# Frequently Asked Questions Update: April 2018

## Topic: General, Log-In/ID, and Search

**Why do we use Streamlyne?**

Streamlyne is part of NJIT's electronic grant management system that has replaced a previous paper-based system. Streamlyne offers several advantages over a paper-based system including the ability of approvers to approve wherever they have internet access, easy monitoring of the approval process, and increased reporting functionality.

**How can I update my eRA Commons ID for all future NIH proposals?**

Go to Main Menu>Setting>Person Extended Attributes, **click "Edit", enter it under "eRA Commons User Name" and submit the change/update.**

**How do I search/find a Grants.gov Opportunity ID in order to submit through Streamlyne?**

Once you have initiated the main/required fields in proposal development but most importantly identified and input the appropriate federal agency and saved the proposal, you can click on the "S2S" tab on the main menu on the left-hand side of the screen. There, you will click the "S2S Lookup (with a magnifying glass)", which will bring you to the "Opportunity Lookup" screen. There you can either type in the Opportunity ID if you are aware of one, as well as the "CFDA" number.

Once confirmed, the sub-sections "Opportunity", "Submission Details", "Forms" will be repopulated with specific data and attachments for the submission using Streamlyne. Completion of the remaining sections in proposal development can proceed thereafter. Links to the sponsor guide/application instructions will also appear in the S2S screen.

**How do I search for a document in Streamlyne?**

Streamlyne Research search features are accessible from the Menu Bar, from the Main Menu, and from within documents. (Page 19 of the New User Manual posted on the Research website http://www.njit.edu/research/sites/research/files/StreamlyneNewUserManualCommonElements.pdf ).

**Searching Across All Modules**: In any Streamlyne Research module, please click the magnifying glass on the Menu Bar to access the Document Lookup. This will open up a form to search for any document in any Streamlyne Research module, regardless of whether the document is delivered or customized.

**Searching Within a Module:** If you would like to search for a document specific to a given module, click the hyperlinked menu option from the Main Menu. Streamlyne Research will direct you to a Lookup form that searches specifically for documents within the module selected.

**Searching at the Field Level:** Whether you are looking for a data element within a document section or trying to narrow down search criteria, you may search for a specific value by clicking the magnifying glass next to any field. If a magnifying glass does not appear next to a field, it means that the entries for this field are not limited to a set of configured values, and therefore cannot be accessed using the Lookup function.

**How do I see the *Action List* of pending items in workflow?**

Streamlyne Research will route you to the Action List. The Action List is the jumping-off page for all Streamlyne functionality. The Action List occupies the center of the page. Each line on the Action List represents a pending workflow item, requiring some sort of action from you. (Page 3 of the New User Manual posted on the Research website http://www.njit.edu/research/sites/research/files/StreamlyneNewUserManualCommonElements.pdf ).

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.

**Why is the system's response/processing time slow?**

Streamlyne is a cloud-based system and may experience network slowdowns just like any other such system. Both NJIT and Streamlyne are aware that the system may slow down and part of our continuous improvement plan is to limit such slowdowns as much as possible. Please report any extended slowdown to your research ambassador.

**Topic: Budget**

**Can I change project start and end dates after I have submitted for approval?**

When a proposal is routed for approval certain information is locked to ensure that the information at the various approval levels (department, college, and university) remains constant. This is intended to guarantee that the authority of academic leadership (e.g., chairs and deans) is recognized in the system.

The start and end dates are included in the data that is locked. If you need to change the dates of a proposal already submitted for approval, you will have to recall the proposal, make the necessary changes, and resubmit for approval.

**I need to change my budget - Do I need to change it in Streamlyne?**

Budgetary information is locked once the approval is submitted for approvals to ensure that the

budget does not change between the different approval levels.  The budget can be changed as many times as needed before submitting it for approval.

**Can I generate budgets for multiple years from the Year-1 budget in Streamlyne?**

Yes!  You only need to input the Year-1 budget and then click on the "generate all periods" button. Stremalyne will create budget sheets for the remaining periods. You can then go to "summary" under the budget tab to review budget sheets for all periods.  You can also change specific budget items that you allocated in Year-1 but you do not want to continue them in the following periods.

**How can I add another investigator or my research ambassador to my proposal in order to help on budget preparation and edit proposal details?**

Select the "Permissions" link from the left hand side of the main proposal screen in any proposal development document.  From the Permissions screen you will be able to search for the person you wish to add and grant them a specific level of permission (aggregator, budget creator, viewer).  After you select the appropriate person, click *"Add"* and they will be added to your proposal.

**How can I review budget reports and print out a detailed budget summary to share with a prospective sponsor/collaborator for review purposes?**

Once you have developed your budget in Streamlyne, go to the left-hand menu of your proposal development document and select *Budget Versions*.

1) The *Budget Versions* screen will show the budget versions you have worked on.  Select the version that is complete, assign it as "final" and change the budget status from "incomplete" to "complete".
2) On the left-hand menu of the budget screen, select *Budget Actions*.
3) On the *Budget Actions*, select the option *Print Forms*.
4) The *Print Forms* screen will show several reports. These reports provide summary as well as details and specific calculations for review.

| | | |
|---|---|---|
| 1 | Budget Costshare Summary Report | Print |
| 2 | Budget Cumulative Report | Print |
| 3 | Budget Salary Report | Print |
| 4 | Budget Summary Report | Print |
| 5 | Budget Summary Total Report | Print |
| 6 | Industrial Budget Report | Print |
| 7. | Industrial Cumulative Budget Report | Print |

You can print and save PDF versions of any or all reports by the following steps:

1. Click the section header to expand the Print Forms section.
2. Identify which form you would like to print.
3. If you would like to capture any relevant budget comments on the form, click the corresponding Print Budget Comments checkbox.
4. Click the corresponding Print button to generate a PDF of the form.
5. Your operating system will prompt you to open or save the downloaded PDF. Follow these prompts to save the document.
6. Repeat Steps 2 through 5 until all desired forms are generated.

You may also elect to print out a budget summary in the "NSF" format or in a generic budget table format. You can do so by the following steps:

1. On the left-hand side menu of the Proposal Development Document, select the *Proposal Actions* tab.
2. On the *Proposal Actions* screen, select *Print*.
3. Select *Show* under the Print Sponsor Form Packages. On this screen, there are options to select individual budget periods as well as a summary budget.

**In credit split, what is the difference between Responsibility, Space and Financial? Or what is it intended for?**

Credit Split allows you to properly document the effort/time, space, and responsibility of the key personnel during the life of the project. This data will be used for different reports such as research validations for Promotion and Tenure.

**Responsibility**: the state of being accountable for the performance of the project
**Space**: the facility/lab used in the performance of the project
**Financial**: responsibility for expenditures (allowability and allocability) within the project

**When collaborating on NIH submissions, how do you add a Co-Investigator who is not an NJIT employee? How do I include their bio sketches?**

The personnel data in Streamlyne is drawn from Banner, which guarantees accurate information about NJIT personnel. If a proposal requires the inclusion of non-NJIT investigators, the NJIT PI should contact their department's research ambassador to assist in adding such individuals.

How and when do I include a subaward (i.e. before or after I enter the budget? Subaward format?) What do I do if the subcontractor is not listed?

A budget from the entity proposed as a sub awardee must be in place. Use the attached form

Obtain he latest version for the R&R budget (ambassador can help with this)
Forward the R&R Budget Sub award form to your Subcontractor
For NSF and other proposals – please use the general R&R Sub award form and forward to the subcontract
Once you received the information from the subcontractor, please see your ambassador for further processing

Having the R&R budget Sub award form, will allow streamlyne to populate the figures in the proposal budget

If the subcontract is not listed on streamlyne, please work with your ambassador to add this organization to the system.

**How do I enter a cost share? For my salary? For other personnel and expenses?**

Cost Share for personnel other than faculty is very similar to release time –

1. Add the person under Key personnel
2. Select the period (start and end dates) that the staff/admin will be devoted to the project
3. select percentage

## Topic: Proposal Submission

**The sponsoring agency for my proposal does not appear in Streamlyne. How do I request a new sponsor to be added? What should I do?**

If the agency does not appear in NJIT's Banner system, the agency will need to be added. You should communicate this need to your research ambassador who will be assist with this process. In order to help you, the ambassador will need the following information:

## Required fields * Optional fields -

## Address book full information
*Address Line 1:
-Address Line 2:
-Address Line 3:
*City:
-Country Code:
*County:
*State:

## Point of contact
*Email Address:
-Fax Number:
*First Name:
*Last Name:
-Full Name:
*Organization:

*Phone Number:
*Postal Code:
-Title: Boston

## Organization book full information
*Address:

-Animal Welfare Assurance:
-CAGE Number:
-Com Gov Entity Code:
*Congressional District:
*County:
-DODAC Number:
*DUNS Number:
-DUNS Plus Four Number:
*Federal Employer Id (TIN):
-Human Sub Assurance:
-NSF Institutional Code:
*Organization Name:

**Do I need to mark attachments as complete before submitting for approval?**

Yes please mark all attachments completed; otherwise incomplete documents will cause validation errors.  This is to guarantee that incomplete documents are not accidentally submitted with your proposal.

**Is it possible to make changes after I uploaded a file before submission for approval? Can I request to make a change into a file that has been approved by Chair and or Dean?**

Changes can be made to any part of the proposal before it is submitted for approval.  Once a proposal is submitted for approval, certain parts of the proposal, including the budget and start/end dates, are

locked to guarantee they remain constant throughout the approval process.  Other parts of the proposal can be updated during or after the approval process is completed.   Your research ambassador will be able to assist in this process.


**Is it possible to change a file after it has been approved by Chair and or Dean?**

While you cannot add or delete a file after the proposal has been approved, you can edit a file that is part of the proposal during or after the approval process.

**How do I find my proposal if I am not the initiator?**

Please see Attachment A

**How do I find my proposal if I am a Co-PI?**

Please see Attachment A

**How do I find my proposal if I am a Key Person?**

Please see Attachment A

**How can I perform a search for a Document ID?**

Please see Attachment A


**How do I request funds to support PhD student (graduate research assistant salary and tuition) without naming this student?**

Please see Attachment B

# Attachment A

How can I find my proposal if I am not the initiator or PI?
Specific Questions:

How do I find my proposal if I am not the initiator? How do I find my proposal if I am a COPI?
How do I find my proposal if I am a Key Person? How can I perform a search for a Document id?

You will need to obtain the document id from the PI. Then perform a document search:
Search menu (magnifying glass icon)
Search by Document ID
Search



The search will find one document and you just need to click on the numbers to access it

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# Attachment B

How to support a TBD student?

Specific Questions:

How to add a TBD student on Streamlyne?

I would like to request funds to support PhD student (graduate research assistant salary and tuition) without naming this student. How can I do this in the Streamlyne?

Answer:

Go to budget, then personnel, and finally under Personnel Detail, you will see the option "Summary"

What you want to do is Person: Summary
Object Code name: Graduate Assistant Stipend. Group: TBD
Then Add



This will generate a new line that will prompt you the Requested Salary option.

Likely you will also need Tuition for the student.

This can be added in "Non-Personnel" then "Other Direct" and the object code is Graduate Tuition Awards.



**\*** These fields are fundamental to the proposal package

| Field Name | Field Description | Field Instructions |
|---|---|---|
| **Project Start Date** | Anticipated start date of the project | Enter in MM/DD/YYYY format or click the calendar icon to select. |
| **Lead Unit** | The complete list of all units for which the signed-on user is authorized to submit proposals | Select from a dropdown list of configured values. |
| **Project End Date** | Anticipated start date of the project | Enter in MM/DD/YYYY format or click the calendar icon to select. |
| **Grants.gov Opportunity** | Opportunity Package from the federal site | Enter the opportunity number or CFDA and search |
| **Submission Type** | Identifies a proposal as a pre-application, application, or change/corrected. | Select from a dropdown list of configured values. |
| **Budget** | Budget proposed following guidelines | Enter budget data under the different budget fields |