpanels, and are frequently able to be expanded using the Show button.



- **Next Step**

- When the instructions indicate move to the next step, (e.g. Otherwise, skip to the next step), move to the next item in the current list of instructions. .

- **Next Process**

- When the instructions indicate move to the next process, (e.g. Otherwise, skip to the next process), move to the next set of instructions (rather than the next item in the current set).

# Accessing the Streamlyne QP and Routing System

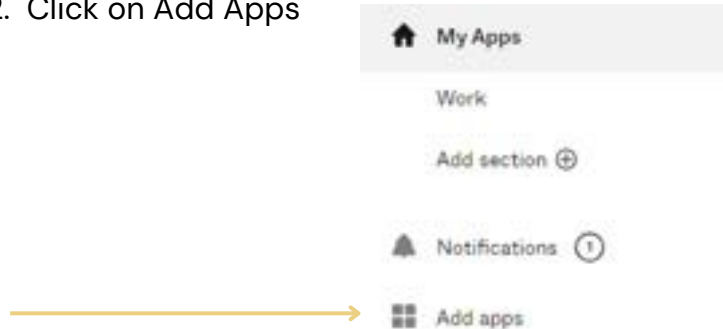
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The Streamlyne Proposal Development and Routing System Environment can be accessed through Okta at [iastate.okta.com/app/UserHome](https://iastate.okta.com/app/UserHome)

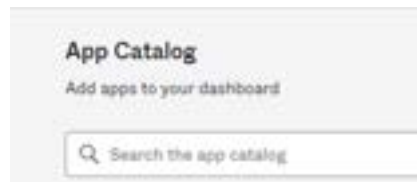
## Adding Streamlyne to Okta

To add the Streamlyn Icon to Okta:

1. Login to Okta at <https://iastate.okta.com/app/UserHome>
2. Click on Add Apps



3. Locate the App Catalog Search Box



4. Type Streamlyne in the search box and click the **Add** button

## Note

To access the live Streamlyne Production Environment, add the Streamlyne icon. The Streamlyne Test Environment icon may also appear in the search. The Streamlyne Test Environment is used to create TEST proposals only and does NOT contain live data. Proposals created in the Streamlyne Test Environment will NOT be accepted by OSPA for submission.

5. The Streamlyne Icon will appear on the Okta page.



## Opening Streamlyne from Okta

To open Streamlyne from Okta:

1. Login to Okta at <https://iastate.okta.com/app/UserHome>
2. Click on the Streamlyne icon.



3. Click on the Log in with SSO button



4. Streamlyne will open to the user's Streamlyne Dashboard



### Streamlyne Dashboard:

Upon logging into the Streamlyne Proposal Development and Routing System, the system defaults to each individual user's Streamlyne Dashboard.

From within the dashboard, users can navigate to their Action List, PD/QP List (Proposal Development/Quick Proposal), or their IP (Institutional Proposal) list.



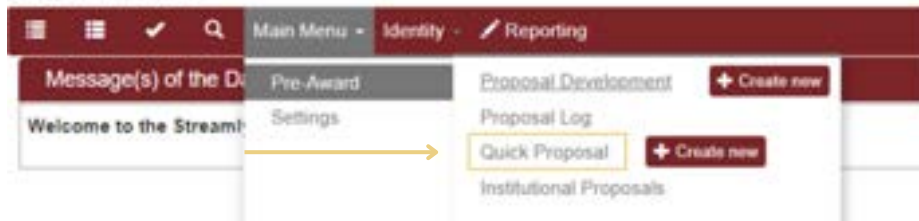


# Locating an Existing Document

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## Locating an Existing Quick Proposal Document

To locate an existing QP (Quick Proposal) document, click on Main Menu, scroll to Pre-Award, and then click on Quick Proposal.



On the Quick Proposal Lookup page, any of the QP traits, or a combination of traits with or without wildcards, can be used to search for the QP, such as:

- Quick Proposal Number (the QP number)
- Title (the title of the QP as listed in Streamlyne)
- Principal Investigator (the name of the PI listed on the QP in Streamlyne)
- Lead Unit (the lead unit listed on the QP in Streamlyne)
- Sponsor Name (the name of the sponsor of the proposal as listed in Streamlyne)

Click the Search button to see a list of all QPs with the requested traits.

From the list displayed, click on the blue edit link on the left side to open and edit the QP, or click on the blue view link on the left to open and view the QP. (Edit and view availability are based on user roles and rights.)

## Locating an Existing Institutional Proposal Document

To locate an existing IP (Institutional Proposal) document, click on Main Menu, scroll to Pre-Award, and then click on Institutional Proposal.



On the Institutional Proposal Lookup page, any of the IP traits, or a combination of traits with or without wildcards, can be used to search for the IP, such as:

- Institutional Proposal Number (the IP number)
- Project Title (the title of the IP as listed in Streamlyne)
- Principal Investigator (the name of the PI listed on the IP in Streamlyne)
- Sponsor Name (the name of the sponsor of the proposal as listed in Streamlyne)

Click the Search button to see a list of all IPs with the requested traits.

From the list displayed, click on the blue open link on the left to open and view the IP. (Edit and view availability are based on user roles and rights.)

## Initiating a New Quick Proposal (QP) Document

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Each QP is initiated with the same three steps: you must navigate to the “+ Create new” button, you must enter the minimum fields required for saving, and you must click the Save button. A record of your document will not exist in Streamlyne until these three steps are completed.

All QPs are created by clicking the button next to Quick Proposal under the Main Menu Pre-Award option.



Each QP is initiated with the same three steps: you must navigate to the “+ Create new” button, you must enter the minimum fields required for saving, and you must click the Save button. A record of your document will not exist in Streamlyne until these three steps are completed.

All QPs are created by clicking the button next to Quick Proposal under the Main Menu Pre-Award option.

# Setting Up a Quick Proposal (QP) Document

## Stages in QP Setup

There are two stages to creating a QP for preparation and eventual submission:

1. Filling out all the required fields on the Quick Proposals Tab
2. Completing the Questionnaire Tab
3. Review and Submission

## Quick Proposal Tab

Document Overview:



The screenshot shows the 'Document Overview' section of a web form. It includes a red header bar with a dropdown arrow and the text 'Document Overview'. Below the header, there are three input fields: 'Description' (marked with an asterisk and a search icon), 'Explanation' (marked with an asterisk and a search icon), and 'Organization Document Number'. A legend in the top right corner indicates that an asterisk (\*) denotes a required field.

- Description: Your Quick Proposal Number and Type of Agreement (MTA or NDA).
  - ex). 00326366 MTA
  - You can find your Quick Proposal Number as seen below



The screenshot shows the 'Quick Proposal Details' section of the web form. It has a red header bar with a dropdown arrow and the text 'Quick Proposal Details'. Below the header, there is a yellow bar with the text 'Quick Proposal' and a search icon. Underneath, there are two input fields: 'Quick Proposal Number' (with an example value of 00326366) and 'Fiscal Year' (with a value of 5/2024). A yellow arrow points to the 'Quick Proposal Number' field.

Quick Proposal Details:

- Quick Proposal Type:
  - Select the type of agreement from the drop down
- Principle Investigator (Internal User Name)
  - Click the search icon next to the box



The screenshot shows a search field for the 'Principle Investigator (Internal User Name)'. It consists of a text input box and a search icon (magnifying glass) to its right. A yellow arrow points to the search icon.

- You can look up your principle investigator the following ways:
  - First Name: %First Name%
  - Email Address: %email%
  - Last Name: %Last Name%
  - Username: %isu username%

Person Lookup

Person ID: <input type="text"/>	Last Name: <input type="text"/>
First Name: <input type="text"/>	User Name: <input type="text"/>
Email Address: <input type="text"/>	Office Phone: <input type="text"/>
Active: <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both	Home Unit: <input type="text"/>
Campus Code: <input type="text"/>	

- **Note:** make sure there are no unnecessary spaces in your search. This could affect the results.

- Click the blue return value next to the correct PI

←

- Lead Unit:

- This field should auto-populate
  - If the field does not, or what auto-populated is incorrect, please use the drop-down menu to select the correct unit

\* Lead Unit  ←

- Sponsor: (The entity you intend to set the MTA/NDA up with)
  - Click the search icon next to the box
  - You can look up your sponsor using the following recommended ways:
    - Sponsor Code
    - Sponsor Name: %Name%
      - Try not to write out the whole name of the company. Use as little letters as possible
    - Sponsor Type: Drop down menu
  - Click the blue return value next to the correct sponsor

\* Sponsor :  ←

←

- **Note:** If you cannot find your sponsor in the list, please use the instructions below to request your sponsor to be added:
  - Please note that your QP Document cannot be submitted without a sponsor
  - Requesting a Sponsor:
    - Paste this link into your browser:  
<https://www.ospa.iastate.edu/streamlyne/streamlyne-request-forms>
    - Select “New Sponsor”
    - Fill out the required fields to the best of your knowledge
    - Click Submit
    - After the document is submitted, you should receive an email within a couple of days notifying you of your sponsors addition to Streamlyne.
- Anticipated Award Type:
  - Unfunded Agreement
- Comments:
  - Any additional information you would like to provide
- Proposal Type:
  - Generally you will need to select “New” from the drop-down
- Title:
  - The title of your proposal. Please add the type of agreement in your title
  - ex). Flower Study MTA

Click **SAVE**



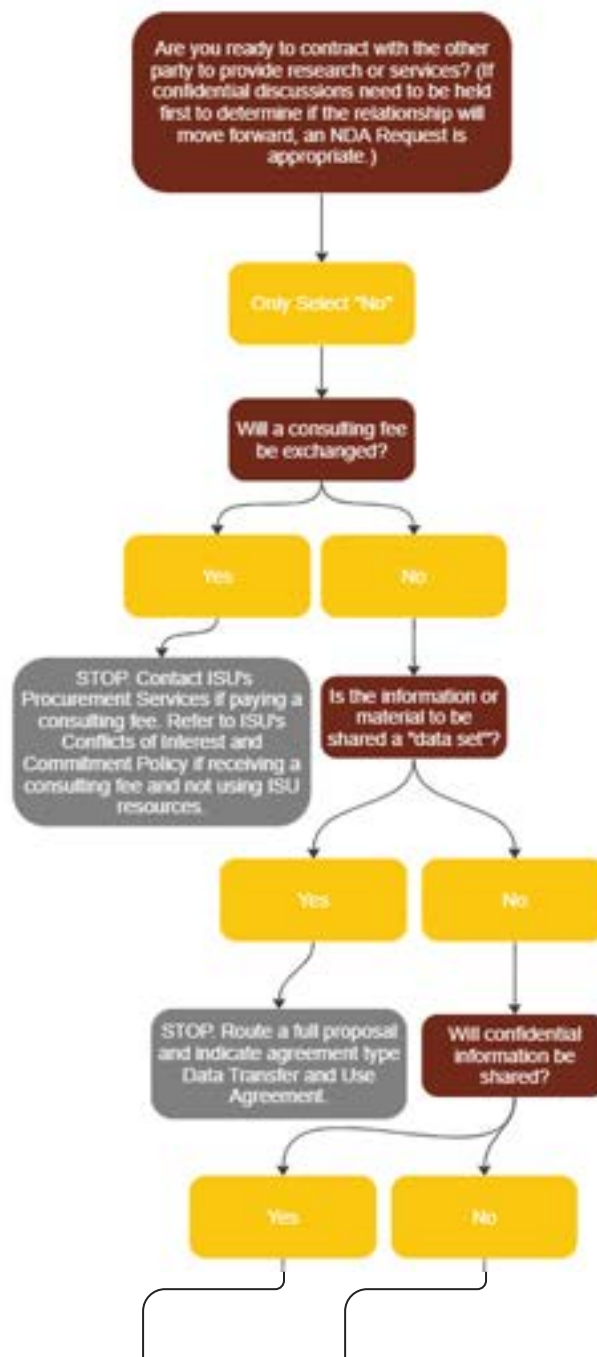
## Questionnaire Tab

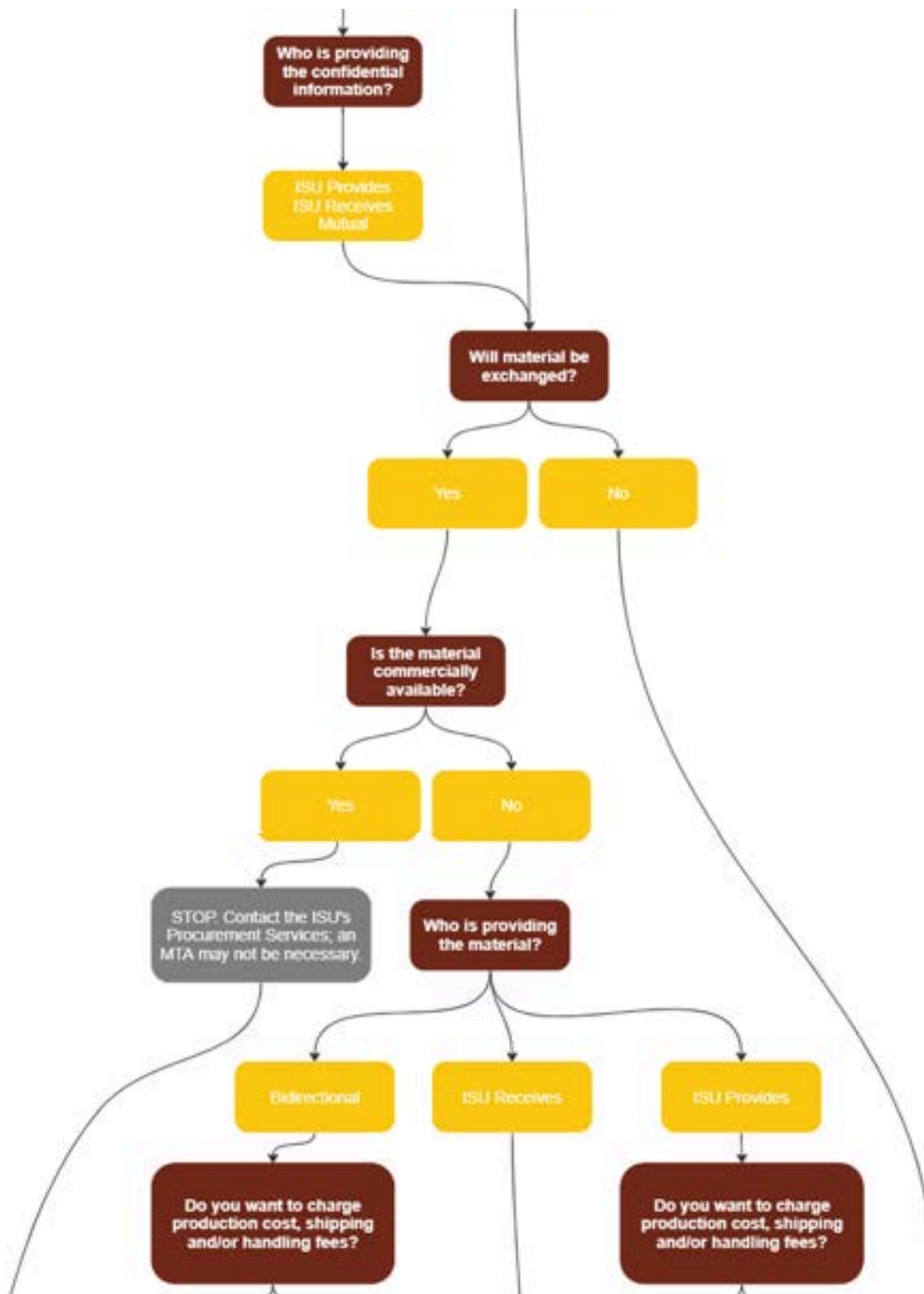
### MTA-NDA Screening Questions

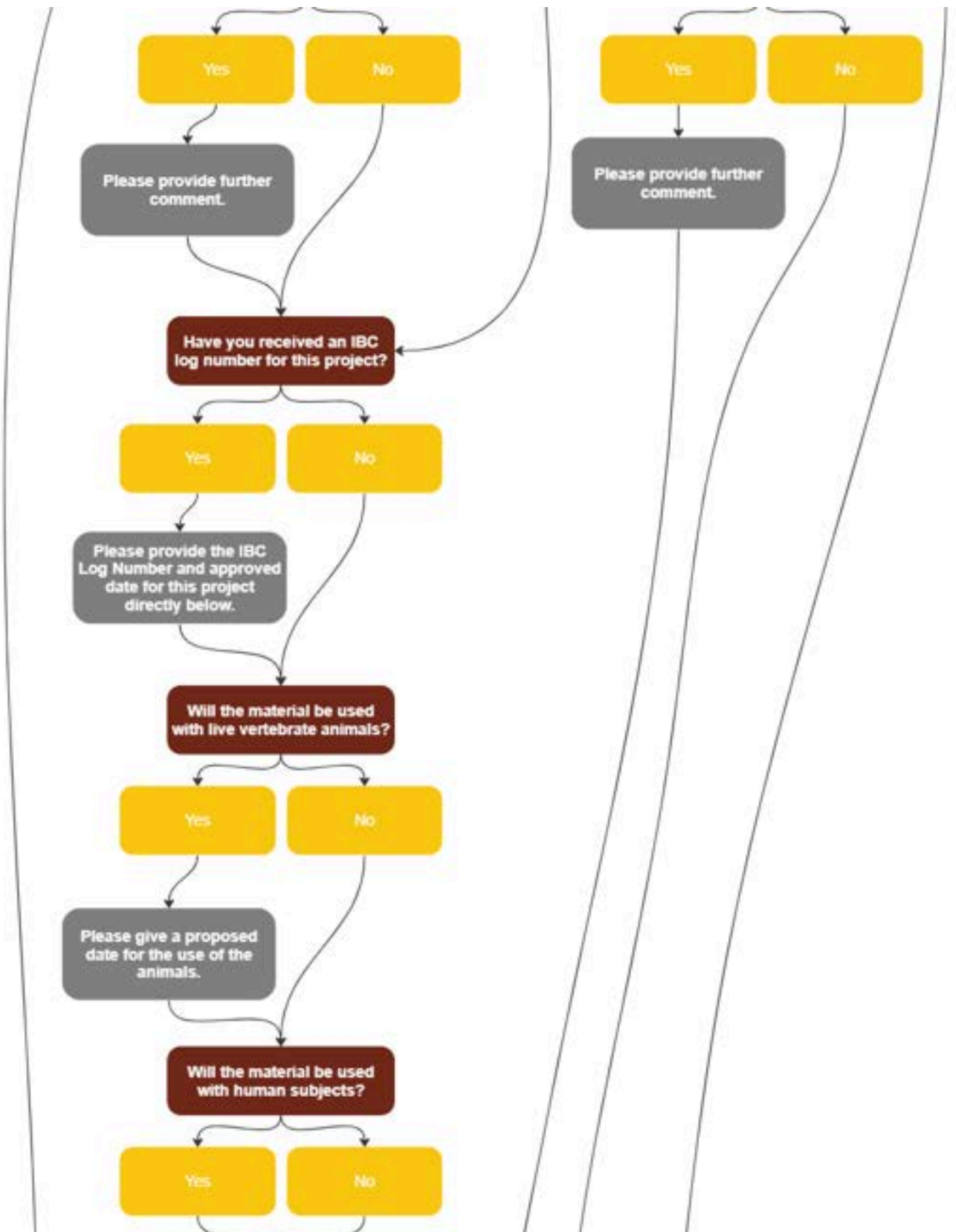
- Click the drop down to see the questionnaire



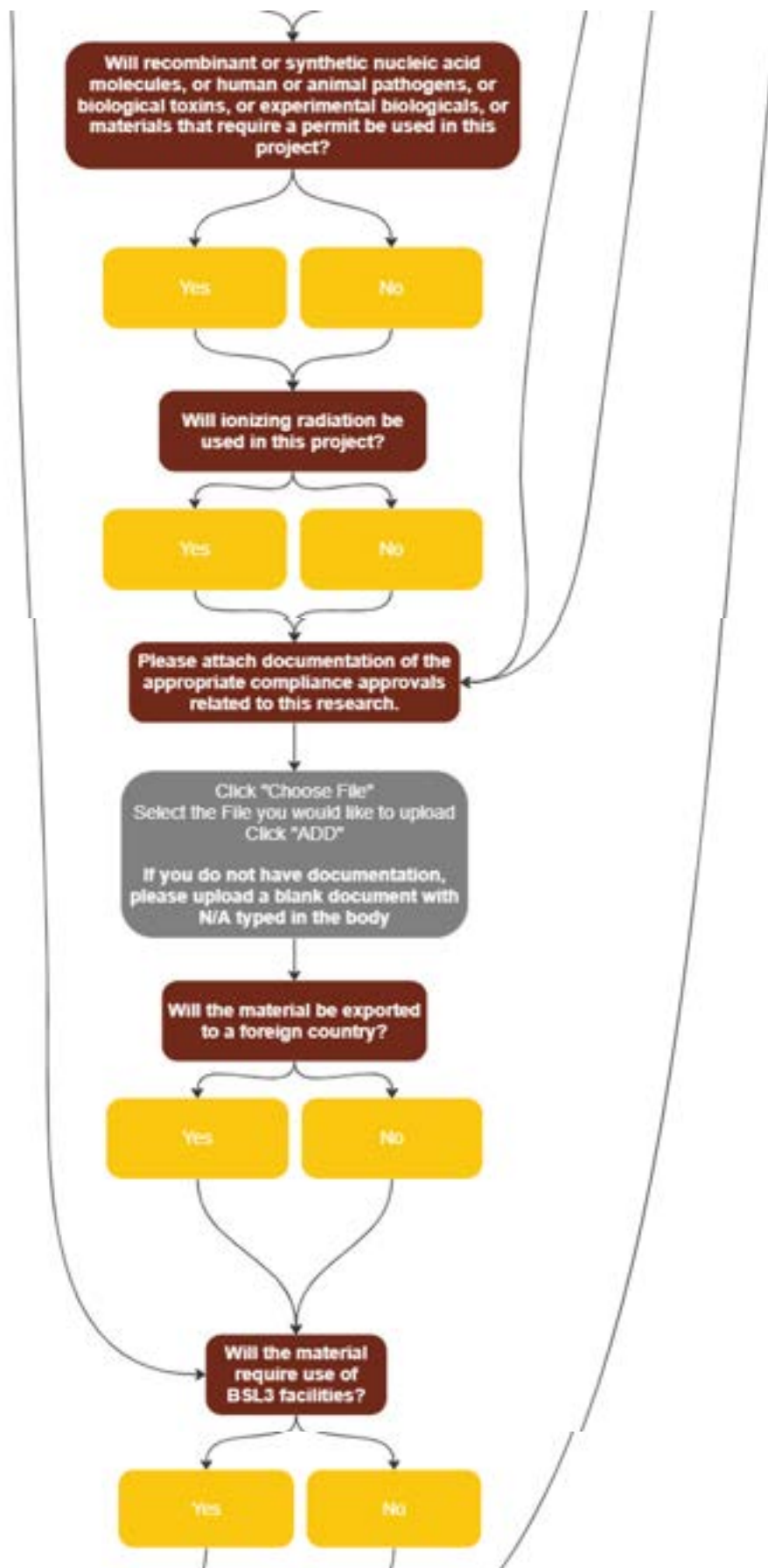
- Questions:



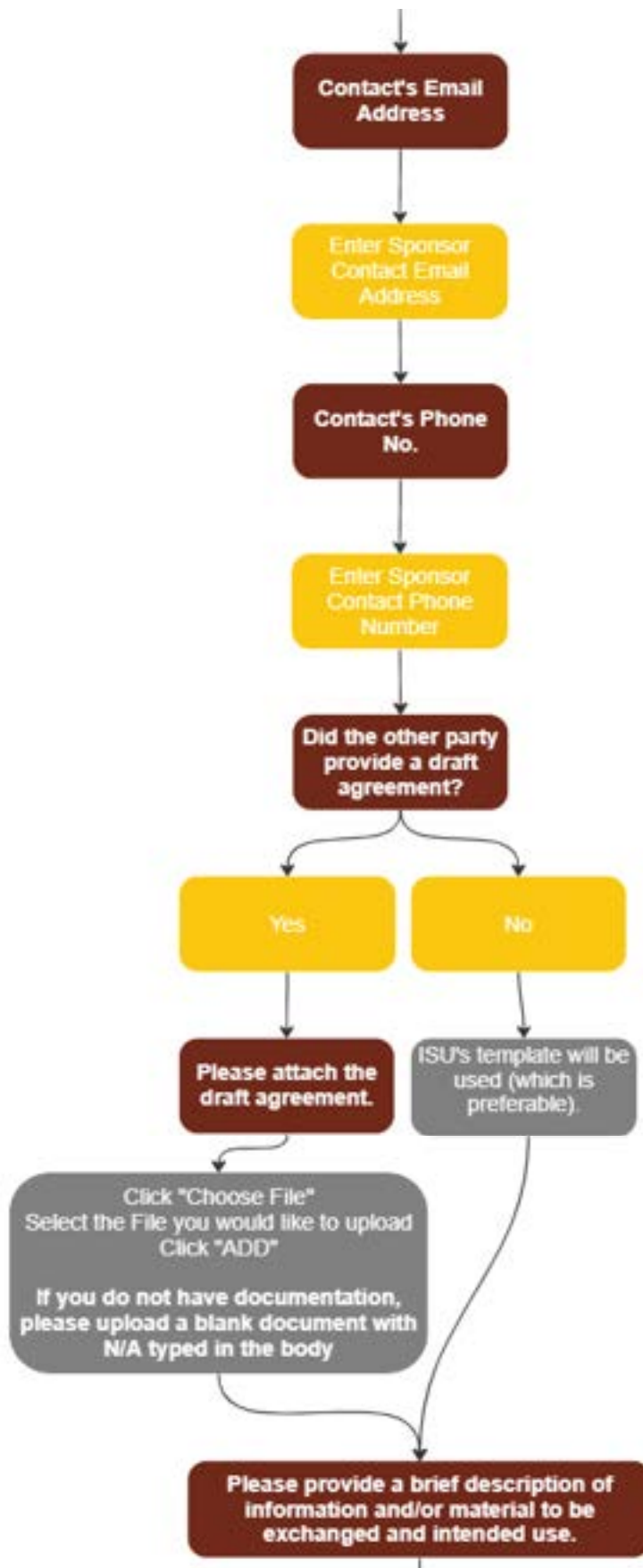


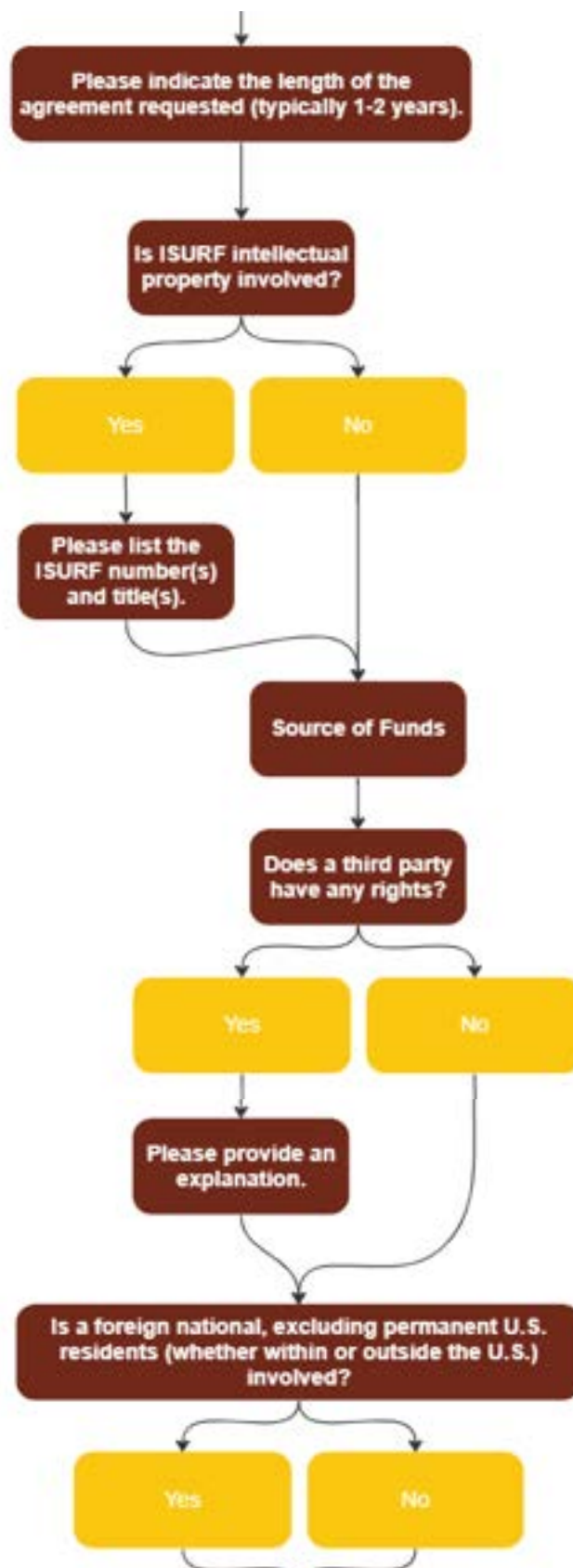


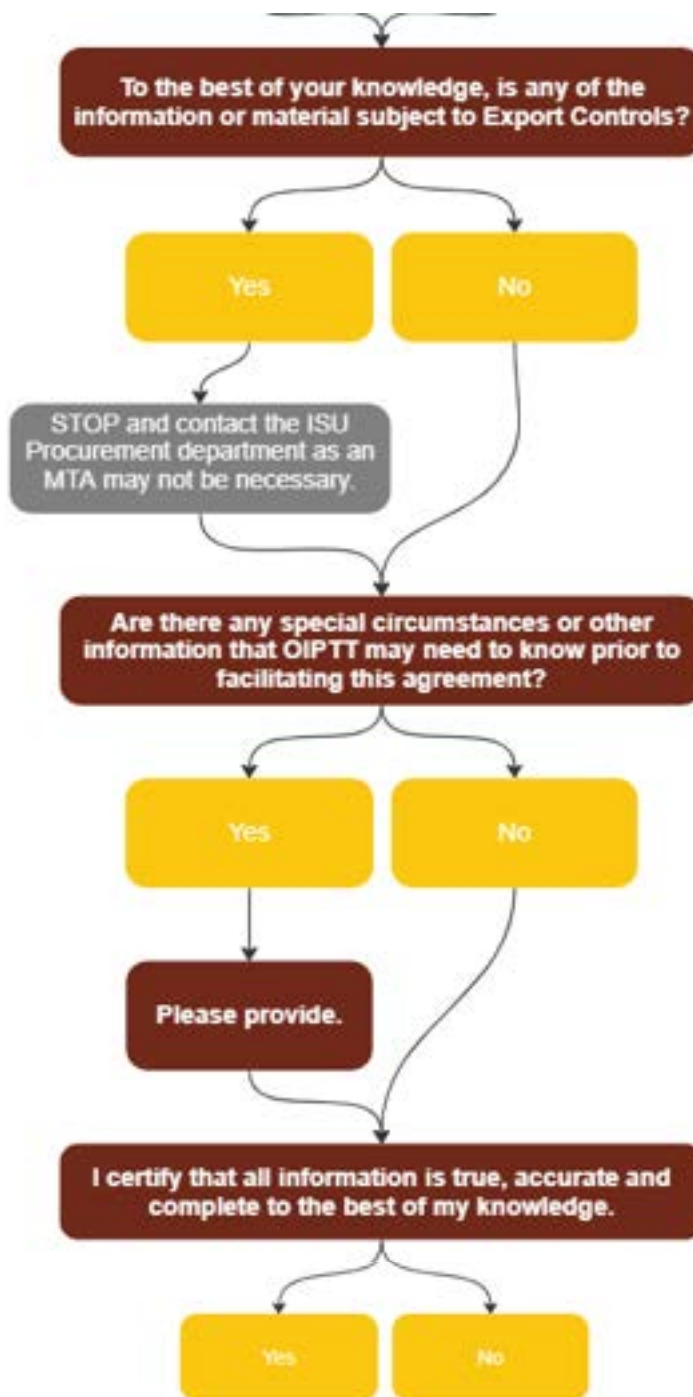












Click "SAVE" at the bottom of the screen when complete

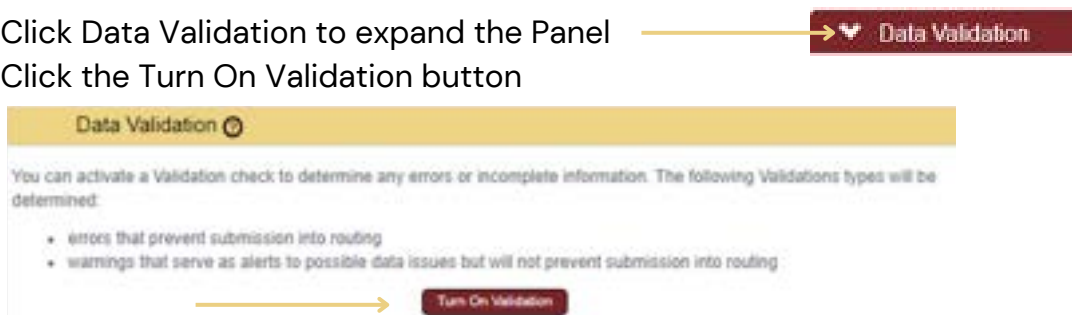
### Note

Your questionnaire should say "Complete" at the top of the screen. If it says "Incomplete," please go back through the questionnaire and make sure all the fields are completed.

- If you are not sure why it says "Incomplete," please reach out to [streamlyne@iastate.edu](mailto:streamlyne@iastate.edu) for assistance.

## Quick Proposal Actions Tab

- Click Data Validation to expand the Panel
- Click the Turn On Validation button



### Note

Streamlyne will run a series of validation steps to make sure that all fields are populated as required, that dollar values total correctly, and that field entries do not conflict (wherever possible). If errors are found, a red error message will display at the top of the page.

1 error(s) found on page.

Warnings indicate data issues that should be reviewed but do not have to be changed.



- Streamlyne will display a list of errors and warnings found on the document. Click the Fix button next to the listed error or warning.
- Streamlyne returns to the document section where the problem resides. Make the corrections.
- Repeat the steps above as many times as necessary to resolve all errors.

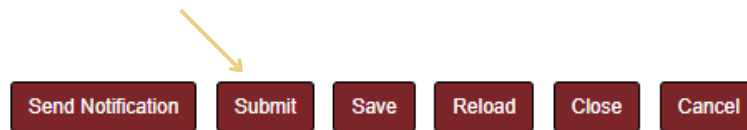
## Submitting the Quick Proposal

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Once you submit your Quick Proposal, your request will be routed to OIPTT. During that time, the Quick Proposal will be locked to prevent editing and turned into an Institutional Proposal. A negotiator will be assigned to your request within two business days.

### Submitting your Quick Proposal in Streamlyne

- Go to the Quick Proposal Action Tab
- Scroll to the bottom of the webpage
- Click the red "Submit" button



## Contact Us:

If you have any questions regarding the process above, or have any suggestions for how we can improve, please reach out one of the following ways:

- Email: [indcntnt@iastate.edu](mailto:indcntnt@iastate.edu)
- Phone: (515) 294-4740