Navigating in Streamlyne Research

Logging In

Streamlyne uses the UNC single sign-on (SSO) user name and password, follow these steps to log in:

1. Open a browser window.

Note Streamlyne Research is compatible with the two most recent versions of Chrome, Safari, Firefox, and Internet Explorer.

2. Go to https://research.unco.streamlyne.org/

3. Streamlyne uses the UNC Single Sign-On. Enter your email address (first.last@unco.edu) and Password, and then click the Sign in button.

The Action List

If your login is successful, Streamlyne Research will route you to the Action List. The Action List is the jumping-off page for all Streamlyne functionality. Each line on the Action List represents a pending workflow item, requiring some sort of action from you.

The Menu Bar
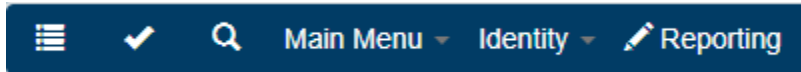
The Menu Bar remains fixed to your primary Streamlyne Research tab regardless of where you are in the application. This is your primary means of navigation in the application.

- Click the List button to return to the Portal Page and Action List at any point.

- When you complete an action, the item is moved to the Outbox. Click the Outbox button to review all items on which you have taken action.

- Click the Magnifying Glass to access the Document Search function.
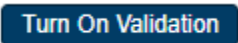
Submitting a Quick Proposal

UNC will be using Streamlyne's Quick Proposal (QP) function as the Notice of Intent to Apply for a grant. Quick Proposal collects the basic information about the grant proposal and notifies the Office of Research and Sponsored Programs that you are preparing a proposal. The items listed below are required.

1. Hover your mouse over Main Menu –> Pre-Award –> Quick Proposal, then click on the **+** sign to create a new QP.
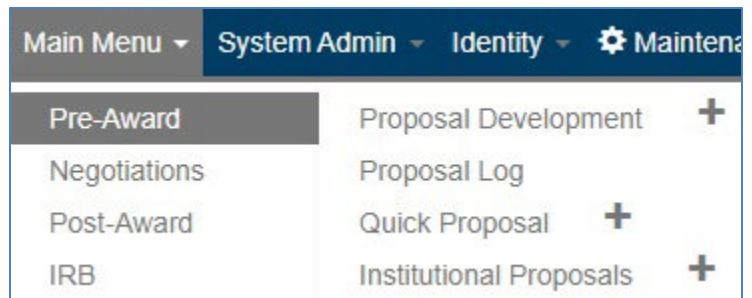
2. Once you are in a document, you may want to click on the button to expand all of the sections on the page.

3. Description: Enter your last name, first name, and the funding source.

4. Quick Proposal Type: Select Open Submission, Limited Submission or Other. (A Limited Submission grant allows only one submission per institution.)

5. Proposal Type: Select the most appropriate proposal type.

6. Principal Investigator: Using the magnifying glass, search for and select either an internal or external PI. All faculty and graduate students should be in the Internal User Name search. The PI should be the person completing this form, so please put yourself as the PI, in most cases. (Even if this is a subaward from another university, the PI entered should be the UNC PI, not the PI of record on the main proposal.)

7. Lead Unit: If you enter an internal PI, this will populate with that PIs home department. You may change it if needed.

8. Title: Enter the title of your project.

9. Deadline Date: Enter the proposal submission deadline date.

10. Click Save.

11. Click on ❓ **Questionnaire** in the left sidebar.

12. Click on the ⯆ to open all of the questions. All of the questions are required so you must answer each one.

13. When you have answered all of the questions, it is a good idea to click the Save button at the bottom.

14. Click on ⚡ **Quick Proposal Actions** in the left sidebar.

15. Click ⯆ or open the ⯆ **Data Validation** section.

16. Click on **Turn On Validation**. Streamlyne will now show warnings for any missing information in your QP.

17. In the section, attach any documents you feel are relevant in Notes and Attachments. Please check with your department chair/school director and dean for department/college-specific required documents.

18. In Ad Hoc, you can add people whom you want to be notified that you have submitted a QP. Be sure to click the Add button after you have selected the individual, or the notification will not go out.

19. Once all of these steps are complete, click Submit.

More On Document Search

As previously stated, clicking the Magnifying Glass 🔍 from the Menu Bar accesses the Document Search function. This is a handy tool for general access to specific documents, or for auditing changes to Maintenance Documents.

To find any specific document, enter as much information as possible into the search fields, and then click the Search button. Streamlyne Research will display the search results immediately below the window, allowing you drill into each document by clicking the hyperlinked document numbers.

- Click the magnifying glass to access the full list of Document Types available in Streamlyne. See Appendix A for the full list of Document Types. This kind of search can be useful when you would like to see all the changes made to a specific document.

- To search for documents based on the username of the person who created a document, (not necessarily the same person who performed the last update), click the magnifying glass to search for and select the username of the Initiator.

- If you know the specific Document ID you would like to search for, enter it into the Document Id field. A Document ID is the unique identifier assigned to every document created in the system. A Document ID will never be assigned twice. For example, a given Proposal Development document may be assigned a Prop Dev ID of 120 with a Document ID of 5469. The story told by these numbers is: this is the 120th Proposal Development document saved to the database, and the 5,469th document created in the system. Note that you cannot search for module-specific identifiers within the Document Search window.

- The Date Created From and Date Created To fields can be used together to get a specific date range, or individually. Enter data in MM/DD/YYYY format, or click the calendar icon to search for and select a date value.

- If you would like to reference this search later, enter a brief word or phase in the Name This Search field. To find this search later, click the dropdown labeled Searches in the upper righthand corner of the page.


The Dropdown Menus

Main Menu

The Main Menu is the place from which all transactional work is completed. The options on the menu will change based on the permissions of the signed-on user; only modules that a user has access to will appear on her or his menu.

- Initiate a new document directly from any of the below options by hovering over the Main Menu Option and clicking the Plus Sign next to the desired document type.

Logging Out

While it is tempting to terminate your Streamlyne session by clicking the **X** in the corner of your browser window, be sure to protect your data by logging out of the application *before* ending your browsing session.
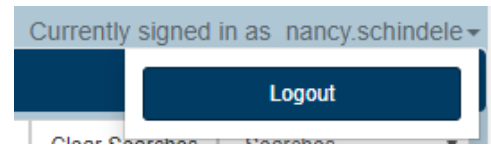
To log out securely, click on your hyperlinked <u>username</u> on the right-hand side of the Hyperlink Bar, and then click the Logout button.