

# Navigating in Streamlyne Research

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## Logging In

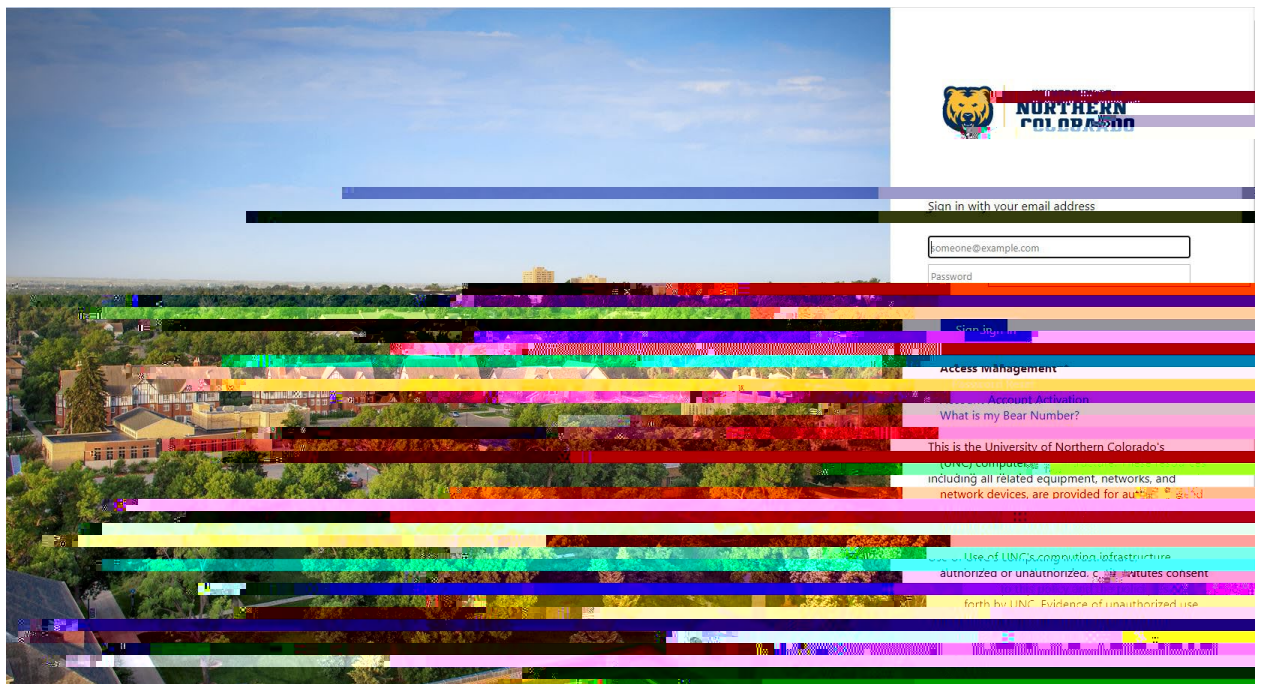
Streamlyne uses the UNC Single sign on (SSO) user name and password. Follow these steps to log in:

1. Open a browser window.

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

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

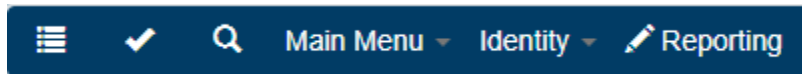
3. Streamlyne uses the UNC Single Sign Enter your email address (first.last@unco.edu) and Password, and then click the Signin button.






## The Action List

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

## The Menu Bar



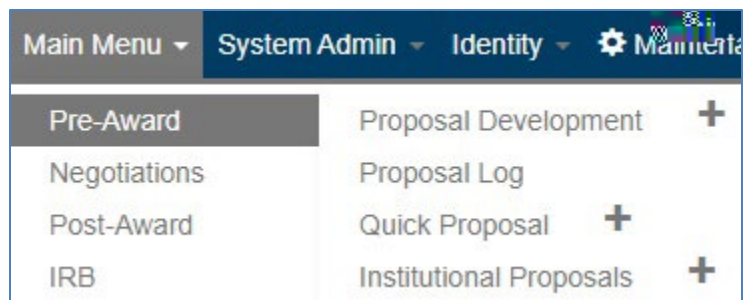
The Menu Bar remains fixed to your primary Streamlyne Research tab regardless of where you are in the application. This is your primary means of navigation in the application.


- Click the List button  to return to the Portal Page and Action List at any point.
- When you complete an action, the item is moved to the Outbox. Click the Outbox button  to review all items on which you have taken action.
- Click the Magnifying Glass  to access the Document Search function.

## Submitting a Quick Proposal

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

1. Hover your mouse over Main Menu → Pre-Award → Quick Proposal, then click on the + sign to create a new QP.

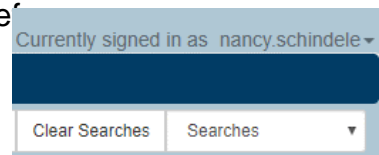


2. Once you are in a document, you may want to click the  button to expand all of the sections on the page.
3. Description: Enter your last name, first name, and the funding source.
4. Quick Proposal Type: Select Open Submission, Limited Submission or A Limited Submission grant allows only one submission per institution.
5. Proposal Type Select the most appropriate proposal type

6. Principal Investigator: Using the magnifying glass, search for and select either an internal or external PIAI faculty and graduate students should be in the Internal User Namesearch.




- Click the magnifying glass to access the full list of Document Types available in Streamlyne. See Appendix A for the full list of Document Types. This kind of search can be useful when you would like to see all the changes made to a specific document.
- To search for documents based on the username of the person who created a document (not necessarily the same person who performed the last update), the magnifying glass search for and select the username of the creator.
- If you know the specific document ID you would like to search for, enter it into the Document ID field. A Document ID is the unique identifier assigned to every document created in the system. A Document ID will never be assigned twice. For example, a Proposal Development document may be assigned a Prop Dev ID of 120 with a Document ID of 5469. The story told by these numbers is: the 120<sup>th</sup> Proposal Development document saved to the database, and the 5,469<sup>th</sup> document created in the system. Note that you cannot search for module-specific identifiers within the Document Search window.
- The Date Created From and Date Created To fields can be used together to get a specific date range, or individually. Enter data in MM/DD/YYYY format, or click the calendar icon to search for and select a date value.
- If you would like to reference this search later, enter a brief word or phrase in the Name This Search field. To find this search later, click the dropdown labeled Searches in the upper righthand corner of the page.



## The Dropdown Menus

### Main Menu

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

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

## Logging Out

While it is tempting to terminate your Streamly ~~session~~ by clicking the ~~X~~ in the corner of your browser window, be sure to protect your data by logging out of the application ~~before~~ ending your browsing session.



To log out securely, click on your hyperlinked ~~name~~ on the right hand side of the Hyperlink Bar, and then click the ~~Logout~~ button.