



MANUAL

**STREAMLYNE PROPOSAL DEVELOPMENT AND ROUTING
SYSTEM MANUAL**

UPDATED JUNE 2024

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Introduction

Foundational Concepts in Streamlyne Proposal Development

The **Proposal Development (PD)** document is the proposal development and routing document for each application Iowa State University (ISU) or the Iowa State University Foundation (ISUF) submits for external sponsored funding or a gift. The data entered on the PD is validated, routed for initial review, routed for final review and workflow approvals, and submitted to the sponsor.

Grants.gov/S2S vs. Non-Grants.gov/External Submissions

PD documents can be submitted via **System-to-System (S2S)** to the Grants.gov portal for federal solicitations or non-S2S for all other proposals. S2S submissions require that all PDs be prepared according to standards set by Grants.gov and ISU. Non-S2S submissions require that all PDs be prepared according to ISU's standards. All proposals submissions must be completed according to the sponsoring agency's guidelines.

Concurrent Users

Streamlyne allows three concurrent users per document at any time, but never more than one user per section to avoid data conflicts. Three separate users may concurrently update the Proposal's core data elements, the narrative elements on the Abstracts & Attachments Tab, and the Budget Versions Tab, respectively.

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 Proposal Development 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 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

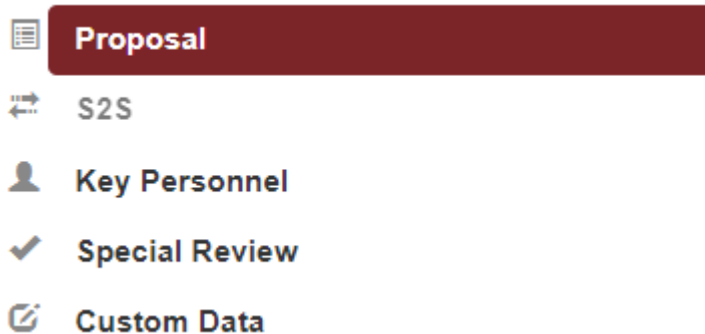
Using the browser buttons in Chrome, Firefox, Safari, or another browser rather than moving through Streamlyne using Streamlyne's built-in features may cause information to save incorrectly or cause system errors that corrupt the proposal document or budget document.

Navigating Streamlyne

Proposal Development (PD) is divided into two primary sections, the **Proposal Development Document** and the **Budget Document**. Each of these two documents is further 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 Proposal Document and the Budget Document.



- **Panels**

Panels separate each Tab into categories for different component parts of the proposal and budget, and appear as red bars.



- **Subpanels**

Subpanels are divisions between Panels and appear as gold bars (e.g. Applicant Organization, Performing Organization, etc.).

The screenshot shows a form titled "Organizations, Performance Sites & Collaborators" with a dropdown arrow. It contains four subpanels, each with a gold header bar and a help icon:

- Applicant Organization**: Contains the text "Iowa State University of Science and Technology" and a "Show" button next to "Congressional Districts".
- Performing Organization**: Contains the text "Iowa State University of Science and Technology" and a "Show" button next to "Congressional Districts".
- Performance Site Locations**: Contains a "Location Name" input field and an "Add:" label.
- Collaborators**: Contains a "Location Name" input field and an "Add:" label.

- **Subsections**

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

A vertical list of six subsections, each with a "Show" button and a label:

- Show Person Details
- Show Extended Details
- Show Degrees
- Show Unit Details
- Show Custom Person Data
- Show Proposal Person Certification (Incomplete)

- **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).

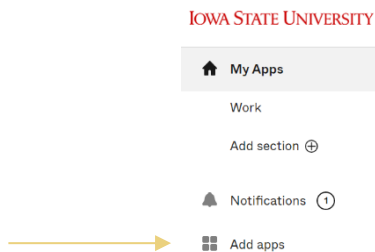
Accessing the Streamlyne Proposal Development and Routing System

The Streamlyne Proposal Development and Routing System Environment can be accessed through Okta at iastate.okta.com/app/UserHome.

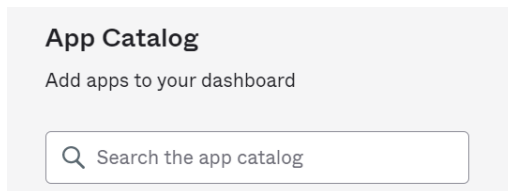
Adding Streamlyne to Okta

To add the Streamlyne icon to Okta:

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



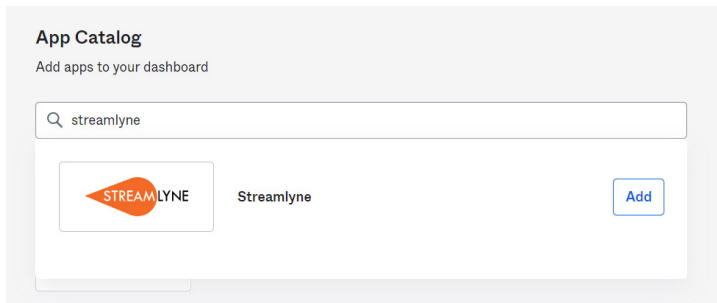
3. Locate the App Catalog search box.



4. Type **Streamlyne** in the search box and click on 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.

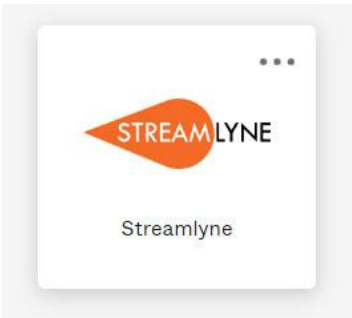


5. The Streamlyne icon will appear on the Okta page.

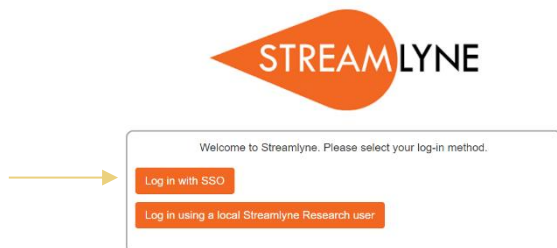
Opening Streamlyne from Okta

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.

☰ ☰ ✓ 🔍 Main Menu ▾ Identity ▾ ✎ Reporting

Message(s) of the Day

Welcome to the Streamlyne Proposal Development and Routing System!

- Action List
- PD/QP (1)
- IP (0)

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

Action List

Click on Action List to expand the list of documents requiring action.

▼ Action List

Action	Id	Number	Type	Title	Route Status	Lead Unit	PIReporter	Delegator	Date Created	Submission Date	Group Request	Log
--------	----	--------	------	-------	--------------	-----------	------------	-----------	--------------	-----------------	---------------	-----

Each item on the action list will display an icon indicating the type of action to be taken.

- ACK – Acknowledge

The user needs to Acknowledge approval of a PD.
(This action is used only when OSPA blanket approves a PD.)



- APP – Approve

The user needs to Approve the PD.



- FYI – For Your Information

The user has been sent an FYI and may review the document and/or clear the FYI as needed.



- COM – Complete

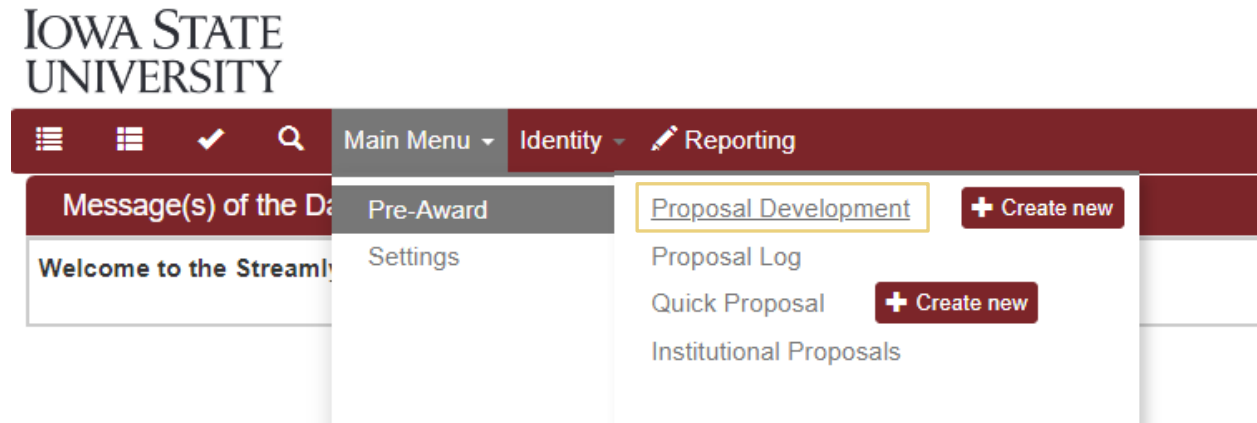
The user needs to complete the document.



Locating an Existing Document

Locating an Existing Proposal Development Document

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



On the Development Proposal Lookup page, any of the PD traits, or a combination of traits with or without wildcards (see page 5), can be used to search for the PD, such as:

- Principal Investigator Username (the net-id of the PI listed on the PD in Streamlyne)
- Proposal Number (the PD number)
- Initiator Username (the net-id of the user who started the PD in Streamlyne)
- Project Title (the title of the proposal as listed in Streamlyne)
- Sponsor Name (the name of the sponsor of the proposal as listed in Streamlyne)

Development Proposal Lookup

The screenshot shows the 'Development Proposal Lookup' search form. It contains various input fields for searching by traits: Principal Investigator Username, All Personnel Full Name, Initiator Full Name, Proposal Number, Proposal State (dropdown), Sponsor Deadline Date From, Internal Deadline Date From, Sponsor Code, Prime Sponsor Code, Lead Unit ID, Award ID, Hierarchy Status, Principal Investigator Full Name, Initiator Username, Proposal Type (dropdown), Proposal Document Number, Project Title, Sponsor Deadline Date To, Internal Deadline Date To, Sponsor Name, Prime Sponsor Name, Lead Unit Name, and Grants.gov Opportunity. At the bottom of the form are three buttons: 'Search', 'Clear', and 'Cancel'.

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

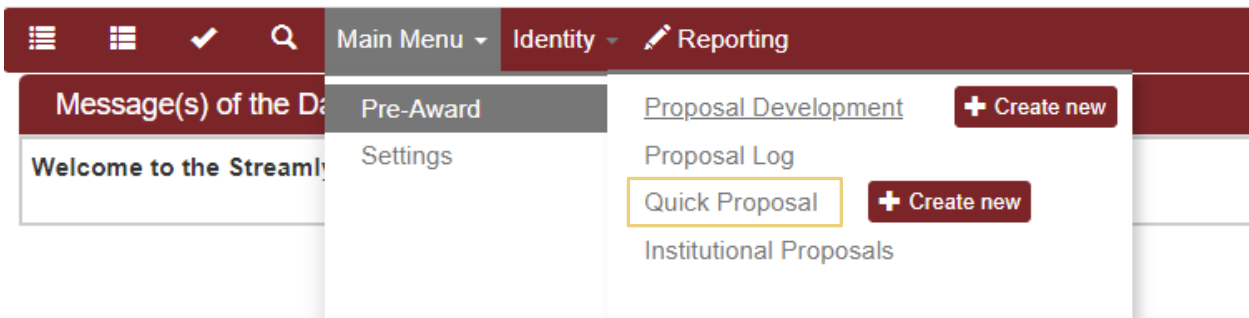
Actions	Proposal Number	Proposal Type	Proposal State	Project Title	Sponsor Code	Sponsor Name	Initiator Username	Principal Investigator	Lead Unit ID	Lead Unit Name	Prime Sponsor Code	Prime Sponsor Name	Sponsor Deadline Date	Award ID	Original Institutional Proposal ID	Grants.gov Opportunity	Hierarchy Status	Proposal Document Number	Revision Other Description
edit view streams	7	New	Canceled	Cows are Cool	001044	NIH-NATIONAL INSTITUTES OF HEALTH	schreck1	James M Reecy	CALSAES-ANS	ANIMAL SCIENCE - CALSAES			12/20/2022			PA-GN-R01	Not in a hierarchy	4134	
edit view streams	8	New	In Progress	Cows: Real or Myth?	001091	NSF-NATIONAL SCIENCE FOUNDATION	schreck1	James M Reecy	CALSAES-ANS	ANIMAL SCIENCE - CALSAES			12/20/2022			PA-GN-R01	Not in a hierarchy	4138	
edit view streams	9	New	In Progress	Cows: Reall	001044	NIH-NATIONAL INSTITUTES OF HEALTH	schreck1	James M Reecy	CALSAES-ANS	ANIMAL SCIENCE - CALSAES			12/20/2022			PA-GN-R01	Not in a hierarchy	4139	

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

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.

IOWA STATE
UNIVERSITY



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)

Quick Proposal Lookup

Quick Proposal Number:

Quick Proposal Status:

Merged With Institutional Proposal:

Title:

Principal Investigator (External Address Book ID):

Sponsor:

Comments:

Deadline Date To:

Quick Proposal Type:

Proposal Merged With:

Created Institutional Proposal:

Principal Investigator:

Lead Unit:

Sponsor Name:

Deadline Date From:

Initiator:

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

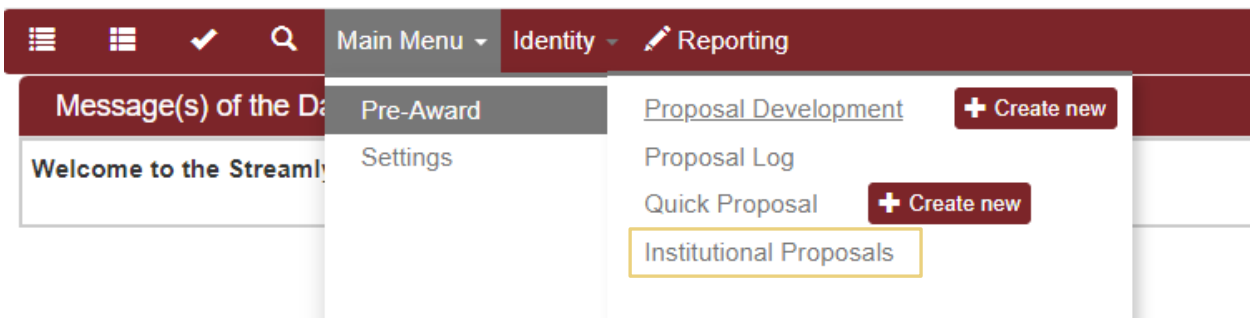
Actions	Quick Proposal Number	Quick Proposal Type	Proposal Log Status	Proposal Merged With	Merged With Institutional Proposal	Created Institutional Proposal	Proposal Type	Title	Principal Investigator	Principal Investigator (Non-Employee)	Lead Unit	Sponsor	Sponsor Name	Comments	Deadline Date	Initiator
edit view streams	00000051	NDA	Pending				New	NDA predicting Super Bowl winner			EDIR-OIC	001431	UNIVERSITY OF NEVADA LAS VEGAS		02/11/2023	Imunmm
edit view streams	00000052	MTA	Pending				New	Super Bowl game jersey	Lynne Marie Mumm		EDIR-OIC	100776	UNDER ARMOUR INC		02/10/2023	Imunmm

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 Proposals Document

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

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On the Institutional Proposals 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)
- Sponsor Name (the name of the sponsor listed on the IP in Streamlyne)
- Principal Investigator Full Name (the name of the PI listed on the IP in Streamlyne)
- Project Title (the title of the proposal as listed in Streamlyne)

Institutional Proposal Lookup

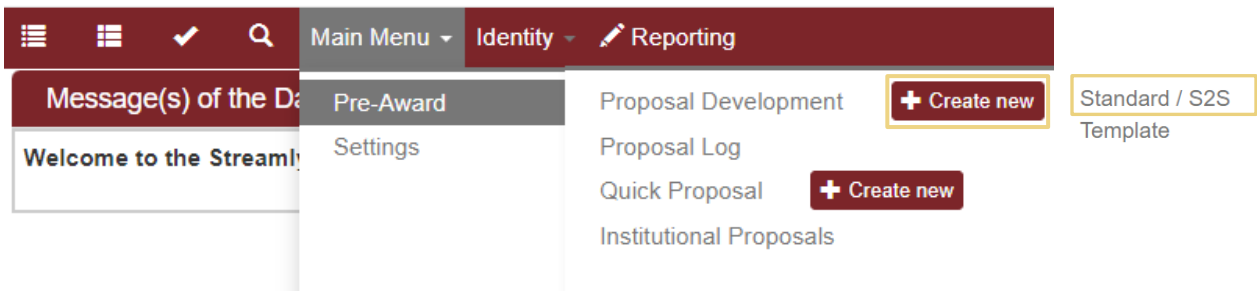
Click the Search button to see a list of all IPs with the requested traits.

Actions	Institutional Proposal Number	Sponsor Proposal ID	Proposal Type	Activity Type	Status	Lead Unit ID	Lead Unit Name	Account ID	Project Title	Sponsor ID	Sponsor Name	Prime Sponsor ID	Prime Sponsor	Principal Investigator
open streams	00113042		New	Scholarships & Fellowships	Funded/Executed	CALS/AES-ANS	ANIMAL SCIENCE - CALS/AES		A Systems Genetics Approach to Identify Epigenetic Variants Associated...	001481	USDA-NATIONAL INSTITUTE OF FOOD & AGRICULTURE (NIFA)			James M Reecy

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 Proposal Development (PD) Document

Each PD 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 PDs are created by clicking the **+ Create new** button next to Proposal Development under the Main Menu Pre-Award option. After clicking the create new button, click Standard/S2S to begin creating the new PD.

Required Fields for Saving Document

Required Fields for Saving Document

In order to "Save" the proposal and obtain a **Proposal Number**, all fields found in the **Required Fields for Saving Document** panel are required as well as the **Anticipated Award Type** field found in the **Sponsor & Program Information** panel.

With the exception of the **Lead Unit**, saved information can be edited prior to submission.

Required Fields for Saving Document

Proposal Number :	<input type="text"/>	* Sponsor Code :	<input type="text"/>
* Proposal Type :	<input type="text"/>	* Project Start Date :	<input type="text"/>
* Lead Unit ID :	<input type="text"/>	* Project End Date :	<input type="text"/>
* Activity Type :	<input type="text"/>	* Submission Type :	<input type="text"/>
* Sponsor Deadline Date :	<input type="text"/>	* Sponsor Deadline Time :	<input type="text"/>
* Project Title :	<input type="text"/>		

The following fields are required and must be completed to save the record without “required fields” errors:

Tab	Panel	Field Name	Field Description	Field Instructions
Proposal	Required Fields for Saving Document	Proposal Type	Identifies the nature of the proposal: New, Continuation, Resubmission, Revision, etc.*	Select from the drop-down box
Proposal	Required Fields for Saving Document	Lead Unit ID	The list of all units for which the initiator is authorized to submit proposals	Select from the drop-down box
Proposal	Required Fields for Saving Document	Activity Type	Identifies the activity type of the proposal: Instruction, Public Service, Research, etc.*	Select from the drop-down box
Proposal	Required Fields for Saving Document	Sponsor Deadline Date	Date the proposal is due to the sponsor	Enter the date in MM/DD/YYYY format or click the calendar icon to select the date
Proposal	Required Fields for Saving Document	Project Title	The formal project title	Enter the title in the text field
Proposal	Required Fields for Saving Document	Sponsor Code	Streamlyne unique identifier for the sponsoring agency	Enter or look up the Sponsor ID for the sponsoring organization


Tab	Panel	Field Name	Field Description	Field Instructions
Proposal	Required Fields for Saving Document	Project Start Date	Anticipated start date of the project	Enter the date in MM/DD/YYYY format or click the calendar icon to select the date
Proposal	Required Fields for Saving Document	Project End Date	Anticipated end date of the project	Enter the date in MM/DD/YYYY format or click the calendar icon to select the date
Proposal	Required Fields for Saving Document	Submission Type	Identifies the proposal as an Application, Pre-Application, or Change/Corrected Application.	Select from the drop-down box
Proposal	Required Fields for Saving Document	Sponsor Deadline Time	The time the proposal is due to the sponsor listed in local ISU time .	Enter in HH:MM AM/PM format or click the clock icon to select the time
Proposal	Sponsor & Program Information	Anticipated Award Type	Identifies the anticipated award type for the proposal: Animal Product Trial, Contract, Grant, ISUF Gift, etc.*	Select from the drop-down box

*See the Appendices for definitions.

To Create a PD Document

1. Initiate a new document by navigating to **Main Menu > Pre-Award > Proposal Development > + Create New > Standard/S2S**.
2. Complete the Required Fields for Saving Document as outlined above.
3. Add the Principal Investigator (PI) I to the PD. (Follow instructions in the Adding Personnel section of the manual, starting on page 32).
4. Save the PD by clicking the Save button at the very bottom of the page.

Note

Once the document is saved, it will remain on your **Action List** as a pending item with a  symbol, prompting you to complete the document at your convenience. The document will remain on your Action List as a COM item until it is submitted for initial review or into routing for final approval.



OSPA recommends adding one additional aggregator at the time of PD initiation. This allows an additional person to have full edit access to this PD, in the case that the initiator is unavailable to perform an action later in processing. Adding an aggregator late in the process will only allow for view access. See page 58 of this manual for instructions for adding additional aggregators in the Permissions Tab

Setting Up an S2S Proposal

Skip this Panel if the proposal is not being submitted to a Grants.gov opportunity via S2S.

Overview

Stages in S2S Setup

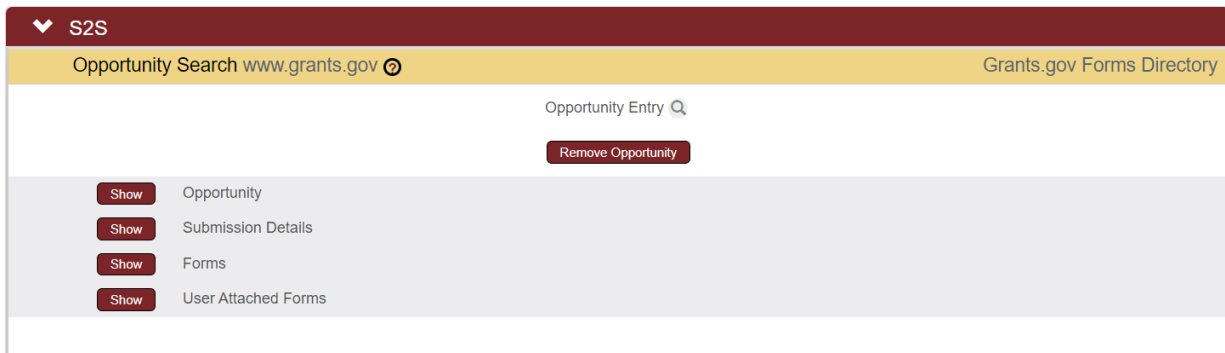
There are three stages to creating a PD for preparation and eventual S2S submission:

1. Link the opportunity to the **PD** on the **S2S** Tab.
2. Using the opportunity instructions, select the optional federal forms to include in the submission package.
3. Identify and access any User Attached Forms required for the submission.

Linking an Opportunity to the Proposal Development Document

Follow these steps to add a Grants.gov opportunity to a proposal:

1. Click the **S2S**  **S2S** Tab.
2. Click the magnifying glass  next to Opportunity Entry.



Note

Is the Opportunity ID or CFDA Number known? If not, click the hyperlink to access the Grants.gov site to find these values.

S2S

Opportunity Search www.grants.gov

- Enter or paste the **Opportunity ID** or the **CFDA Number**, into the appropriate field and then click the Search button.

Opportunity Entry

S2S Provider: Grants.Gov Opportunity ID:

CFDA Number:

- The search results will appear below the lookup window.

Return Value	CFDA Number	Closing Date	Competition Id	Package Id	Instruction Page	Opening Date	Opportunity ID
return value	93.855	08/12/2025	FORMS-G	PKG00075058	https://trainingapply.grants.gov/apply/opportunities/instructions/PKG0...	08/13/2021	PA-GN-R01

- Click the **return value** hyperlink that corresponds to the desired opportunity

Additional Options

- If the wrong opportunity was selected, simply repeat Steps 2 through 4 to select the correct opportunity.
- To submit this application via another method, click the **Remove Opportunity** button to remove the opportunity.

Select Conditionally Required Forms

Follow these steps to identify and include conditionally required forms:

- From within the **S2S** Panel, click the Show button to view the Opportunity Subsection.

Opportunity

Opportunity

Opportunity ID : PA-GN-R01

* Opportunity Title : G.g. Training and NIH Ext-UAT FOA (R01-Clinical Trial Not Allowed)

Submission Type : Application

S2S Revision Type :

CFDA Number : 93.855

Competition Id : FORMS-G

Package Id : PKG00075058

Opening Date : 08/13/2021

Closing Date : 08/12/2025

Instruction Page : https://trainingapply.grants.gov/apply/opportunities/instructions/PKG00075058-Instructions.pdf

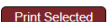
Schema URL : https://trainingapply.grants.gov/apply/opportunities/schemas/applicant/PKG00075058.xsd

S2S Provider : Grants.Gov

2. Click the **Instruction Page** hyperlink to download the instructions in PDF

3. From within the **S2S Panel**, click on the **Show** button  **Forms**  to expand the **Forms Subsection**.

Form Name	Mandatory	Include	Type	Select to Print: (All Included None)
SF424 (R & R) V5.0	Yes	Yes	Autogenerated	<input type="checkbox"/>
Project/Performance Site Location(s) V4.0	Yes	Yes	Autogenerated	<input type="checkbox"/>
Research And Related Other Project Information V1.4	Yes	Yes	Autogenerated	<input type="checkbox"/>
Research and Related Senior/Key Person Profile (Expanded) V4.0	Yes	Yes	Autogenerated	<input type="checkbox"/>
PHS 398 Cover Page Supplement V5.0	Yes	Yes	Autogenerated	<input type="checkbox"/>
PHS 398 Research Plan V4.0	Yes	Yes	Autogenerated	<input type="checkbox"/>
PHS Human Subjects and Clinical Trials Information V3.0	Yes	Yes	Webform	<input type="checkbox"/>
Research & Related Budget V3.0	No	<input type="checkbox"/>	Autogenerated	<input type="checkbox"/>
R & R Subaward Budget Attachment(s) Form 5 YR 30 ATT V3.0	No	<input type="checkbox"/>	Autogenerated	<input type="checkbox"/>
PHS 398 Modular Budget V1.2	No	<input type="checkbox"/>	Autogenerated	<input type="checkbox"/>
PHS Assignment Request Form V3.0	No	<input type="checkbox"/>	Autogenerated	<input type="checkbox"/>



4. The **Forms Subsection** displays all mandatory and optional forms in this opportunity package. Conditionally required fields are marked “No” in the mandatory column. To include these forms, check the checkbox in the Include column.



Tip

Check “Include” early for Forms that are not Mandatory, but you have determined should be included according to the guidelines or the project. If “Include” is not checked prior to PD finalization, certain required data fields or attachments may not be recognized as needed and will not be identified as missing in Data Validation.


Preparing a Proposal Development Document

Prerequisites

1. The minimum fields required for saving have been completed.
2. The S2S setup has been completed, if applicable.

Proposal Tab > Required Fields for Saving Document > Institutional Fields Conditionally Required Subpanel

Institutional Fields Conditionally Required

Original Institutional Proposal ID : 

Revision Type :

Revision Other Description :

1. If the Proposal Type is a **Continuation or a Supplement**, enter the Streamlyne Institutional Proposal (IP) Number (or GoldSheet # from the Legacy Systems with two leading zeros) of the **original** award into the Original Institutional Proposal ID field, or click the magnifying glass to search for and select the correct value.
2. If the Proposal Type is **Resubmission or Revision** for a previous proposal that was not yet awarded, enter the Streamlyne Institutional Proposal (IP) Number (or GoldSheet # for Proposals from the Legacy Systems with two leading zeros) in the Original Institutional Proposal ID field, or click the magnifying glass to search for and select the correct value. If you select "Revision", skip to step 4.
3. If the Proposal Type is **Revision**, select the best-fitting **Revision Type** from the drop-down box.
 - a. Continue to the next step if you selected **Other (Specify)** here.
 - b. Enter a brief description of the revision in **Revision Other Description** field.


select
Decrease Award
Decrease Award & Decrease Duration
Decrease Award & Increase Duration
Decrease Duration
Increase Award
Increase Award & Decrease Duration
Increase Award & Increase Duration
Increase Duration
Other(Specify)

Proposal Tab > Sponsor & Program Information Panel

▼ Sponsor & Program Information

Sponsor & Program Information ⓘ

Sponsor Deadline Type :	<input type="text" value="select"/>	Notice of Opportunity :	<input type="text" value="select"/>
Internal Deadline Date :	<input type="text"/>	Opportunity ID :	<input type="text"/>
Sponsor Name :		Opportunity Title :	<input type="text"/>
Prime Sponsor Code :	<input type="text"/>	CFDA Number :	<input type="text"/>
Research Type :	<input type="text" value="select"/>	CFDA Title :	<input type="text"/>
NSF Science Code :	<input type="text" value="select"/>	Prev Grants.Gov Tracking ID :	<input type="text"/>
NSF Division Code :	<input type="text"/>	Agency Routing Identifier :	<input type="text"/>
Sponsor Program Code :	<input type="text"/>	Sponsor Proposal ID :	<input type="text"/>
Does this Proposal include Subrecipients? :	<input type="checkbox"/>	Sponsor Award ID :	<input type="text"/>
* Anticipated Award Type :	<input type="text" value="select"/>		

1. Click on **Sponsor & Program Information** to expand the Panel. 
2. Click on the **Sponsor Deadline Type** drop-down box and select **Receipt** if the proposal has a fixed submission deadline or select **Target** if the proposal has a soft submission deadline.
3. Enter an **Internal Deadline Date** if needed. This date can be used when requesting a proposal be completed, reviewed, and approved prior to the sponsor deadline date.
4. The **Sponsor Name** field will auto-populate from the Sponsor Code field in the Required Fields for Saving Document Panel.
5. A **Prime Sponsor** is the organization from which funds will originate if that organization differs from the Sponsor. If the proposal has a prime sponsor, click the Prime Sponsor Code magnifying glass to search for and select the correct value.

Note

The prime sponsor is always the organization where the funds originate, if other than the Sponsor. Federal flow-through funding should always have a prime sponsor selected.

6. If the Activity Type is Research, click on the **Research Type** drop-down box and select the appropriate type:

Research Type	Definition
Applied	Applied research is original investigation undertaken in order to acquire new knowledge. It is directed primarily towards a specific, practical aim or objective.
Basic	Basic research is experimental or theoretical work undertaken primarily to acquire new knowledge of the underlying foundations of phenomena and observable facts, without any particular application or use in view.
Development	Experimental development is systematic work, drawing on knowledge gained from research and practical experience and producing additional knowledge, which is directed toward producing new products or processes or toward improving existing products or processes.

7. If the Activity Type is Research, click on the [NSF Science Code](#) drop-down box and select the appropriate NSF Science Code for proposals with an Activity Type of Research. (<https://www.nsf.gov/statistics/srvyherd/surveys/srvyherd-2022.pdf>). Enter the Code Description in Streamlyne, not the associated code.

NSF Science Code	Description
B.01	Aerospace, Aeronautical and Astronautical Engineering

Note

This field is **required** for all proposals with the Activity Type of Research and is not limited to NSF proposals.

8. If the proposal sponsor or prime sponsor is NSF, enter the appropriate **NSF Division Code** in the text field, otherwise leave the field blank. The NSF Division code can be found in the RFA, or in the Research.gov application. A list of possible options can also be found in this list, under the applicable Directorate. <https://new.nsf.gov/about/directorates-offices#eng>


9. If the opportunity has an additional designation beyond the Opportunity ID, enter the appropriate designation in the **Sponsor Program Code** text field, otherwise leave the field blank (e.g. for a USDA NIFA AFRI enter Program Code A1102 or for DOE-FOA-0002864 AMMTO-BTWO and OE FY22 Multi-Topic FOA; Topic Area 1 enter Program Code Next Generation Materials and Manufacturing Processes).
10. If the Proposal includes subrecipients, click the checkbox for **Does this proposal include Subrecipients?**
11. If the **Anticipated Award Type** has not yet been selected, do so at this time. See complete list with definitions on page 111 of this manual.
12. Click on the **Notice of Opportunity** drop-down box and select the opportunity type from the list.
13. The **Opportunity ID** field will auto-populate if the proposal has been linked to a Grants.gov opportunity, and that opportunity has a CFDA number. If this is the case, skip to the next step. Otherwise, enter the **Opportunity ID** in the text box.
14. The **Opportunity Title** field will auto-populate if the Proposal has been linked to a Grants.gov opportunity, and that opportunity has a CFDA number. If this is the case, skip to the next step. Otherwise, enter the **Opportunity Title** in the text box, if applicable.
15. The **CFDA Number** field may auto-populate if the Proposal has been linked to a Grants.gov opportunity, and that opportunity has a CFDA number. If the number did not auto-populate, enter the **CFDA Number** in the format NN.NNN.
16. If the proposal is a Changed/Corrected submission, or resubmission of a previous Grants.gov submission AND is noted in the guidelines as required, enter the **Prev. Grants.Gov Tracking ID** in the text field.
17. If there is an **Agency Routing Identifier**, enter it in the text field (e.g. NIH NOSI number).
18. If the sponsor has assigned a Proposal ID, enter this in the **Sponsor Proposal ID** field. Usually, this ID is available when a proposal is resubmitted, a renewal, or revised.
19. If the proposal is associated with an existing award and an award ID number has been provided by the sponsor, enter it in the **Sponsor Award ID** field. One may be available when a proposal is a supplement or continuation.

Proposal Tab > Organizations, Performance Sites & Collaborators Panel

The data recorded in the **Organizations, Performance Sites & Collaborators** Panel is required for submissions.

The screenshot shows a web interface with a dark red header bar containing a dropdown menu labeled "Organizations, Performance Sites & Collaborators". Below the header, there are four main sections, each with a yellow header bar and a search icon:

- Applicant Organization**: Shows "Iowa State University of Science and Technology" with a search icon. Below it is a "Show" button and a "Congressional Districts" dropdown menu.
- Performing Organization**: Shows "Iowa State University of Science and Technology" with a search icon. Below it is a "Show" button and a "Congressional Districts" dropdown menu.
- Performance Site Locations**: A table with columns "Location Name", "Address", and "Actions". Below the table is an "Add:" label, a search field with "(Select)" and a magnifying glass icon, and an "Add" button.
- Collaborators**: A table with columns "Location Name", "Address", and "Actions". Below the table is an "Add:" label, a search field with "(Select)" and a magnifying glass icon, and an "Add" button.

- 1 Click on **Organizations, Performance Sites & Collaborators** to expand the Panel. 
- 2 The **Applicant Organization** defaults to Iowa State University of Science and Technology. If the proposal has an Anticipated Award Type of **ISUF Gift** or **501(c)(3) Sponsored Project**, change the Applicant Organization to the **Iowa State University Foundation** by clicking the magnifying glass to search for and select the correct value. For all other Anticipated Award Types, the Applicant Organization should remain **Iowa State University of Science and Technology**. (Congressional Districts are addressed in the next section of this manual.)
- 3 The **Performing Organization** will always remain Iowa State University of Science and Technology and should not be modified.
- 4 **S2S Only**: If submitting the proposal through the S2S portal to Grants.gov, and if the Project/Performance Site Location(s) form requires performance site locations in addition to the Iowa State University location, click the magnifying glass to search for and select the location where the work will take place in the **Performance Site Locations** field. Note, Performance Sites do not need to be added when a Subrecipient Organization is entered in the Collaborators section, described below.

If this does not apply to the proposal, skip to step 6.

5 Click the **Add** button to complete the action.

Repeat Steps 4 and 5 until all performance sites have been added.

6 If applicable, list organizations that will be affiliated with the project in the **Collaborators** Subpanel. Include any subrecipient organizations, and third-party cost share providers. (This does not include consultants.) To add an organization, click the magnifying glass to search for and select the correct value. Check the box next to the collaborator if they will be included as a Performance Site Location. **All subrecipients must be added in this Subpanel.**

Note

If the organization to be entered is not yet available in the collaborators search, submit a **New Organization (Subrecipient)** form, found on the home page of the OSPA website. Be prepared to enter the Organization Name, Address with a full 9-digit zip code, UEI (if available) and the Congressional District of that Organization (if submitting to a federal opportunity).

The screenshot shows the top navigation area of the OSPA website. On the left, there is a header for the 'Office of Sponsored Programs Administration at Iowa State University' and a section titled 'Our Mission' with a brief description. On the right, there is a sidebar titled 'Streamlyne Request Forms' containing a list of links: 'New Sponsor', 'New Organization (Subrecipient)', 'Update Organization (Subrecipient) Address', 'New External Person', and 'New Credit Split for RU F&A Distribution'.

If this does not apply to the proposal, skip to the next process.

7 Click the **Add** button to complete the action.

Repeat Steps 6 and 7 until all collaborators have been added.

The screenshot shows a table titled 'Collaborators' with the following structure:

	Location Name	Address	Actions
Add:		(Select) <input type="text"/>	<input type="button" value="Add"/>
1	UNIVERSITY OF CALIFORNIA DAVIS	UNIVERSITY OF CALIFORNIA DAVIS <input type="text"/> 1850 RESEARCH PARK DR STE 300, DAVIS, CA 95618-6153	<input type="button" value="Delete"/>

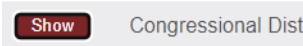
Below the table, there is a 'Show' button and a link to 'Congressional Districts'.

Proposal Tab > Organizations, Performance Sites & Collaborators Panel > Congressional Districts Subsections

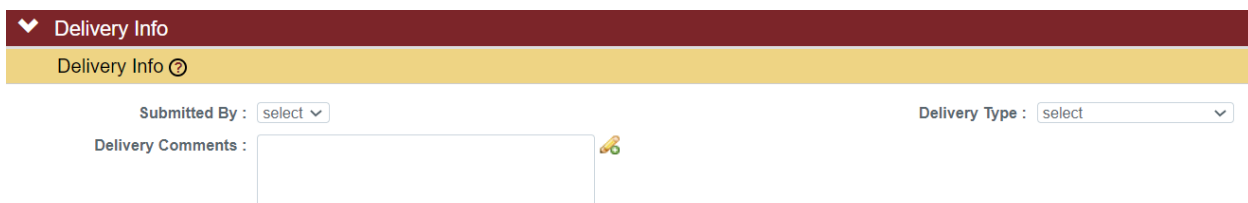
The **Congressional Districts** Subsection will appear for each address listed in the **Organizations, Performance Sites & Collaborators** Panel of the **Proposal** Tab.

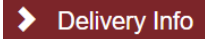
If you have added performance sites or collaborators and are submitting the proposal via S2S, review or add the congressional district(s) associated with each address and organization, as described below. Otherwise, skip to the next process.



1. Click the **Show** button next to the **Congressional Districts** Subsection you wish to review or edit. 
2. The congressional district for the address will enter by default if it is in the system. To remove the defaulted congressional district, click the corresponding **Delete** button.
3. To add a new/additional congressional district, click the **State** drop-down box and select the appropriate value.
4. Enter the **District Number**.
5. Click the **Add** button to complete the action.
6. Repeat Steps 1 through 5 until all congressional districts have been added to performance locations and collaborators.

Proposal Tab > Delivery Info Panel



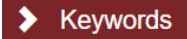
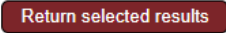
1. Click on **Delivery Info** to expand the Panel. 
2. Click on the **Submitted By** drop-down box to indicate whether the proposal will be submitted by the ISU Foundation, OSPA, or the PI.
3. Click on the **Delivery Type** drop-down box to indicate whether the proposal will be submitted via Email, Other Electronic System, Research.gov, or Streamlyne S2S.

4. Enter the other electronic system name in the **Delivery Comments** text field, if applicable.


Proposal Tab > Keywords Panel

The **Keywords** Panel is used to document proposals that involve foreign countries. Countries should be added when the sponsor is a foreign entity, a project paid/unpaid collaborator will perform work in a foreign country, the country is the home country of any project personnel who are not permanent residents of the United States, a subaward recipient is a foreign entity, the work is occurring in a foreign country, or the work product will be used in a foreign country. International travel to conferences outside of the U.S. is not considered foreign involvement. If involvement in foreign countries is answered Yes, foreign countries are to be listed as Keywords in Streamlyne.

Add:	Description	Actions
1	(select) Q	<input type="checkbox"/>
	ANTARCTICA	<input type="checkbox"/> <input type="button" value="Select All"/> <input type="button" value="Delete Selected"/>

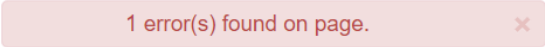
1. Click on **Keywords** to expand the Panel. 
- If no foreign countries are involved, skip to the next process.
2. Search for countries by clicking the magnifying glass under **Description**.
3. Enter a country name in the Description field and click the Search button; or leave the Description field blank and click search to generate a list of countries.
4. Click the checkbox next to the appropriate countries.
5. Click the **Return selected results** button to populate the selected countries to your proposal. 

Saving the Proposal Data

1. Click the **Save** button at the bottom of the page. 

- Streamlyne will validate that all system required fields are populated.

If you are missing minimum required fields on your Proposal, the system will display a message with the number of errors at the top of the page, as well as an error message



at the section level and the field level.

- Errors found in this Section:**
 - Proposal Type (Proposal Type) is a required field.

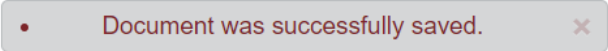
If necessary, complete the missing fields and click the **Save** button again.

Required Fields for Saving Document ?

Proposal Number : 230

* Proposal Type :

- Confirm that your proposal is error-free by checking to make sure the success message displays above the **Required Fields for Saving Document** Panel.



Key Personnel Tab

The **Key Personnel** Tab is used to identify the **Principal Investigator** (PI) for the proposed project as well as any **Co-Investigators** (Co-PIs) or **Key Persons** who will contribute significantly to the project.

Adding Key Personnel to the Proposal


▼ Key Personnel

Key Personnel ?

Internal User Name
 External Address Book ID

* Person	Unit	* Proposal Role	
Add:		<input type="text" value="select"/>	<input type="button" value="Add"/> <input type="button" value="Clear"/>

Principal Investigator is a required field prior to submission. Only one PI is allowed.

1 Click on the **Key Personnel**  **Key Personnel** Tab.

2 In the **Key Personnel** Panel, select the button for **Internal User Name** (Employee) or **External Address Book ID** (Non-Employee), then click on the magnifying glass to look up the key personnel to be added to the proposal.

If an **External Key Person** is not found, they may need to be added to the Streamlyne system. Use the “New External Person” request form on the OSPA Home page to initiate this request.



Note

If the user name (net-id) of the ISU employee being added to the proposal is known, enter the name in the Internal User Name search field and then click on the Proposal Role drop-down box. This will populate the person without doing a full search.

3 Click on the **Proposal Role** drop-down box to select the key person’s role.

Note

A **Proposal** must have one and only one person with the **PI** role. Additional investigators can be added as **Co-Investigators**.

If the proposal is being submitted to the National Institutes of Health (NIH), the system will display a **Multiple PI** checkbox when a key person is identified as a **Co-Investigator**. If the intent is to include the Co-Investigator as an additional PI, check the box for **Multiple PI**. Leave unchecked if the person will remain as Co-Investigator.

	* Person	Unit	* Proposal Role	Multiple PI
Add:	Criminal J Researcher	Criminal Justice	Co-Investigatc ▼	<input checked="" type="checkbox"/>

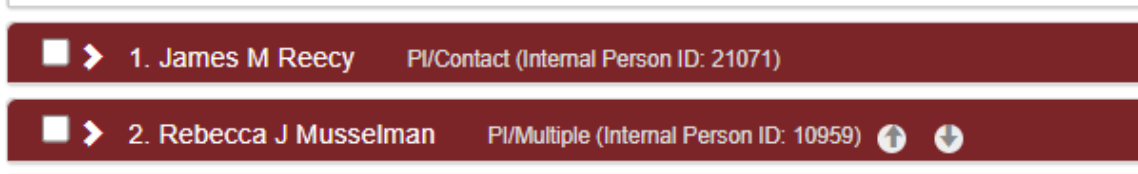
4 If a **Key Person** was selected in Step 3, enter brief description or position title in the **Key Person Role** field.

* Proposal Role	* Key Person Role
Key Person ▼	<input type="text"/>

- 5 Click the **Add** button to add the key personnel to the proposal.
- 6 Repeat Steps 2 through 5 until all **Key Personnel** are identified.

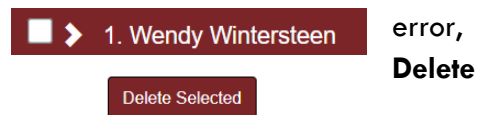
Notes

The order of these Key Personnel entries can be adjusted if desired. Click on the small up or down arrow next to the person to change the order.



Streamlyne adds a new named personnel Panel for each key person added to the proposal.

If a PI, Co-PI, or Key Person has been added in click the checkbox on the named Panel and click the **Selected** button at the bottom of the page.



Updating Key Personnel Attributes > Named Personnel Panel(s)

1. Wendy Wintersteen Principal Investigator (Internal Person ID: 21086)

Wendy Wintersteen ?

Show	Person Details
Show	Extended Details
Show	Degrees
Show	Unit Details
Show	Custom Person Data
Show	Proposal Person Certification (Incomplete)

For each **Key Personnel** (PI, Co-PIs, and Key Persons) added to a proposal, a new named personnel Panel is generated and auto-populates with data from Workday HR. Auto-populated data can be modified or added as needed in the Panel Subsections. On proposals submitted via S2S, many fields in the personnel Subsections map to fields in the S2S forms.

Note

Changing auto-populated data, or adding new data, in the Named Personnel Panel Subsections will change that data only for this **Proposal** and will not overwrite the source data (from Workday HR) for future proposals.

Person Details

1. To change the role of the **PI** or **Co-PIs** on the proposal, click the **Show** button on the **Person Details** Subsection, and select the correct role from the **Proposal Person Role Id** drop-down box.
2. Named personnel may submit proposals under a name that differs from their legal name. To update the submission name, click the **Show** button on the **Person Details** Subsection, and update the **First Name**, **Middle Name**, and **Last Name** fields with the name used for submissions.
3. To add a Key Personnel's eRA Commons User Name, click the **Show** button on the **Person Details** Subsection, and enter the user name in the **eRA Commons User Name** text field.
4. Check that the addresses are complete for all Key Personnel, including a 9-digit zip code when this is a S2S submission.
5. Once any updates are made to the **Person Details** Subsection, click the **Save** button at the bottom of the screen.

Extended Details

1. For proposals requiring citizenship or visa information, click the **Show** button on the **Extended Details** Subsection to view the person's **Citizenship Type** and **Has Visa** indicator.
2. Once any updates are made to the **Extended Details** Subsection, click the **Save** button at the bottom of the screen.

Note

Any additional fields in the **Person Details**, **Extended Details**, or **Degrees** Subsections not noted above may be entered or updated as needed.

Unit Details

1. To see or change the units listed for each Key Personnel, click the **Show** button on the **Unit Details** Subsection.

Note

The first unit listed for the PI will be the **Lead Unit** for the proposal.

The second unit listed for the PI, and first unit for each Co-PI or Key Person, will be their **Supervisory Organization** (Sup Org) from Workday HR.

If the PI, Co-PI, or Key Person is **Faculty**, the next unit listed will be their first **Faculty Appointment** in Workday HR.

The order the units may differ from the order above; however, the order of the units does not impact the proposal.

2. To add any additional units (such as a Center), click the magnifying glass under **Unit Name** to search for and return the unit which needs to be added, and click the **Add** button.

Unit Details		
Unit Name	* Unit Number	Actions
Add: (select) <input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Note

If you know the unit code (e.g. SVPP-WISE) of the unit to be added, type it into the **Unit Number** text box and click the **Add** button. Entry of the unit code is case sensitive.

3. To delete any units, click the **Delete** button next to each unit you wish to remove from the person.

Note

For the Lead Unit under the PI, no Delete button is available. To change the Lead Unit, copy the proposal to a new document with a new Lead Unit. For more information see section Proposal Actions > Copy to New Document.

Custom Person Data

1. To see the key personnel's **COI Disclosure Date**, click the **Show** button on the **Custom Person Data** Subsection, and then click the **Show** button on the **COI Disclosure Date** Subsection.

4. Wendy Wintersteen Co-Investigator (Internal Person ID: 21086)

Wendy Wintersteen

Show Person Details

Show Extended Details

Show Degrees

Show Unit Details

Hide Custom Person Data

Hide COI Disclosure Date

COI Disclosure Date

Full Group Name: COI Disclosure Date

COI Disclosure Date: MM/DD/YYYY

Show Proposal Person Certification (Incomplete)

Combined Credit Split

Proposal Person Certification

1. Key Personnel will complete the Proposal Person Certification as part of the workflow routing and approval process.

Updating Key Personnel > Combined Credit Split Panel

Combined Credit Split			
Combined Credit Split			
	Financial	Incentive	Contribution
Theodore John Heindel	<input type="text" value="50.00"/>	<input type="text" value="50.00"/>	<input type="text" value="50.00"/>
ENG-COMFRE - CENTER FOR MULTIPHASE FLOW RESEARCH AND EDUCATION- ENG	<input type="text" value="50.00"/>	<input type="text" value="100.00"/>	<input type="text" value="100.00"/>
ENG-ME - MECHANICAL ENGINEERING - ENG	<input type="text" value="50.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Unit Total:	100.00	100.00	100.00
Carolyn Joy Dill	<input type="text" value="50.00"/>	<input type="text" value="50.00"/>	<input type="text" value="50.00"/>
CALS/AES-CALSAD - AG AND LIFE SCI ADMINISTRATION - CALS/AES	<input type="text" value="100.00"/>	<input type="text" value="100.00"/>	<input type="text" value="100.00"/>
Unit Total:	100.00	100.00	100.00
Totals			
Investigator Total:	100.00	100.00	100.00

[Recalculate](#)

- For each project key personnel, indicate the percentage of credit allocated for **Financial**, **Incentive**, and **Contribution**, by assigning a value between 0.00 and 100.00 (on the gray bars). If only one key person is assigned, enter 100 for all credit categories.

Credit Type	Definition
Financial	Percentage of requested project funding that each PI and Co-PI will be allocated or will manage. The total of the financial percentages for all PI/Co-PIs must equal 100%.
Incentive	The F&A cost incentive program was established to encourage PIs to obtain full F&A recovery on awards. Fifteen percent of the F&A charged on a qualifying award is credited to the incentive worktag(s). In order for incentive to be distributed, an award must use the full and allowable F&A (IDC) rate. If the sponsor has a published rate that limits F&A, this is considered to be full and allowable. If incentive will not be received, please enter 100% for the PI to satisfy system requirements.

Credit Type	Definition
Contribution	Percentage of overall project work that each PI and Co-PI contributes to the proposed project. The total of the Contribution percentages for all PI/Co-PIs must equal 100%. This percentage is used in calculating the RU F&A Distribution. Not to be confused with ISU Effort Certification percentages in Workday.

- If you have a single project key personnel assigned to more than one unit, indicate how the person’s contribution should be split across units by assigning a value between 0.00 and 100.00 for the Contribution column. The Financial and Incentive columns do not need to be split between units and 100% can be entered in the first unit for each person.
- The **Unit Total** should sum to 100.00 for each person, and the **Investigator Total** should sum to 100.00 for each column.

Click the **Recalculate** button to sum the Unit Totals and Investigator Totals.

Updating Key Personnel > RU F&A Panel

The **RU F&A Distribution** Panel is calculated automatically using each Key Personnel’s **Contribution** from the **Combined Credit Split** Panel and their 10/31 payroll allocation from the current year at the time of proposal.

Combined Credit Split			
Combined Credit Split ⓘ			
	Financial	Incentive	Contribution
Theodore John Heindel	<input type="text" value="100.00"/>	<input type="text" value="100.00"/>	<input type="text" value="100.00"/>

For example:

If Dr. Heindel had 100% contribution on a proposal, and his 10/31 payroll allocation was divided between the College of Engineering and the Vice President for Research Office, the RU F&A Distribution Panel would automatically display the calculation.

If the contribution was split between multiple key personnel, each of their 10/31 payroll allocations would be split using their associated contribution percentage as noted in the Combined Credit Split Panel. The **RU F&A Distribution** Panel should always total 100% or 100.01%.

RU F&A Distribution	
RU F&A Distribution	
Theodore John Heindel	
ENG - COLLEGE OF ENGINEERING	80.60
VPR - VICE PRESIDENT FOR RESEARCH	19.40
Total	
Investigator Total:	100.00

Note

If an individual does not have a 10/31 payroll allocation split (e.g. they were hired after 10/31, they are emeritus, etc.), their RU F&A Distribution will show up with no amounts. This must be corrected before Workflow routing. Please submit a request using the Streamlyne Request Form on the OSPA Website:

IOWA STATE UNIVERSITY
Office of Sponsored Programs Administration

Home > Welcome to the Office of Sponsored Programs Administration at Iowa State University

Streamlyne >

Proposals/Pre-Award >

Awards/Post-Award >

Policies >

Our Mission
The Office of Sponsored Programs Administration (OSPA) promotes and facilitates the research, education, and outreach missions of Iowa State University by supporting and administering research and sponsored programs.

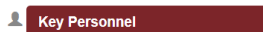
Streamlyne Request Forms

- New Sponsor
- New Organization (Subrecipient)
- Update Organization (Subrecipient) Address
- New External Person
- New Credit Split for RU F&A Distribution

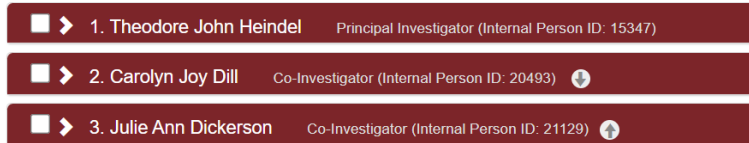
Updating Key Personnel > Reordering Key Personnel on the Proposal

When **Key Personnel** are added to a proposal, the entries are listed in the order added, except for the **PI**, whose entry will always be listed first. If you need to change the order in which the **Key Personnel** display, print on forms, and are included on **S2S** submissions to Grants.gov, follow the steps below.

1. Click on the **Key Personnel** Tab.



2. If a **PI** and at least two other personnel have been added to the proposal, up and down arrows display next to the names of personnel added to the proposal.




To move a **Person** up in the list, click on the **up arrow** after their Internal Person ID.

To move a **Person** down in the list, click on the **down arrow** after their Internal Person ID.

3. Once you have the **Personnel** in the correct order for the proposal, click the **Save** button to save your changes.

Special Review Tab

The **Special Review** functionality is designed to record human subject research and/or animal research on a proposal.


1. Click on the **Special Review** Tab. 
2. In the **Special Review** Panel, click on the **Type** drop-down box to select **IRB-Human Subjects** or **IACUC-Vertebrate Animals**.
3. Click on the **Approval Status** drop-down box and select **Pending**.

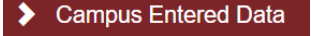
Note

Approval Status selections other than Pending may be entered if desired, or if necessary for an S2S form, but this is not required by OSPA or ISUF for proposal approval.

4. Click the **Add** button to add the special review item to the proposal.
5. Repeat Steps 2 through 4 until all applicable special reviews are recorded.

Custom Data Tab

1. Click on the **Custom Data** Tab. 

2. Click on **Campus Entered Data** to expand the Panel. 
3. If one of the key personnel on the proposal is the director of an ISU Center, and that individual wants their incentive to go into their Center Director Incentive account (ISU Worktag), rather than their Principal Investigator Incentive account (ISU Worktag), enter a **Y** in the **Center Director Incentive** text field.

If not, skip to the next question.

4. If the proposal includes work conducted off-campus, enter the location in **Performance Site – Off-campus Performance Site(s)** text field (e.g. Villisca, Iowa or Toronto, Canada).
5. Click the magnifying glass after the **Performance Site – Primary ISU Site** text field to select the correct building, field, or farm location where the largest portion of the work at ISU will be taking place. Click the **return value** link to add the **Primary ISU Site** to the proposal.

Note

All proposals must have a **Primary ISU Performance Site** and may have both an off-campus Performance Site and a Primary ISU site.

6. If the proposal is part of a current ISU Award, enter the current Worktag number into the **Worktag/Account # - Current** text field. This would be used with **Continuation** and **Supplement** Proposal Types.

If not, skip to the next question.

7. If the proposal is a part of a previous ISU Award, enter the previous Worktag number into the **Worktag/Account # - Previous** text field. This could be used with **New** and **Renewal** Proposal Types.

Abstracts & Attachments Tab

This section acts as a repository for all proposal attachments, including attachments required as part of a S2S submission. A user can make updates to the **Abstracts & Attachments** Tab while another user is working in the **Proposal** Tab, and a third user is working in the **Budget Document** (not the Budget Versions Tab in the Proposal Document). When one user is updating the **Abstracts**

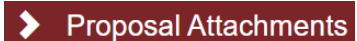
& **Attachments** Tab, the users working on the other Panels of the **Proposal Document**, or on the **Budget Document**, will see a message informing them that the **Narrative** section (i.e. Abstracts & Attachments Tab) is locked for editing.

Abstracts & Attachments Tab > Proposal Attachments Panel

The **Proposal Attachments** Panel stores all documents that will be submitted to the sponsor as part of the proposal package. Note that this is NOT the section for attaching and transmitting **S2S/Grants.gov** forms, though any ancillary attachments required to support **S2S/Grants.gov** forms should be uploaded here.

The screenshot shows the 'Proposal Attachments (0)' panel. At the top, there is a dark red header with a white downward arrow and the text 'Proposal Attachments (0)'. Below this is a yellow bar with the text 'Add Proposal Attachments' and a circular icon. The main form area is white and contains several fields: 'Attachment Type' (a dropdown menu with 'select' in it), '* Status' (a dropdown menu with 'select' in it), 'Uploaded By' (a text input field), 'Posted Timestamp' (a text input field), 'Comments' (a text area with a small icon to its right), '* File Name' (a 'Choose File' button and the text 'No file chosen'), 'Contact Name' (a text input field), 'Email Address' (a text input field), 'Phone Number' (a text input field), and 'Description' (a text area with a small icon to its right). At the bottom center of the form are two buttons: 'Add' and 'Reset'.

1. Click on **Proposal Attachments** to expand the Panel.



2. Click the **Attachment Type** drop-down box and select the most appropriate value.

Note

If you are submitting a Grants.gov proposal through **S2S**, then the list of available **Attachment Types** will include those that are mandatory or conditionally required as part of the submission for the opportunity identified on the **S2S** Tab.

3. Click the **Choose File** button and select the file to upload.
4. Click the **Status** drop-down box and indicate whether the document is complete or incomplete.

Note

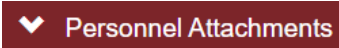
The status must be marked **Complete** before final submission and approval.

5. Click the **Add** button to complete the action.

6. Repeat steps 2-5 until all necessary sponsor attachments have been added. If no additional Proposal Attachments are needed, skip to the next Panel.
7. To open a PDF version of the attachment in another window, click the **Show** button next to the filename of the attached file, then click the **View** button.
8. To delete any attachment, click the **Delete** button.
9. To replace an existing attachment with an updated version, first click the **Replace** button.
10. Click the **Choose File** button and select the file to upload.
11. Click the **Add** button to complete the replacement.

Abstracts & Attachments Tab > Personnel Attachments Panel

The **Personnel Attachments** Panel stores documents specific to individual **Key Personnel** listed on the Key Personnel Tab.

1. Click on **Personnel Attachments** to expand the Panel. 
2. Click the **Person** drop-down box and select the key person to whom the attachment will pertain.

Note

If the key person is not listed in the **Person** drop-down box, return to the **Key Personnel** Tab to add the key person to the proposal.

3. Click the **Attachment Type** drop-down box and select the attachment type.
4. Click the **Choose File** button and select the file to upload.
5. Click the **Add** button to complete the attachment process.
6. Repeat steps 2-5 until all necessary Personnel Attachments have been added. If no additional Personnel Attachments are needed, skip to the next Panel.

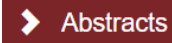
7. To open a PDF version of the attachment in another window, click the **Show** button next to the filename of the attached file, then click the **View** button.
8. To delete any attachment, click the **Delete** button.
9. To replace an existing attachment with an updated version, first click the **Replace** button.
10. Click the **Choose File** button and select the file to upload.
11. Click the **Add** button to complete the replacement.

Abstracts & Attachments Tab > Internal Attachments Panel

The **Internal Attachments** Panel stores documents that will not be submitted to the sponsor. These documents may include the guidelines, F&A Waiver, Cost-Share Form, etc.

1. Click on **Internal Attachments** to expand the Panel.
2. Click the **Attachment Type** drop-down box and select the attachment type.
3. Click the **Choose File** button and select the file to upload.
4. Click the **Add** button to complete the action.
5. Repeat steps 2-4 until all necessary Internal Attachments have been added. If no additional Internal Attachments are needed, skip to the next Panel.
6. To open a PDF version of the attachment in another window, click the **Show** button next to the filename of the attached file, then click the **View** button.
7. To delete any attachment, click the **Delete** button.
8. To replace an existing attachment with an updated version, first click the **Replace** button.
9. Click the **Choose File** button and select the file to upload.
10. Click the **Add** button to complete the replacement.

Abstracts & Attachments Tab > Abstracts Panel

1. Click on the header to expand the **Abstracts** Panel. 
2. Click the **Abstract Type** drop-down box, and then select **Project Summary**.
3. In the **Abstract Details** text field, enter one of the following by cutting and pasting or typing in the text box either the:
 - Proposal Summary
 - Executive Summary
 - Project Overview
 - Short Statement of Work
 - Abstract
4. Click the **Add** button to complete the action.

Note

This **Abstract Details** field may be used by the VPR or other campus leadership to generate reports based on key words.

Abstracts & Attachments Tab > Notes Panel

The **Notes** Panel can be used to record any information that should be communicated to proposal approvers or documented regarding the proposal.

1. Click on **Notes** to expand the Panel.
2. Enter the **Note Topic**.


3. In the **Note Text** field, type or copy and paste the note message.
4. Click the **Add** button to complete the action.

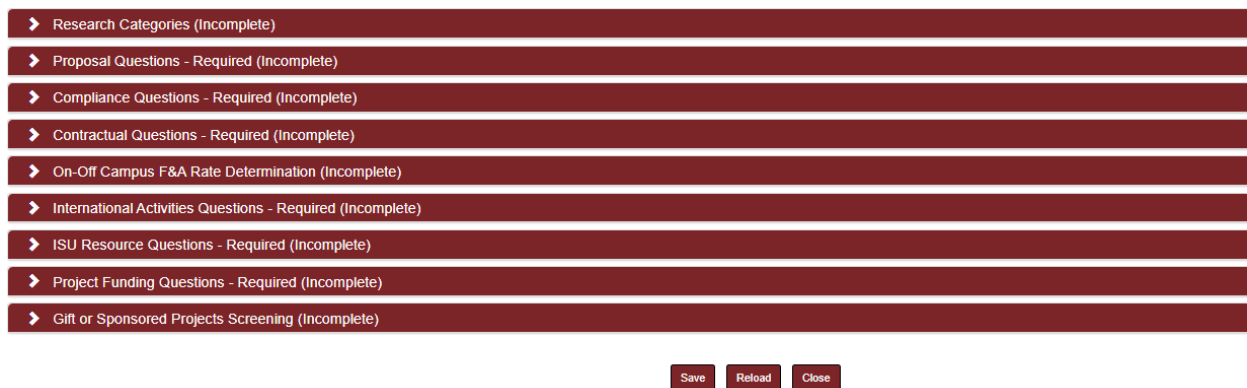
Note

Once a note has been added it cannot be edited or deleted.

Questions Tab

The **Questions** Tab includes questionnaires marked required, which must be answered before the **Proposal** can be routed for approval, as well as optional questionnaires. Additional required sponsor questionnaires (not shown below) may appear if required for an S2S submission.

1. Click the **Questions** Tab. 
2. Click on the Panel name to open the Questionnaire to be completed.



3. After all of the required questionnaires are answered click the **Save** button at the bottom of the page.

Research Categories

This questionnaire is **required** when the proposal **Activity Type** is **Research**. The questionnaire does not need to be completed for any other activity type. Click on **Research Categories** to expand the Panel and complete the questionnaire.

- For **Research Category Level 1**, select the drop-down box category which best describes the research type of the proposal.

- For **Research Category Level 2**, select the drop-down box category which best describes the research type of the proposal. If a correct selection is not available, a Level 2 selection is not required.
- For **Research Category Level 3**, select the drop-down box category which best describes the research type of the proposal. If a correct selection is not available, a Level 3 selection is not required.

Proposal Questions

This questionnaire is required for ALL proposals. Click on **Proposal Questions** to expand the Panel and complete the questionnaire. Please note the following:

- ISURF Background IP is ISURF-owned intellectual property such as patented inventions or copyrights or software owned by ISURF that will be used in the proposed project.
- 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). Non-disclosure agreements specify each party's rights and responsibilities with regard to the confidential information.
- Commercial applications may include patents, licenses, software, or tangible material.
- Limited submission proposals are instances when the number of proposals that can be submitted by an organization (ISU or ISUF) is limited by the sponsor.

Compliance Questions

This questionnaire is required for ALL proposals. Click on **Compliance Questions** to expand the Panel and complete the questionnaire. This Panel includes questions regarding: human subjects; BSL3 laboratory usage; export control including restrictions on citizenship/immigration status of project personnel or restrictions on disseminating research results; ionizing radiation; recombinant or synthetic nucleic acid molecules, human or animal pathogens, biological toxins, experimental biologicals, materials that require a permit; and, vertebrate animals.

Contractual Questions

This questionnaire is required for ALL proposals. Click on **Compliance Questions** to expand the Panel and complete the questionnaire.

International Activities Questions

This questionnaire is required for ALL proposals. Click on **International Activities Questions** to expand the Panel and complete the questionnaire. Please note the following:

- Foreign nationals (including graduate students, undergraduate students, post-docs, key personnel, or other project personnel, etc.) are persons who are not citizens or permanent residents (green card holders) of the United States.
- Non-US countries are countries that are not part of the United States of America or its territories. Foreign Countries should be indicated when the sponsor is a foreign entity, a project paid/unpaid collaborator will perform work in a foreign country, a subaward recipient is a foreign entity, the project work is occurring in a foreign country, or the work product will be used in a foreign country. International travel to conferences outside of the US is not considered foreign involvement.

ISU Resource Questions

This questionnaire is required for ALL proposals. Click on **ISU Resource Questions** to expand the Panel and complete the questionnaire.

Project Funding Questions

This questionnaire is required for ALL proposals. Click on **Project Funding Questions** to expand the Panel and complete the questionnaire.

Gift or Sponsored Projects Screening

If it is not clear if the proposal should be routed as a Gift or a Sponsored Project, this optional questionnaire can be used to make the determination. Click on **Gift or Sponsored Projects Screening** to expand the Panel and complete the questionnaire. Answer each question with the appropriate drop-down box or yes/no selection. The questions will change based upon the responses given. After all of the presented questions have been answered, the system will indicate if the proposal should be routed as a gift or a sponsored project, and will indicate either:

- This is a Gift. Please indicate ISUF Gift in the Anticipated Award Type field in the Sponsor & Program Information Panel of the Proposal Tab and change the Applicant Organization to the ISU Foundation.

- This is a Sponsored Project which will be submitted and managed through the ISU Foundation. Please indicate 501(c)(3) Sponsored Project in the Anticipated Award Type field in the Sponsor & Program Information Panel of the Proposal Tab and change the Applicant Organization to the ISU Foundation.
- This is a Sponsored Project. Please indicate the appropriate Sponsor Project type in the Anticipated Award Type field in the Sponsor & Program Information Panel of the Proposal Tab.

On-Off Campus F&A Rate Determination

This optional questionnaire can be used to determine if the proposal should use the On-Campus or Off-Campus F&A Rate. Click on **On-Off Campus F&A Rate Determination** to expand the Panel and complete the questionnaire. Answer each question with the appropriate yes or no selection. The questions will change based upon the responses given. After all of the presented questions have been answered, a determination of on-campus or off-campus will be provided.

Budget Versions Tab

The **Budget Versions** Tab allows you to develop the budget for the Proposal. From this section you can create multiple budget versions to explore what-if scenarios; however, only one budget will be identified as the final and complete budget when the package is submitted to the sponsoring agency.

To initiate a new **Budget** document, skip to Initiating and Updating a Proposal Budget.

Proposal Summary Tab

The **Proposal Summary** Tab displays all data for the Proposal Document in summary form.

Click the **Proposal Summary** Tab. Click each Panel to expand each Panel or use the double carrots to expand or contract all of the Panels on the Tab at one time.



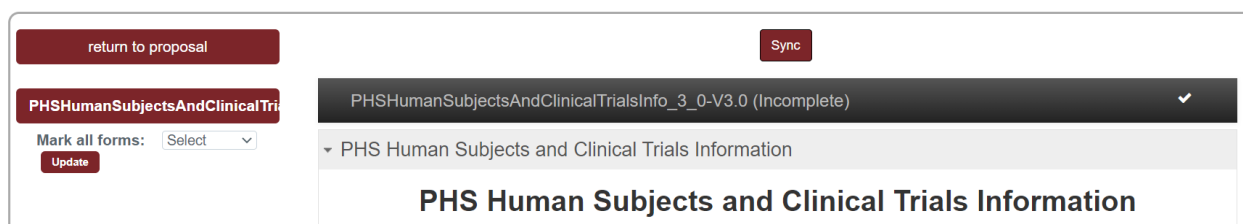
Use the **Show** and **View** buttons to drill down to view Proposal data details.

Forms Tab

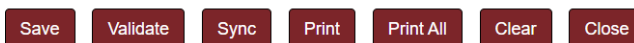
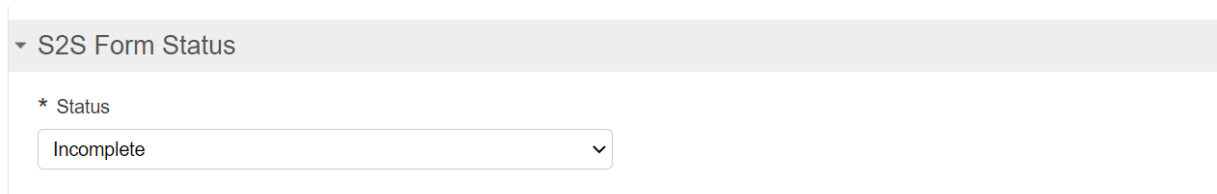
The **Forms** Tab includes Forms which are required as part of an S2S submission, and that are listed as type **Webform** on the Forms Subsection of the S2S Tab.

Form Name	Mandatory	Include	Type	Select to Print: (All Included None)
SF424 (R & R) V5.0	Yes	Yes	Autogenerated	<input type="checkbox"/>
Project/Performance Site Location(s) V4.0	Yes	Yes	Autogenerated	<input type="checkbox"/>
Research And Related Other Project Information V1.4	Yes	Yes	Autogenerated	<input type="checkbox"/>
Research and Related Senior/Key Person Profile (Expanded) V4.0	Yes	Yes	Autogenerated	<input type="checkbox"/>
PHS 398 Cover Page Supplement V5.0	Yes	Yes	Autogenerated	<input type="checkbox"/>
PHS 398 Research Plan V4.0	Yes	Yes	Autogenerated	<input type="checkbox"/>
PHS Human Subjects and Clinical Trials Information V3.0	Yes	Yes	Webform	<input checked="" type="checkbox"/>

Click on the **Forms** tab to open the list of **Webforms**. Each Webform will be listed as a tab, and the first form on the list will open automatically. To change Webforms click on the Webform Tab for the appropriate Webform.



1. Click the **Sync** button at the top of the **Webform** to sync the form to information completed in other areas of the proposal.
2. Complete any remaining fields in the Webform as needed.



3. Once the form is finalized, click the **Status** drop-down box at the bottom of the form and select Complete.
4. Click the **Save** button at the bottom of the page to save the changes.
5. Repeat steps 1-5 until all required Webforms are complete.

Proposal Actions

Proposal Actions Tab > Data Validation Panel

▼ Data Validation

Data Validation 🔄

You can activate a Validation check to determine any errors or incomplete information. The following Validations types will be determined:

- errors that prevent submission into routing
- warnings that serve as alerts to possible data issues but will not prevent submission into routing
- errors that prevent submission to grants.gov

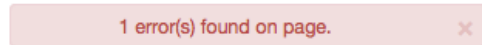
Turn On Validation

1. Click on the **Data Validation** Panel.
2. 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 and that dollar values total correctly. This is the same validation routine automatically run when the Proposal is submitted.

If errors are found, **Streamlyne** will display a red error message at the top of the page.



3. **Streamlyne** will display a list of errors and warnings found on the document.

Note

Errors must be corrected prior to finalizing the Proposal. Warnings indicate data issues that should be reviewed but do not have to be changed in order to submit the Proposal.

Validation Errors

Hide Budget Versions (1)

The budget is incomplete. Please update the status. Fix

Show Compliance Questions - Required (1)

Show Contractual Questions - Required (1)

4. Click the **Fix** button next to the listed error or warning.
5. **Streamlyne** returns to the document Panel where the problem resides. Corrections should be made at this time.
6. Repeat Steps 3-5 as until all errors are resolved.

Note

Data validation can be turned off by clicking on the **Turn Off Validation** button.

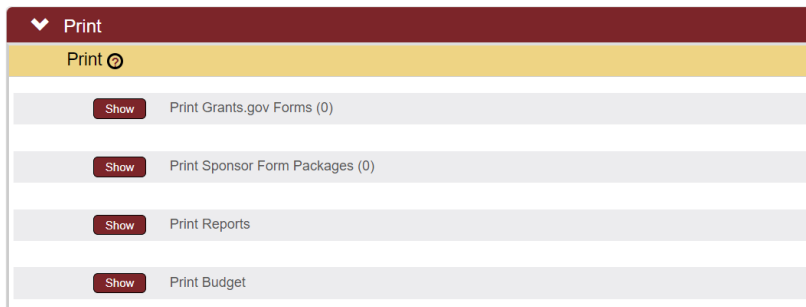
Turn Off Validation

Proposal Actions > Proposal Hierarchy

The Proposal Hierarchy Panel documents any hierarchy or will indicate that the proposal is unlinked to any hierarchy. **Proposal Hierarchy** will only be used by ISU for multi-project or multi-core proposals. Please contact the OSPA Pre-Award Team or streamlyne@iatate.edu prior to initiating a PD using **Proposal Hierarchy**.

Proposal Actions > Print Panel

1. Click on the **Print** Panel to view the Print Subsections.



2. The number of forms available for printing is noted in parentheses on the **Print Grants.gov Forms** and **Print Sponsor Form Packages** Subsections.
To print forms in these Subsections, click the corresponding **Show** button(s).
3. Click the checkboxes next to the forms to print or click the **Select All** option.
4. Click the **Print Selected** button.
5. Repeat steps 2-4 until all needed forms are printed.

Proposal Actions > Copy to New Document Panel

▼ Copy to New Document

Copy to New Document ⓘ

Proposal: yes

Lead Unit: LAS-CHEM

Budget? : all versions ▾

Attachments? :

* Lead Unit : select ▾

Questionnaires? :

Custom Data? :

S2S Opportunity & Tracking Info? :

Template? :

Webforms? :

Copy Proposal

1. To copy an existing Proposal to a new Proposal, click on the **Copy to New Document** Panel.
2. To include budget data from the source document, click the **Budget?** checkbox. (This option is only available when the source Proposal has at least one budget version.) Otherwise, skip to Step 4.
3. Indicate which budget versions should be copied by selecting the appropriate value from the drop-down box.
4. To include copies of the source **Proposal's** attachments, click the **Attachments?** checkbox. (This checkbox becomes available only when the source Proposal has at least one attachment.)
5. Select the **Lead Unit** for the new Proposal by clicking **Lead Unit** drop-down box. (The **Lead Unit** for the source document is displayed on the second line of this Panel.)
6. To copy responses on the **Questions** Tab to the new Proposal, click the **Questionnaires?** checkbox.
7. To copy the **S2S Opportunity & Tracking Info** to the new Proposal, click the **S2S Opportunity & Tracking Info?** Checkbox.
8. To copy the **Webforms** to the new Proposal, click the **Webforms?** Checkbox.

- Once all selections have been made, click the **Copy Proposal** button. Streamlyne will open the new Proposal on a new browser tab.

Proposal Actions > Route Log Panel

The **Route Log** Panel shows proposal actions that have been taken, that are in progress, and that will be taken next. Approval is required by the Lead Unit and all associated Reporting Units.

▼ Route Log

Route Log

- ID: 33189
- Actions Taken
- Pending Action Requests
- Future Action Requests

The **ID: #** Panel displays the current Route Status the Document Status of the PD.

▼ ID: 5012

ProposalDevelopmentDocument

Title	Iceland. Better tha; Proposal No: 46; PI ; Sponsor: TEAGASC; Due Date: 01/31/2023;		
Type	Proposal Development Document	Created	12:25 PM 01/26/2023
Initiator	Kristmundsdottir, Asrun Yr	Last Modified	04:31 PM 04/16/2023
Route Status	SAVED	Last Approved	
Document Status		Document Status Modified	
Node(s)	Initiated	Finalized	

The **Actions Taken** Panel displays each complete proposal action by the type of action taken, the user that took the action, and the time and date of each action.

▼ Actions Taken

	Action	Taken By	Time/Date	Annotation
show	SAVED	Ruther, Marva Kay	01:34 PM 04/12/2023	
show	COMPLETED	Ruther, Marva Kay	01:38 PM 04/12/2023	
show	APPROVED	Hallmark, Shauna L	01:42 PM 04/12/2023	

The **Pending Action Requests** Panel displays the proposal actions which are currently in progress or pending.

Note

To see a list of **Unit Approvers** Click on the Unit Approver Type in the **Requested Of** column.

Pending Action Requests				
Action	Requested Of	Time/Date	Annotation	
show IN ACTION LIST FYI	Unit Approver Type CCEE Unit Number ENG-CCEE	01:42 PM 04/12/2023	KC-WKFLW Unit Approver 1 Derived Role	

The **Future Action Requests** Panel displays the proposal actions which still need to be completed.

Future Action Requests				
Action	Requested Of	Time/Date	Annotation	
show PENDING APPROVE	Unit Approver Type EEOB Unit Number CALS/AES-EEOB CARES	04:32 PM 04/16/2023	KC-WKFLW Development Proposal Lead Unit Approver N CALS/AES-EEOB -- KC-WKFLW Development Proposal Lead Unit Approver Y CALS/AES	
show PENDING FYI	Unit Approver Type EEOB Unit Number CALS/AES-EEOB	04:32 PM 04/16/2023	KC-WKFLW Unit Approver 1 Derived Role	
show PENDING APPROVE	Unit Approver Type AES-RU Unit Number CALS/AES	04:32 PM 04/16/2023	KC-WKFLW Unit Approver 2 Derived Role	
show PENDING APPROVE	OSPA Pre-Award Team	04:32 PM 04/16/2023	KC-UNT OSP Approver Y 000001	

Proposal Actions > Ad Hoc Recipients Panel

Additional users can be added to the proposal via the **Ad Hoc Recipients** Panel. Once the document is submitted into workflow the Ad Hoc action will appear on the added user's Action List and be inserted into workflow at the point in the workflow chain when the Ad Hoc action was added.

For an **ISU Gift** award type, the ISU Foundation asks that the fiscal officer is added to the PD as an Ad Hoc Recipient.

Note

Prior to adding an Ad Hoc Recipient, add the person(s) to the Permission Tab using the Aggregator role. Return here to complete this step: [Permissions Tab > Users Panel](#).

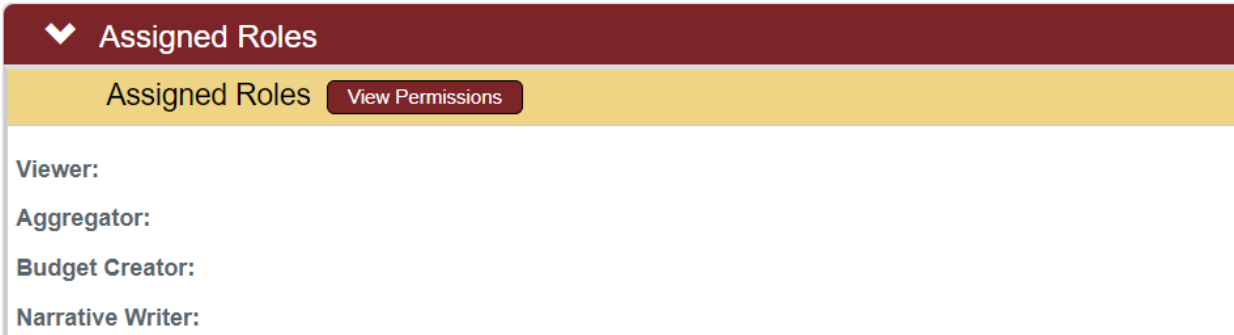
1. Click on the **Ad Hoc Recipients** Panel.
2. In the **Person Requests** Subsection, click the Action Requested drop-down box and select **Approve, Complete, or FYI**.
 - **FYI** sends the identified recipient an **FYI** item in their Action List with a link to the associated document. The document will update to FINAL status regardless of the recipient’s subsequent action.
 - **Approve** sends the identified recipient an **APP** item in their Action List that will require an approval before the document status will update to FINAL status.
 - **Complete** sends the identified recipient a **COM** item in their Action List that will remain on their list until the Submit button is clicked by anyone with access to do so for the PD.
3. Enter the net-id of the user to be added or click the magnifying glass to search for and select the user who will receive the assignment.
4. Click the **Add** button to add the user.
5. Click the Send Ad Hoc button at the bottom of the screen to send the action item to the user.

Permissions Tab

Depending on a user’s role on the Proposal, the **Permissions** Tab page allows users to view, modify, or add user permissions to the Proposal.

Permissions Tab > Assigned Roles Panel

The **Assigned Roles** Panel displays the name of each employee who has some level of access to this particular **Proposal**, with the users categorized by role.



Click the **View Permissions** button in the **Assigned Roles** Subpanel to access a **Roles** Panel pop-up window displaying permissions detailed by role name.

The screenshot shows the 'Roles' panel pop-up window. It has a dark red header with a white downward arrow and the text 'Roles'. Below this is a yellow bar with the text 'Viewer'. The main content is a table with two columns: the left column lists permissions and the right column lists descriptions. Below the table is another yellow bar with the text 'Aggregator', followed by another table with two columns: the left column lists permissions and the right column lists descriptions.

View Proposal:	View Proposal Development Document
View Budget:	View Proposal Budget
View Narratives:	View Proposal Narrative
Print Proposal:	Print proposal on a sponsor specific path
View Proposal Development Webforms:	Authorizes users to view the proposal Development Webforms.

Submit ProposalDevelopmentDocument:	Submit a Proposal for approval
Modify ProposalDevelopmentDocument:	Modify Proposal Development Document
Modify Budget:	Create/Modify Proposal Budget

Permissions Tab > Users Panel

The functionality in the **Users** Panel allows proposal user permissions to be modified by expanding, restricting, or eliminating default access. Access may also be granted to users who would not normally have default access to the Proposal.

Note

Any changes made to this Panel will be effective for this proposal only, and will not apply to any future or previous proposals.

* User Name	Full Name	Unit #	Unit Name	Role	Actions
1 jreecy	James M Reecy	VPR-VPR	VICE PRESIDENT FOR RESEARCH - VPR	Aggregator	<input type="button" value="Add"/> <input type="button" value="Edit Role"/> <input type="button" value="Delete"/>

1. To grant access to the **Proposal**, enter the net-id of the person to be added, or click the magnifying glass under the **User Name** field to search for and select the desired username.

Otherwise, skip to Step 4.

2. Click the **Role** field drop-down box and select the desired user role.
3. Click the **Add** button to complete the action.
4. To modify an existing user's access, click the **Edit Role** button on the line of the user whose role requires modification.
5. Streamlyne will display a pop-up window with the list of available roles with a checkmark next to the user's currently assigned role.

Check the box(es) to select the **Role(s)** that the user needs to have for the **Proposal**.

Roles	
Viewer	<input type="checkbox"/>
Aggregator	<input checked="" type="checkbox"/>
Budget Creator	<input type="checkbox"/>
Narrative Writer	<input type="checkbox"/>
Unlocked Certification Questions	<input type="checkbox"/>

6. Click the Save button at the bottom of the pop-up window to update the changes to the user's **Roles**. These changes become effective immediately.
7. To remove a user's access to a **Proposal** entirely, click the **Delete** button next to that user's name.
8. Click on the **Save** button at the bottom of the page to update your changes.

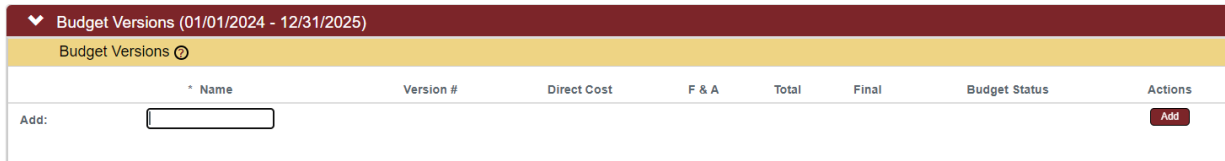
Initiating and Updating a Proposal Budget

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

Initiating Budget Document

Follow these steps to create a new **Budget** document for a **Proposal**:

1. From within the **Proposal** document, click on the **Budget Versions** Tab.



The screenshot shows a web interface for managing budget versions. At the top, there is a header bar with a dropdown arrow and the text "Budget Versions (01/01/2024 - 12/31/2025)". Below this is a sub-header "Budget Versions" with a refresh icon. The main area contains a table with the following columns: Name, Version #, Direct Cost, F & A, Total, Final, Budget Status, and Actions. Below the table, there is an "Add:" label followed by an input field and an "Add" button.

2. Enter a meaningful short title for this budget in **Name** field.
3. Click the **Add** button to initiate the **Budget** document.

The new budget version will display on the **Budget Versions** list.

Note

Once an initial budget version has been created, you can create additional budget versions by following steps 2 & 3 above or by copying an existing budget.

Copy a budget to a new budget version by clicking on the **Copy** button next to an existing budget.

4. Click the **Open** button to access the **Budget** document.

Note

Streamlyne will create and display a new **Budget** document.

To return to the **Proposal** document at any time, click the **Return to Proposal** button that appears at the top of the left-hand Tab menu.

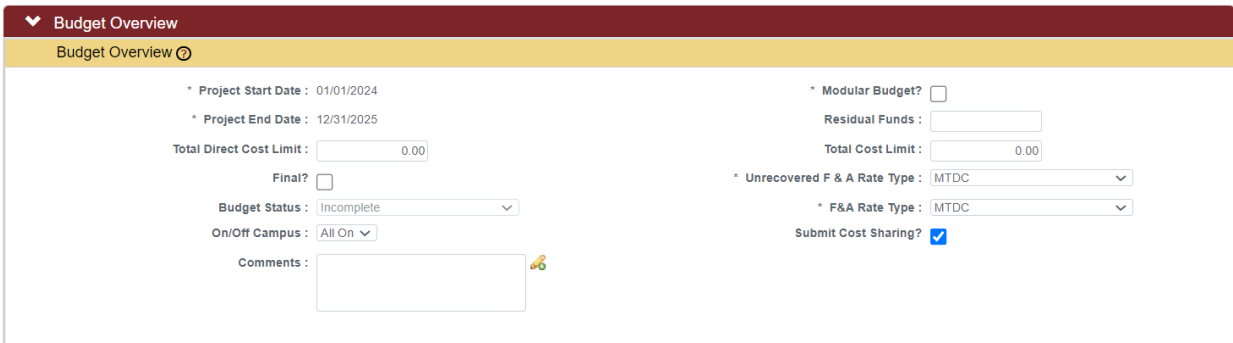
return to proposal

Parameters Tab

Upon clicking open to access the Budget Document, the new **Proposal Budget** document opens to the **Parameters** Panel.

Parameters

Parameters Tab > Budget Overview Panel



The screenshot shows the 'Budget Overview' panel with the following fields and values:

- Project Start Date: 01/01/2024
- Project End Date: 12/31/2025
- Total Direct Cost Limit: 0.00
- Final?:
- Budget Status: Incomplete
- On/Off Campus: All On
- Comments: [Text Area]
- Modular Budget?:
- Residual Funds: [Text Field]
- Total Cost Limit: 0.00
- Unrecovered F & A Rate Type: MTDC
- F&A Rate Type: MTDC
- Submit Cost Sharing?:

1. The **Project Start Date** and **Project End Date** display the project dates from the proposal. This date can be changed from the proposal Tab in the **Required Fields for Saving Document** Panel.

Changing the dates on the proposal Tab may require additional changes to the budget to accommodate those date changes.

2. Entering a **Total Direct Cost Limit** sets the maximum funding amount (excluding indirect costs) that will be requested from the sponsor in the **Budget**. Leave this field blank to create a **Budget** without a pre-set limit.

When an amount is entered in this field, warning messages will display if the direct costs in the **Budget** exceed this limit.

3. Click the **Final?** checkbox to indicate that this **Budget** is the version that will be submitted to the Sponsor.

Once the **Budget** has been marked both **Final** and **Complete**, the **Final?** checkbox becomes read-only. To make the checkbox editable, make sure the **Budget Status** is set to **Incomplete**.

4. The **Budget Status** field defaults to **Incomplete** and only becomes active once the **Budget** has been marked as **Final**.

Click the **Budget Status** drop-down box to indicate whether the final **Budget** is **Complete** or **Incomplete**.

5. Click the **On/Off Campus** drop-down box and select the appropriate value from the drop-down box. This selection determines if the F&A Rate on the budget will be the on or off campus rate.

6. Enter any information that should be preserved for future reference in the **Comments** field.

Note: This field is for campus use only and will not be reviewed by OSPA/OIPTT/ISUF. Notes to be communicated to OSPA/OIPTT/ISUF should be made in the **Notes** Panel of the **Abstracts & Attachments** Tab

7. Click the **Modular Budget?** checkbox if the **Budget** is for an NIH opportunity that accepts funding requests in the modular format (e.g., \$25,000 increments up to \$250,000 per year).

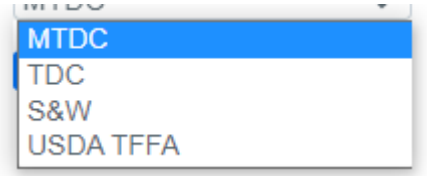
8. Enter **Residual Funds** to document any funds remaining from previous awards.

9. Entering a **Total Cost Limit** sets the maximum funding amount (including direct and indirect costs) that will be requested from the sponsor in the **Budget**. Leave this field blank to create a **Budget** without a pre-set limit.

When an amount is entered in this field, warning messages will display if the total costs in the **Budget** exceed this limit.

10. The **Unrecovered F&A Rate Type** will always be MTDC.

- Click the **F&A Rate Type** drop-down box and select the rate type that applies to this budget.



- If cost share data should be transmitted to the **Sponsor**, click the **Submit Cost Sharing** checkbox.

Parameters Tab > Budget Periods & Totals Panel

Budget Periods & Totals											
Budget Periods											
Actions	#	Period Start Date	Period End Date	No. of Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit
Add		<input type="text"/>	<input type="text"/>		<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Delete	1	01/01/2024	12/31/2024	12.0	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Delete	2	01/01/2025	12/31/2025	12.0	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Totals											
		01/01/2024	12/31/2025	24.0	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00		

The **Budget Periods & Totals** Panel holds summary budget data for the proposal budget period(s). **Budget Periods** are initially established using the project start and end dates entered on the proposal. From this Tab, you can adjust the **Budget Periods** as necessary as long as the dates fall within the **Project Start** and **End Dates**.

In this Panel, you can also create a simple summary **Proposal Budget** by entering values in the fields for each **Budget Period**. Enter summary budget amounts here if you will not be creating a detailed budget.

If the default periods are appropriate and you plan to create a detailed budget by entering in personnel and non-personnel costs, this Panel is not required. The system will populate the summary data automatically based on the detailed budget expenses you will add in the additional Budget Document Tabs.

Note

Unless required by the Funder, gifts do not require a detailed budget.

To update the budget periods and/or create a simple budget in the **Budget Periods & Totals** Panel:

- Click **Budget Periods & Totals** to expand the Panel.

Note

The system defaults to display the **Budget Period(s)** based on the **Project Start/End Dates**, automatically assuming a 12-month project period duration. The default periods can be modified, or new periods can be added as needed.

Budget periods cannot overlap. Make sure to review project period start and end dates to prevent an overlap of days across different periods.

2. The **Period Start Date** represents the first day of the budget period. If the default date is acceptable or if you are not adding a new budget period, skip to the next step.

Otherwise, enter this date in MM/DD/YYYY format or click the calendar icon to select the date from the calendar.

Note

The **Period Start Date** for the first budget period must be equal to or later than the **Project Start Date**, and the **Period End Date** for the final budget period must be equal to or earlier than the **Project End Date**.

3. The **Period End Date** represents the last day of the budget period. If the default date is acceptable or if you are not adding a new budget period, skip to the next step.

Otherwise, enter this date in MM/DD/YYYY format or click the calendar icon to select the date from the calendar.

Note

Do not enter a value in the **Total Sponsor Cost** field. This value will calculate automatically whether you are entering direct costs and F&A costs in this Panel to create a summary budget or entering detailed expenses to develop the budget.

4. When entering budget detail in the **Personnel** and **Non-Personnel** Tabs, the system will automatically calculate the **Direct Cost**. Skip to Step 8.

Otherwise, if not entering a detailed budget, enter the direct cost limit as a dollar value in the **Direct Cost** field.

5. When entering budget detail in the Personnel and Non-Personnel Tabs, the system will automatically calculate the **F&A Cost**.

Otherwise, if not entering a detailed budget, enter the **F&A Cost** as a dollar value in the **F&A Cost** field.
6. When entering budget detail in the Personnel and Non-Personnel Tabs, the system will automatically calculate the **Unrecovered F&A**.

Otherwise, if not entering a detailed budget, enter the unrecovered **F&A Cost** as a dollar value in the **Unrecovered F&A** field.
7. When entering budget detail in the Personnel and Non-Personnel Tabs, the system will automatically calculate **Cost Sharing**.

Otherwise, if not entering a detailed budget, enter the cost-sharing amount as a dollar value in the **Cost Sharing** field.
8. To default detail budget line amounts based on the cost limit (direct plus indirect), enter the total cost limit for the budget period in the **Cost Limit** field.

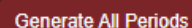
Otherwise, skip to the next step.
9. To default budget line amounts based on the direct cost limit, enter the total direct cost limit for the budget period in the **Direct Cost Limit**.

Otherwise, skip to the next step.
10. To add a new budget period to the summary, click the **Add** button.

Otherwise, click the **Save** button at the bottom of the page to update your changes.
11. Repeat Steps 2 through 11 until all budget periods are included on the budget document.
12. If necessary, click the **Delete** button to remove any budget periods that were created in error.
13. Click the **Calculate All Periods** button to update the totals.

Parameters Tab > Generate All Periods Button

If you are working with a multi-period budget with detailed costs, the **Generate All Periods** button at the bottom of the page will copy all expenses from **Budget Period 1** to subsequent budget periods.

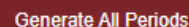


Do not click this button until all Period 1 costs are entered on the Non-Personnel and Personnel Tabs.

Skip to the **Rates** Tab if the **Non-Personnel** and **Personnel** costs have not yet been completed for **Budget Period 1**. You will be referred back to the Parameters Panel at the end of the chapter dedicated to non-personnel costs, as detailed here: [Parameters Tab > Generate All Periods Button](#).

Once **Personnel** and **Non-Personnel** costs are added to the initial period in the proposal budget, follow these steps to copy costs from **Budget Period 1** to all subsequent periods:

1. Click the **Save** button to ensure that the most current budget data will be used in the copy.
2. Click on the **Generate All Periods** button at the bottom of the page.



Budget costs will be added to all subsequent periods. These costs will be inflated where appropriate. You can edit, update, or delete the copied data for each period in the **Personnel** and **Non-Personnel** Tabs.

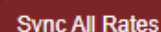
Rates Tab

The options in the **Rates** Tab are rates grouped by class. Within each rate class section, the ISU negotiated rates are called **Institute Rates** and the rates that apply to the proposal are called the **Applicable Rate**.

Each time rates are modified in the Rates Tab, the budget will be recalculated and apply the updated rates. Further, when **Applicable Rates** are less than **Institution Rates**, Streamlyne will calculate the **Cost Share** and/or **Unrecovered F&A** amount for the budget period accordingly.

Rates Tab > Sync All Rates

When a proposal is created by copying an earlier proposal, it is possible that the copied rates differ from the current rates configured at your institution. To ensure the




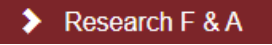
current rates are applied to the proposal, click the **Sync All Rates** button at the bottom of the Rates Tab to update the proposal budget document with the latest Institute Rates.

Rates Tab > F&A Panel

The title of the **F&A** Panel reflects the **Activity Type** selected on the proposal, for example, “Research F&A” or “Instruction F&A.” This Panel displays the default F&A rate types that are effective for the **Proposal Activity Type** during the fiscal year(s) covered by the proposal budget.

The F&A rates set up in this Panel will be applied automatically to relevant line-item costs on the Personnel and Non-Personnel Tabs.

Research F & A							
Research F & A							
Description	On CampusContract	Fiscal Year	Start Date	Institute Rate	* Applicable Rate	Fixed Amount?	
MTDC	No	2024	07/01/2023	26.00000	26.00000	No	
MTDC	Yes	2024	07/01/2023	53.00000	53.00000	No	
MTDC	No	2025	07/01/2024	26.00000	26.00000	No	
MTDC	Yes	2025	07/01/2024	53.00000	53.00000	No	
TDC	No	2024	07/01/2023	26.00000	26.00000	No	
TDC	Yes	2024	07/01/2023	53.00000	53.00000	No	

1. Click on the **Rates** Tab. 
2. Click on **F&A** to expand the Panel. 
3. The **Applicable Rate** fields are automatically populated with the corresponding **Institute Rates** for the selected **Activity Type**.

Identify which **Applicable Rates** within the F&A rate type should change for this proposal, if any (i.e. The F&A rate type as identified on the F&A Rate Type field on the Parameters Tab).

4. Enter the **Applicable Rate** changes to all the lines of the F&A rate type (MTDC, TDC, S&W, or USDA TFFA) selected for this proposal. Do not update the Applicable Rate field for the remaining F&A rate types.

Note

To reset the **Applicable Rate** values to match the **Institute Rate** values for the F&A Panel only, click the **Reset All Rates** button.

Reset All Rates

To sync the **Institute Rates** with the current **Institute Rates** for the F&A Panel only click the **Sync All Rates** button. This should not be necessary if you performed the **Sync All Rates** action in the Rates Tab > Sync All Rates Panel.

Sync All Rates

Rates Tab > Fringe Benefits Panel

This Panel displays the default **Fringe Benefits** rate types for the fiscal year(s) covered by the **Proposal Budget**.

Calculations using **Fringe Benefits** rates set up in this Panel will be automatically applied to line-item costs within the **Personnel Tab**, according to the **Object Code Type**.

Fringe Benefits						
Fringe Benefits						
Description	On CampusContract	Fiscal Year	Start Date	Institute Rate	* Applicable Rate	Fixed Amount?
Faculty	No	2024	07/01/2023	26.30000	26.30000	No
Faculty	Yes	2024	07/01/2023	26.30000	26.30000	No
Faculty	No	2025	07/01/2024	26.30000	26.30000	No
Faculty	Yes	2025	07/01/2024	26.30000	26.30000	No
Non-Student Hourly	No	2024	07/01/2023	9.30000	9.30000	No
Non-Student Hourly	Yes	2024	07/01/2023	9.30000	9.30000	No
Non-Student Hourly	No	2025	07/01/2024	9.30000	9.30000	No
Non-Student Hourly	Yes	2025	07/01/2024	9.30000	9.30000	No
AmeriCorps	No	2024	07/01/2023	8.10000	8.10000	No

1. Click on **Fringe Benefits** to expand the Panel.
2. The **Applicable Rate** fields are automatically populated with the corresponding **Institute Rates**.

> Fringe Benefits

Identify which **Applicable Rates** within the **Fringe Benefits** rate type should change for this **Proposal**, if any. Changing of fringe benefit rates is rare, and normally only changed to 0% when fringe benefits are not allowed.

3. Enter the changes to the **Applicable Rate** fields where appropriate.

Note

To reset the **Applicable Rate** values to match the **Institute Rate** values for the Fringe Benefits Panel only, click the **Reset Rates** button.

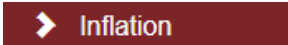
To sync the **Institute Rates** with the current **Institute Rates** for the Fringe Benefit Panel only click the **Sync Rates** button. This should not be necessary if you performed the Sync All Rates action in the Rates Tab > Sync All Rates Panel.

Rates Tab > Inflation Panel

This Panel displays the **Inflation** rates that are effective for the **Proposal Activity Type** during the fiscal year(s) covered by the **Proposal Budget**.

Calculations using **Inflation** rates detailed here will be applied automatically to line item costs on the Personnel and Non-Personnel Tabs.

Inflation						
Inflation						
Description	On CampusContract	Fiscal Year	Start Date	Institute Rate	* Applicable Rate	Fixed Amount?
Salaries	No	2024	07/01/2023	3.00000	3.00000	No
Salaries	Yes	2024	07/01/2023	3.00000	3.00000	No
Salaries	No	2025	07/01/2024	3.00000	3.00000	No
Salaries	Yes	2025	07/01/2024	3.00000	3.00000	No
Materials and Services	No	2024	07/01/2023	0.00000	0.00000	No
Materials and Services	Yes	2024	07/01/2023	0.00000	0.00000	No
Materials and Services	No	2025	07/01/2024	0.00000	0.00000	No
Materials and Services	Yes	2025	07/01/2024	0.00000	0.00000	No
Tuition	No	2024	07/01/2023	4.20000	4.20000	No
Tuition	Yes	2024	07/01/2023	4.20000	4.20000	No
Tuition	No	2025	07/01/2024	4.20000	4.20000	No
Tuition	Yes	2025	07/01/2024	4.20000	4.20000	No

1. Click on **Inflation** to expand the Panel. 
2. The **Applicable Rate** fields are automatically populated with the corresponding **Institute Rates**.

Identify which **Applicable Rates** within the **Inflation** rate type should change for the proposal, if any.

3. Enter the changes to the **Applicable Rate** fields where appropriate.

Note

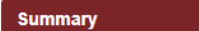
To reset the **Applicable Rate** values to match the **Institute Rate** values for the Inflation Panel only, click the **Reset Rates** button.

To sync the **Institute Rates** with the current **Institute Rates** for the Inflation Panel only click the **Sync Rates** button.

Inflation rates higher than the Institute Rates listed should not be used for proposals with federal funding sources.

Summary Tab


Click the **Summary** Tab to view condensed, read-only sponsor budget data for the first five budget periods of the proposal.

A dark red rectangular button with the word "Summary" in white text.

Budget costs for each period, as well as the total budget cost, are broken down into **Personnel** and **Non-Personnel** Subpanels. Detailed budget data is accessible by clicking the **Show** button to expand the various Subsections. Alternatively, clicking the **Edit** button will navigate directly to the Personnel or Non-Personnel Tabs.

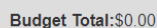
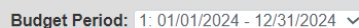
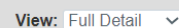
Personnel Tab

Click the **Personnel** Tab to access budget expenses related to project personnel.

A dark red rectangular button with the word "Personnel" in white text.

Note

The **Personnel** Tab view defaults to the first period for multi-period budgets. To work with a different budget period, click the **Budget Period** drop-down box and select the needed date range. Then, click the **Update View** button to update the data on the page.

A light gray rectangular box containing the text "Period Total:\$0.00".A light gray rectangular box containing the text "Budget Total:\$0.00".A light gray rectangular box containing the text "Budget Period: 1: 01/01/2024 - 12/31/2024" followed by a downward arrow icon.A light gray rectangular box containing the text "View: Full Detail" followed by a downward arrow icon.A dark red rectangular button with the text "Update View" in white.

The page view defaults to **Full Detail**. If you do not wish to view the line item detail for each expense item, click the arrows next to the **View** field and select **Simple Detail** from the drop-down box. Then, click the **Update View** button to condense the data on the page.

Personnel Tab > Project Personnel (All Periods) Panel

All project personnel, both named and to-be-named (TBN), must be identified in the **Project Personnel (All Periods)** section for salaries to be added to a budget period(s).

▼ Project Personnel (All Periods)

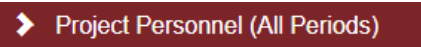
Changes made in the Project Personnel panel must be saved before the corresponding results are reflected in the Personnel Details panel.

Project Personnel (All Periods) ⓘ

Sponsor Salary Cap :

Add: Internal User Name Search 🔍
External Address Book Search 🔍
To be named 🔍

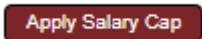
	Person	Job Code	Appointment Type	* Base Salary	* Salary Effective Date	Salary Anniversary Date	Actions
1	Wendy Wintersteen	<input type="text" value="F3000"/> 🔍 President	12M DURATI ▼	<input type="text" value="100,000.00"/>	<input type="text" value="08/01/2024"/> 📅	<input type="text"/> 📅	<input type="button" value="Delete"/> Base Salary by Period
2	Graduate Assistant 1 TBD	<input type="text" value="AA000"/> 🔍 DEFAULT	12M DURATI ▼	<input type="text" value="24,500.00"/>	<input type="text" value="08/01/2024"/> 📅	<input type="text"/> 📅	<input type="button" value="Delete"/> Base Salary by Period

1. Click on **Project Personnel (All Periods)** to expand the Panel. 
2. The **Project Personnel (All Periods)** Panel populates with all named personnel from the **Key Personnel** Tab in the Proposal document.


If additional personnel are added to the Proposal document after the Project Personnel (All Periods) Panel is initially populated, click the **Sync Personnel** button to ensure all named personnel on the proposal also appear on the Project Personnel (All Periods) Panel in the **Proposal Budget** document.
3. To add additional personnel to the budget, click the magnifying glass after **Internal User Name Search** to search for and select Employee person records.

To add unnamed personnel, click the **To be named** magnifying glass to the search for and select the necessary position names.
4. For each named personnel, the system will populate Job Code, Appointment Type, Base Salary, and Salary Effective Date from ISU's Workday HR system.

5. For positions where personnel have yet to be named or for named personnel without salary data, enter the annual salary amount that will be budgeted for the position in the **Base Salary** field.
6. If a named person is added to the budget, the Project Period Start Date auto-populates in the **Salary Effective Date** field. This date can be modified for each person as needed.
7. For **Proposal Budgets** with multiple periods, personnel can be added for each period with a salary change, and the salary set for each of those **Budget Periods**.
8. If a named person or to be named position was listed in error, click the corresponding **Delete** button to remove the line.
9. If details for the person have been added to a budget period, those details must be deleted first before the person can be deleted from the **Project Personnel (All Periods)** Panel.
10. Click the **Save** button at the bottom of the screen to save the changes and ensure all personnel and positions are available in the Person Detail Panel.
11. Repeat these steps until all named personnel and to-be-named positions have been added to the **Project Personnel (All Periods)** Panel.
12. The Sponsor Salary Cap value is populated with the annual NIH salary cap. In order to apply the salary cap to all budget personnel, click the **Apply Salary Cap** button. Once selected, the system will adjust the Base Salary Rate with respect to the duration of the Appointment Type to the value in the Sponsor Salary Cap field.




To remove the salary cap limitation, click the Reset Default Salaries button to return the Base Salary to their original values.



Personnel Tab > Budget Overview Panel

This Panel displays the budget period's cumulative totals, which will be updated each time costs are added.

 Budget Overview (Period 1)

Budget Overview (Period 1)			
Budget Overview (Period 1)			
Period 1 Start Date	07/01/2017	Cost Limit	0.00
Period 1 End Date	06/30/2018	Total Cost Limit	0.00
Direct Cost	100,000.00	Direct Cost Limit	0.00
F&A Cost	50,000.00	Total Direct Cost Limit	0.00
Unrecovered F&A	0.00	Cost Sharing	0.00
Total Sponsor Cost	150,000.00		

Personnel Tab > Personnel Detail Panel

Before a person can be added to the **Personnel Detail** Panel for a budget period, the person must be named to the **Project Personnel** Panel. If persons are missing from this Panel, return to Personnel Tab > Project Personnel (All Periods) Panel to add the missing records.

Personnel Detail (Period 1)

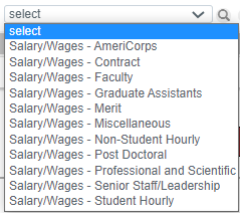
Add Details

* Person	* Object Code Name	Group	Action
<input type="text" value="Select"/>	<input type="text" value="select"/>	<input type="text" value="select"/> --or-- <input type="text" value="(new group)"/>	<input type="button" value="Add"/>

1. Click on **Personnel Detail** to expand the Panel. > Personnel Detail (Period 1)
2. Click the **Person** drop-down box to select a named person or position. The **Person** drop-down box is populated with all the persons and positions that have been added to **Project Personnel (All Periods)** Panel.
3. Click the arrow on the **Object Code Name** field to select the appropriate personnel category for this individual.

Note

When personnel are added to the budget, they are automatically grouped by **Object Code**.



4. Click the **Add** button to add the personnel or position to the detailed budget.
5. Repeat steps 2 through 4 until detailed records are created for all project personnel and positions, then click the Save button at the bottom of the screen to save the changes.

Personnel Tab > Personnel Detail Panel > Salary/Wages Detail Subsection

Salary/Wages - Faculty						
1	Person James M Reecy - F3850	* Start Date 01/01/2024	* End Date 12/31/2024	% Effort 0.00000	% Charged 0.00000	
	Period Type Calendar	Requested Salary 0.00	Calculated Fringe 0.00	Calculate	Sync to Requested Salary	Details Delete
Totals:		0.00	0.00			

1. From within the **Salary/Wages Detail** Subsection, click the **Show** button to expand the **Object Code** Subsection.
2. The **Start/End Dates** auto-populate based on the proposal period Start/End Dates.
If the person's effort will be calculated using a different date range, enter the dates in MM/DD/YYYY format or click the calendar icon to select the dates.
3. Enter the **% Effort** to indicate the amount of effort that the person will expend during the project period.
4. Enter the **% Charged** to indicate the amount of effort that will be charged to the **Sponsor** for the person's salary.

Note

The **% Effort** and **% Charged** will usually be the same. If the **% Charged** is less than the **% Effort**, then the budget will automatically calculate the difference as **Cost Share**.

5. Select the **Period Type** from the drop-down box. The Period Type will appear on S2S forms but will NOT impact salary calculations.
6. Click the **Calculate** button to calculate the **Requested Salary** and **Calculated Fringe**.

- To determine the % Charged for a specific requested salary, click the **Sync to Requested Salary** button.

In the pop-up box, enter the requested salary amount and click the **Calculate** button.

Personnel Budget Sync to Requested Salary
Personnel Budget Details - James M Reecy

Effective Period : 01/01/2024 to 12/31/2024
% Effort : 0.00000
% Charged :
Requested Salary :

Calculate Set % Charged Close

This will return the % Charged percentage.

To populate the % Charged in the Salary Detail Subsection, click the **Set % Charged** button. This will populate the % Charged field. The % Effort field will need to be entered.

- To enter the object code description, click on the **Details** button and complete the **Description** field in the pop-up box. Click the **Save** button to return to the object code line item.

Note

The pop-up box will also display the person months, which can then be entered in the description field.

Effective Period : 08/01/2023 to 07/31/2024
% Effort : 8.33000
% Charged : 8.33000

Description :

Unrecovered F&A : 0.00
Cost Sharing Amount : 0.00
Cost Sharing Percent : 0.00000
Person Months : 1.00

- Repeat steps 1 through 8 until detail records are created for all project personnel in the budget period.
- Click the **Delete** button if a record was added in error.

Personnel Tab > Personnel Detail Panel > Object Code Subsection > Object Code Details Subsection

Salary/Wages - Faculty Details

Budget Category Senior Personnel/Key Pe
Unrecovered F&A 0.00
Apply Inflation?
Submit Cost Sharing?
Budget Justification Notes

of Person(s) 1
Cost Sharing 0.00
On/Off Campus Yes
Group Description

1. From within the **Object Code** Name (e.g. Salary/Wages – Faculty Details) Subsection, click the **Show** button to expand the **Details** Subsection.
2. Review the details for the expense item(s).

If the defaulted values for the **Object Code** are appropriate, skip to the next process.

If the defaulted values should be altered for this **Object Code**, continue to the next step.
3. To change the **Budget Category** form field associated with this expense, click the Budget Category drop-down box and select the appropriate value. This field is ONLY used to map expenses to federal sponsor expense categories for **S2S** submissions.

Note

The **Unrecovered F&A** field displays the under-recovery amount calculated by the system for this expense item. No action is required for this field.

4. The **Apply Inflation?** checkbox becomes available only when inflation eligibility is configured for the expense at the **Object Code** level.

If appropriate, check or uncheck the box to apply or remove inflation at the **Object Code Group** level.
5. Record any budget justification notes for the salary costs in the **Budget Justification Notes** field. Budget Justifications for cost line items can be consolidated to form a budget justification narrative using the **Budget Justification Consolidation** feature in the **Budget Actions** Tab.

Note

The **# of Persons** field reflects the number of persons that have been added to this **Object Code Group**.

Note

If the **% Charged** is less than the **% Effort** for any of the person lines in the **Object Code Group**, the total dollar amount is automatically calculated and displayed in the **Cost Sharing** field.

Note

The **On/Off Campus** checkbox displays the on (yes) or off (no) campus F&A rate status for the proposal that was selected in the **Budget Overview** Panel in the **Parameters** Tab.

6. Click the **Save** button at the bottom of the screen to save the changes.

Note

Do not click the **Apply to Later Periods** button for each object code group if intending to push period one into future periods in its entirety using the **Generate All Periods** button in the **Parameters** Tab.



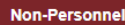
If the personnel entries were not calculated at the line item level, when all personnel entries and corresponding cost detail have been entered for the period, clicking the **Calculate Current Period** button at the bottom of the screen will initiate calculations.

Non-Personnel Tab

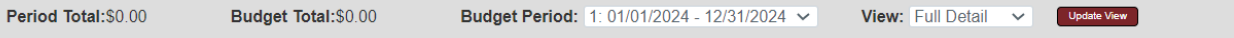
All non-personnel costs in the budget are managed on the **Non-Personnel** Tab.

Non-Personnel Tab > Budget Overview Panel

Click on the **Non-Personnel** Tab.



The Non-Personnel Tab view defaults to the first period for multi-period budgets. To work with a different budget period, click the **Budget Period** drop-down box and select the needed date range. Then, click the **Update View** button to update the data on the page.



Period Total:\$0.00

Budget Total:\$0.00

Budget Period: 1: 01/01/2024 - 12/31/2024

View: Full Detail

Update View

The page view defaults to **Full Detail**. If you do not wish to view the line-item detail for each expense item, click the arrows next to the **View** field and select **Simple Detail** from the drop-down box. Then, click the **Update View** button to condense the data on the page.

Budget Overview (Period 1)	
Budget Overview (Period 1)	
Period 1 Start Date 08/01/2023	Cost Limit 0.00
Period 1 End Date 07/31/2024	Total Cost Limit 0.00
Direct Cost 0.00	Direct Cost Limit 0.00
F&A Cost 0.00	Total Direct Cost Limit 0.00
Unrecovered F&A 0.00	Cost Sharing 0.00
Total Sponsor Cost 0.00	

The **Budget Overview** Panel displays the proposal’s cumulative budget totals, which will be updated each time costs are added to the **Non-Personnel** Tab in the processes that follow.

Note

Budget Justifications for cost line items can be consolidated to form a budget justification narrative using the **Budget Justification Consolidation** feature on the **Budget Actions** Tab.

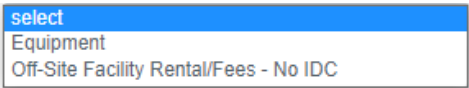
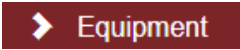
Note

The **Unrecovered F&A** field displays the under-recovery amount calculated by the system for this expense item. **Unrecovered F&A** is calculated when the **Applicable F&A Rate** for the Proposal Budget is less than the Institute Rate, and the item’s Object Code is configured to apply indirect costs.

Non-Personnel Tab > Equipment Panel

Equipment			
Equipment ⓘ			
	* Object Code Name	Description	Total Base Cost
Add:	select		0.00
			Add

1. Click on **Equipment** to expand the Panel.
2. Click the **Object Code Name** drop-down box and select the expense.



3. Enter a description of the expense in the **Description** field, if needed.
4. Enter the total cost for the expense in the **Total Base Cost** field.
5. Click the **Add** button to complete the action.
6. Repeat Steps 2 through 5 until all equipment expenses are entered.
7. If an expense was added in error, click the corresponding **Delete** button to remove the line.

Non-Personnel Tab > Equipment Panel > Line Item Details Subsection

Hide
Line Item Details

* Start Date

* End Date

Apply Inflation? No

Budget Category

Budget Justification Notes

Unrecovered F&A 0.00

Cost Sharing

On/Off Campus Yes

Submit Cost Sharing?

1. Click the **Show** button to expand the **Line Item Details** Subsection. Show Line Item Details
2. Review the details for this expense item.

If the defaulted values for this expense are appropriate for this **Proposal Budget**, repeat Steps 1 and 2 for all other expense items in this budget category.

If the defaulted values should be altered for this expense item, continue to the next step.
3. To change the **Budget Category** form location for this expense, click the **Budget Category** drop-down box and select the appropriate form field. This field is **ONLY** used to map expenses to federal sponsor expense categories for **S2S** submissions.
4. Record any budget justification notes for the expense in the **Budget Justification Notes** field.
5. To add ISU cost sharing to this expense, enter the dollar amount in the **Cost Sharing** field.

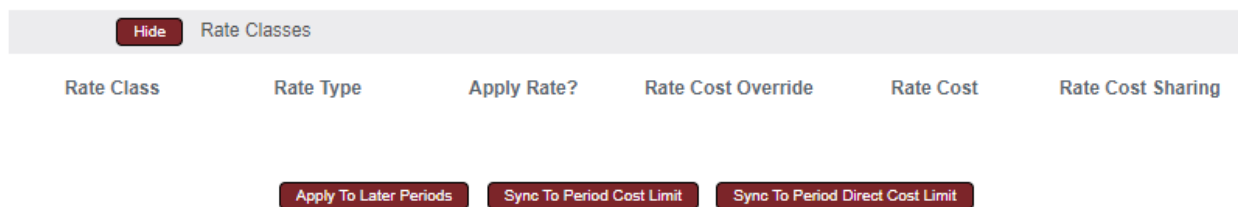
Note

The **On/Off Campus** checkbox displays the on (yes) or off (no) campus F&A rate status for the proposal that was selected in the **Budget Overview** Panel in the **Parameters** Tab.

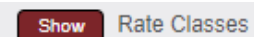
6. To indicate that the item's cost share amount should not be submitted to the Sponsor, uncheck the **Submit Cost Sharing?** box.
7. Click the **Save** button at the bottom of the screen to save the changes.

Non-Personnel Tab > Equipment Panel > Line-Item Details Subsection > Rate Classes Subsection

The **Rate Classes** Subsection displays the Rate Class, Rate Type, the calculated cost rate, and the calculated cost sharing rate for the line item, if applicable. Features in this Panel allow adjustment or removal of individual rates at the expense item level. If no rates are applicable for the line-item object code, then no rates will display here.



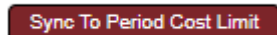
1. Click the **Show** button to expand the **Rate Class** Subsection.



Note

No ISU rates apply to the Equipment object code types.

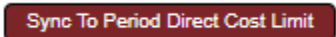
2. Click the **Sync To Period Cost Limit** button to automatically generate this cost amount based on the **Period Cost Limit** entered on the **Budget Periods & Totals** Panel of the **Parameters** Tab.



Clicking this button will update the direct and indirect costs for the line item to the amount needed to set the **Budget Total** equal the **Period Cost Limit**.

Depending on the current budget total, the amount for this cost line item may be increased or decreased.

If clicked, the system will prompt you to confirm the action before proceeding.

3. Click the **Sync to Period Direct Cost Limit** to automatically generate this cost amount based on the **Period Direct Cost Limit** on the **Budget**  **Periods & Totals** Panel of the **Parameters** Tab.

Clicking this button will set the direct cost for the line item to the amount needed to make the **Budget Direct Cost** equal the **Period Direct Cost Limit**. Depending on the current direct costs total in the budget, the amount for this cost line item may be increased or decreased.

If clicked, the system will prompt you to confirm the action before proceeding.

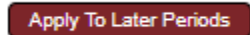
Note

Should the **Sync to Period Cost Limit** or the **Sync To Period Direct Cost Limit** feature be needed, it is best utilized after all other expense line items have been entered for the period

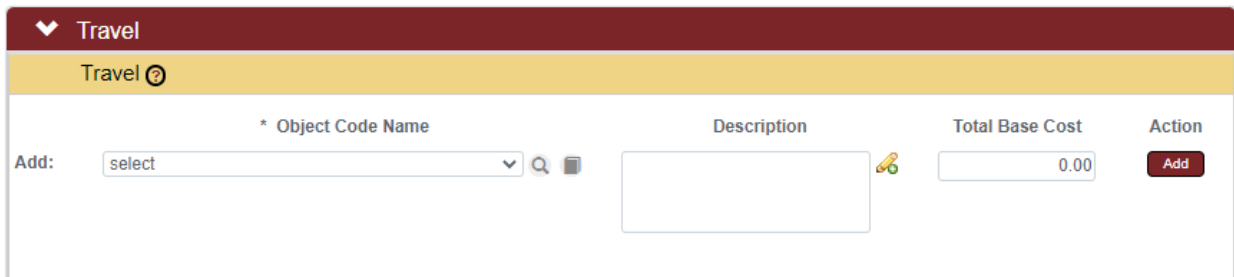
4. Click the **Save** button at the bottom of the screen to save the changes.

Note

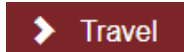
Do not click the **Apply to Later Periods** button for each object code group if intending to push period one into future periods in its entirety using the **Generate All Periods** button in the **Parameters** Tab.




Non-Personnel Tab > Travel Panel

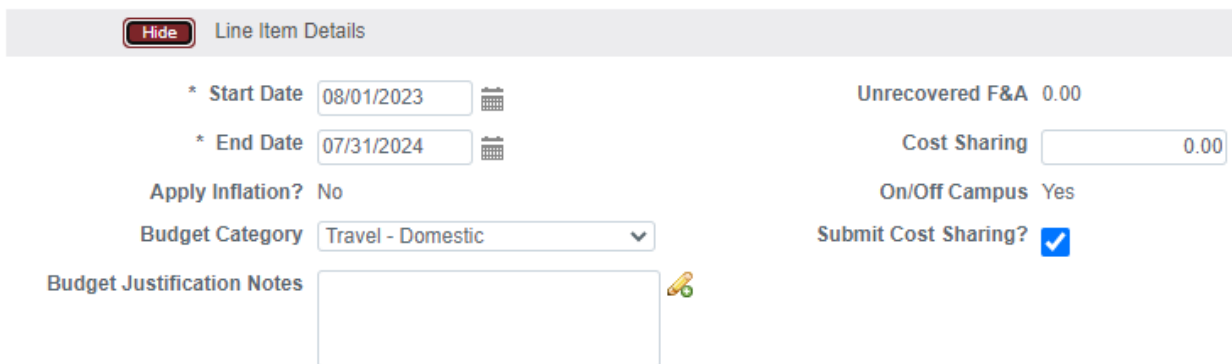


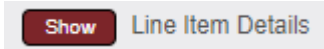
1. Click on **Travel** to expand the Panel.



2. Click the **Object Code Name** drop-down box and select the expense description. 
3. Enter a description of the expense in the **Description** field, if needed.
4. Enter the total cost for this particular expense in the **Total Base Cost** field.
5. Click the **Add** button to complete the action.
6. Repeat Steps 2 through 5 until all travel expenses are entered.
7. If an expense was added in error, click the corresponding **Delete** button to remove the line.

Non-Personnel Tab > Travel Panel > Line-Item Details Subsection



1. Click the **Show** button to expand the **Line Item Details** Subsection. 
2. Review the details for this expense item.

If the defaulted values for this expense are appropriate for this **Proposal Budget**, repeat Steps 1 and 2 for all other expense items.

If the defaulted values should be altered for this expense item, continue to the next step.
3. To change the **Budget Category** from location for this expense, click the **Budget Category** drop-down box and select the appropriate form field. This field is **ONLY** used to map expenses to federal sponsor expense categories for **S2S** submissions.
4. Record any budget justification notes for the expense in the **Budget Justification Notes** field.

- To add ISU cost sharing to this expense, enter the dollar amount in the **Cost Sharing** field.

Note

The On/Off Campus checkbox displays the on (yes) or off (no) campus status for the proposal that was selected in the Budget Overview Panel in the Parameters Tab.

- To indicate that the item's cost share amount should not be submitted to the **Sponsor**, uncheck the **Submit Cost Sharing?** box.
- Click the **Save** button at the bottom of the screen to save your changes.

Non-Personnel Tab > Travel Panel > Line-Item Details Subsection > Rate Classes Subsection

The **Rate Classes** Subsection displays the Rate Class, Rate Type, the calculated cost rate, and the calculated cost sharing rate for the line item, if applicable. Features in this Panel allow adjustment or removal of individual rates at the expense item level. If no rates are applicable for the line-item object code, then no rates will display here.


Hide Rate Classes					
Rate Class	Rate Type	Apply Rate?	Rate Cost Override	Rate Cost	Rate Cost Sharing
MTDC	MTDC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	530.00	0.00

Apply To Later Periods
Sync To Period Cost Limit
Sync To Period Direct Cost Limit

- Click the **Show** button to expand the **Rate Class** Subsection. Show Rate Classes
- Review the data displayed in each column.
- If needed, uncheck any **Apply Rate** checkbox to remove one or more rates from the **Object Code**'s cost calculations.
- Click the **Sync to Period Cost Limit** button to automatically generate this cost amount based on the **Period Cost Limit** entered on the **Budget Periods & Totals** Panel of the **Parameters** Tab. Sync To Period Cost Limit

Clicking this button will update the direct and indirect costs for the line item to the amount needed to set the **Budget Total** equal the **Period Cost Limit**. Depending on the current budget total, the amount for this cost line item may be increased or decreased.

If clicked, the system will prompt you to confirm the action before proceeding.

5. Click the **Sync to Period Direct Cost Limit** to automatically generate this cost amount based on the **Period Direct Cost Limit** on the **Budget Periods & Totals** Panel of the **Parameters** Tab. 

Clicking this button will set the direct cost for the line item to the amount needed to make the **Budget Direct Cost** equal the **Period Direct Cost Limit**. Depending on the current direct costs total in the budget, the amount for this cost line item may be increased or decreased.


If clicked, the system will prompt you to confirm the action before proceeding.

Note

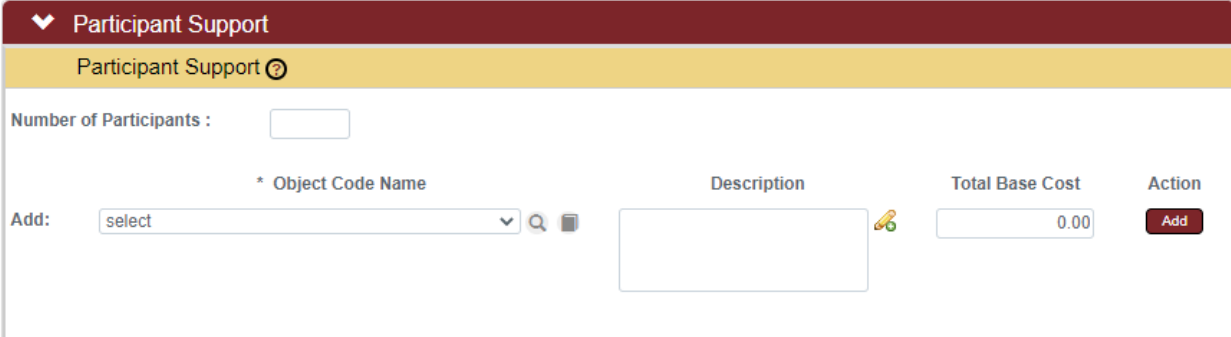
Should the **Sync to Period Cost Limit** or the **Sync To Period Direct Cost Limit** feature be needed, it is best utilized after all other expense line items have been entered for the period

6. Click the **Save** button at the bottom of the screen to save the changes.

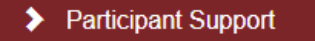
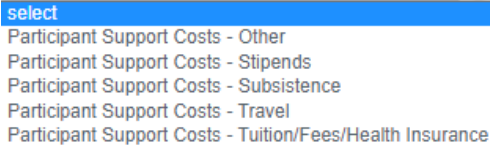
Note

Do not click the **Apply to Later Periods** button for each object code group if intending to push period one into future periods in its entirety using the **Generate All Periods** button in the **Parameters** Tab. 

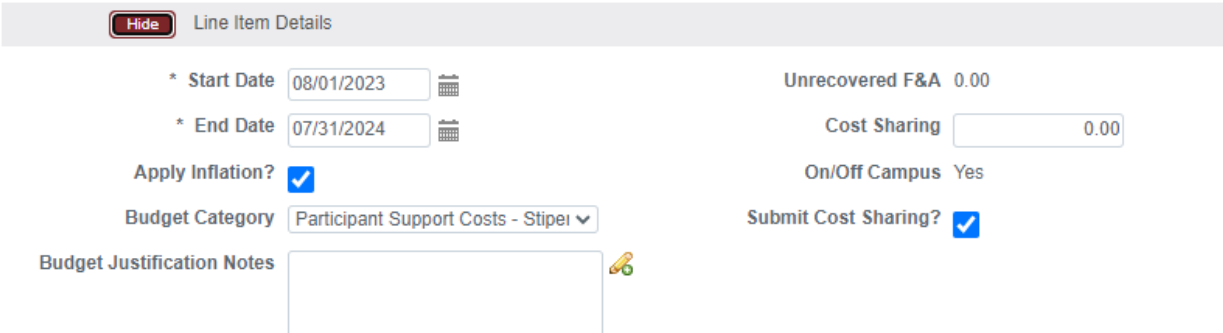
Non-Personnel Tab > Participant Support Panel



* Object Code Name	Description	Total Base Cost	Action
<input type="text" value="select"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="button" value="Add"/>

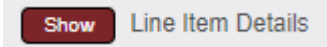
1. Click on **Participant Support** to expand the Panel. 
2. Enter the **Number of Participants** for the proposal.
3. Click **Object Code Name** drop-down box and select the expense. 
4. Enter a description of the expense in the **Description** field, if needed.
5. Enter the total cost for the expense in the **Total Base Cost** field.
6. Click the **Add** button to complete the action.
7. Repeat Steps 3 through 7 until all participant expenses are entered.
8. If an expense was added in error, click the corresponding **Delete** button to remove the line.

Non-Personnel Tab > Participant Support Panel > Line-Item Details Subsection



The screenshot shows the 'Line Item Details' subsection. At the top left is a 'Hide' button. The form contains several fields:

- * Start Date: 08/01/2023 (with a calendar icon)
- * End Date: 07/31/2024 (with a calendar icon)
- Apply Inflation?:
- Budget Category: Participant Support Costs - Stiper (dropdown menu)
- Budget Justification Notes: A text area with a pencil icon.
- Unrecovered F&A: 0.00
- Cost Sharing: 0.00 (input field)
- On/Off Campus: Yes
- Submit Cost Sharing?:

1. Click the **Show** button to expand the **Line Item Details** Subsection. 
2. Review the details for this expense item.

If the defaulted values for this expense are appropriate for this **Proposal Budget**, repeat Steps 1 and 2 for all other expense items.

If the defaulted values should be altered for this expense item, continue to the next step.
3. To change the **Budget Category** form location for this expense, click the **Budget Category** drop-down box and select the appropriate form field. This field is **ONLY** used to map expenses to federal sponsor expense categories for **S2S** submissions.

4. To add ISU cost sharing to this expense, enter the dollar amount in the **Cost Sharing** field.

Note

The **On/Off Campus** checkbox displays the on (yes) or off (no) campus F&A rate status for the proposal that was selected in the **Budget Overview** Panel in the **Parameters** Tab.

5. To indicate that the item's cost share amount should not be submitted to the **Sponsor**, uncheck the **Submit Cost Sharing?** box.
6. Click the **Save** button at the bottom of the screen to save the changes.

Non-Personnel Tab > Participant Support Panel > Line Item Details Subsection > Rate Classes Subsection

The **Rate Classes** Subsection displays the Rate Class, Rate Type, the calculated cost rate, and the calculated cost sharing rate for the line item, if applicable. Features in this Panel allow adjustment or removal of individual rates at the expense item level. If no rates are applicable for the line-item object code, then no rates will display here.

Hide Rate Classes

Rate Class	Rate Type	Apply Rate?	Rate Cost Override	Rate Cost	Rate Cost Sharing
------------	-----------	-------------	--------------------	-----------	-------------------

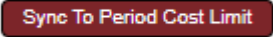
Apply To Later Periods Sync To Period Cost Limit Sync To Period Direct Cost Limit

Show Rate Classes

1. Click the **Show** button to expand the **Rate Class** Subsection.

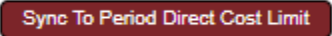
Note

No ISU F&A rates apply to the Participant Support object code types.

2. Click the **Sync To Period Cost Limit** button to automatically generate this cost amount based on the **Period Cost Limit** entered on the **Budget Periods & Totals** Panel of the **Parameters** Tab. 

Clicking this button will update the direct and indirect costs for the line item to the amount needed to set the **Budget Total** equal the **Period Cost Limit**. Depending on the current budget total, the amount for this cost line item may be increased or decreased.

If clicked, the system will prompt you to confirm the action before proceeding.

3. Click the **Sync to Period Direct Cost Limit** to automatically generate this cost amount based on the **Period Direct Cost Limit** on the **Budget Periods & Totals** Panel of the **Parameters** Tab. 

Clicking this button will set the direct cost for the line item to the amount needed to make the **Budget Direct Cost** equal the **Period Direct Cost Limit**. Depending on the current direct costs total in the budget, the amount for this cost line item may be increased or decreased.


If clicked, the system will prompt you to confirm the action before proceeding.

Note

Should the **Sync to Period Cost Limit** or the **Sync to Period Direct Cost Limit** feature be needed, it is best utilized after all other expense line items have been entered for the period

4. Click the **Save** button at the bottom of the screen to save the changes.

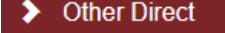

Note

Do not click the **Apply to Later Periods** button for each object code group if intending to push period one into future periods in its entirety using the **Generate All Periods** button in the **Parameters** Tab. 

Non-Personnel Tab > Other Direct Panel

The **Other Direct** Panel is used to record budget items not covered in other sections.

* Object Code Name	Description	Total Base Cost	Action
select		0.00	Add

1. Click on **Other Direct** to expand the Panel. 
2. Click the **Object Code Name** drop-down box and select the expense. 
 - Alterations and Renovations
 - Computing Services
 - Consultant/Professional Services
 - ISU Foundation Fee
 - Materials and Supplies
 - Other Direct Costs
 - Postage
 - Publication Costs
 - Subawards - Direct Costs Burdenable
 - Subawards - Direct Costs Nonburdenable
 - Subawards - Indirect Costs Burdenable
 - Subawards - Indirect Costs Nonburdenable
 - Telecom Charges
 - Tuition
 - Tuition Other Trainee type
 - Tuition PostDoc Trainee Degree Seeking
 - Tuition PostDoc Trainee Not Degree Seeking
 - Tuition PreDoc Trainee Dual Degree
 - Tuition PreDoc Trainee Single Degree
 - Tuition Undergrad Trainee
3. Enter a description of the expense in the **Description** field, if needed.
4. Enter the total cost for the expense in the **Total Base Cost** field.
5. Click the **Add** button to complete the action.
6. Repeat Steps 2 through 5 until all other expenses are entered.
7. If an expense was added in error, click the corresponding **Delete** button to remove the line.

Non-Personnel Tab > Other Direct Panel > Line-Item Details Subsection

Hide Line Item Details

* Start Date	<input type="text" value="08/01/2023"/>		Unrecovered F&A 0.00
* End Date	<input type="text" value="07/31/2024"/>		Cost Sharing <input style="width: 50px;" type="text" value="0.00"/>
Apply Inflation?	<input checked="" type="checkbox"/>		On/Off Campus Yes
Budget Category	<input type="text" value="Tuition"/>		Submit Cost Sharing? <input checked="" type="checkbox"/>
Budget Justification Notes	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>		

1. Click the **Show** button to expand the **Line Item Details** Subsection.

Show Line Item Details

2. Review the details for this expense item.

If the defaulted values for this expense are appropriate for this **Proposal Budget**, repeat Steps 1 and 2 for all other expense items.

If the defaulted values should be altered for this expense item, continue to the next step.

3. To change the **Budget Category** form location for this expense, click the **Budget Category** drop-down box and select the appropriate form field. This field is **ONLY** used to map expenses to federal sponsor expense categories for **S2S** submissions.
4. Record any budget justification notes for the expense in the **Budget Justification Notes** field.
5. To add ISU cost sharing to this expense, enter the dollar amount in the **Cost Sharing** field.



Tip

Unrecovered IDC is automatically calculated but is not entered into the budget by Streamlyne. If this amount needs to be shown in the budget, it should be entered as it's own cost in Non-Personnel

* Object Code Name

Note

The **On/Off Campus** checkbox displays the on (yes) or off (no) campus F&A rate status for the proposal that was selected in the **Budget Overview** Panel in the **Parameters** Tab.

6. To indicate that the item's cost share amount should not be submitted to the **Sponsor**, uncheck the **Submit Cost Sharing?** box.
7. Click the **Save** button at the bottom of the screen to save the changes.

Non-Personnel Tab > Other Direct Panel > Line-Item Details Subsection > Rate Classes Subsection

The **Rate Classes** Subsection displays the Rate Class, Rate Type, the calculated cost rate, and the calculated cost sharing rate for the line item, if applicable. Features in this Panel allow adjustment or removal of individual rates at the expense item level. If no rates are applicable for the line-item object code, then no rates will display here.

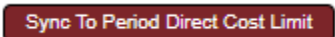
Rate Class	Rate Type	Apply Rate?	Rate Cost Override	Rate Cost	Rate Cost Sharing
MTDC	MTDC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	530.00	0.00

Rate Classes

1. Click the **Show** button to expand the **Rate Class** Subsection. Rate Classes
2. Review the data displayed in each column.
3. If needed, uncheck any Apply Rate checkbox to remove one or more rates from the Object Code's cost calculations.
4. Click the **Sync To Period Cost Limit** button to automatically generate this cost amount based on the **Period Cost Limit** entered on the **Budget Periods & Totals** Panel of the **Parameters** Tab.

Clicking this button will update the direct and indirect costs for the line item to the amount needed to set the **Budget Total** equal the **Period Cost Limit**. Depending on the current budget total, the amount for this cost line item may be increased or decreased.

If clicked, the system will prompt you to confirm the action before proceeding.

5. Click the **Sync to Period Direct Cost Limit** to automatically generate this cost amount based on the **Period Direct Cost Limit** on the **Budget Periods & Totals** Panel of the **Parameters** Tab. 

Clicking this button will set the direct cost for the line item to the amount needed to make the **Budget Direct Cost** equal the **Period Direct Cost Limit**. Depending on the current direct costs total in the budget, the amount for this cost line item may be increased or decreased.

If clicked, the system will prompt you to confirm the action before proceeding.

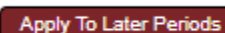
Note

Should the **Sync To Period Cost Limit** or **Sync To Period Direct Cost Limit** feature be needed, it is best utilized after all other expense line items have been entered for the period.

6. Click the **Save** button at the bottom of the screen to save the changes.

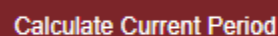
Note

Do not click the **Apply to Later Periods** button for each object code group if intending to push period one into future periods in its entirety using the **Generate All Periods** button in the **Parameters** Tab.



Non-Personnel Tab > Calculate Current Period

When all non-personnel entries and corresponding cost detail have been added and entered for the period, click the **Calculate Current Period** button at the bottom of the screen to initiate calculations.



Parameters Tab > Generate All Periods Button

If you are working with a multi-period budget and data entry is complete for both the **Personnel** and **Non-Personnel** Tabs, go to the Parameters Tab > Generate All Periods Button to copy all **Period 1** data to subsequent periods with escalation as noted.

If you are working with a single period budget, skip this step and continue to the next process.

Note

At any time, go to the **Summary** Tab to see a summary of all of the budget categories entered.

Distribution & Income Tab

Use the **Distribution & Income** Tab to allocate cost share amounts or unrecovered F&A amounts to specific accounts (ISU Worktags) and to allocate any income generated by the project.

Distribution & Income Tab > Cost Sharing Panel

▼ Cost Sharing (3)

Cost Sharing Distribution List

	Project Period	Percentage	Source Account	Amount	Actions
Add:	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="button" value="Add"/>
1	<input type="text" value="1"/>	<input type="text" value="0.00"/>	<input type="text"/>	<input type="text" value="765.00"/>	<input type="button" value="Delete"/>
2	<input type="text" value="2"/>	<input type="text" value="0.00"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="button" value="Delete"/>
3	<input type="text" value="3"/>	<input type="text" value="0.00"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="button" value="Delete"/>
				Total Allocated:	\$765.00
				Unallocated:	\$0.00

Cost Sharing Summary

Period 1: 08/01/2023 - 07/31/2024:	\$765.00
Period 2: 08/01/2024 - 07/31/2025:	\$0.00
Period 3: 08/01/2025 - 07/31/2026:	\$0.00
Total Cost Sharing:	\$765.00

1. Click on the **Distribution & Income** Tab.
2. Click on Cost Sharing to expand the Panel.

If no cost share amounts were entered in the budget, then the section will not be available for data entry.

▼ Cost Sharing (0)

Cost Sharing doesn't apply or is not available

If cost share amounts were generated at any step in the budget creation, the cost share transactions will be allocated by project period in the **Cost Sharing Distribution List** Subpanel.

3. To add new cost share amounts, on the **Add:** line enter the budget period number of the cost share in the **Project Period** field.

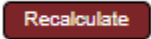
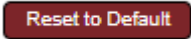
Note

No entry is required in the Percentage or Source Account (ISU Worktag) column fields.

4. Add the dollar amount of the cost share in the **Amount** field.
5. Click the **Add** button to complete this action.

Note

To update existing cost share lines, repeat steps 3-4 on the line to be updated.

6. Repeat Steps 3 through 5 until all cost share amounts are added and/or updated.
7. If an item was added in error, click the corresponding **Delete** button to remove the line.
8. Click the **Recalculate** button to generate a new **Cost Sharing Total**. 
9. To reset the cost sharing amounts to the default values, click the **Reset to Default** button. 
10. Click the **Save** button at the bottom of the screen to save the changes.

Distribution & Income Tab > Unrecovered F&A Panel

▼ Unrecovered F&A (3)

Unrecovered F&A Distribution List ⓘ

	Fiscal Year	Applicable Rate	Campus	Source Account	Amount	Actions
Add:	<input type="text"/>	<input type="text" value="0.00000"/>	<input type="text" value="Select"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="button" value="Add"/>
1	<input type="text" value="2023"/>	<input type="text" value="15.00000"/>	<input type="text" value="Yes"/>	<input type="text"/>	<input type="text" value="760.00"/>	<input type="button" value="Delete"/>
2	<input type="text" value="2024"/>	<input type="text" value="15.00000"/>	<input type="text" value="Yes"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="button" value="Delete"/>
3	<input type="text" value="2005"/>	<input type="text" value="15.00000"/>	<input type="text" value="Yes"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="button" value="Delete"/>
Total Allocated:					\$760.00	
Unallocated:					\$0.00	

Unrecovered F&A Summary

Period 1: 08/01/2023 - 07/31/2024:	\$760.00
Period 2: 08/01/2024 - 07/31/2025:	\$0.00
Period 3: 08/01/2025 - 07/31/2026:	\$0.00

1. Click on **Unrecovered F&A** to expand the Panel.

▶ Unrecovered F&A (0)

If no unrecovered F&A amounts were calculated in the budget, then this section will not be available for data entry.

▼ Unrecovered F&A (0)

Unrecovered F & A doesn't apply or is not available

If unrecovered F&A amounts were generated at any step in the budget creation, the F&A amounts will be allocated by project period in the **Unrecovered F&A Distribution List** Subpanel.

Distribution & Income Tab > Project Income Panel

This Panel is only used for S2S submission that require a Project Income Form as a part of the proposal submission. Completion of this Panel has no effect on the budget.

▼ Project Income (0)

Income Details ⓘ

	*Period	*Income	*Description	Actions
Add:	<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Income Summary ⓘ

	Period 1 Income:	\$0.00
	Period 2 Income:	\$0.00
	Period 3 Income:	\$0.00
	Total Income:	\$0.00

1. If the project will be engaged in activities that generate income, click on **Project Income** to expand the Panel.
Otherwise, skip to the next process.
2. Select the budget period to which the income should be allocated by clicking the arrows next to the **Period** field and selecting the period from the drop-down box.
3. Enter the dollar amount anticipated to be generated for the period in the **Income** field.
4. Enter a brief description of the activities that will generate the income in the **Description** field.
5. Click the **Add** button to complete the action.
6. Repeat Steps 2 through 5 until all income is recorded.
7. Click the **Save** button to record the changes.

Modular Budgets Tab

Click on the Modular Budget tab.

Modular Budget

This feature should be used when the proposal budget is to be submitted as a modular budget (not as a detailed budget).

A detailed proposal budget should be created as described in the previous sections, and then used to automatically generate the modular budget.

Select Modular Budget Period

Budget Period:

Update View



Document was successfully saved. ✕

* Indicates required field

Modular Budget Overview (Project)

Modular Budget Overview (Project) ⓘ

Project Start Date: 08/01/2023
Project End Date: 07/31/2026
Project Total Requested Cost: \$ 0.00

Direct Cost

Direct Cost ⓘ

Direct Cost Less Consortium F&A: \$ 0.00
Consortium F&A: \$ 0.00
Total Direct Cost: \$ 0.00

F&A

F&A ⓘ

F&A Rate Type	F&A Rate	F&A Base	Funds Requested
		Total:	\$ 0.00

Sync

Save

Reload

Close

Create a Modular Budget from the Detailed Budget

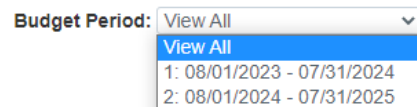
After the detailed budget is complete, click the **Sync** button at the bottom of the screen.

This action will automatically use the Total Direct Costs from each of the defined budget periods, round that value up to the next \$25,000 module and populate the Direct Cost Less Consortium F&A value. If the detailed budget includes a subaward budget which specifies the subawardee F&A, this amount will be extracted from the Total Direct Costs prior to its entry as the Direct Cost Less Consortium F&A. Any subawardee F&A will be listed separately in the Consortium F&A entry.

The Total Direct Cost listed on the Modular Budget will be the sum of these two values for each budget period.

Modular Budget Period View

The Budget Period drop-down box provides an option for each of the budget periods in the proposal and will default to “View All”. Click the drop-down box, select the desired Budget Period, and click the Update View button.



Modular Budget Overview

The Modular Budget Overview Panel includes the Project Start and End Dates and the Project Total Requested Cost. When viewing a specific Budget Period, the Period Total Requested Cost is also displayed.

Modular Budget Direct Cost

The Direct Cost Panel will display three values: the Direct Cost Less Consortium F&A, Consortium F&A, and Total Direct Cost. When the Budget Period is set to View All, these amounts will be the total project values. When the Budget Period is set to a specific Budget Period, these amounts will reflect the values for that Budget Period.

Modular Budget F&A

The F&A Panel will display the F&A Rate Type(s) which apply to the total project when the Budget Period is set to View All, or the F&A Rate Type(s) which apply to a single Budget Period when the Budget Period is set to a specific Budget Period.

Budget Actions Tab

Click on the **Budget Actions** Tab.

Budget Actions

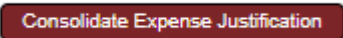
Budget Actions Tab > Print Forms Panel

1. Click **Print Forms** to expand the Panel.
2. Identify which forms 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. Repeat Steps 2 through 4 until all desired forms are generated.
6. A copy of the **Budget** may also be printed from the **Print Forms** section.

Print Forms		
Print Forms	Print Budget Comments	Actions
1 Budget Costshare Summary Report	<input type="checkbox"/>	Print
2 Budget Cumulative Report	<input type="checkbox"/>	Print
3 Budget Salary Report	<input type="checkbox"/>	Print
4 Budget Summary Report	<input type="checkbox"/>	Print
5 Budget Summary Total Report	<input type="checkbox"/>	Print
6 Industrial Budget Report	<input type="checkbox"/>	Print
7 Industrial Cumulative Budget Report	<input type="checkbox"/>	Print
Print Budget		Actions
1 RR_Budget_1_4		Print

Budget Actions > Budget Justification Panel

The screenshot shows a web interface for budget justification. At the top, there is a dark red header with a downward arrow and the text "Budget Justification". Below this is a yellow bar with the text "Budget Justification" and a help icon. The main area is white and contains a table with three columns: "Last Updated Timestamp", "Updated By", and "Justification Text". The "Justification Text" column is currently empty, indicated by a large rectangular box. At the bottom center of the panel, there is a dark red button with the text "Consolidate Expense Justification".

1. Click **Budget Justification** to expand the Panel.
2. Click the **Consolidate Expense Justification** button to combine individual justification notes entered during the creation of the budget into a contiguous narrative. 
3. Edit or append the narrative as necessary.
4. Click the **Save** button to record the changes.

Budget Actions Tab > Proposal Hierarchy Panel

The **Proposal Hierarchy** Panel displays the proposal's hierarchy. **Proposal Hierarchy** will only be used by ISU for multi-project or multi-core proposals. Please contact the OSPA Pre-Award Team or streamlyne@iatate.edu prior to initiating a project using **Proposal Hierarchy**.

Budget Actions Tab > Subaward Budget Panel

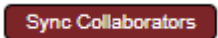
Any subaward budgets for proposals submitted via S2S to Grants.gov should be uploaded in the **Subaward Budget** Panel. The subaward institution should provide their budget using the R&R subaward budget indicated in the S2S Panel Forms section of the PD. Once the form is attached

within the Subaward Budget Panel the system will extract the subaward budget amounts and automatically add the costs to the **Non-Personnel** costs.



See the OSPA Tip Sheet- Entering Sub Budgets in Streamlyne for more info on selecting the proper R&R sub budget form and tips for accurate sub budget entries.

Proposals not submitted through S2S to Grants.gov may upload any Subaward budgets as part of the **Proposal Abstracts and Attachments**.

1. Click on **Subaward Budget** to expand the Panel.
2. Click the Sync Collaborators button to add Collaborators from the Collaborators Subpanel in the Proposal Tab of Proposal Document to the Subaward Budget Panel. 
3. To add additional subcontractor organizations, click the magnifying glass to select the **Organization Name**.

Note

The subaward organization must first be added to the **Streamlyne Research Organization** table. Send an email to ospa-proposals@iastate.edu to add a new organization.

4. Enter any **Comments** as needed.
5. Click the Choose File button to search for and upload the desired file.
Once the file is attached, the filename will display as the **Subaward PDF File Name**.
6. Click the Add button to add the **Subaward** budget to the **Proposal Budget**.
7. Click the **Replace** button to replace an existing subaward budget attachment with a different PDF file.

8. Click the **Delete** button to remove a subaward budget attachment.
9. Click the **View PDF** button to open the PDF document.
10. Click the View XML button to view the XML from the Subaward Budget import.
11. Click the **Show** button in the **Attachment Details** Subsection to see additional information about the uploaded file.
12. Click the **Show** button in the **Details** Subsection to view and edit period cost details for the subaward budget.
13. Click the Sync from PDF button to reset the data to the data contained in the uploaded PDF and to cancel out any changes you made to the Subawardee values in the budget data.

Budget Actions Tab > Data Validation Panel

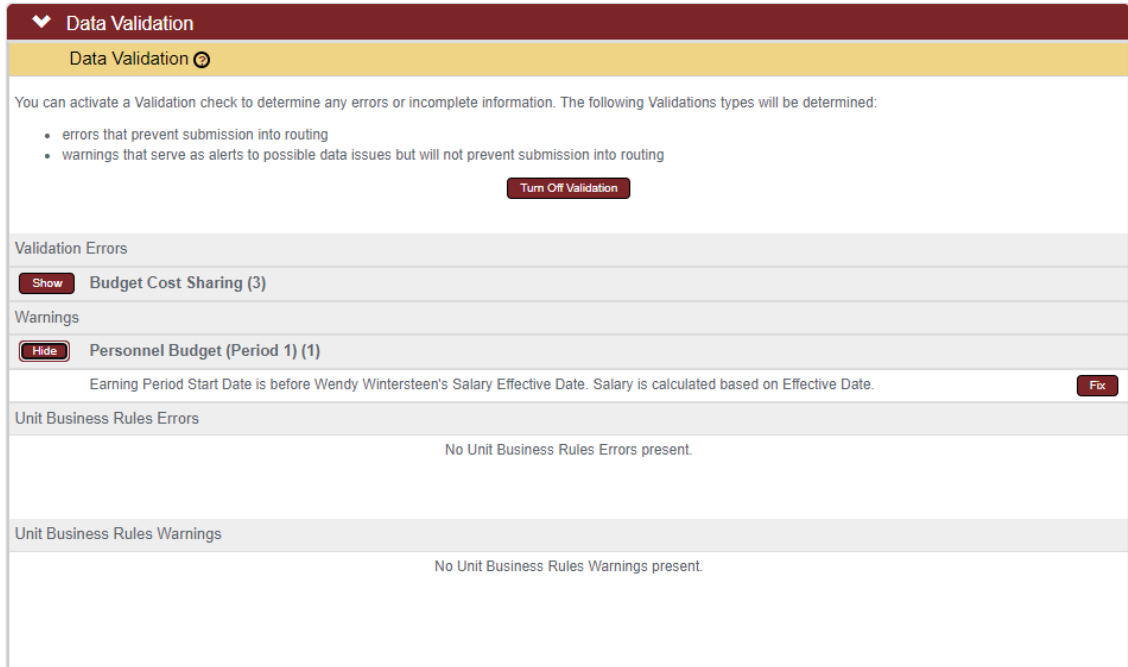
1. Click **Data Validation** to expand the Panel.
2. Click the **Turn On Validation** button. 

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). This is the same validation routine automatically run when the **Proposal Budget** is finalized. If errors are found, a red error message will display at the top of the page.



Errors must be corrected prior to finalizing the **Proposal Budget**. Warnings indicate data issues that should be reviewed but do not have to be changed to finalize the **Proposal Budget**.



3. **Streamlyne** will display a list of errors and warnings found on the document. Click the **Fix** button next to the listed error or warning.
4. **Streamlyne** returns to the document section where the problem resides. Make the corrections.
5. Repeat Steps 3 and 4 as many times as necessary to resolve all errors.
6. Click the **Turn Off Validation** button to continue working on the **Proposal Budget** without the system running validations to check for errors or missing data.
7. Once the budget version has passed validation, and it has been identified as the budget version that will be submitted to the sponsor, you can identify this budget as Complete and Final and route for Initial Review.

Submitting for Initial Review

Proposal budgets will be routed for **Initial Review** prior to being submitted into workflow for final review and approval. Initial Review routes the PD from the initiator to OSPA, where it is assigned to an initial reviewer (in OSPA or in ISUF as applicable). Once submitted into Initial Review, the proposal document status changes to **Submitted for Review**, and the proposal document and budget document are locked to prevent editing. Once assigned to an initial reviewer, the document status changes to **Under Review**.

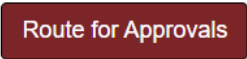
Routing a Proposal for Initial Review

1. On the **Proposal Actions** Tab click the **Route for Initial Review** button. This action will initiate Action List notifications to all Initial Reviewers and the proposal will close and the document status will change to **Submitted for Review**.
2. On an Initial Reviewer in OSPA or ISUF has been assigned, the document status will change to **Under Review**.
3. The initial reviewer will conduct their review and determine if the proposal budget is approved or will return the PD for corrections. Any observations or notes will be entered on the Notes Panel within the Abstracts & Attachments Tab by OSPA or ISUF.
4. If the Proposal's budget is approved, the document status will change to **Review Complete**, and changes can again be made to the proposal and attachments (but not the budget).
5. If returned for correction, the PD will need to be rerouted to Initial Review until the budget has been approved. The document status will change to **Reviewed – Changes Requested** until resubmitted for Initial Review.

Submitting & Approving

After a proposal has completed Initial Review, and when the Proposal Document and attachments have been finalized, the document is ready for submission into workflow for routing and final approvals.

Submitting a Proposal into Workflow Routing for Final Approval

1. Open the Proposal to be submitted for final approvals.
2. Click on the **Proposal Actions** Tab.
3. Click the **Route for Approvals** button at the bottom of the page. 
4. Once the Proposal Document has been submitted into workflow and is routing for final approvals, the Proposal will go to the first of three levels (or nodes) of approval prior to reaching OSPA/ISUF. Each approval level must either:
 - Return to Previous – Return the Proposal Document to the previous step for changes.
 - Approve – Approves the Proposal Document and advances it to the next approver level.
 - Not Approve – Ends the Proposal Document.
5. **Key Personnel Approval**

Once submitted into workflow, the Proposal Document will go to the the **PI, Co-PIs, and Key Persons** for certification and approval. Each Key Personnel will receive the ability to certify and approve simultaneously, and all must certify and approve prior to the Proposal Document moving to the next level (or node).
6. **Lead Unit Approval**

Upon certification and approval by all Key Personnel, the Proposal Document will go to the **Lead Unit** for approval. All authorized approvers for the lead unit will receive notification in their action list of the approval needed, but only one approver must complete the approval. All non-lead units will receive an FYI in their action list for the proposal.

7. Reporting Unit Approval

Upon approval by the Lead Unit, the Proposal Document will go to all **Reporting Units** (formerly known as RRCs) for approval. All authorized approvers for each Reporting Unit will receive notification in their action list of the approval needed, but only one approver must complete the approval for each Reporting Unit.

8. OSPA/ISUF Approval

Upon receipt by OSPA, the proposal will be assigned to a final approver in OSPA or ISUF. Once OSPA has approved the Proposal it can be submitted to the sponsor via the method indicated in the Proposal Document.

Reviewing & Approving a Proposal

▼ Action List													
Action	Id	Number	Type	Title	Route Status	Lead Unit	PI/Reporter	Initiator	Delegator	Date Created	Submission Date	Log	
Show	APP	4911	34	Proposal Development Document	ENROUTE	AGRICULTURAL AND BIOSYSTEMS ENGINEERING - CALS/AES #CALS/AES-ABE	James M Reecy	Richter, Nichole Lynne		03:26 PM 01/18/2023			

1. Click the **Show** button next to the **APP** item on your Action List.
2. Click the **Open Proposal** button.
3. The system will display the document open to the **Proposal Summary** Tab, with the **Proposal Summary** section expanded.

Review the data in the **Proposal Summary** section.

4. Click on the **Budget Summary** Panel.
5. Click the **Show** buttons to access and review the summarized budget data.
6. Click on the **Key Personnel** Panel.

7. For PIs, Co-PIs and Key Persons, click on the **Complete** button next to your name, which will take you to the **Key Personnel** Panel. Click on your name and complete the questions under the **Proposal Person Certification** Panel.
8. Click the **View** and **Show** buttons to access and review the summarized personnel data.
9. Continue to review the remaining sections – **Special Review, Custom Data, Questions, Attachment, and Keywords** – by clicking the section headers to access the summarized data.
10. Once the proposal has been reviewed, click on the button on the bottom of the screen associated with the action to be taken.

Appendices 1 - Definitions

Activity Type

Activity Type	Definition
Research	The research category includes all activities for organized research that are separately budgeted and accounted for, whether funded by an entity external to the institution (sponsored research) or separately budgeted and accounted for by an organizational unit within the institution (university research). It includes activities for the training of individuals in research techniques (research training) that utilize the same facilities as other research activities.
Instruction	The instruction category includes activities for teaching and training that are part of an institution's instructional program. It includes activities for credit and noncredit courses; academic, vocational, and technical instruction; remedial and tutorial instruction; and regular, special, and extension sessions. The instruction category also includes departmental research, which are research and scholarly activities that are not separately budgeted and accounted for.
Public Service	The public service category includes activities established primarily to provide non-instructional services beneficial to individuals and groups external to the institution. It includes activities for cooperative extension services.
Academic Support	The academic support category includes activities that provide support services for the institution's primary missions: instruction, research, and public service. It includes activities for academic administration, academic computing, educational media services, and for the retention, preservation, and display of educational materials, such as libraries, museums, and galleries.

Activity Type	Definition
Student Services	The student services category includes activities with the primary purpose of contributing to students' emotional and physical well-being and intellectual, cultural, and social development outside the context of the formal instruction program. It includes activities for student admissions, student career services, student counseling and health services, student events, student organizations, student records, and student services.
Institutional Support	The institutional support category includes central and executive-level activities concerned with management and long-range planning for the entire institution. It includes activities for general administrative services, administrative computing, fiscal operations, human resources, legal services, planning operations, public and alumni relations and fundraising, and space management.
Operations & Maintenance	The operations and maintenance category includes activities for the administration, supervision, operation, maintenance, preservation, and protection of the institution's physical property. It includes activities for care of grounds, custodial services, facility planning and management, hazardous waste disposal, maintenance and operation of buildings, major repairs and renovation, public safety and security, and utility services.
Scholarships & Fellowships	The scholarships and fellowships category includes scholarships and fellowships funded by a sponsored project or gift. Scholarship and fellowship recipients are not required to perform services to the institution in order to be paid. (Trainee stipends awarded to individuals who are not enrolled in formal course work should be charged to instruction, research, or public service.)

Activity Type	Definition
Student Financial Aid	The student financial aid category should only be used by OSPA for certain US Department of Education programs, such as CWS, Pell, SEOG and TEACH.

Anticipated Award Type

Anticipated Award Type	Definition
501(c)(3) Sponsored Project	An award where the sponsor requires the recipient to be a 501(c)(3) non-profit entity in order to be eligible for funding.
Animal Product Trial	An agreement for the evaluation of material (e.g., drug, medical device) or animal feed where the sponsor provides the funding, material and/or evaluation protocol. No new intellectual property is anticipated; improvements to background intellectual property are owned by providing party.
Consortium Membership	An overarching agreement that governs the terms of ISU membership in a consortium. Consortium membership typically involves multiple universities and multiple industry members.
Contract	A legally binding agreement signed by an authorized ISU official and the sponsor. The sponsor is providing support for a specific set of tasks or deliverables. A contract often includes detailed terms and conditions. When ISU is a subrecipient, and not directly awarded funds from a prime sponsor, a contract is normally issued.
Cooperative Agreement	A funding mechanism which is used by federal agencies when a program requires substantial federal agency involvement. A cooperative agreement is usually more restrictive than a grant.
Data Transfer and Use Agreement	A data transfer and use agreement (DTUA) is an unfunded agreement that governs the exchange of specific data between two parties. A DTUA establishes the permitted disclosure of a unique data set, allowable uses, and any privacy or security requirements necessary for receiving and handling the data. A DTUA also assigns appropriate responsibilities to the researcher(s) and recipient(s) using the data.

Anticipated Award Type	Definition
Field Trial	An agreement for the evaluation of agricultural material (e.g., seeds, plants, chemicals) where the sponsor provides the funding, material and/or evaluation protocol. No new intellectual property is anticipated.
Grant	A grant is financial assistance for a specific purpose or project without expectation of tangible deliverables other than periodic and/or final reports. The sponsor does not normally play an active role in the project. Grants are usually issued with general terms and conditions.
Internal Grant Program	An agreement funded from ISU internal sources of funding.
IPA	An agreement under the Interpersonal Personnel Act (IPA) Mobility Program that outlines the obligations and responsibilities of the parties when an ISU faculty member is temporarily assigned to a federal agency.
ISU Membership Fees	An agreement to fund membership in an ISU center or institute. ISU membership fees apply to industry/university collaborative research consortiums (IUCRC) and IUCRC-like consortiums, which are a collaborative group of sponsors that come together to fund research projects of ISU faculty.
ISUF Gift	A contribution received for either restricted or unrestricted use in furthering the University's research and educational mission and/or operations. A gift is something of value that is given to the University by a donor who expects no consideration in return, other than recognition of the gift and its disposition in accordance with the donor's wishes. A gift may be unrestricted, meaning the funds can be used for University purposes, or its use may be restricted as designated by the donor. Gifts will be processed through the ISU Foundation.
Master Agreement	A contract between the university and a sponsor that specifies most of the terms and conditions for projects funded under the

Anticipated Award Type	Definition
	master agreement. A separate “statement of work” may be executed for each order under the master agreement and would include the quantity/type of work as well as the cost.
Other Funded/Agreement	Used for funded agreements only if none of the other funded agreement types are applicable.
SFA Scholarship	An SFA Scholarship provides student assistance that is processed by ISU Student Financial Aid.
Technical Evaluation	An agreement for the evaluation of non-biological or non-animal related material (e.g., equipment, software, samples, prototype) where the sponsor provides the funding, material and/or evaluation protocol. No new intellectual property is anticipated; improvements to background intellectual property are owned by providing party.
Unfunded Agreement	An agreement with no funding (zero dollar) that is not an MTA, NDA, or DTUA.
_Cost Share Subaward Agreement (PO)	A formal written agreement between ISU and a third party for the purpose of documenting the third party's non-cash cost share commitment to a funded award at ISU. Not to be used for PD documents.
_FDP Subaward-Issued by ISU	An agreement issued by ISU that is funded from a Federal grant or cooperative agreement, where a portion of the scope of work under the ISU award is delegated by ISU to a non-profit organization or educational institution. Not to be used for PD documents.
_Non-FDP Subaward-Issued by ISU	An agreement issued by ISU that is funded from a sponsored project, where a portion of the scope of work under the ISU award is delegated by ISU to another entity (subrecipient). Used for all subawards that do not fit the FDP Subaward definition. Not to be used for PD documents.

Cost Share Type

Cost Share Type	Definition
Mandatory Direct	Mandatory Direct is cost share committed that is required by the sponsor as a condition of receiving an award and budgeted as direct costs. Mandatory cost share must be included in the proposal as a condition of eligibility for an award.
Mandatory Indirect	Mandatory Indirect is cost share committed that is required by the sponsor as a condition of receiving an award and budgeted as indirect costs associated with Mandatory Direct costs. Mandatory cost share must be included in the proposal as a condition of eligibility for an award.
Mandatory Unrecovered	Mandatory Unrecovered is cost share committed that is required by the sponsor as a condition of receiving an award and budgeted as indirect costs from using an IDC rate less than ISU's full negotiated F&A rate. This equates to the difference between the amount of IDC budgeted to the award and the amount that would have been budgeted to the award if ISU's full negotiated F&A rate was used. Mandatory cost share must be included in the proposal as a condition of eligibility for an award.
Voluntary Direct	Voluntary Direct is cost share committed that is NOT required by the sponsor as a condition of receiving an award (but may be suggested by the sponsor) and is budgeted as direct costs. Voluntary committed cost share occurs when resources are offered by the university (documented and quantified in the proposal) when providing cost share is not a proposal requirement.
Voluntary Indirect	Voluntary Indirect is cost share committed that is NOT required by the sponsor as a condition of receiving an award and is budgeted as indirect costs associated with Voluntary Direct costs. Voluntary committed cost share occurs when resources

Cost Share Type	Definition
	are offered by the university (documented and quantified in the proposal) when providing cost share is not a proposal requirement.
Voluntary Unrecovered	Voluntary Unrecovered is cost share committed that is NOT required by the sponsor as a condition of receiving an award and is budgeted as indirect costs from using an IDC rate less than ISU's full negotiated F&A rate. This equates to the difference between the amount of IDC budgeted to the award and the amount that would have been budgeted to the award if ISU's full negotiated F&A rate was used. Voluntary committed cost share occurs when resources are offered by the university (documented and quantified in the proposal) when providing cost share is not a proposal requirement.
Third-Party	Third-Party is cost share committed by a non-ISU entity to an ISU project. Third-Party cost share may be cash or in-kind contributions (materials or services) that benefit a project or program. Third-Party commitments for ISU cost share must be documented in writing.

Credit Type

Anticipated Award Type	Definition
Incentive	The F&A cost incentive program was established to encourage PIs to obtain full F&A recovery on awards. Fifteen percent of the F&A charged on a qualifying award is credited to the incentive worktag(s). In order for incentive to be distributed, an award must use the full and allowable F&A (IDC) rate. If the sponsor has a published rate that limits F&A, this is considered to be full and allowable. If incentive will not be received, please enter 100% for the PI to satisfy system requirements.
Contribution	Percentage of overall project work that each PI and Co-PI contributes to the proposed project. The total of the Contribution percentages for all PI/Co-PIs must equal 100%. This percentage is used in calculating the RU F&A Distribution (see below). Not to be confused with ISU Effort Certification percentages in Workday.
Financial	Percentage of requested project funding that each PI and Co-PI is allocated or responsible to manage. The total of the Financial percentages for all PI/Co-PIs must equal 100%.
RU F&A Distribution	Forty-five percent of the F&A charged on an award is credited back to the Streamlyne Reporting Units (RUs) that are ISU Resource Responsibility Centers (RRCs). Distributions are calculated by the Streamlyne system based on Contribution percentages (see above) and the October 31 payroll costing allocations for the PI and all Co-PIs.

Notice of Opportunity Type

Notice of Opportunity Type	Definition
Federal Solicitation	A formal proposal solicited by a federal sponsor by publishing a specific program announcement. These solicitations are often called Request for Proposals (RFPs), Funding Opportunity Announcements (FOAs), or Broad Agency Announcements (BAAs). PIs responding to the program announcement prepare the proposal to comply with and meet the sponsor's proposal requirements and guidelines. This includes proposals where ISU is a subrecipient and the prime recipient (ISU sponsor) is receiving funding from a federal sponsor.
Unsolicited	A written proposal that is submitted to a sponsor on the initiative of an ISU PI, rather than in response to a sponsor's request for a proposal.
Verbal Request for Proposal	A written proposal that is submitted to a sponsor in response to a verbal request from that sponsor to an ISU PI.
Non-Federal Solicitation	A formal proposal solicited by non-federal sponsors by publishing specific program announcements. These solicitations are often called Request for Proposals (RFPs), Funding Opportunity Announcements (FOAs), etc. PIs responding to the program announcement prepare the proposal to comply with and meet the sponsor's proposal requirements and guidelines.
Internal	A written proposal that is submitted in response to a specific ISU funding opportunity in order to receive funding from an internal (ISU) funding source.

Proposal Role Type

Proposal Role Type	Definition
Co-Investigator (Co-I or Co-PI)	An individual working with the Principal Investigator (PI) in the design, execution and/or oversight of a project, and recognized by the PI as someone who would make a significant contribution to a project.
Principal Investigator (PI)	The primary individual responsible for the overall development and content of a proposal and conduct and administration of a sponsored project. A PI may delegate aspects of proposal preparation to other ISU staff but is ultimately responsible for all aspects of the proposal as submitted.
Key Personnel	Other individuals who are not designated as a PI or Co-PI and contribute to the scientific development or execution of a project in a substantive measurable way and are considered essential to the project work that will be performed.

Proposal Type

Proposal Type	Definition
Continuation	A proposal for an existing project that requires a non-competitive continuation proposal to receive additional funding and additional time (e.g. sponsor requests additional proposal to add both money and time to a project).
Internal Grant Program	A proposal to be funded by an internal (ISU) funding source. Contact OSPA or the ISU program contact if unsure whether a Streamlyne proposal is necessary.
Limited Submission	A proposal to a competitive funding program that restricts the number of proposals that may be submitted by ISU.
New	A proposal for a project that has not previously been awarded funding.
Renewal	A proposal for competitive renewal of an existing award for an additional period of performance. Funding is requested but not guaranteed.
Resubmission	A resubmission of a previously submitted unfunded proposal after modification of the proposal following sponsor review.
Revision	A revision of a proposal made after the solicitation closing date at the request of (or allowed by) the sponsor.
Supplement	A proposal for additional funds for an existing award within the same period of performance as the existing project.

Research Type

Research Type	Definition
Applied	Applied research is original investigation undertaken in order to acquire new knowledge. It is directed primarily toward a specific, practical aim or objective.
Basic	Basic research is experimental or theoretical work undertaken primarily to acquire new knowledge of the underlying foundations of phenomena and observable facts, without any particular application or use in view.
Development	Experimental development is systematic work, drawing on knowledge gained from research and practical experience and producing additional knowledge, which is directed toward producing new products or processes or toward improving existing products or processes.

Appendices 2 – NSF Science Codes

These codes are required for all proposals with an Activity Type of Research and will be used for Iowa State University's HERD Reporting. NOTE: the description is used in Streamlyne, not the associated code.

NSF Science Codes – Alphabetical by Description

NSF Science Code	Description
B.01	Aerospace, Aeronautical and Astronautical Engineering
D.01	Agricultural Sciences
H.01	Anthropology
F.01	Astronomy and Astrophysics
C.01	Atmospheric Science and Meteorology
B.02	Bioengineering and Biomedical Engineering
D.02	Biological and Biomedical Sciences
J.01	Business Management and Business Administration
B.03	Chemical Engineering
F.02	Chemistry
B.04	Civil Engineering
J.02	Communication and Communications Technologies
A.01	Computer and Information Sciences

NSF Science Code	Description
H.02	Economics
J.03	Education
B.05	Electrical, Electronic, and Communications Engineering
C.02	Geological and Earth Sciences
D.03	Health Sciences
J.04	Humanities
B.06	Industrial and Manufacturing Engineering
J.05	Law
F.03	Materials Science
E.01	Mathematics and Statistics
B.07	Mechanical Engineering
B.08	Metallurgical and Materials Engineering
D.04	Natural Resources and Conservation
C.03	Ocean Sciences and Marine Sciences
B.09	Other Engineering
C.04	Other Geosciences, Atmospheric Sciences, and Ocean Sciences
D.05	Other Life Sciences
J.08	Other Non-Science and Engineering Fields

NSF Science Code	Description
F.05	Other Physical Sciences
I.01	Other Sciences
H.05	Other Social Sciences
F.04	Physics
H.03	Political Science and Government
G.01	Psychology
J.06	Social Work
H.04	Sociology, Demography, and Population Studies
J.07	Visual and Performing Arts

NSF Science Codes – Alphabetical by Code

NSF Science Code	Description
A.01	Aeronautical and Astronautical - Engineering
A.02	Bioengineering/Biomedical - Engineering
A.03	Chemical - Engineering
A.04	Civil - Engineering
A.05	Electrical - Engineering

NSF Science Code	Description
A.06	Mechanical - Engineering
A.07	Metallurgical and Materials - Engineering
A.99	Other - Engineering
B.01	Astronomy - Physical Sciences
B.02	Chemistry - Physical Sciences
B.03	Physics - Physical Sciences
B.99	Other - Physical Sciences
C.01	Atmospheric - Environmental Sciences
C.02	Earth Sciences - Environmental Sciences
C.03	Oceanography - Environmental Sciences
C.99	Other - Environmental Sciences
D.01	Mathematical Science
E.01	Computer Sciences
F.01	Agricultural - Life Sciences
F.02	Biological - Life Sciences
F.03	Medical - Life Sciences
F.99	Other - Life Sciences
G.01	Psychology

NSF Science Code	Description
H.01	Economics - Social Sciences
H.02	Political Science - Social Sciences
H.03	Sociology - Social Sciences
H.99	Other - Social Sciences
I.01	Other Sciences, n.e.c.
J.01	Education - Non-Science and Engineering Fields
J.02	Law - Non-Science and Engineering Fields
J.03	Humanities - Non-Science and Engineering Fields
J.04	Visual and Performing Arts - Non-Science and Engineering Fields
J.05	Business and Management - Non-Science and Engineering Fields
J.06	Communications, Journalism and Library Sciences - Non-Science and Engineering Fields
J.07	Social Work - Non-Science and Engineering Fields
J.99	Other - Non-Science and Engineering Fields