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**Award, Award Report Tracking, Time & Money,  
and Award Budget Modules**

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# Using This Guide

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Please keep the following things in mind as you use this guide:

## A Stepwise Approach

These guides are designed to facilitate immediate productivity for new users in a complex and unfamiliar system. To achieve this end, the processes are broken down into manageable chunks with the steps to each process laid out sequentially.

By practicing the steps and experimenting in the application at the detail level, you will gain the knowledge you need to design high-level processes that meet your institution's unique needs.

## Navigation and Common Elements

This guide assumes you are familiar with common features and basic navigation as presented in the **NEW USER MANUAL: Navigation, the Action List, and Common Document Elements**.

Please use that manual as a companion to this one, as we have tried to eliminate redundancy wherever possible.

## Every Installation Is Different

Streamlyne Research is highly configurable. During the implementation process at your institution, it is likely you will perform some level of analysis to identify which features you would like to use, which values you would like to change to reflect your institution's terminology, and which features you will skip altogether.

Given this, the processes detailed in this document are representative of general Award practices and do not necessarily represent the exact manner in which your institution will choose to use the application.

Let's begin!

## Introduction

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The Award, Time & Money, and Budget documents work together to provide a comprehensive picture of all award details and requirements throughout the life of the project. The process begins with the creation of an Award document when a notice of award is received. The Award document captures the administrative details of the award agreement, including terms and conditions, reporting deliverables, key personnel, and sponsor information.

Once an Award document is processed, a Time & Money document is initiated to capture the funding details of the award. Most importantly, funds are obligated for specific periods of time in the Time & Money document. Only then can an initial Budget document be created in order to allocate these obligated funds. Depending on your implementation, the budget may be at a summary level or detailed object code level.

After the initial Award, Time & Money, and Budgets are setup, these documents are versioned according to actions taken by the sponsor. Actions to be reflected in the Award module include funding changes, date changes, administrative actions, rebudgets, deobligations, no cost extensions, and closeouts.

## Initiating a New Award

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The Award document is a versioned history of a sponsored project. Types of information tracked via the Award document include, funding proposal, the Principal Investigator and Key Personnel, the Sponsor, reports due, and terms applicable to the award. When an award agreement is issued or modified, you will create/edit the Award document to reflect the details of the agreement/modification. This may be the initial issuance of the award, or modification to obligate new funds and/or extend the dates of the project, or change the terms and conditions

This section will describe the steps to initiate and submit an Award document in Streamlyne Research. The purpose of an Award document is to collect and track data associated with the contract granted to your institution by the Sponsor.


### Navigation

Main Menu > Post-Award > Awards > +

## Quick Start Checklist

If your goal is to quickly enter and save an Award in order to add detail later, these fields must be completed for the document to save without validation errors:

Tab	Section	Field Name	Description
Award	Document Overview	<b>Description</b>	A short description of the document's purpose
Award	Details & Dates: Current Action	<b>Transaction Type</b>	The type of action currently being taken on the Award
Award	Details & Dates: Institution	<b>Lead Unit ID</b>	The unique identifier of the project's administrative department
Award	Details & Dates: Institution	<b>Award Status</b>	The current status of the Award as defined by your institution
Award	Details & Dates: Institution	<b>Activity Type</b>	The activity being performed, as defined by your institution
Award	Details & Dates: Institution	<b>Award Title</b>	The official title for the Award
Award	Details & Dates: Institution	<b>Award Type</b>	The Award category, as defined by your institution
Award	Details & Dates: Sponsor	<b>Sponsor ID</b>	The unique identifier of the funding sponsor for the project
Award	Details & Dates: Time & Money	<b>Project End Date</b>	The date the project will be considered complete

1. Initiate a new document by following the navigation path here, as above:  
Main Menu > Post-Award > Awards > +
2. Complete the Quick Start fields outlined in the preceding table. All fields are on the defaulted Award tab.
3. Click the Save button at the bottom of the page to save your work. 

- Note**
- Once the document is saved, it will remain on your Action List as a pending item with a COM symbol, prompting you to complete the document at your convenience.
  - The document will remain on your Action List as a COM pending item until you click the Submit button to submit it into your institution's predefined routing path.

If you click the Submit button before entering Anticipated and Obligated dollar amounts during the initiation of the new Award, you will need to use the [Time & Money Tab: Transactions Section](#) to add those dollar amounts.

## Updating the Award Tab

If you have initiated an Award using the Quick Start process above, open the document by clicking the corresponding hyperlinked Id for the COM item on your Action List.

If you wish to initiate a document instead, follow the navigation path here, as above:

Main Menu > Post-Award > Awards > +

Once you access the Award document, Streamlyne Research will display the document opened to the Award tab. If the Document Status is FINAL and you have the appropriate permissions, click the Edit button at the bottom of the page.

An orange rectangular button with the word "Edit" in white text.

If you receive a message that a "Pending version already exists. Do you want to edit the Pending version?", select Yes to continue.

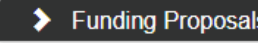


## Award Tab > Document Overview Section

Update the Document Overview section as outlined in the **NEW USER Manual: Navigation, the Action List, and Common Document Elements**.

## Award Tab > Funding Proposals Section

In Streamlyne Research, you can link one or more Institutional Proposals created in the Pre-Award modules to an Award document. When you link an Institutional Proposal (IP) to an Award, data from the IP document is used to populate fields on the Award. This reduces data entry and minimizes opportunities for keying errors.

You are not required to link an Institutional Proposal to an Award. If your institution is not yet using the Streamlyne Research Pre-Award suite or if there is no corresponding Institutional Proposal for the Award, skip to the next section. Otherwise, follow these steps to link an IP to an Award:

1. Click on the header to expand the Funding Proposals section. 
2. Add the Institutional Proposal by clicking the magnifying glass  to search for and select the desired record.
3. Click the Add button. 

**Note** When an Award document is in Initiated status, the **Proposal Merge Type** is automatically set to Initial Funding and cannot be changed.

Once an initial Institutional Proposal is linked to the Award or the required Award data is manually entered and saved, Streamlyne Research allows you to link additional Institutional Proposals with different **Proposal Merge Type** options. These options are defined here:

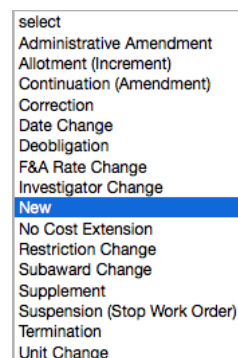
- No Change** Link a new Institutional Proposal, but make no change to the data on the Award
- Merge** Link an Institutional Proposal and add the IP's data to the Award where the data is new or different
- Replace** Link an Institutional Proposal, overwrite the data on the Award with the data on the IP wherever possible, and append new data to the existing data in sections where existing data cannot be replaced, e.g., on the Special Review tab and in the Cost Sharing and Rates sections on the Commitments tab





2. The page is displayed with the Current Action subsection expanded by default.

Click the arrows next to the **Transaction Type** field, and then select the appropriate Type from the dropdown list. Sample options are displayed here.



3. Enter the appropriate date in the **Notice Date** field. You may hand-key the date in MM/DD/YYYY format or select the date by clicking the calendar icon.

This date represents the date that the transaction was prompted whether by an award notice or any other means.

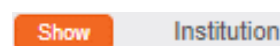
4. Enter any information that should be preserved for future reference in the **Comments** field.

## Award Tab > Details & Dates Section > Institution Subsection

A screenshot of the 'Institution' subsection form. At the top, there is a 'Hide' button and the title 'Institution'. Below this, the form contains several fields: 'Award ID: 000154-00001A', 'Version: 1', '\* Award Status: Active' (dropdown), 'Account ID:' (text input with a magnifying glass icon), 'Research Type: select' (dropdown), '\* Award Title: Test' (text input with a magnifying glass icon), '\* Lead Unit ID: 101000' (text input with a magnifying glass icon and 'School of Fine Arts and Humanities' below it), 'Account Type: select' (dropdown), '\* Activity Type: Research' (dropdown), '\* Award Type: Grant' (dropdown), and 'Research and Development Award:' (checkbox).

1. The Institution subsection may already be expanded by default.

If not, click the Show button to expand the Institution subsection.



2. If you linked an Institutional Proposal to the Award, then the **Lead Unit** data from the Institutional Proposal is populated here.

If the field is blank, hand-key the Unit Code in the **Lead Unit** field or click the magnifying glass to search for and select the Unit Code.

**Note** After the Award document is saved, the **Lead Unit** field will no longer be editable on the Award tab. The **Lead Unit** must be modified by editing the Principal Investigator units on the Contacts tab, as described in the [Contacts Tab > Key Personnel > Person Details & Unit Details Subsection](#).

- Click the arrow next to the **Account Type** field, and then select the most appropriate value from the dropdown list. Sample options are displayed here.

select  
Conversion Account  
Core Grant Administration  
Draper Fellowship  
Fabricated Equipment  
Gift  
No Account  
Off-campus account  
**Regular**  
SBIR  
STTR  
Service Facilities

- Click the arrow next to the **Award Status** field, and then select the most appropriate value from the dropdown list. Sample options are displayed here.

select  
**Active**  
Closed  
Hold  
Inactive  
Pending  
Terminated

- If you linked an Institutional Proposal to the Award, the **Activity Type** defaults to the type recorded on the IP document.

If this field is not populated, or if you need to change the value, click the arrows next the **Activity Type** field, and then select the most appropriate value from the dropdown list. Sample options are displayed here.

select  
Clinical Trial  
Construction  
Fellowship - Post-Doctoral  
Fellowship - Pre-Doctoral  
Instruction  
Other  
Public Service  
**Research**  
Student Services

- Enter an account number in the **Account ID** field.

**Note** The use of the **Account ID** field will vary institution by institution. Streamlyne Research allows this field to be hand-keyed, to be selected from a list of configured accounts, or to be integrated to your financial system. We will determine the method most appropriate for you during your implementation.

- Click the arrow next the **Award Type** field, and then select the type of agreement you are entering into with the Sponsor. Sample options are displayed here.

select  
Budget Office WBS  
Consortium Expenditures  
Consortium Membership  
Contract  
Cooperative Agreement  
Facilities Agreement  
Fellowship  
Gift  
**Grant**  
Indefinite Delivery Contract  
NIH Training Grant  
Other Transaction Agreement  
Student Financial Aid

- Click the arrow next to the **Research Type** field and select the appropriate research descriptor from the dropdown list.

select  
**Applied**  
Basic  
Development  
Translational

- Click the **Research and Development Award** field checkbox if appropriate.

10. If you linked an Institutional Proposal to the Award, the **Title** is populated with the description from the IP document.


If text needs to be added or modified, enter a project description in the **Title** field.

## Award Tab > Details & Dates Section > Sponsor Subsection

Some data in the Sponsor subsection will come over from the Institutional Proposal, if one has been linked to the Award.

The screenshot shows the 'Sponsor' subsection of the 'Details & Dates' section. It features a 'Hide' button and a 'Sponsor' label. The form contains several fields: 'Sponsor ID' (populated with '000340' and 'National Institutes of Health'), 'Prime Sponsor ID' (empty), 'Sponsor Award ID' (empty), 'FAIN' (empty), 'CFDA Number' (empty), 'CFDA Title' (empty), 'Federal Award Issue Date' (empty with a calendar icon), 'NSF Science Code' (set to 'Bioengineering/Biomedical - Engi'), and 'Modification ID' (empty). Each field has a magnifying glass icon for search.

1. Click the Show button to expand the Sponsor subsection.
2. If you linked an Institutional Proposal to the Award, the **Sponsor ID** is populated with the **Sponsor** from the IP document.

If the **Sponsor ID** is blank, or if you need to modify the **Sponsor**, click the magnifying glass  to search for and select the correct value.

3. A Prime Sponsor is the organization from which funds originated if that organization differs from the Sponsor. For example, if your institution has received a subaward as federal pass-through funding, then the Sponsor is the institution that granted you the subaward and the Prime Sponsor is the federal sponsor where the funds originated.

If you linked an Institutional Proposal to the Award, the **Prime Sponsor ID** is populated with the Prime Sponsor from the Institutional Proposal document.

If you need to add or edit the **Prime Sponsor ID**, click the magnifying glass  to search for and select the correct value.

4. Enter the Sponsor's identifying number for the Award in the **Sponsor Award ID** field.

5. The **FAIN** field is used to capture the Federal Award Identification Number assigned to every grant awarded by a federal sponsor. This number is especially important if you will be issuing subawards using the Streamlyne Subaward module using delivered FDP templates.

If applicable, enter the FAIN.

6. If you linked an Institutional Proposal to the Award, the **CFDA Number** should come forward from the IP document.

If the field is blank and the funding for the Award originates from a federal source, enter the Catalog of Federal Domestic Assistance number in the **CFDA Number** field.

7. If the field is blank and the funding for the Award originates from a federal source, enter the Title associated with the Catalog of Federal Domestic Assistance number in the **CFDA Title** field

8. If the award is federal, enter the **Federal Award Issue Date** in MM/DD/YYYY format. This date is especially important if you will be issuing Subawards using the Streamlyne Subaward module using delivered FDP templates.

9. If the funding originated from the National Science Foundation, click the arrow next to the **NSF Science Code** field to select the applicable science category.

select  
Aeronautical and Astronautical - Engineering: A.01  
Agricultural - Life Sciences: F.01  
Astronomy - Physical Sciences: B.01  
Atmospheric - Environmental Sciences: C.01  
Bioengineering/Biomedical - Engineering: A.02  
**Biological - Life Sciences: F.02**  
Business and Management - Non-Science and Engineering Fields: J.05  
Chemical - Engineering: A.03  
Chemistry - Physical Sciences: B.02  
Civil - Engineering: A.04  
Communications, Journalism and Library Sciences - Non-Science and Eng  
Computer Sciences: E.01  
Costs not included in NSF report - used for reconciliation purposes: Z.99  
Costs to be allocated: J.98  
Earth Sciences - Environmental Sciences: C.02  
Economics - Social Sciences: H.01  
Education - Non-Science and Engineering Fields: J.01  
Electrical - Engineering: A.05  
Humanities - Non-Science and Engineering Fields: J.03



10. The **Modification ID** field is used to record the Sponsor's identifying number for a modification to an existing Award. If applicable, enter this date in MM/DD/YYYY format.

## Award Tab > Details & Dates Section > Sponsor Funding Transferred Subsection

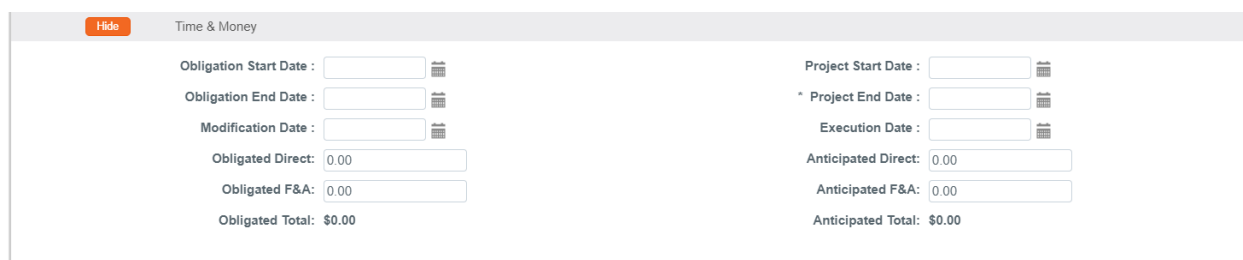
Sponsor Funding Transferred	
ID/Description	Action
Add: <input type="text"/>	<input type="button" value="Add"/>

1. If the funding for the project is awarded by one Sponsor but is received from the budget of another agency via inter-agency transfer, click the Show button to expand the Sponsor Funding Transferred subsection.

Otherwise, skip ahead to the next process.


2. In the **ID/Description** field, enter the **Sponsor ID** of the agency from which the funding was transferred. If necessary, click the magnifying glass  to look up the correct value.
3. Click the Add button to complete the action. 

## Award Tab > Details & Dates Section > Time & Money Subsection



Depending on your institution's configuration of Streamlyne Research modules and workflow, certain fields in this section may display as read-only. In that case, those fields are expected to be entered using the Time & Money document.

Skip ahead to [Updating the Time & Money Document](#) for more information on this functionality.

1. Click the Show button to expand the Time & Money subsection.  Time & Money
2. Enter the beginning date for the current funding period in the **Obligation Start Date** field. Type this value in MM/DD/YYYY format or click the calendar icon to select the date.
3. Enter the ending date for the current funding period in the **Obligation End Date** field. Type this value in MM/DD/YYYY format or click the calendar icon to select the date.
4. If this is a modification for an Award, enter the date that the modification was received in the **Modification Date** field. Type this value in MM/DD/YYYY format or click the calendar icon to select the date.
5. Enter the direct dollar amount obligated to date by the sponsor in the **Obligated Direct** field.

6. Enter the F&A dollar amount obligated to date by the sponsor in the **Obligated F&A** field.
7. Enter the beginning date for the entire project in the **Project Start Date** field by typing the date in MM/DD/YYYY format, or by clicking the calendar icon to select the date.
8. Enter the ending date for the entire project in the **Project End Date** field by typing the date in MM/DD/YYYY formats, or by clicking the calendar icon to select the date.
9. Enter the date the sponsor award instrument was fully executed in the **Execution Date** field, if your institution tracks this information.
10. Enter the total dollar amount of direct dollars anticipated for the entire project period in the **Anticipated Direct** field.
11. Enter the F&A anticipated for the project period in the **Anticipated F&A** field.

## Award Tab > Subawards Section

Subawards

Approved Subaward Amounts to Date ?


* Organization Name	* Total Amount	Actions
Add: <input type="text"/>	<input type="text" value="0.00"/>	<button>Add</button>
Total:	\$0.00	<button>Recalculate</button>




Subawards where this award is a Funding source

Subrecipient Name:	Subaward ID:	Anticipated Amount:	Obligated Amount:	Award Status:
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The Subaward section records basic data for subcontracts when some portion of the Award funding is transferred from your institution to another organization in exchange for the completion of some portion of the research activity.

Skip ahead to the next process if your Award does not have an associated Subaward.

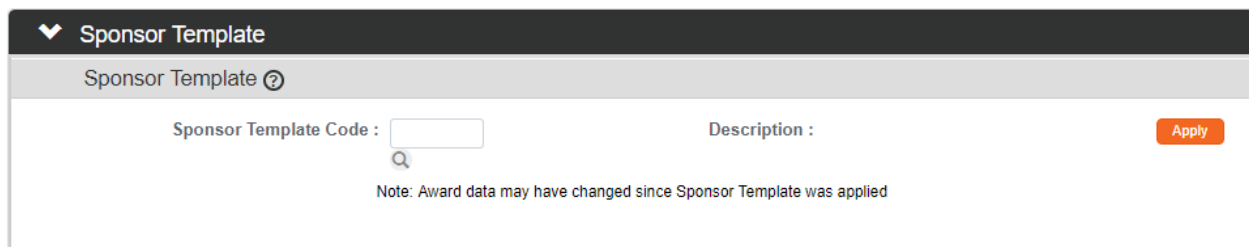
1. Click on the header to expand the Subawards section.
2. Click the magnifying glass  to look up and select the **Organization Name** of the subcontractor.

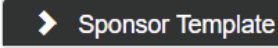


3. Enter the dollar amount that will be paid to the subcontractor in the **Total Amount** field.
4. Click the Add button. 
5. Repeat Steps 2 through 4 until all subcontractors and amounts are identified.
6. If you added a Subaward in error, click the Delete button to remove the line. 
7. Click the Recalculate button to generate a total of the Subaward Amounts. 

## Award Tab > Sponsor Template Subsection

This section allows you to optionally apply a Sponsor Template to populate the Award with default data maintained at the Sponsor level. This feature lets you create an Award without having to manually enter common Award data from a specific Sponsor or type of Sponsor. A Sponsor Template can include a Prime Sponsor Code, Sponsor Contact(s), Payment Basis, Payment Method, Terms, Reports, and Comment text that will be used to populate Award fields.

If your institution has elected not to use the Sponsor Template functionality or if there is no relevant Sponsor Template for this Award, skip ahead to the next process.



1. Click on the header to expand the Sponsor Template section. 
2. Click the magnifying glass  to look up the **Sponsor Template Code**.
3. Click the Apply button to populate template data on the Award. 
4. The system will prompt you to confirm that you want to apply the template.  
Click Yes to continue, or No to prevent the template data from being used.
5. If the Award is already populated with data (whether that data was hand-keyed or populated from the IP), the system will prompt you to confirm that the current Award data should be replaced with information from the Sponsor Template.  
  
Choosing between the Yes and No options, click the button that reflects your desired outcome.

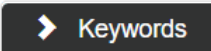



## Award Tab > Keywords Section

	Description	Actions
Add: (select) 🔍		
1	Carbon	<input type="checkbox"/>
2	Temperature	<input type="checkbox"/>

Select All Delete Selected

The purpose of the Keywords section is to record terms that describe and categorize the kind of research associated with the Award. This section is optional.

1. If your institution has chosen to use this functionality, click on the  header to expand the Keywords section.  
Otherwise, skip to the next process.
2. Click the magnifying glass 🔍 to search for the **Keyword Descriptions** associated with the research.
3. After searching, click the checkbox(es) ☒ next to the desired keyword(s).
4. Click the Return Selected Results button to populate the keywords on the Award. 
5. Repeat Steps 2 through 4 until all Keywords are added to the Award.

## Updating the Contacts Tab

If you linked an Institutional Proposal to the Award, most of the data on the Contacts Tab will automatically populate from the IP. There are times, though, when you will need to edit that data.

If your institution is not using Streamlyne Research's Pre-Award suite, or if you have created an Award without linking to an Institutional Proposal, you will need to manually update the Contacts Tab with project personnel details.

## Contacts Tab > Key Personnel

The screenshot shows the 'Key Personnel (1)' section. At the top, there are two radio buttons: 'Internal User Name' (selected) and 'External Address Book ID'. Below them is a search input field with a magnifying glass icon. The main area is a table with columns: '\* Person', 'Unit', and '\* Project Role'. The table has one row with the following data: '1' in the first column, 'Biochemistry Investigator' in the second, 'Biochemistry' in the third, and 'PI/Contact' in the fourth. To the right of the table, there are 'Add' and 'Clear' buttons. Below the table, there are two 'Show' buttons: 'Show Person Effort' and 'Show Unit Details'.

* Person	Unit	* Project Role
1	Biochemistry Investigator 102-456-1079 testuser@streamlyne.org	Biochemistry PI/Contact

1. Click on the tab header on the left-hand menu to access the Contacts tab.


Contacts

2. Click the header to expand the Key Personnel section.

> Key Personnel (2)

3. Streamlyne Research will display this section with the Key Personnel subsection expanded.

If the Award is linked to an Institutional Proposal, the Principal Investigator will be listed here along with other named team members who will contribute to the project.

To add additional named personnel to the Award, click the radio button next to either the **Internal User Name** or **External Address Book ID** fields and then click the magnifying glass  to search for and select the team member's Person ID or Address Book ID.

4. Click the arrow next to the **Project Role** field to select the team member's role from the dropdown list.

select  
Co-Investigator  
Key Person  
PI/Contact

5. If you selected the Key Person role in Step 4, provide a description of the role the person will play on the project.
6. Click the Add button to complete the action.
7. Repeat Steps 3 through 6 until all team members are identified according to your institution's procedure.

Add

## Contacts Tab > Key Personnel > Person Effort & Unit Details Subsection


1. Each team member listed in the Key Personnel section will have his or her own Person Effort and Unit Details subsections.

Click the Show button to expand the Person Effort subsection associated with the first team member.

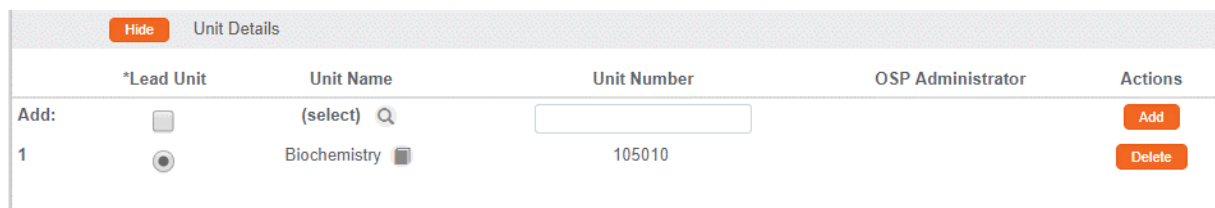
Show Person Details



The form is titled "Person Effort" and has a "Hide" button. It contains several input fields and a "Calculate" button. The fields are organized into two columns. The left column has "Faculty:" with a checked checkbox, "Academic Year Effort %:", "Summer Effort %:", "Calendar Year Effort %:", and "Total Effort %:". The right column has "Academic Year Effort Person-Months:", "Summer Effort Person-Months:", "Calendar Year Effort Person-Months:", and "Total Effort Person-Months:". The "Calculate" button is at the bottom center.


2. If the team member is a faculty member, indicate this by clicking the **Faculty** checkbox. 
3. Enter the effort this person is responsible for in the **Academic Year Effort** and the **Summer Effort**, or the **Calendar Year Effort** fields.
4. Click the Show button next to the Unit Details subsection.

Show Unit Details





The form is titled "Unit Details" and has a "Hide" button. It contains a table with columns: "Lead Unit", "Unit Name", "Unit Number", "OSP Administrator", and "Actions". The "Lead Unit" column has a radio button. The "Unit Name" column has a search icon. The "Unit Number" column has an input field. The "OSP Administrator" column has an input field. The "Actions" column has "Add" and "Delete" buttons. The table has one row with the following data: "Add:" (radio button), "(select)" (search icon), "Biochemistry" (text), "105010" (text), and "Add" (button). The "Delete" button is also present.

5. For employees, the Unit assigned to the team member's Person record is populated here. For non-employees, the Unit assigned to the person's Address Book record is populated here.

If the person's effort for this Award should be linked to a department other than his or her home department, or if the effort will be shared between departments, click the magnifying glass  next to the **Unit Name** field to search for and assign another Unit.

Otherwise, skip to Step 11.

6. Click the Add button  to add this Unit to the team member's entry on the Award.
7. Repeat Steps 6 and 7 until all Units are represented for this team member.
8. Remove any extraneous records by clicking the Delete button. 

9. For the Principal Investigator only: if more than one department is listed, indicate which department is the **Lead Unit** for the Award by clicking the radio button.
10. Repeat Steps 1 through 9 until all team members' details have been updated.

## Contacts Tab > Key Personnel > Combined Credit Split Subsection

The Combined Credit Split subsection is configurable based on your institution's needs, and the type of data collected at your institution will determine the types of credit displayed here. Alternatively, your institution may elect not to track any credit splits, in which case, this subsection will not display at all.

The instructions in this section detail how to complete the Combined Credit Split subsection for a sample set of credit types. Your institution's credit types will vary.

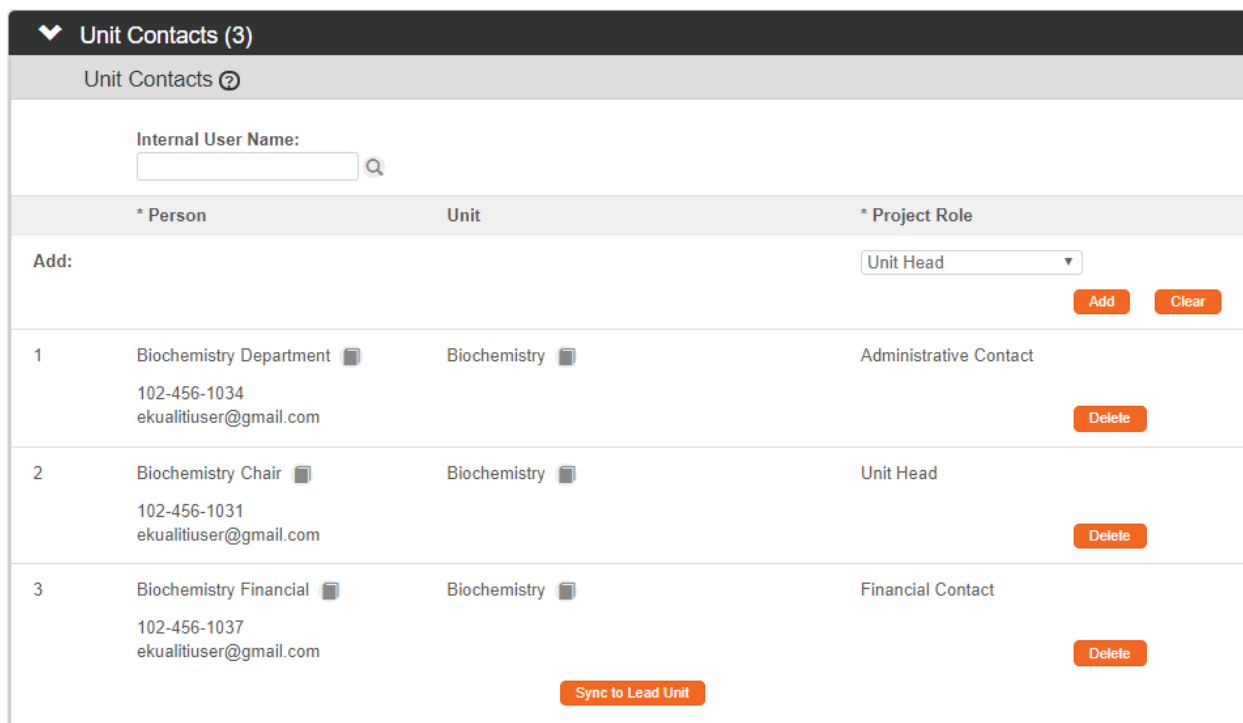
	Recognition	Responsibility	Space	Financial
<b>Biochemistry Professor</b>	<input type="text" value="50.00"/>	<input type="text" value="60.00"/>	<input type="text" value="100.00"/>	<input type="text" value="100.00"/>
105010 - Biochemistry	<input type="text" value="100.00"/>	<input type="text" value="100.00"/>	<input type="text" value="100.00"/>	<input type="text" value="100.00"/>
<b>Unit Total:</b>	100.00	100.00	100.00	100.00
<b>Biochemistry Researcher</b>	<input type="text" value="50.00"/>	<input type="text" value="40.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
105010 - Biochemistry	<input type="text" value="100.00"/>	<input type="text" value="100.00"/>	<input type="text" value="100.00"/>	<input type="text" value="100.00"/>
<b>Unit Total:</b>	100.00	100.00	100.00	100.00
<b>Totals</b>				
<b>Project Person Total:</b>	100.00	100.00	100.00	100.00

1. For each project team member, indicate the percentage of credit allocated for each category established by your institution—in this example, **Recognition**, **Responsibility**, **Space** and **Financial**—by assigning a value between 0.00 and 100.00.  
  
If you only have one team member assigned to the Award, enter 100 for all credit categories, and then skip to the next process.
2. If you have any project team members assigned to more than one unit, indicate how each person's credit should be split across units by assigning a value between 0.00 and 100.00 for each category.

- The Unit Total should sum to 100.00 for each person, and the Project Person Total should sum to 100.00 for each category.

Click the Recalculate button  to confirm there are no errors in your totals.






## Contacts Tab > Unit Contacts Section

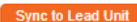


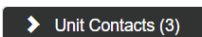

Unit Contacts (3)

Unit Contacts ⓘ


Internal User Name:  🔍

	* Person	Unit	* Project Role	
Add:			Unit Head	 
1	Biochemistry Department 102-456-1034 ekualitiuser@gmail.com	Biochemistry	Administrative Contact	
2	Biochemistry Chair 102-456-1031 ekualitiuser@gmail.com	Biochemistry	Unit Head	
3	Biochemistry Financial 102-456-1037 ekualitiuser@gmail.com	Biochemistry	Financial Contact	



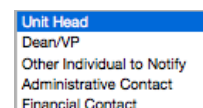
- Click the header to expand the Unit Contacts section. 
- If you updated the Lead Unit in the previous process and would like to pull in the Lead Unit Contacts and the Central Contacts assigned to that new Lead Unit, click the Sync to Lead Unit button. 

If clicked, a warning message will appear prompting you to confirm the action.


- If you would like to include an additional user's contact details, click the magnifying glass  next the **Internal User Name** field to search for and select the desired Person record.

Otherwise, skip to the next process.

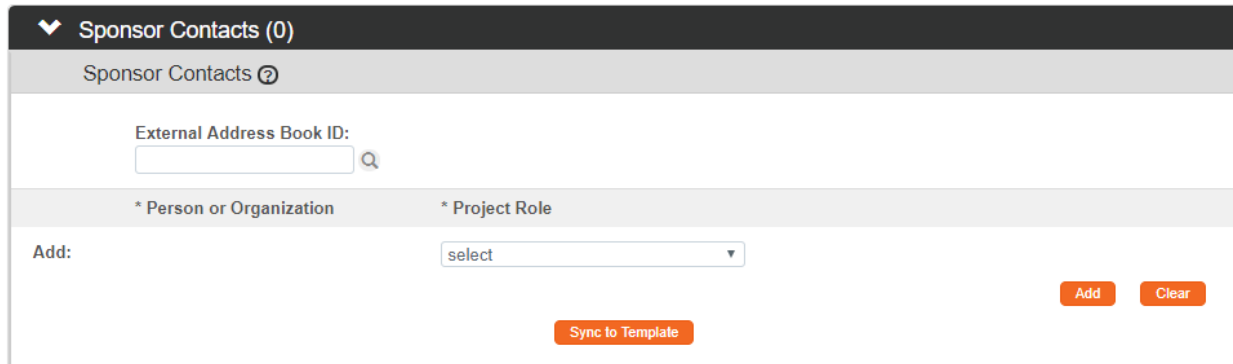
- Click the arrow next the **Project Role** field to select the Person's role from the dropdown list.

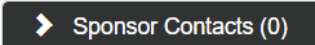


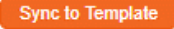


Unit Head  
Dean/VP  
Other Individual to Notify  
Administrative Contact  
Financial Contact

5. Click the Add button  to add the Person's contact information to the Award.
6. Repeat Steps 3 through 5 until all the Person contact information is identified.

## Contacts Tab > Sponsor Contacts Section









1. Click the header to expand the Sponsor Contacts section. 
2. If you chose to link in a Sponsor Template on the Awards tab, any Sponsor Contact data that was included on the template will be populated here.  
  
If you need to add additional Sponsor Contacts, click the magnifying glass  next the **External Address Book ID** field to search for and select the correct entry from the search results.  
  
Otherwise, skip to the next process.
3. Click the arrow next the **Project Role** field to select the contact's role from the dropdown list.
4. Click the Add button  to add the Sponsor's contact information to the Award.
5. Repeat Steps 2 through 4 until all Sponsor Contacts are added.
6. Use the Sync to Template button to reset the list of Sponsor Contacts listed here to the default Contacts on the Sponsor Template. The Sponsor Contacts in the Award will be updated to match the list in the Template.   
  
If clicked, a warning message will appear to confirm the action.

## Contacts Tab > Central Administration Contacts

The Central Administration Contacts section stores read-only contact information for the administrative personnel assigned to the Lead Unit for this Award.


Click on the header to expand the section should you need to access this data.

➤ Central Administration Contacts (10)

▼ Central Administration Contacts (8)			
Central Administration Contacts ?			
	Person	Unit	Project Role
1	IRB Administrator  102-456-1064 testuser@streamlyne.org	Human Subjects Office 	IRB Administrator
2	IACUC Administrator  102-456-1065 testuser@streamlyne.org	Animal Care & Use Office 	IACUC Administrator
3	Conflicts Administrator  102-456-1066 testuser@streamlyne.org	Conflict of Interest Office 	COI Administrator

## Updating the Commitments Tab

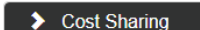
### Commitments Tab > Cost Sharing Section

▼ Cost Sharing				
Cost Sharing ?				
Add:	Percentage <input type="text"/> %	* Type <input type="text" value="select"/>	* Project Period <input type="text"/>	Source <input type="text"/>
	Destination <input type="text"/>	* Commitment Amount <input type="text"/>	Cost Share Met <input type="text"/>	Verification Date <input type="text"/> 
				<input type="button" value="Add"/>

1. Click on the tab header on the left-hand menu to access the Commitments tab.

Commitments

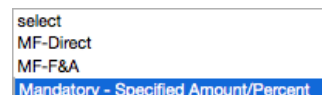
2. If there is Cost Sharing information on the linked Institutional Proposal, that data will appear in this section of the Award.

If you need to add or edit cost share, click the header to expand the Cost Sharing section. 

Otherwise, skip to the next process.

3. If your institution is tracking cost sharing percentages for this Award, enter the Cost Sharing **Percentage** as a value between 0.01 and 100.00.

4. Click the arrows next to the Cost Sharing **Type** field, and then select the most appropriate option from the dropdown list.



A dropdown menu with the following options: select, MF-Direct, MF-F&A, and Mandatory - Specified Amount/Percent (which is highlighted in blue).

5. Enter the **Project Period** during which this Cost Sharing will apply.

Enter this as a year in YYYY format. Depending on your institution's procedures, the year may indicate the fiscal year, a project year, or a calendar year.

6. Enter the provider of funding for the Cost Share Type into the **Source** field, according to your institution's procedures. The **Source** is usually an account number or unit name.

**Note** Depending on your browser's settings, you may need to drag the horizontal grey scrollbar all the way to the right to access the rest of the fields.

7. Enter the account number that will be charged for cost-sharing expenditures in the **Destination** field, according to your institution's procedures

8. Enter the cost share dollar amount committed for this award in the **Commitment Amount** field.

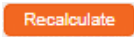
9. As project work progresses over the course of the award lifecycle, you can enter the dollar amount already expended for this item in the **Cost Share Met** field.

For a New Award, this will usually be left blank.

10. Enter the date that the **Cost Share Met** value was confirmed in the **Verification Date** field. Enter the date in MM/DD/YYYY format or click the calendar icon to select the date.

11. Click the Add button  to complete this action.

12. Repeat Steps 3 through 11 until all Cost Share items are included.

13. Click the Recalculate button  to update all Cost Share Totals.



14. Enter any relevant or useful information in the **Comments** field that should be preserved for future reference.
15. Use the Sync to Template button to add or reset the text in the **Comments** field to use the default text available from the Sponsor Template, if any exists. Sync to Template


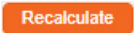
If clicked, a warning message will appear to confirm the action.

## Commitments Tab > Rates Section > F&A Rates Subsection

The F&A Rates subpanel displays the facilities and administrative cost rate(s) that are associated with an award. You may enter different rates for multiple periods, if appropriate.

1. Click the header to expand the Rates section. > Rates
2. If there is Unrecovered F&A information on a linked Institutional Proposal, that data will appear in this section of the Award.  
  
Enter the F&A rate in the **Rate** field as a percentage value between 00.1 and 99.9.
3. Click the arrow next to the **Type** field, and then select the F&A Type from the dropdown list.
4. Enter the **Fiscal Year** to which this F&A Rate applies in YYYY format.
5. After you tab or click out of the **Fiscal Year** field, Streamlyne Research will automatically populate the **Start Date** and **End Date** with the beginning and ending dates for the **Fiscal Year**.

If you need to change one or both of these dates to represent a partial period, hand-key the new date(s) in MM/DD/YYYY format into the **Start Date** and/or **End Date** field(s). You may also select the dates by clicking the calendar icon.

6. From the **Campus** dropdown list, select on or off to indicate whether this Rate applies to on-campus or off-campus costs.
7. Enter the account or department that will pay for Unrecovered F&A in the **Source** field.
- Note** Depending on your browser's settings, you may need to drag the horizontal grey scrollbar all the way to the right to access the rest of the fields.
8. Enter the account number that will be charged for Unrecovered F&A into the **Destination** field, according to your institution's procedures.
9. Enter the dollar amount of indirect costs that will not be covered by the Sponsor in the **Unrecovered F&A** field.
10. Click the Add button to complete this action. 
11. Repeat Steps 2 through 10 until Rates for all fiscal years covered by the Award are added.
12. Click the Recalculate button to update all Unrecovered F&A Totals, if applicable. 
13. Enter any relevant or useful information in the **Comments** field that should be preserved for future reference.

## Commitments Tab > Rates Section > Benefits Rates Subsection

The Benefits Rates subsection allows you to add any Award-specific benefits rates that are not standard for your institution. For example, if a sponsor does not pay fringe benefits, you can enter the rate as zero (0) in this section.

Skip this section if the Award should use the standard rates configured for your institution in the budget.



The screenshot shows a web interface for the 'Benefits Rates' subsection. At the top, there is a 'Hide' button and the text 'Benefits Rates'. Below this is a header bar with 'Benefits Rates' and a search icon. The main form area contains two input fields: 'On Campus' and 'Off Campus', each followed by a percentage sign. Below these is a 'Comments:' label and a large text area for entering comments. A small icon is visible to the right of the text area.

1. If non-standard benefits rates apply to this Award, click the Show button to expand the Benefits Rates section. Show Benefits Rates  
Otherwise, skip to the next process.
2. Enter the Award's On Campus Benefit Rate as a percent value between 0.00 and 99.9 in the **On Campus** field.
3. Enter the Award's Off Campus Benefit Rate as a percent value between 0.00 and 99.9 in the **Off Campus** field.
4. Enter any information for future reference about Benefit Rates in the **Comments** field.

## Commitments Tab > Preaward Authorizations

**Preaward Authorizations**

**Sponsor Authorization**

Authorized Amount: \$

Effective Date:

Comments:

**Institutional Authorization**

Authorized Amount: \$

Effective Date:

Comments:

1. If the Sponsor or your institution has authorized pre-award spending for the project, click the header to expand the Preaward Authorizations section. Preaward Authorizations  
Otherwise, skip to the next process.
2. If the Sponsor has authorized funding in advance of the finalization of the Award, enter the dollar amount in the Sponsor Authorization subsection **Authorized Amount** field.  
Otherwise, skip to Step 5.

3. Enter the **Effective Date** of the Sponsor's funding authorization in MM/DD/YYYY format or click the calendar icon to select the date.
4. Enter any relevant information about this Sponsor Authorization for future reference in the **Comments** field.
5. If your Institution has authorized funding in advance of the finalization of the Award, enter the dollar amount in the Institution Authorization subsection **Authorized Amount** field.  
  
Otherwise, skip to the next process.
6. Enter the **Effective Date** of the Institution's funding authorization in MM/DD/YYYY format or click the calendar icon to select the date.
7. Enter any relevant information this Institution Authorization that should be preserved for future reference in the **Comments** field.

## Updating the Budget Versions Tab

The Budget Versions tab has three sections:

The Budget Overview section displays summary data from the current budget version, if one exists.

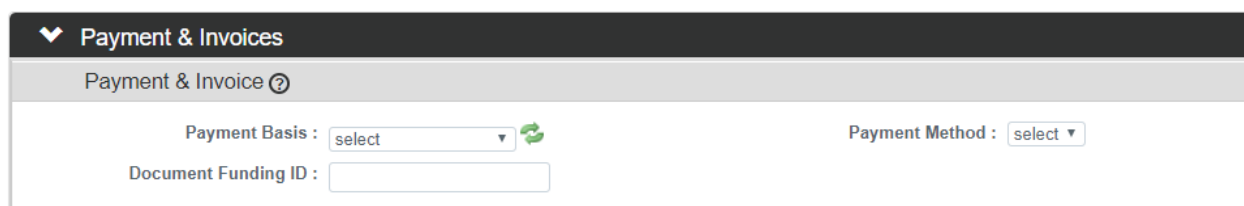
The Budget Versions section displays the various budget versions that have been added to the Award, and allows you to initiate a new budget version.


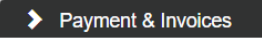
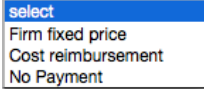
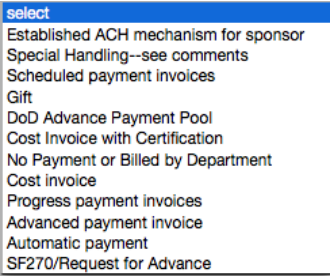
The Budget Limits section displays personnel and non-personnel limits from the current budget version, if one exists.

Before you may initiate a new Budget Version, the system requires that the Award is complete with a Document Status updated to Final. Any Time & Money documents must be updated to Final Status as well. Skip ahead to [Initiating and Updating an Award Budget](#) for more information on Award Budget functionality.

## Updating the Payment, Reports & Terms Tab

### Payment, Reports & Terms Tab > Payment & Invoices Section > Payment & Invoice Subsection



1. Click the tab header on the left-hand menu to access the Payment, Reports & Terms tab.
2. Click the header to expand the Payment & Invoices section to set up the payment schedule and invoice requirements for the Award.
3. Select the payment structure from the **Payment Basis** dropdown list to indicate how the Sponsor makes payments to your institution for work performed on the Award.
4. Select the **Payment Method** from the dropdown list to indicate the mechanism for obtaining payments from the Sponsor. Sample options are shown here.  
  
The Payment Basis selected in Step 3 will determine which **Payment Method** options are available.
5. If the Sponsor provided a unique identifier that documents the obligation of funds, enter that identifier in the **Document Funding ID** field.

## Payment, Reports & Terms Tab > Payment & Invoices Section > Payment & Invoice Requirements Subsection

Payment & Invoice Requirements (0)

* Payment Type	* Frequency	* Frequency Base	OSP File Copy	Due Date	Action
Add: <input type="text" value="select"/>	<input type="text" value="select"/>	<input type="text" value="select"/> Base Date: MM/DD/YYYY	<input type="text" value="select"/>	<input type="text"/>	<input type="button" value="Add"/>
Invoice Instructions: <input type="text"/> <input type="button" value="Sync to Template"/>					
<input type="button" value="Generate Schedule"/>					

Award Payment Schedule

Schedule Details	Invoice ID	Due Date	Overdue	Preparer	Status	Activity Date	Comments	Amount	Last Update	Actions
Add:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="button" value="Add"/>
Total:									\$0.00	<input type="button" value="Recalculate"/>

1. You can enter a separate line for each payment report or invoice type required for the Award in the Payment & Invoice Requirements subsection.

If a Sponsor Template is in use, and you would like the Payment or Invoicing types documented on the Sponsor Template to populate this section, click the Sync to Template button. Then, skip to Step 10.

Otherwise, continue to Step 2.

2. Identify the payment report or invoice type required by the Sponsor by selecting from the **Payment Type** dropdown list. Sample options are shown here.

select  
 Final (Final Report)  
 Form provided by sponsor (Final Report)  
 None  
 Online  
 Other  
 Payment  
 Progress/Status  
 SF 1034 Final (Final Report)  
 SF 270 (Final Report)  
 SF 294 (Final Report)  
 SF 295 (Final Report)  
 Standard Institutional

3. Identify how often the Payment Type is due by selecting the **Frequency** from the dropdown list.

The Payment Type selected in Step 2 will determine which **Frequency** options are available.

select  
 15 Days After Each Quarter  
 Annual  
 As required  
 At expiration  
 Monthly  
 One in advance  
 Quarterly  
 Scheduled

4. Identify the base date that, together with the Payment Frequency identified in Step 3, the system should use to generate the payment schedule. Select an option from the **Frequency Base** dropdown list.

select
As Required
Obligation End Date
Project End Date
Project Start Date

The Frequency selected in Step 3 will determine which **Frequency Base** options are available.

Once a **Frequency Base** is selected, the Base Date will display below the field in MM/DD/YYYY format.

- Note** Depending on your browser's settings, you may need to drag the horizontal grey scrollbar all the way to the right to access the rest of the fields.

* Frequency Base	OSP File Copy	Due Date	Action
<div>select ▼</div> <div>Base Date: MM/DD/YYYY</div>	<div>select ▼</div>	<div></div> <div>📅</div>	<div>Add</div>

5. Identify which payment and/or invoice document(s) should be retained by the Office of Sponsored Projects by selecting from the most appropriate value from the **OSP File Copy** dropdown list.
6. If the payment dates are not going to be calculated by the system for this Payment Type, enter the **Due Date** in MM/DD/YYYY format, or click the calendar icon to select the date.
7. Click the Add button to complete this action. 

Add

select
Letter Only
Report
Report + Letter
Sponsor Form

- Note** Adding a payment or invoice item makes the Recipients subsection available. See [Recipients](#) section below for information about using this subsection.
8. Repeat Steps 2 through 7 until all payment or invoice items are added.
  9. Record special instructions for future reference in the **Invoice Instructions** field.
  10. Before completing this step, it is important that all Payment Types are added to the Award. This is because the Generate Schedule button should be clicked only once in the lifetime of the Award document to avoid duplicating items on the schedule. If it is clicked more than once, the duplicate items will need to be manually removed from the schedule.

Click the Generate Schedule button if you would like the system to generate a payment schedule for the Payment Type(s) added to the Award. 

Generate Schedule


**Note** When you click the Generate Schedule button, Streamlyne Research will populate the Award Payment Schedule subsection with the payment items specified by your selections, so you can enter and track details about each payment or invoice during the course of the Award. This information is covered in the [Award Payment Schedule Subsection](#) section below.

## Payment, Reports & Terms Tab > Payment & Invoices Section > Payment & Invoice Requirements Subsection > Recipients

<div>Hide</div> Recipients (0)				
	Contact Type	Name/Organization	Number of Copies	Action
Add:	<div>select</div>	<div></div>	<div>1</div>	<div>Add</div>

1. If you would like to record the Sponsor Contacts who will receive the invoice/report items, click the Show button to expand the Recipients subsection. 

Show

 Recipients (0)  
Otherwise, skip to the next process.
2. If Sponsor Contacts have been added to this Award on the Contacts tab, they will be available to select in the **Contact Type** field.  
Click the arrow next to the **Contact Type** field, and then select the correct Sponsor Contact from the dropdown list.
3. If the desired Contact is not available on the Contact Type dropdown list, click the magnifying glass  next to the **Name/Organization** field to search the address book and select the contact.
4. Enter the **Number of Copies** that should be sent to the Recipient.
5. Click the Add button to record this information. 

Add
6. Repeat Steps 1 through 5 until all necessary Recipients for each invoice item or payment report are recorded.

## Payment, Reports & Terms Tab > Payment & Invoices Section > Award Payment Schedule Subsection

If you clicked the Generate Schedule button for the invoice or payment reporting items (as detailed in section regarding the [Payment & Invoice Requirements Subsection](#)), an individual line for each instance an item is due will display in the Award Payment Schedule subsection. The **Schedule Details** and **Due Date** columns will be populated. All other optional detail for an invoice or reporting item must be added manually.



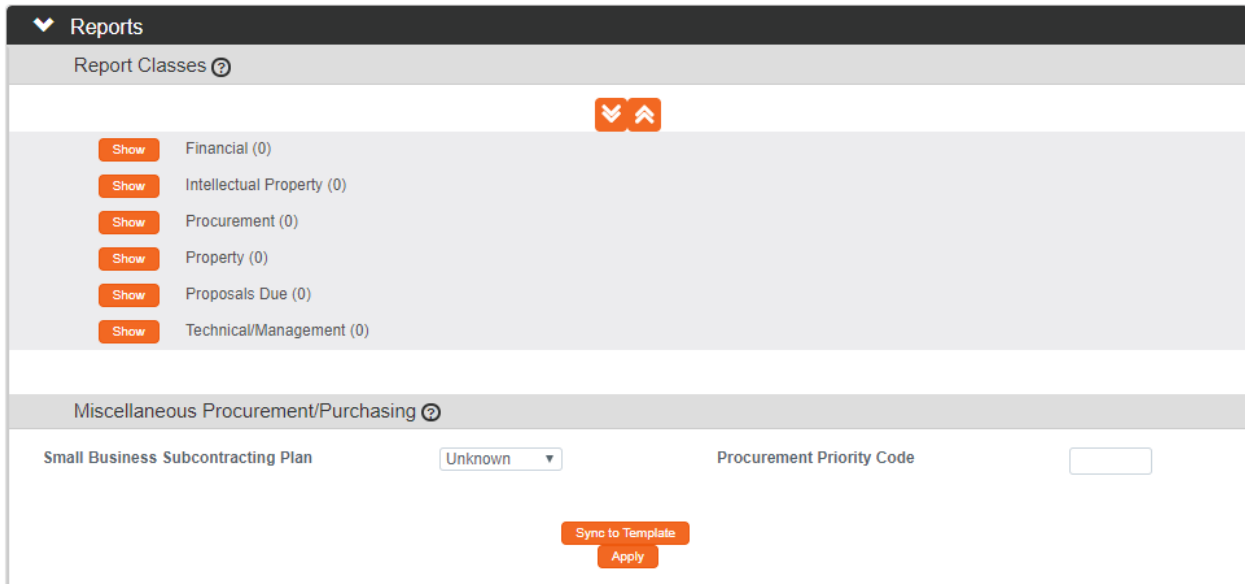
You also have the option to manually add a Payment Schedule item using the Add action button – either in addition to previously created items or in lieu of them. For manually scheduled items, enter data on topmost **Add:** line. To update previously scheduled items, enter data for each line number where the **Schedule Details** column is populated with an item description.

Award Payment Schedule										
Schedule Details	Invoice ID	Due Date	Overdue	Preparer	Status	Activity Date	Comments	Amount	Last Update	Actions
Add:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<select type="text"></select>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="button" value="Add"/>
1 Final-90 days after expiration-Project End Date-Sponsor Form	<input type="text"/>	03/31/2019	<input type="text"/>	<input type="text"/>	<select type="text"></select>	<input type="text"/>	<input type="text"/>	0.00		<input type="button" value="Delete"/>
Total:								\$0.00		<input type="button" value="Recalculate"/>

1. Enter an optional invoice number in the **Invoice ID** field.
2. If the system has not calculated a **Due Date** for you, enter this in MM/DD/YYYY format, or click the calendar icon to select the date.
3. If the payment report of invoice is overdue, enter a note in the **Overdue** field.
4. For the **Preparer** field, click the magnifying glass to look up and select the name of the person who prepared the invoice.
5. Click the arrow next to the **Status** field, and then select the invoice status from the dropdown list.
6. In the **Activity Date** field, enter the date the payment item was submitted in MM/DD/YYYY format, or click the calendar icon to select the date.
7. If there is any information that should be added to be referenced at a later date, type this into the **Comments** field.
8. Enter the item's dollar amount in the **Amount** field.
9. If changes have been made to existing lines, click the Save button at the bottom of the page.
10. If the data entered is for a new row, click the Add button to schedule the new item.
11. Click the Recalculate button to update all Payment & Invoice Totals.

## Payment, Reports & Terms Tab > Reports Section

In the Report Classes subsection, there are several classes of Reports. The instructions that follow use the Financial Class as an example, but the instructions apply to each Report Class.



1. Click the header to expand the Reports section.
2. The system will display the page with each Report Class subsection collapsed.

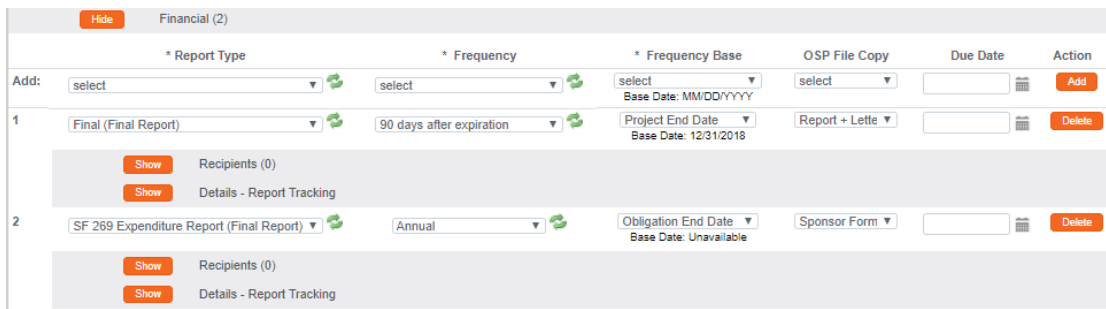
If a Sponsor Template is in use and you would like the Reports documented on the Template to populate this section, click the Sync to Template button.

[Sync to Template](#)

Otherwise, continue to the next step to add individual Reports.

3. Click the Show button to expand the Financial subsection.

[Show](#) Financial (2)



4. To add a Report required for the Award, click the arrow next to the **Report Type** field, and select the desired report from the dropdown list.

- Click the arrow next to the **Frequency** field, and indicate how frequently the report should be submitted by selecting from the dropdown list.

Note that the **Report Type** selected in the previous step drives the choices available in the dropdown list.

- Click the arrow next to the **Frequency Base** field, and indicate the date the system should use to calculate the report due dates by selecting from the dropdown list.

- Identify which report document should be retained by the Office of Sponsored Projects by selecting the most appropriate value from the **OSP File Copy** dropdown list.

- In the **Due Date** field, enter the date that the submission is due in MM/DD/YYYY format, or click the calendar icon to select the date.

- Click the Add button to record this information.

Add

- Repeat Steps 3 through 9 for each Report Class subsection until all reports are added to the Award.

**Note** When you click the Add button in Step 9, the Recipients and Details – Report Tracking subsections for that Report will become available. Here you can track where the report should be submitted, along with the activities associated with the Report. See sections [Reports Subsection > Recipients](#) and [Report Subsection > Details – Report Tracking](#) below for information on these features.



## Payment, Reports & Terms Tab > Reports Subsection > Recipients

For each Report added to an Award, you have the option to name a Recipient to whom the Report should be submitted.

- If you would like to record the Sponsor Contacts who will receive the Reports added in the previous process, click the Show button to expand the Recipients subsection.

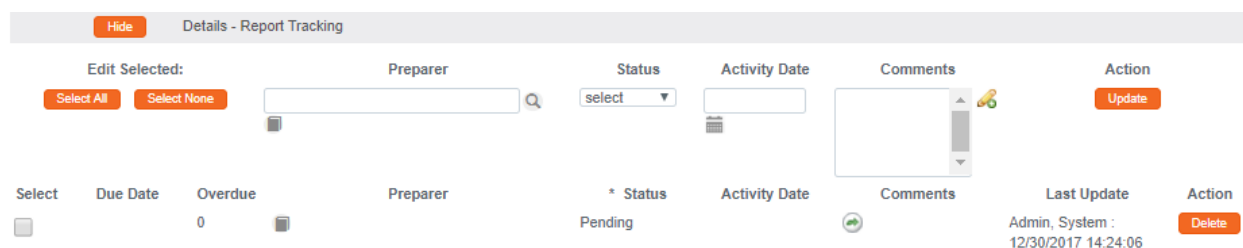
Show Recipients (0)

Otherwise, skip to the next process.

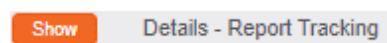
2. If Sponsor Contacts have been added to this Award on the Contacts tab, they will be available to select in the **Contact Type** field.  
  
Click the arrow next to the **Contact Type** field, and then select the correct Sponsor Contact from the dropdown list.
3. If the desired Contact is not available on the Contact Type dropdown list, click the magnifying glass  next to the **Name/Organization** field to search the address book and select the contact.
4. Enter the **Number of Copies** that should be sent to the Recipient.
5. Click the Add button to complete this action. 
6. Repeat Steps 1 through 5 until all Recipients have been added for each Report listed on the Award.

## Payment, Reports & Terms Tab > Reports Subsection > Details – Report Tracking

For each Report added to an Award, you have the option to add details to track the status and activities for the Report.





1. If you would like to track the status and activities for a Report added in previous processes, click the Show button to expand the Details – Report Tracking subsection.



Otherwise, skip to the next process.


**Note** The subsection will display the **Due Date(s)** for the Report along with fields to track the **Preparer, Status, Activity Date** and **Comments**. You can enter the data directly in the fields, or if there are multiple instances of the same report, you can edit multiple Report lines at once using the Update feature in the upper right-hand corner.

The fields available for editing are the same whether you are editing line-by-line or updating multiple lines at once.

2. If you would like to edit multiple lines at a time, click the checkbox  next to the lines to update. You may also click the Select All button if you wish to edit all lines. Select All
3. For the **Preparer** field, click the magnifying glass  to search for the name of the person who prepared the Report.
4. Click the arrows next to the **Status** field, and then select the Report status from the dropdown list.
5. In the **Activity Date** field, enter the date the Report was submitted in MM/DD/YYYY format, or click the calendar icon to select the date.
6. If there is any information that should be added for future reference, type this into the **Comments** field.
7. If you are editing a single line, click the Save button at the bottom of the page. Save  
If you are editing multiple lines at once, click on the Update button instead. Update
8. Repeat Steps 1 through 7 to add Details for each Report listed on the Award.

## Payment, Reports & Terms Tab > Reports Subsection > Miscellaneous Procurement/Purchasing

This section allows you to identify the **Small Business Subcontracting Plan** requirement and enter a **Procurement Priority Code**, if either applies to the Award.

Miscellaneous Procurement/Purchasing 

Small Business Subcontracting Plan

Unknown ▼

Procurement Priority Code

Sync to Template  
Apply

1. A **Small Business Subcontracting Plan** may be required for Awards from federal or state sponsors.

Click the arrow to select the appropriate option to indicate whether this type of plan is required for the Award.

Unknown ▼


Unknown

Required

Not Required

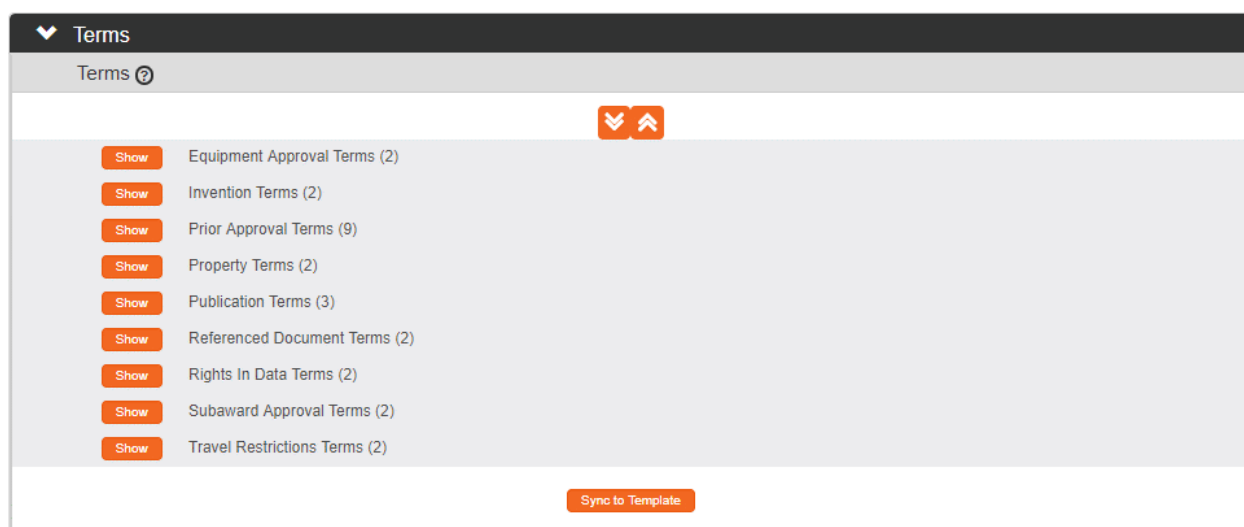
2. For Awards such as federal contracts from the Department of Defense, a **Procurement Priority Code** may apply.


If so, enter the code number in the field as designated by the Sponsor in the Award contract.

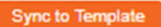
3. Click the Save button at the bottom of the page. 


## Payment, Reports & Terms Tab > Terms Section


The Terms section is the place where contract terms for this Award can be recorded.





1. Click the header to expand the Terms section. 
2. The system will display the page with the Equipment Approval Terms subsection already expanded if there are no Equipment Approval Terms already present.


If a Sponsor Template is in use, and you would like Terms documented on the Template to populate this section, click the Sync to Template button. 

Otherwise, enter the **Sponsor Term Code**, or click the magnifying glass  to look up and select the desired value(s) from the list of sponsor terms configured for your institution.

3. Click the Add button to add this Term to the Award. 
4. Repeat Steps 2 and 3 until all Equipment Approval Terms are included on the Award.

- Click the Show button next to each of the remaining Terms subsections where contract terms will be added. 

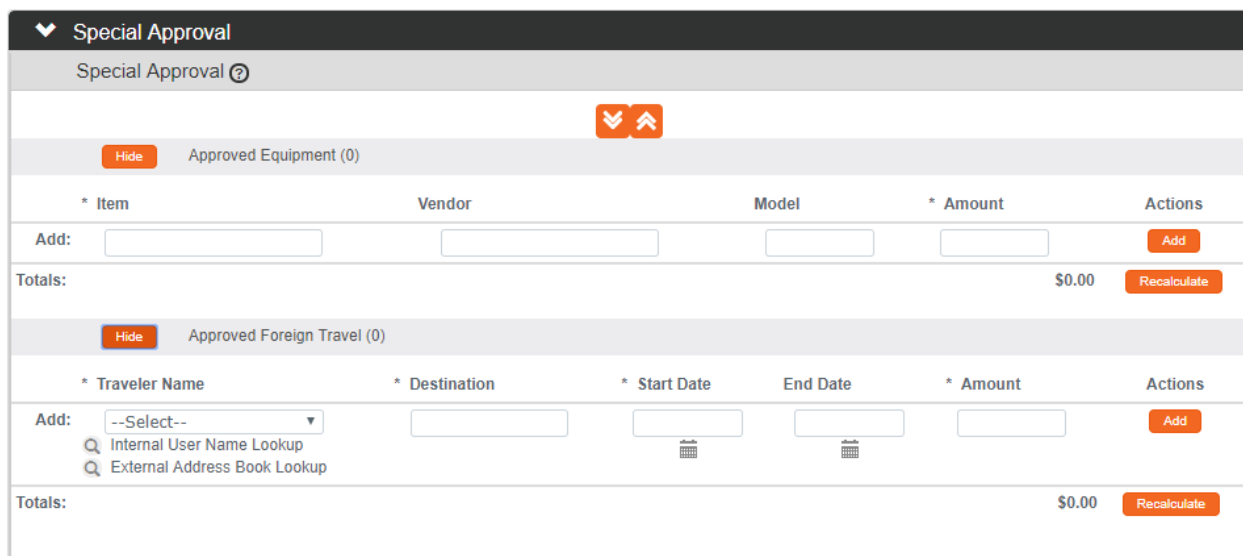
You may also expand all the subsections at once by clicking the downward-facing double chevron at the top of the section. 

- Continue to add Terms by repeating Steps 2 and 3 until terms have been added for all term types.
- If any items were added in error, remove them by clicking the Delete button next to each extraneous row. 

**Note** Data validation will prevent you from submitting the Award until all at least one Term has been added to each Term Type subsection.


## Payment, Reports & Terms Tab > Special Approval Section


This section is optionally used to record one-off approvals for foreign travel or equipment purchases.






**Special Approval**





Special Approval ?

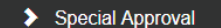


 Approved Equipment (0)





* Item	Vendor	Model	* Amount	Actions
Add: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Totals:			\$0.00	

 Approved Foreign Travel (0)


* Traveler Name	* Destination	* Start Date	End Date	* Amount	Actions
Add: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
 Internal User Name Lookup					
 External Address Book Lookup					
Totals:			\$0.00		

- If you need to record special approvals for travel or equipment, click the header to expand the Special Approval section. 


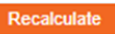
Otherwise, skip to the next process.

2. To record an equipment approval, click the Show button next to the Approved Equipment subheader.  Approved Equipment (0)  
Otherwise, skip to Step 10.
3. Enter a description of the equipment in the **Item** field.
4. In the **Vendor** field, identify the company from whom the item will be purchased.
5. Enter the model number in the **Model** field.
6. In the **Amount** field, enter the total dollar amount needed to complete the purchase.
7. Click the Add button to record the item. 
8. Repeat Steps 3 through 7 until all equipment purchases are recorded.
9. Click the Recalculate button to update all Equipment Totals. 
10. To record a foreign travel approval, click the Show button next to the Approved Foreign Travel subheader.  Approved Foreign Travel (0)  
Otherwise, skip to the next process.


11. Select the project team member approved to travel from the **Traveler Name** dropdown list.

If the traveler is not included in the dropdown list, use the Internal User Name Lookup or External Address Book Lookup by clicking the magnifying glass  to search for and select the traveler.

Alternatively, you may also return to [Contacts Tab > Key Personnel](#) to add the person to Key Personnel.

12. Enter the traveler's destination in the **Destination** field.
13. Enter the date of departure in the **Start Date** field. Use MM/DD/YYYY format or click the calendar icon to select the date.
14. Enter the date of return in the **End Date** field. Use MM/DD/YYYY format or click the calendar icon to select the date.
15. In the **Amount** field, enter the total cost for the trip.
16. Click the Add button to record the item. 
17. Repeat Steps 11 through 16 until all travel approvals are recorded.
18. Click the Recalculate button to update all Travel Totals. 

\* Traveler Name

Add:	--Select--
	
	--Select--
Totals:	Biochemistry Professor
	Biochemistry Researcher



## Payment, Reports & Terms Tab > Closeout Section

Final reports requested or scheduled in the Payment, Invoices, or Reports sections are displayed in the Closeout section in read-only format. Update archive information and final report submission dates here.

▼ Closeout

Award Closeout ⓘ

Archive Location

Archive Date

	Final Report	Due Date	Final Submission Date	Actions
Add:	<div></div>	<div></div>	<div></div>	<div>Add</div>
1	Financial	MULTIPLE	<div></div>	<div></div>
2	Technical	03/16/2019	<div></div>	<div></div>
3	Patent	06/30/2019	<div></div>	<div></div>
4	Property	MULTIPLE	<div></div>	<div></div>
5	Invoice	MULTIPLE	<div></div>	<div></div>

1. If you need to record information related to the Award Closeout, click the header to expand the Closeout section. 

➤ Closeout

  
Otherwise, skip to the next process.
2. If applicable and/or known, enter the location where the Award documentation is archived in the **Archive Location** field.
3. Using MM/DD/YYYY format, enter the date the Award was archived in the **Archive Date** field, or click the calendar icon to select the date.
4. If this Sponsor requires a custom closeout report that is not already listed, enter the report's description in the **Final Report** field.  
  
Otherwise, skip to Step 7.
5. Enter the date that the custom report is due in the **Due Date** field using MM/DD/YYYY format, or by clicking the calendar icon to select the date.
6. Click the Add button to record the custom report to the Closeout section. 

Add
7. If available, record the dates that the requested final reports were submitted in the corresponding **Final Submission Date** fields. Enter the date in MM/DD/YYYY format, or click the calendar icon to select the date

## Updating the Special Review Tab

The Special Review functionality is designed to record formal reviews or administrative efforts linked to the effort tracked on your Award, in such instances as:

- Human subjects research tracked on IRB Protocol documents
- Animal research tracked on IACUC Protocol documents
- Technology/data protections recorded on Intellectual Property Review documents
- Research-related facilities requests or clearances, such as lab transfers or material handling requests

1. Click on the tab header on the left-hand menu to access the Special Review tab.

Special Review

**Note** If you linked an Institutional Proposal to the Award, then any Special Review information that recorded on the IP will default into the Award. You can update, remove, or add Reviews in this section as needed.

2. Click the arrow next to the field to select the Special Review **Type** from the dropdown list configured for your institution.

select


- Human Subjects
- Animal Usage
- Recombinant DNA
- Radioactive Isotopes
- Biohazard Materials
- International Programs
- Space Change
- Tech Licensing: No conflict (A)
- Tech Licensing: Reviewed, no conflict (B1)
- Tech Licensing: Potential Conflict (B2)
- Tech Licensing: Previously Reviewed
- Foundation Relations

3. If your institution uses Streamlyne Research for IRB or IACUC Protocols, **Approval Status** will automatically populate based on the **Protocol Status** of the document linked by **Protocol Number** in Step 4. Continue to the next step.

If your institution does not use Streamlyne Research for IRB or IACUC Protocols, click on the arrow next to the field to select the appropriate **Approval Status** from the dropdown list.

4. If your institution uses Streamlyne Research for IRB or IACUC Protocols, click the magnifying glass next to the **Protocol Number** field to look up this value.

Otherwise, enter the Protocol or Intellectual Property Review number in the **Protocol Number** field.

5. Enter the **Application Date**, **Approval Date**, and **Expiration Date** of your linked project, if possible. Type these values in MM/DD/YYYY format or click the calendar icon to select the date.
6. If the human subjects research on a linked IRB Protocol falls under one of the six categories of Exempt Research per the Common Rule (45 CFR 46.101(b)), identify the **Exemption #** by clicking the arrow next to the field and selecting the correct E# from the list.
7. Click the Add button to complete this action. 
8. Repeat Steps 2 through 7 until all related reviews are recorded.

## Updating the Custom Data Tab

As the name implies, the fields on the Custom Data tab are 100% configurable by your institution. If you would like to explore these screens, click on the tab header on the left-hand menu to access this section.



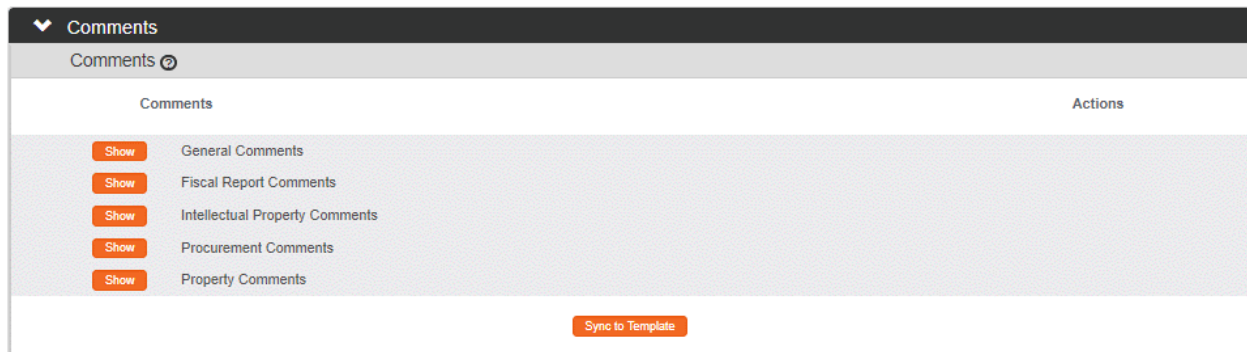
If you have linked an Institutional Proposal to this Award, Custom Data from the IP will display here. From this tab, you can edit the information according to your institution's procedure. If your institution does not use Custom Data, or if no changes are needed, continue to the next process.






## Updating the Comments, Notes & Attachments Tab

The Comments functionality detailed below is unique to the Comments, Notes & Attachments tab on the Award document. For information on the how to add Notes and Attachments to the Award, refer to the **NEW USER MANUAL: Navigation, the Action List, and Common Document**

**Elements, Notes and Attachments Section.** For information on how to add a Comment to the Award, follow the steps below.

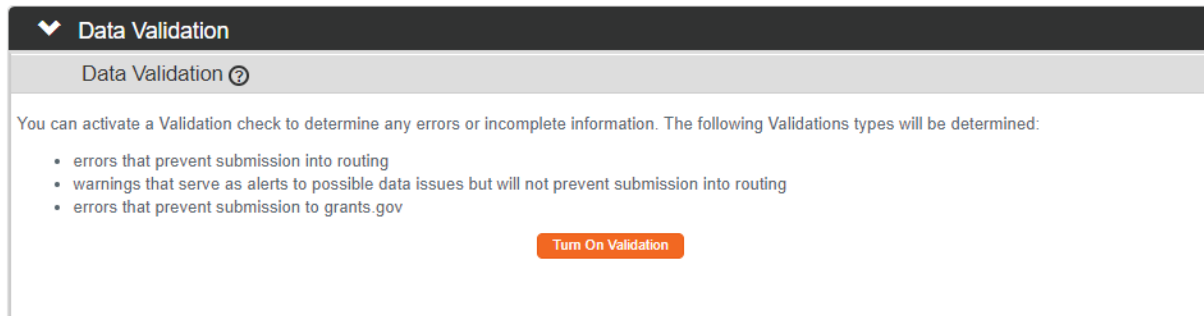
**Note** The types of Comments available in the Award are configurable by your institution, so the sections you see may vary from the ones shown in the image below.



1. Click the tab header on the left-hand menu to access the Comments, Notes & Attachments tab. 
  2. Click the header to access the Comments section. 
  3. Click the Show button next the Comment Class you would like to review or update. 
  4. Enter any information that should be preserved for future reference in the Comments field.
- Note** If you have applied a Sponsor Template to the Award, default Comment text available from that Template will display here. At this point, you edit that text as it pertains to this Award.
5. Click the Save button at the bottom of the page. 
  6. If a Sponsor Template is in use, and you would like the Comments from the Template to replace text this section, click the Sync to Template button. 

## Using the Award Actions Tab

### Award Actions Tab > Data Validation Section



1. Click the tab on the left-hand menu to access the Award Actions

Award Actions

2. Click the header to access the Data Validation section.

Data Validation

3. Click the Turn On Validation button.

Turn On Validation

**Note** Streamlyne Research 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 Award is submitted.

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

1 error(s) found on page.



4. Streamlyne Research will display a list of errors and warnings found on the document.

Click the Fix button next to the listed error or warning.

Fix

**Note** Errors must be corrected prior to submitting the Award. Warnings indicate data issues that should be reviewed but do not have to be changed in order to submit the Award.

5. Streamlyne Research will return to the document section where the problem resides.

Make your corrections now.

6. Repeat Steps 4 and 5 as many times as necessary to resolve all errors.

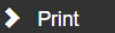
## Award Actions > Hierarchy Actions






Hierarchy Actions let you build and view an Award Hierarchy with parent and child awards. From this section, you can copy an award to create a new child or to create a new standalone award. For details on how to use this feature, refer to [Using Hierarchy Actions](#).

## Award Actions > Print Section

This section describes the steps to print an Award. You may print an Award at any time in the document's lifecycle.

The screenshot shows the 'Print' section of a software interface. At the top, there is a dark header with a dropdown arrow and the word 'Print'. Below this is a light gray bar with 'Print' and a help icon. The main content area is divided into several sections. The 'Award Notice' section contains three columns of checkboxes for various document subsections: Terms, Special Review, Approved Equipment, Approved Foreign Travel, Approved Subawards, Cost Sharing, F&A Rates, Benefits Rates, Flow Thru, Comments, Funding Summary, Hierarchy Distributions, Technical Reports, Reports, Payment, Closeout, Sponsor Contacts, Custom Data, Keywords, Unit Contacts, and Credit Split. To the right of these checkboxes are 'Signature Required' checkboxes and a 'Print' button. Below the 'Award Notice' section are 'Award Modification' and 'Award Hierarchy' sections, each with 'Award Version' and 'Transaction' dropdown menus, 'Signature Required' checkboxes, and 'Print' buttons. The 'Award Hierarchy' section also has a 'Time & Money History' section. Below these are 'Time & Money' and 'Transaction Detail' sections, each with 'Award Version' and 'Transaction' dropdown menus, 'Signature Required' checkboxes, and 'Print' buttons. At the bottom, there is a 'Print Reports' section with a 'Hide' button, a 'Person Lookup' section with a search bar, and a 'Current Report' section with 'Initiate' and 'Print' buttons. The 'Pending Report' section also has 'Initiate' and 'Print' buttons.

1. Click on the header to expand the Print section. 
2. Indicate which sections of the **Award Notice** you would like to print by checking or unchecking the boxes next to the names of the document subsections.

3. If applicable, indicate that a signature is required on the hardcopy by clicking the Signature Required checkbox. Signature Required :   
  
This option ensures a section for recording signatures and dates is added to the PDF output.
4. Click the Print button in the top right corner of the Award Notice section. 
5. Streamlyne Research will generate a PDF of the selected **Award Notice** sections.  
  
Follow your browser's prompts to open, save, or print this document.
6. If you need to generate hard copies of the Award Modification or Time & Money Transaction Detail, indicate which version of the award you would like to include in the document by selecting the **Award Version** from the dropdown list.  
  
Otherwise, skip to Step 11.
7. Indicate which transaction number you would like to include in the Award Modification or Time & Money Transaction Detail by selecting the **Transaction Number** from the dropdown list.
8. If applicable, indicate that a signature is required on the hardcopy by clicking the Signature Required checkbox. Signature Required : 
9. Click the Print button. 
10. Streamlyne Research will generate a PDF of the Award Modification or Time & Money Transaction Detail document.  
  
Follow your browser's prompts to open, save, or print this document.
11. If you need to generate hard copies of the Award Hierarchy or Time & Money History, click the corresponding Print button.   
  
Otherwise, skip to the next process.
12. Streamlyne Research will generate a PDF of the Award Hierarchy or Time & Money History document.  
  
Follow your browser's prompts to open, save, or print this document.


## Award Actions > Ad Hoc Recipients


For information on how to use this common function, please refer to the **NEW USER MANUAL: Navigation, the Action List, and Common Document Elements**, Ad Hoc Recipients Section.

## Award Actions > Route Log

For information on how to use this common function, please refer to the **NEW USER MANUAL: Navigation, the Action List, and Common Document Elements**, Route Log Section.

## Award Actions > Submitting an Award

Once all the Award data has been entered and validated, click the Submit button to save the changes and route the document through your institution's workflow. 

It is common practice to exclude Award documents from standard review and approval workflow processes. If this is the case at your institution, you must still click the Submit button to finalize the Award. 





## Using Hierarchy Actions

Streamlyne Research delivers functionality that allows you to create new Award documents from existing Award documents in order to reduce data entry wherever possible. This feature is accessible from the Hierarchy Actions section of the Award Actions tab. A new Award document can be either a stand-alone Award with a unique Award ID, or a child Award document that shares an Award ID with its parent.

Streamlyne Research does not prescribe a use for parent-child Award hierarchy; your institution can fully leverage the Award module without using this feature. The benefit of the hierarchy feature is that it allows your institution to design a process that supports your reporting needs by separating out meaningful Award segments on to child documents. For example, some institutions have designed processes that require the creation of a separate child document for each Award Period, while others create a child document to track certain expenses separately from the parent. Because each Award can only be linked with a single account number, institutions also use the Award Hierarchy when a project requires multiple accounts to manage budgets and expenditures.

Note that the child Award will have the same base Award ID as the source document, but with an incrementing suffix. Given this, you will always be able to identify the parent Award because its Award ID will always have a suffix of -00001A, as shown in this example here:

Award ID	Sponsor Award ID	Lead Unit ID	Lead Unit	Account ID	Award Status	Award Title
000173-00001A	3R01IC09876-17	105010	Biochemistry		Active	Sample Award with an Award Hierarchy
000173-00002B	3R01IC09876-17	105010	Biochemistry		Active	Sample Award with an Award Hierarchy - Child 1
000173-00003B	3R01IC09876-17	105010	Biochemistry		Active	Sample Award with an Award Hierarchy - Child 2

## Accessing the Award Copy Function

1. From within the Award, click the tab header on the left-hand menu to access the Award Actions tab.
2. Click the header to expand the Hierarchy Actions section.
3. If you prefer to view this on a separate browser tab, click the Open Window button.

Award Actions

► Hierarchy Actions

Hierarchy Actions Open Window

- If there is existing data in the system, it may be the case that the Award you are working with already has a hierarchy established.

To view this hierarchy, click the expansion button represented by the file folder icon.

- Click the hyperlinked Award ID for the document you want to work with—either to copy to a new document, or to add a new child to it.



**Result** Streamlyne Research will display the Award Copy window for the selected document, as shown here:

**Note** You can also access this tab and section in an Award by clicking on the hyperlinked copy action from results of an Award Lookup search, as shown here:

Actions	Award ID	Sponsor Award ID	Lead Unit ID	Lead Unit	Account ID	Award Status	Award Title	Sponsor ID	Sponsor Name
open <u>copy</u> streams	000173-00001A	3R01IC09876-17	105010	Biochemistry		Active	Sample Award with an Award Hierarchy	000340	National Institutes of Health

## Using the Award Copy Function

### Creating a New Award

Once you have accessed the Award Copy function, follow these steps to create a new, stand-alone Award document with a different Award ID than the source document.

If you wish to add a child document to an existing Award, skip to the next process.

1. In the Award Copy subsection, the **Copy Descendants** checkbox is conditionally available when the Award you are working with has children.

Check the **Copy Descendants** checkbox if you would like to copy the selected Award and all of its children to the new Award.

Otherwise, leave the box unchecked to copy only the parent-level Award.

2. Click the **Copy as: new** radio button.

3. Click the Copy button. 

**Result** Streamlyne Research will create and display a new Award document that is a partial copy of the original. While most basic Award data is copied to the new Award, some information is excluded, such as start/end dates, dollar amounts, budgets, subawards, payment schedules, sponsor funding transferred information, approved equipment, approved foreign travel, funding proposals, special review, and notes.

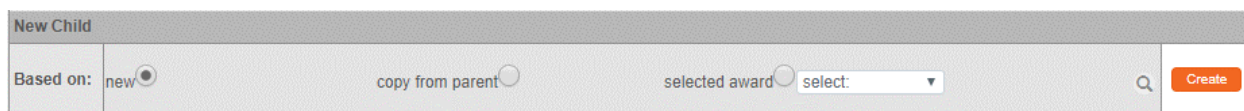
The new Award document will have an **Award ID** that is distinct from the original. The **Document Status** will be INITIATED.

4. Enter the minimum required data and click the Save button to save the new Award.



## Creating a Child Award

Once you have accessed the Award Copy function, follow these steps to add a child Award document to an existing Award.



1. The system requires you to first indicate the basis for the child Award.  
  
If you would like to create a child Award that does not copy data from its parent, click the **Based on: new** radio button. Then, skip to Step 4.  
  
If not, skip to Step 2.
2. If you would like to create a child Award that copies data from the parent (minus Time & Money), click the **Based on: copy from parent** radio button.  
  
If not, skip to Step 3.


3. If you would like to create a child Award that copies data from another child Award in the hierarchy, click the **Based on: selected award** radio button and select the Award to use as the basis for copying from the dropdown list.

You can also click on the magnifying glass  to use the Award Lookup to select the Award from which to copy.

4. Click the Create button. 

**Result** Streamlyne Research will create and display a new child Award document populated according to your selections in Steps 1 through 3.

The system will also display a message indicating the Award has been successfully saved.

• Document was successfully saved. 

The new Award document will share an **Award ID** with its parent, with a new suffix that is one (1) greater than the highest existing suffix within the Award Hierarchy.

The **Document Status** for the child Award will be SAVED.

## Updating the Time & Money Document

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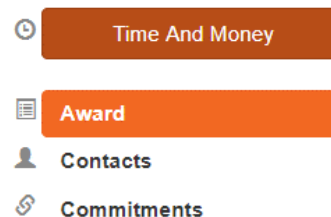
The Time & Money document collects and tracks key dates and amounts for the Award. Users will record the obligation dates, project dates, obligation amounts, and anticipated amounts for an award. The Time & Money document is edited any time the award agreement is modified to adjust the period of performance or dollar value of the award. Awarded funds **MUST** be obligated in the Time & Money document before they can be allocated within a Budget.

The Time & Money document is designed to facilitate and track the distribution of Sponsor funds. All financial transactions between Awards within the Award hierarchy are recorded on the Time & Money document, as well as any changes to Project Dates, Period Dates, and Amounts.

### Accessing Time & Money

After an Award document is approved, Streamlyne Research makes the Time & Money document accessible to you from within the Award document.

Click the Time & Money button located at the top of the left-hand tab menu to access the Time & Money document. The system will display the document, expecting you to enter a new transaction.



### Updating the Time & Money Tab

Once you access Time & Money, Streamlyne Research will display the document. If the Document Status is FINAL and you have the appropriate permissions, click the Edit button at the bottom of the page.

A small, rectangular orange button with the word 'Edit' in white text.

Follow these steps to complete a Time & Money transaction:

### Time & Money Tab > Document Overview Section

If you need additional information on this common element, refer to the **NEW USER MANUAL: Navigation, the Action List, and Common Document Elements**, Document Overview Section.

## Time & Money Tab > Award Hierarchy

**Award Hierarchy**

Award Hierarchy ⓘ

Transaction Type Code      Notice Date      Comments

New

Go To: 000173-00001A      Go      ☒ current ☐ pending      Totals

Nodes:	Oblig. Start	Oblig. End	Project End	Oblig. Direct	Oblig. F&A	Oblig. Total	Ant. Direct	Ant. F&A	Ant. Total
000173-00001A :: Biochemistry Professor: Biochemistry	07/01/2017	06/30/2018	06/30/2018	100,000.00	50,000.00	150,000.00	100,000.00	50,000.00	150,000.00
000173-00002B :: Biochemistry	07/01/2017	06/30/2018	06/30/2018	0.00	0.00	0.00	0.00	0.00	0.00

1. If it is not already expanded, click on the header to expand the Award Hierarchy section.

2. If there is an Award Hierarchy, make sure you are working with the correct node of the award by double-checking the Award ID in the Document Header.

If you wish to work with a different child/node in the hierarchy, click the arrows next to the **Go To** field. Select the desired node from the dropdown list, and then click the Go button.

Go To: 000030-00001      Go

- 000030-00001
- 000030-00002
- 000030-00003
- 000030-00004

3. Identify the reason you need to add to or update the Time & Money data by clicking the arrows next to the **Transaction Type Code** field and selecting the transaction type from the dropdown list. Sample options are shown here.

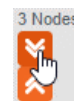
select

- Administrative Amendment
- Allotment (Increment)
- Continuation (Amendment)
- Correction
- Date Change**
- Deobligation
- F&A Rate Change
- Investigator Change
- New
- No Cost Extension
- Restriction Change
- Subaward Change
- Supplement
- Suspension (Stop Work Order)
- Termination
- Unit Change

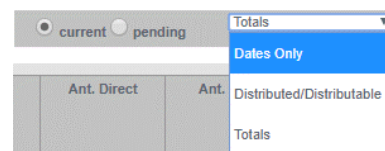
4. If the transaction has a corresponding Sponsor's notice, enter the **Notice Date** in MM/DD/YYYY format, or click the calendar icon to select the date.

5. Enter any information that should be preserved for future reference in the **Comments** field.
6. If you are initiating a Date Change transaction, make changes to the **Obligation Start Date**, the **Obligation End Date**, and/or the **Project End Dates**. As always, enter the data in MM/DD/YYYY format, or click the calendar icon to select the date.

**Note** To access all nodes of the Award, click the double chevron. The system will then display the dates and amounts associated with each node.



If you would like to change the View, toggle between **Current** and **Pending** transactions by clicking the radio buttons. If you would prefer to see Dates Only, or amounts broken out by Distributed/Distributable (instead of the default Obligated/Anticipated), select the desired option from the dropdown list.



## Time & Money Tab > Transactions Section

The Transaction section is the place to log the movement of funds between nodes on the Award Hierarchy, or the movement of funds between the Award and external entities.

Transactions (000025-00001A)
Pending Transactions

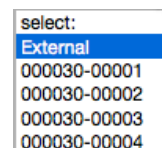
Transaction	Comments	* Source Award	* Destination Award	Obligated Direct Change	Obligated F&A Change	Anticipated Direct Change	Anticipated F&A Change	Actions
Add:		select:	select:	0.00	0.00	0.00	0.00	Add

1. If it is not already expanded, click on the header to expand the Transactions section.

Transactions (000025-00001A)

Note that the Award ID with suffix is clearly displayed on each section header. This is to help ensure you are making changes to the correct node.

2. Enter a brief description of the transaction in the **Comments** field.
3. The **Source Award** represents the source of the funds to be moved in this transaction. The options will be either a node on the hierarchy, or a source external to the Award in cases where the Sponsor is providing additional funds.



Click the arrow next to the **Source Award** field, and then select the source of the funds from the dropdown list.



4. The **Destination Award** represents the destination of the funds being moved in this transaction. The options will be either a node on the hierarchy, or an external destination when money is being transferred to an external recipient.

select:
External
000030-00001
000030-00002
000030-00003
000030-00004

Click the arrow next to the **Destination Award** field, and then select the appropriate value from the dropdown list.

5. The **Obligated Direct Change** field represents the dollar amount committed in the transaction, not including cost share.

Enter the dollar amount in the **Obligated Direct Change** field.

6. The **Obligated F&A Change** field represents the F&A dollar amount committed in the transaction.

Enter the dollar amount in the **Obligated F&A Change** field.

7. The **Anticipated Direct Change** field represents the dollar amount anticipated for the project, to include the current obligation plus anticipated incremental and future-year funding. Cost share is excluded.

Enter the dollar amount in the **Anticipated Direct Change** field.

8. The **Anticipated F&A Change** field represents the anticipated F&A dollar amount.

Enter the dollar amount in the **Anticipated F&A Change** field

9. Click the Add button to complete the transaction. 

**Result** Streamlyne Research will update all dollar value totals on any affected parent and/or child nodes as well the parent node.

The transaction will be logged in the Transaction section of the Time & Money document. You may refer back to this section for a complete history of all transactions executed within the Award Hierarchy.

## Time & Money Tab > Direct/F&A Funds Distribution Section

Streamlyne Research will default project dates and amounts recorded on the Award document to the Direct/F&A Funds section of the Time & Money tab. Default Budget Periods will be generated based on project Start and End Dates. The purpose of this section is to record the breakdown of direct and indirect costs by Budget Period.

Direct/F&A Funds Distribution (000025-00001A)

Direct/F&A Funds Distribution

Project Start Date :
01/01/2015

\* Project End Date :
12/31/2018

Current Anticipated Total :
\$0.00

Current Anticipated Total :
\$0.00

Pending Obligated Total :
\$0.00

Pending Anticipated Total :
\$0.00

	* Start Date	* End Date	* Direct Cost	* F&A Cost	Actions
Add:	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<button>Add</button>
1	<input type="text" value="01/01/2015"/>	<input type="text" value="12/31/2015"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<button>Delete</button>
2	<input type="text" value="01/01/2016"/>	<input type="text" value="12/31/2016"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<button>Delete</button>
3	<input type="text" value="01/01/2017"/>	<input type="text" value="12/31/2017"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<button>Delete</button>
4	<input type="text" value="01/01/2018"/>	<input type="text" value="12/31/2018"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<button>Delete</button>
Total:			\$0.00	\$0.00	<button>Recalculate</button>
Total Anticipated (Direct + F&A):				\$0.00	

1.

If it is not already expanded, click on the header to expand the Direct/F&A Funds Distribution section.

Direct/F&A Funds Distribution (000025-00001A)
2.

The values you see in this section will depend on how much detail you entered on the Award documents within the hierarchy.

You can manually adjust budget period Start and End Dates if the defaulted period dates are not appropriate for the Award.

If you need to manually add a new budget period, populate the **Start Date** and **End Date** with the beginning and ending dates in MM/DD/YYYY format, or click the calendar icon to select the date.

Otherwise, skip to Step 6.
3.

Enter the dollar amounts of the **Direct Cost** and **F&A Cost** for the new budget period.
4.

Click the Add button to record the new budget period.

Add
5.

Repeat Steps 2 through 4 until all budget periods are recorded.
6.

If you need to update the **Direct Costs** and **F&A Costs** for any period, change these values as necessary.
7.

Click the Recalculate button.

Recalculate
- Result

Streamlyne Research will update the **Direct Cost Total** and the **F&A Total** for all budget periods.

## Time & Money Tab > Summary Section

The Summary Section displays key information in read-only format for all the Awards in the hierarchy. The Award ID for the document displayed in this section will be shown prominently in the section header.

Summary (000025-00001A)

Summary ⓘ

Award ID: 000025-00001A

Award Type: Grant

Sponsor Award ID:

Activity Type: Research

Account ID:

Account Type: None Selected

Award Status: Active

Title: KD 3

Dates & Amounts ⓘ

Sponsor: 000340 - National Institutes of Health

Project Start Date: 01/01/2015

Project End Date: 12/31/2018

Anticipated Cumulative: \$0.00

Obligation Start Date:

Obligation End Date:

Obligated Cumulative: \$0.00

Award Details Recorded ⓘ

Approved Subaward? No

Payment Schedule? No

Approved Equipment? No

Sponsor Funding Transferred? No

Approved Foreign Travel? No

Cost Share? Yes

F&A? No

Investigators ⓘ

Investigators

Pediatrics Professor (Principal Investigator)

Units

Pediatrics (Lead Unit)

Pediatrics

Previous

Next

1. Click on the header to expand the Summary section.
2. Review the displayed data to make sure you are working with the correct node in the hierarchy.
3. Use the Previous and Next buttons to view the other nodes in sequence.

Summary (000025-00001A)

## Time & Money Tab > Action Summary Section

The Action Summary section displays a chronological, summarized history of all transactions executed on the Award node. As with other sections, the Award ID and suffix is clearly labeled on the section header.

If you need to research a transaction, click the header to expand the Action Summary section.

Action Summary (000025-00001A)

▼ Action Summary (000030-00001A)					
Action Summary ⓘ					
Notice Date	Transaction Type Code	Obligation Start Date	Obligation End Date	Obligated Cumulative	Obligated Change
	New	01/01/2015	12/31/2015	0.00	0.00

## Time & Money Tab > History Section

The History section displays transactions dynamically with full detail, including hyperlinks and detail expansion buttons. Again, the Award ID and suffix is clearly labeled on the section header.

▼ History (000030-00001A)													
History ⓘ													
Description													
Document													
6631	Award Version 6, Correction, notice date: None, updated 01:42 PM 01/02/2018, by admin. Comments:None.												
30374	Time And Money Document: New, notice date: None, updated 01/02/18 by admin. Comments: None												
Initial Transaction	Obligation Start Date	Obligation End Date	Project End Date	Obligated Change	Obligated Change Direct	Obligated Change Indirect	Obligated Cumulative	Obligated Distributable	Anticipated Change	Anticipated Change Direct	Anticipated Change Indirect	Anticipated Cumulative	Anticipated Distributable
	01/01/2015	12/31/2015	12/31/2016	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6331	Award Version 5, Correction, notice date: None, updated 05:03 PM 12/22/2014, by ekualitidev. Comments:None.												
	Obligation Start Date	Obligation End Date	Project End Date	Obligated Change	Obligated Change Direct	Obligated Change Indirect	Obligated Cumulative	Obligated Distributable	Anticipated Change	Anticipated Change Direct	Anticipated Change Indirect	Anticipated Cumulative	Anticipated Distributable
	01/01/2015	12/31/2015	12/31/2016	0.00	0.00	0.00	200,000.00	100,000.00	0.00	0.00	0.00	300,000.00	200,000.00
6121	Award Version 4, Continuation (Amendment), notice date: None, updated 05:51 PM 12/15/2014, by gcadmin. Comments:None.												
	Obligation Start Date	Obligation End Date	Project End Date	Obligated Change	Obligated Change Direct	Obligated Change Indirect	Obligated Cumulative	Obligated Distributable	Anticipated Change	Anticipated Change Direct	Anticipated Change Indirect	Anticipated Cumulative	Anticipated Distributable

1. Click on the header to expand the History section.

► History (000030-00001A)

2. To view the details for any transaction listed, click the Show button located under each transaction header.

Show Transaction Details/Transaction Details ID: 3

3. To open a linked document, click the hyperlinked Document

Document  
7285 ID.

## Time & Money Tab > Ad Hoc Recipients

For information on how to use this common function, please refer to the **NEW USER MANUAL: Navigation, the Action List, and Common Document Elements, Ad Hoc Recipients Section.**

## **Time & Money Tab > Route Log**

For information on how to use this common function, please refer to the **NEW USER MANUAL: Navigation, the Action List, and Common Document Elements**, Route Log Section.

## Initiating and Updating an Award Budget

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The Award Budget document allows you to maintain budget versions as budget categories, account distributions, or dollar amounts change over time.

The Budget Versions Tab of the Award document has three sections that allow you to view an overview of the budget for the award, create new budget versions, and view the personnel and non-personnel limits.

The Budget Overview section of the Budget Versions tab has a number of fields that display read-only information previously entered/selected from the Award document and/or the latest Budget Version.

The Budget Version section provides a way for the user to view a summary of basic information about each budget version, copy budget versions, open Award Budget documents to view complete details, create new award budget versions, and assign an incremental version number for each approved Award Budget document. New budget versions will be created when an obligated amount changes, if funds need to be reallocated amongst object codes (rebudget), or when funds are deobligated.

The Budget Limits panel displays itemized limits, budget change, previous budget and obligated total and subtotal dollar amounts for Personnel and Non-Personnel costs, with grand totals for Direct, F&A and Total Costs.

Before you may initiate a new Budget Version, the system requires that the Award is complete with a Document Status updated to Final. Any Time & Money documents must be updated to Final Status as well. In order to create an Award Budget, you must have already specified the Project Start/End Dates, Obligation Start/End Dates, Obligated Amount, and Anticipated Amount, as this data will be used to set up budget periods and budget limits. Data from the Award and from Time & Money that influences aspects of each budget version will appear in the Award Budget in a read-only format. Specifically, Award and Time & Money fields including Obligation Start/End Dates, Anticipated Amount, Total Cost Limit, F&A Rate, F&A Type, Cost Sharing, and Distribution & Income are imported to the Award Budget document.

If the Proposal Development module is in use at your institution, you will notice that the Award Budget document is almost identical to the Proposal Budget document. Although Development Proposal Budget data does not automatically populate to Award Budget documents, the information may be copied to form a basis for a new Award Budget document.

## Initiating a Budget Document

Follow these steps to create a new Budget document for an Award:

1. From within the Award document, click on the tab header to expand the Budget Versions tab.

Budget Versions

* Name	Version #	Direct Cost	F & A	Total	Award Budget Type	Budget Status	Actions
Add: <input type="text"/> <span>New</span>							
<input type="checkbox"/> Show All Budgets							

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

**Result** Streamlyne Research will display the new budget in the list of budget versions with default **Version #**, **Direct Cost**, **F&A**, and **Total**. The **Budget Status** defaults to In Progress, and the **Award Budget Type** defaults to New.

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

## Updating the Award Budget Document Parameters Tab

Streamlyne Research displays the new Award Budget document open to the Parameters tab. Follow the processes in this section learn to use the features on the Parameters tab.

Parameters

### Parameters Tab > Budget Overview Section

Streamlyne Research will display the Parameters Tab open to the Budget Overview section. Most of the information displays in read-only format, reflecting data entered and managed on the Award and Time & Money documents. The steps below detail how to enter or update data in the fields that are available for editing.

<b>Budget Overview</b>	
Budget Overview ⓘ	
Account ID :	Obligation Start Date : 07/01/2018
Award ID : 000182-00001A	Obligation End Date : 06/30/2020
Budget Version Number : 1	Budget Totals:
	Obligated Previous: 0.00
	Obligated Change: 100,000.00
	Obligated Total: 100,000.00
Award Budget Type : New	
Award Budget Status : In Progress	Unrecovered F & A Rate Type : MTDC - AWARD ▼
On/Off Campus : Default ▼	F&A Rate Type : MTDC - AWARD
Description : New ⓘ	
Comments :	

1. The **F&A Rate Type** displays as read-only if you have entered F&A Rates on the Commitments tab of the Award.

If F&A Rates have not yet been added to the Award, the field will be available for editing. In this case, click the arrows next to the **F&A Rate Type** field, and select the rate type that applies to this budget.

- Note** Changing the **F&A Rate Type** will result in a recalculation of the budget and may require redistribution of unrecovered F&A amounts.

2. If F&A Rates have been entered on the Award, then **Unrecovered F&A Rate Type** defaults to match the **F&A Rate Type**.

If necessary, edit this rate type by clicking the arrows next to the **Unrecovered F&A Rate Type** field and selecting the rate type that applies to this budget from the dropdown list.

- Note** Changing the Unrecovered F&A Rate Type will result in a recalculation of the budget and may require redistribution of unrecovered F&A amounts.

- Click the arrows next to the **On/Off Campus** field and select the appropriate value from the dropdown list.

- Note** The **On/Off Campus flag** determines whether expenses added to the budget will be added as on- or off-campus expenses based either on the flag set in this field, or on the default for the object codes for those expenses. This becomes significant when on-campus and off-campus items in the budget must have F&A calculated at different rates.

Setting the **On/Off Campus flag** to Default sets the campus indicator for expense line items to the default on/off designation maintained at the Object Code level, allowing the user to override that default as needed each time a line item is added to the budget.

Selecting **All On** or **All Off** will set all budget line items to the campus type selected here, disallowing overriding at the line item level.



4. Enter a short description for this budget version in the **Description** field or accept the default description.
5. Enter any information that should be preserved for future reference in the **Comments** field.

## Parameters Tab > Budget Periods & Totals Section

Actions	#	Period Start Date	Period End Date	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit
<a href="#">Add</a>				0.00	0.00	0.00	0.00	0.00	0.00	0.00

The Budget Periods & Totals section holds summary budget data for the Award Budget period(s). In this section, you can create a simple summary Award Budget by entering values in the fields for each Budget Period.

If the default periods are appropriate and you plan to create a detailed budget by entering in personnel and non-personnel costs, you can skip this section entirely. The system will populate the summary data automatically based on the detailed budget expenses you will add on the other tabs.

Follow these steps to update the budget periods and/or create a simple budget in the Budget Periods & Totals section:

1. Click the header to expand the Budget Periods & Totals section.


[Budget Periods & Totals](#)



**Note** The system will default to display the Budget Period(s) based on the Obligation 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 periods.

2. The **Period Start Date** represents first day of the budget period. If the defaulted 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.

3. The **Period End Date** represents last day of the budget period. If the defaulted 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.
4. If you are entering direct costs and F&A costs to this section to create a summary budget, the system will calculate the **Total Sponsor Cost**. Skip to the next step.  
  
If you will not enter direct and F&A cost information, enter the Sponsor's cost limit as a dollar value in the **Total Sponsor Cost** field. Then, skip to Step 7
5. If you are entering budget detail to the Personnel and Non-Personnel tabs, the system will automatically calculate the **Direct Cost**. Skip to the next step.  
  
Otherwise, enter the direct cost limit as a dollar value in the **Direct Cost** field.
6. If you are entering budget detail to the Personnel and Non-Personnel tabs, the system will automatically calculate the **F&A Cost**. Skip to the next step.  
  
Otherwise, enter the facilities and administrative cost limit as a dollar value in the **F&A Cost** field.
7. If you are entering budget detail to the Personnel and Non-Personnel tabs, the system will automatically calculate the **Unrecovered F&A**. Skip to the next step.  
  
Otherwise, enter the unrecoverable facilities and administrative cost limit as a dollar value in the **Unrecovered F&A** field.
8. If you are entering budget detail to the Personnel and Non-Personnel tabs, the system will automatically calculate **Cost Sharing**. Skip to the next step.  
  
Otherwise, enter the cost-sharing limit as a dollar value in the **Cost Sharing** field.
9. If you want to be able to default detail budget line amounts based on the cost limit, enter the total cost limit for the budget period in the **Cost Limit** field.  
  
Otherwise, skip to the next step.
10. If you want to be able 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.
11. To add a new budget period to the summary, the Add button to add the budget period data to this section.   
  
Otherwise click the Save button at the bottom of the page to update your changes.



12. Repeat Steps 2 through 11 until all budget periods are included on the budget document.
13. If necessary, click the Delete button to remove any budget periods that were created in error. 
14. Click the Recalculate button to update the totals. 

## **Parameters Tab > Budget Periods & Totals Section > Importing Proposal Budget Data**

Once a budget period is added to the document, Streamlyne Research allows you to optionally import data from the Proposal Budget document generated during the Pre-Award process. In order to import Proposal Budget data, the Award must have been linked to a funding Institutional Proposal that has an associated Proposal Development document with a Budget.

If you do not want to import this data, or if the Streamlyne Research Pre-Award suite is not in use at your institution, skip to the next section.

1. When you add a budget period to the Award Budget document, Streamlyne Research displays it in the Budget Periods & Totals section with a period number. Each budget period has its own Delete button and magnifying glass.

Click the magnifying glass next to the budget period to which you would like to add Proposal Budget data.  

## Budget Periods Lookup

\* required field

<b>Proposal Number:</b> <input type="text"/>	<b>Proposal Version:</b> <input type="text"/>
<b>Proposal Development Number:</b> <input type="text"/>	<b>Budget Period:</b> <input type="button" value="v"/>
<b>Total Sponsor Cost:</b> <input type="text"/>	<b>Direct Cost:</b> <input type="text"/>
<b>F&amp;A Cost:</b> <input type="text"/>	<b>Cost Sharing:</b> <input type="text"/>
<b>Unrecovered F&amp;A:</b> <input type="text"/>	<b>Comments:</b> <input type="text"/>

- Streamlyne Research displays the Budget Periods Lookup.

Enter data in the fields to filter the results as needed, and then click the Search button.

Viewing rows 1 to 2

	Proposal Number	Proposal Version	Budget Period	Period Start Date	Period End Date	Total Sponsor Cost	Direct Cost	F&A Cost	Cost Sharing	Unrecovered F&A	Comments
<input type="checkbox"/>	00000552	1	1	07/01/2017	06/30/2018	201,593.75	193,012.50	8,581.25	53,693.75	60,581.26	
<input type="checkbox"/>	00000552	1	2	07/01/2018	06/30/2019	182,200.57	175,836.88	6,363.69	55,304.57	51,261.20	


Export options: CSV | spreadsheet | XML

- Click the checkboxes next to the corresponding Proposal Budget Period(s) you wish to add to the Award Budget.

- Click the Return selected results button to copy the budget data to the Award Budget.



**Result** Detailed costs from the selected Proposal Budget period(s) update to the Award Budget period. These costs can be edited and/or deleted as necessary to complete the Award Budget.

### Parameters Tab > Generate All Periods Button

If you are working with a multi-period budget, the Generate All Periods button at the bottom of the page will copy all detail costs to subsequent budget periods. 

This button should not be clicked until all costs are entered on the Non-Personnel and Personnel tabs. Skip to the next process if the Non-Personnel and Personnel costs have not yet been completed for Budget Period 1. You will be referred back this section 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 Award 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. 


**Result** 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 on the Personnel and Non-Personnel tabs.

## Updating the Rates Tab

The functionality on the Rates tab is dependent on the Rates configuration for your institution. The sections on this tab display these configured Rates grouped by class. Within each rate class section, you have the ability to optionally override the percentage values where rates for the Award differ from institution-wide default rates. The institution-wide default rates are called Institute Rates, and the rate that applies to the Award is called the Applicable Rate.

Each time rates are modified on this tab; the budget will recalculate and apply the updated rates. Further, when Applicable Rates are less than Institute Rates, Streamlyne Research will recognize the discrepancy and calculate the Cost Share or Unrecovered F&A amount for the budget period accordingly.

## Rates Tab > Syncing All Rates

When an Award is copied from another source document, it is possible that the copied rates differ from the current rates configured at your institution. To ensure you are always working with the most current rates, click the Sync All Rates button at the bottom of the Rates tab to update the Award Budget document with the latest Institute Rates. You will 



be asked to confirm that you wish to sync all Institute Rates and Applicable Rates to the rates configured in the Institute Rates table. You will be reminded that doing so will override the existing values and cause a recalculation of the budget.

## Rates Tab > F&A Section

The title of the F&A section reflects the Activity Type selected on the Award, for example, “Research F&A” or “Instruction F&A.” This section displays the F&A rates that are effective for the Award Activity Type during the fiscal year(s) covered by the Award Budget. If F&A Rates have been added to the Commitments tab on the Award, those rates display here; otherwise, this section displays the default F&A rate types set up for your institution.

Calculations using the F&A rates set up in this section will be applied automatically to line item costs within the Personnel and Non-Personnel tabs, taking into account other factors, including Object Code Type, Unrecovered F&A Rate Type, Overhead Rate Type, and Activity Type.

▼ Research F&A					
Research F&A					
Description	On CampusContract	Fiscal Year	Start Date	Institute Rate	* Applicable Rate
MTDC	No	2019	07/01/2018	10.00	<input type="text" value="10.00"/>
MTDC	Yes	2019	07/01/2018	10.00	<input type="text" value="10.00"/>
<div> <span>Sync Rates</span> <span>Reset Rates</span> </div>					

1. Click on the tab header to access the Rates tab. 
2. Click on the section header to expand the F&A section. 
3. The **Applicable Rate** fields are automatically populated with the corresponding **Institute Rates** unless they have been overridden by the F&A Rates set up on the Commitments tab on the Award.  
  
Identify which **Applicable Rates** within the F&A rate class should change to meet the terms of the contract associated with the Award.
4. Enter the changes to the **Applicable Rate** fields where appropriate.

**Note** If you would like to reset the **Applicable Rate** values to match the **Institute Rate** values for this section only, click the Reset Rates button. [Reset Rates](#)

You may also sync the **Institute Rates** with the current Institute Rates for this section only by clicking the Sync Rates button. [Sync Rates](#)

This should not be necessary if you performed the Sync All Rates action described in the section above, [Rates Tab > Syncing All Rates](#).

## Rates Tab > Fringe Benefits

This section displays the Fringe Benefits rates that are effective for the Award Activity Type during the fiscal year(s) covered by the Award Budget. If Benefits Rates have been added to the Commitments tab on the Award, those rates display here; otherwise, this section displays the default Fringe Benefits rate types set up for your institution.

Calculations using Fringe Benefits rates set up in this section 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
EB on LA	No	2006	07/01/2005	25.00	<input type="text" value="25.00"/>
EB on LA	Yes	2006	07/01/2005	27.00	<input type="text" value="27.00"/>
Research Rate	No	2017	07/01/2016	25.00	<input type="text" value="25.00"/>
Research Rate	Yes	2017	07/01/2016	27.00	<input type="text" value="27.00"/>
UROP Rate	No	2017	07/01/2016	25.00	<input type="text" value="25.00"/>
UROP Rate	Yes	2017	07/01/2016	27.00	<input type="text" value="27.00"/>
<a href="#">Sync Rates</a> <a href="#">Reset Rates</a>					

1. Click on the section header to expand the Fringe Benefits section. [> Fringe Benefits](#)
2. The **Applicable Rate** fields are automatically populated with the corresponding **Institute Rates** unless they are overridden by the Benefits Rates set up on the Commitments tab on the Award.

Identify which **Applicable Rates** within the Fringe Benefits rate class should change to meet the terms of the contract associated with the Award.

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

**Note** If you would like to reset the **Applicable Rate** values to match the **Institute Rate** values for this section only, click the Reset Rates button. [Reset Rates](#)

You may also sync the **Institute Rates** with the current Institute Rates for this section only by clicking the Sync Rates button. [Sync Rates](#)

This should not be necessary if you performed the Sync All Rates action described in the section above, [Rates Tab > Syncing All Rates](#).

## Rates Tab > Inflation Section

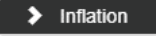
This section displays the Inflation rates that are effective for the Award Activity Type during the fiscal year(s) covered by the Award Budget. The rates that prepopulate this section are the default Inflation Rate types set up for your institution.

Calculations using Inflation rates set up here will be applied automatically to line item costs within the Personnel and Non-Personnel tabs. Generally, Inflation Rates map to line item costs by Object Code, such as employee salaries, student wages, tuition, and materials and services.

Inflation					
Inflation ⓘ					
Description	On CampusContract	Fiscal Year	Start Date	Institute Rate	* Applicable Rate
Administrative Salaries (7/1)	No	2019	07/01/2018	3.00	3.00
Administrative Salaries (7/1)	Yes	2019	07/01/2018	3.00	3.00
Administrative Salaries (7/1)	No	2020	07/01/2019	3.00	3.00
Administrative Salaries (7/1)	Yes	2020	07/01/2019	3.00	3.00
Faculty Salaries (6/1)	No	2019	07/01/2018	3.00	3.00
Faculty Salaries (6/1)	Yes	2019	07/01/2018	3.00	3.00
Faculty Salaries (6/1)	No	2020	07/01/2019	3.00	3.00
Faculty Salaries (6/1)	Yes	2020	07/01/2019	3.00	3.00
Materials and Services	No	2019	07/01/2018	3.00	3.00
Materials and Services	Yes	2019	07/01/2018	3.00	3.00
Materials and Services	No	2020	07/01/2019	3.00	3.00
Materials and Services	Yes	2020	07/01/2019	3.00	3.00
Research Staff (1/1)	No	2019	07/01/2018	3.00	3.00
Research Staff (1/1)	Yes	2019	07/01/2018	3.00	3.00
Research Staff (1/1)	No	2020	07/01/2019	3.00	3.00
Research Staff (1/1)	Yes	2020	07/01/2019	3.00	3.00
Students (6/1)	No	2011	07/01/2010	3.00	3.00
Students (6/1)	Yes	2011	07/01/2010	3.00	3.00
Support Staff Salaries (4/1)	No	2019	07/01/2018	3.00	3.00
Support Staff Salaries (4/1)	Yes	2019	07/01/2018	3.00	3.00
Support Staff Salaries (4/1)	No	2020	07/01/2019	3.00	3.00
Support Staff Salaries (4/1)	Yes	2020	07/01/2019	3.00	3.00


[Sync Rates](#) [Reset Rates](#)




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

Identify which **Applicable Rates** within the Inflation rate class should change to meet the terms of the contract associated with the Award.

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

**Note** If you would like to reset the **Applicable Rate** values to match the **Institute Rate** values for this section only, click the Reset Rates button. 

You may also sync the **Institute Rates** with the current Institute Rates for this section only by clicking the Sync Rates button. 



This should not be necessary if you performed the Sync All Rates action described in the section above, [Rates Tab > Syncing All Rates](#).

## Rates Tab > Vacation Section

The Vacation rate class is optional; it is intended for use when your institution's vacation accrual benefit is calculated independently from employee benefits. This section may or may not display, depending on how rates have been configured for your institution.

When it is in use, section displays the Vacation Rates that are effective for the Award Activity Type during the fiscal year(s) covered by the Award Budget. This section prepopulates with the default Vacation Rate types set up for your institution.

Calculations using rates in this section will be automatically applied to line item costs within the Personnel tab, according to the Object Code Type.

Vacation					
Vacation ⓘ					
Description	On CampusContract	Fiscal Year	Start Date	Institute Rate	* Applicable Rate
Vacation	No	2006	07/01/2005	10.50	<input type="text" value="10.50"/>
Vacation	Yes	2006	07/01/2005	9.50	<input type="text" value="9.50"/>
Vacation on LA	No	2006	07/01/2005	8.00	<input type="text" value="8.00"/>
Vacation on LA	Yes	2006	07/01/2005	8.00	<input type="text" value="8.00"/>
 					

1. Click on the section header to expand the Vacation section. 

2. The **Applicable Rate** fields are automatically populated with the corresponding **Institute Rates**.

Identify which **Applicable Rates** within the Vacation rate class should change to meet the terms of the contract associated with the Award.

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

**Note** If you would like to reset the **Applicable Rate** values to match the **Institute Rate** values for this section only, click the Reset Rates button. [Reset Rates](#)

You may also sync the **Institute Rates** with the current Institute Rates for this section only by clicking the Sync Rates button. [Sync Rates](#)

This should not be necessary if you performed the Sync All Rates action described in the section above, [Rates Tab > Syncing All Rates](#).

## Rates Tab > Other Section

The Other rate class is used to designate custom rates that fall outside of the delivered rate classes. Any data in this section will be specific to your institution.

Other					
Other					
Description	On CampusContract	Fiscal Year	Start Date	Institute Rate	* Applicable Rate
MTDC (DSS Eligible)	No	2017	07/01/2016	25.00	25.00
MTDC (DSS Eligible)	Yes	2017	07/01/2016	55.00	55.00
Other	No	1980	07/01/1979	0.00	0.00
Other	Yes	1980	07/01/1979	0.00	0.00

1. Click on the section header to expand the Other section. [Other](#)
2. The **Applicable Rate** fields are automatically populated with the corresponding **Institute Rates**.

Identify which **Applicable Rates** within the custom rate class should change to meet the terms of the contract associated with the Award.

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

**Note** If you would like to reset the **Applicable Rate** values to match the **Institute Rate** values for this section only, click the Reset Rates button. 

You may also sync the **Institute Rates** with the current Institute Rates for this section only by clicking the Sync Rates button. 

This should not be necessary if you performed the Sync All Rates action described in the section above, [Rates Tab > Syncing All Rates](#).

## Updating the Summary Tab

Click the tab header for the Summary tab to view condensed, read-only budget data for the first five (5) budget periods created for the Award. If there are additional budget periods, use the Back and Next buttons to view the additional periods.



Budget costs for each period, as well as the total budget cost, are broken down into Personnel and Non-Personnel subsections. Detail budget data is accessible by clicking the Show button to expand the various subsections. Alternatively, you may navigate directly to the Personnel or Non-Personnel tabs by clicking the Edit button.



## Summary Tab > Manually Overriding Calculated Fringe and Total F&A Costs

While this tab primarily provides a view of calculated budget costs, you can override the calculated amounts for **Fringe** and **Total F&A Costs** here, if necessary. The overrides for **Fringe** and **Total F&A Costs** should be done after all Personnel and Non-Personnel costs have been added and calculated.

If these costs have not been added, skip this process until these tabs have been completed.

Summary

Summary

back

next

Period 1

07/01/2021 - 06/30/2022

Total

Personnel	<div>Edit</div>		
<div>show</div>	Salary	10,000.00	10,000.00
<div>hide</div>	Fringe	<div>2,700.00</div>	2,700.00
Faculty Salaries Tenured - On		<div>2,700.00</div>	2,700.00
Biochemistry Professor PI/Contact		2,700.00	2,700.00
<div>show</div>	Personnel F&A	<div>6,985.00</div>	6,985.00
<div>show</div>	Calculated Direct Costs	0.00	0.00
Personnel Subtotal		19,685.00	19,685.00
Non-Personnel			
<div>show</div>	Non-Personnel F&A	<div>0.00</div>	0.00
<div>show</div>	Calculated Direct Costs	0.00	0.00
Non-Personnel Subtotal		0.00	0.00
Totals			
TOTAL DIRECT COSTS		12,700.00	12,700.00
TOTAL F&A COSTS		<div>6,985.00</div>	6,985.00
TOTAL COSTS		19,685.00	19,685.00

- If you need to override **Fringe** amounts for a budget period, click on the Show button to expand the Fringe section.

Otherwise, continue to Step 3.
- The **Fringe** calculated for each Personnel Object Code Group displays along with detail for each personnel line within the group.

To override the calculated **Fringe** amount for a group, enter the new amount in the field. Make changes to the **Fringe** for each group as needed.

The total **Fringe** amount will recalculate to use the overridden amount(s) for each group.
- The **F&A Costs** for each Personnel Object Code Group and each Non-Personnel Object Code Group displays.

To override the calculated **F&A Costs**, click the Show button to expand the Personnel F&A or Non-Personnel F&A section, enter the new amount in the field.
- Click the Save button at the bottom of the screen save the new amounts in the 

Save

 budget.

## Updating the Personnel Tab

All budget expenses related to project personnel are managed on the Personnel tab. Click the tab header to access the Personnel tab.

Personnel

Note that the tab view defaults to the first period for multi-period budgets. To work with a different [Update View](#) budget period, click the dropdown list next to the **Budget Period** field and select the date range with which you wish to work. Then, click the Update View button to update the data on the page.

Budget Period: 1: 07/01/2018 - 06/30/2019

View: Full Detail

[Update View](#)

The page view also defaults to Full Detail. This is the appropriate view for data entry. Later, if you do not wish to view the line item detail for each expense item, click the arrow next to the **View** field and select Simple Detail from the dropdown list. Then, click the Update View button to condense the data on the page. [Update View](#)

## Personnel Tab > Project Personnel (All Periods) Section

All project personnel, both named and to-be-named, must be identified in the Project Personnel (All Periods) section in order 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) ⓘ

	Person	Job Code :	Appointment Type :	* Base Salary :	* Salary Effective Date :	Salary Anniversary Date :	Actions
Add:	Internal User Name Search 🔍						
	External Address Book Search 🔍						
	To be named 🔍						
1	Biochemistry Professor (PI/Contact)	AA000 DEFAULT	12M DURATION	100,000.00	07/01/2018		<a href="#">Delete</a>
2	Pediatrics Professor (Co-Investigator)	AA000 DEFAULT	12M DURATION	130,000.00	07/01/2018		<a href="#">Delete</a>

[Sync Personnel](#)

1. Click on the section header to expand the Project Personnel (All Periods) section.

➤ Project Personnel (All Periods)


2. Streamlyne Research initially populates this section with all named personnel from Contacts tab on the Award document.

It may be the case that additional personnel are added to the Award document after this section is initially populated. When this situation occurs, you must manually trigger the data sync to pull those personnel into the list.


Click the Sync Personnel button to ensure all named personnel on the Award also appear on the Project Personnel (All Periods) panel in the Award Budget document.

A rectangular orange button with the text "Sync Personnel" in white.

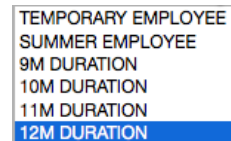
3. To add additional personnel to the budget, click the magnifying glasses  to search for and select **Employee** and/or **Non-Employee** person records.

Alternatively, if you know the project will require hiring or appointing new personnel, click the **To Be Named** magnifying glass  to the search for and select the position name that will be filled at a later date.

4. For each named personnel or position, the system populates as many fields as possible based on the completeness of the configuration in the corresponding Person or Job records.

It may be necessary to manually populate the **Job Code** for a given row by clicking the magnifying glass  to search for and select the **Job Code**.

5. Click the arrow next to the **Appointment Type** field, and then select the appropriate value from the dropdown list.



6. Streamlyne Research populates salary data for named personnel where it is available in the Person records.

For positions where personnel have yet to be named or for named personnel without salary data in Streamlyne Research, enter the salary amount that will be budgeted for the position in the **Base Salary** field.


7. For named personnel, Streamlyne Research populates the Project Period Start Date to the **Salary Effective Date** field.

For positions where personnel have yet to be named, estimate the **Salary Effective Date** as the first day of the budget period.

8. Streamlyne Research also populates the **Salary Anniversary Date** for named personnel if the data is available. If cost-of-living increases are budgeted for this Award using an **Inflation Rate**, this increase will take effect on the Salary Anniversary Date.

If this date is not populated, estimate it by entering the date in MM/DD/YYYY format, or by clicking the calendar icon to select the value.

If no date is entered in this field, the budget will calculate inflation based on the default inflation date set up by your institution.

9. If a named person or position was listed in error, click the corresponding Delete button to remove the line. 


**Note** 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) section.

10. Repeat these steps until all named personnel and to-be-named positions have been added to the Project Personnel (All Periods) section.

11. Click the Save button at the bottom of the screen to save your changes. 

## Personnel Tab > Budget Overview Section

This section displays the budget period's cumulative totals, which will be updated each time costs are added to the Personnel tab. To access this section, click the section header.

 Budget Overview (Period 1)

▼ Budget Overview (Period 1)	
Budget Overview (Period 1)	
Period 1 Start Date 07/01/2018	Budget Amount 0.00
Period 1 End Date 06/30/2019	Obligated Amount 0.00
Direct Cost 0.00	
F&A Cost 0.00	Unrecovered F&A 0.00
Total Sponsor Cost 0.00	Cost Sharing 0.00

## Personnel Tab > Personnel Detail Section

In order for a person to be available to add in the Personnel Detail section for a budget period, the person must first be named to the Project Personnel section. If persons are missing from this section, return to [Personnel Tab > Project Personnel \(All Periods\) Section](#) to add the missing records.

1. Click on the section header to expand the Personnel Detail section.

Personnel Detail (Period 1)

2. Click the dropdown arrow next to the **Person** field to select a named person from the dropdown list.

**Note** The **Person** dropdown list is populated with all of the persons that have been added to Project Personnel section.

3. Click the arrow next to the **Object Code Name** field to select the most appropriate personnel category for this individual. Values listed here will be specific to your institution.

Exempt Technical - On  
Faculty Emeriti  
Faculty Retired Non-Tenured - On  
Faculty Salaries Non-Tenured - Off  
Faculty Salaries Non-Tenured - On  
Faculty Salaries Tenured - Off  
Faculty Salaries Tenured - On  
Fellows - Non-Student- Not MTDC  
Graduate Student Staff - On

4. When personnel are added to the budget, they are automatically grouped by their common Object Code. Your institution's configuration governs budgeting attributes for all personnel assigned to the **Object Code**, including their eligibility for inflation increases, the application of on- or off-campus rates, and the use of justification notes.

**Groups** allow you to organize and manage personnel by other criteria than Object Code. If it is helpful to add this person to either a predefined or new ad hoc group in order to define a new set of budget attributes for all personnel assigned to the group, select or enter a value in the **Group** field.

5. Click the Add button to update the Detail record for this person.
6. Repeat Steps 2 through 5 until detail records are created for all project personnel.

Add



## Personnel Tab > Personnel Detail Section > Salary Detail Subsection

Hide Faculty Salaries Tenured - On					
1	Person Biochemistry Professor - AA000	* Start Date 07/01/2021	* End Date 06/30/2022	% Effort 10.00000	% Charged 10.00000
	Period Type Calendar	Requested Salary 10,000.00	Calculated Fringe 2,700.00	Calculate	Sync to Requested Salary
		Obligated Salary 0.00	Obligated Fringe 0.00	Details	Delete
Totals:		Requested Salary 10,000.00	Calculated Fringe 2,700.00		
		Obligated Salary 0.00	Obligated Fringe 0.00		

- From within the Personnel Detail subsection, click the Show button to expand the Object Code subsection and add details to calculate salary for the persons added in the previous section. [Show](#)
  - The **Start/End Dates** defaulted here are based on the 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.
  - Enter the **% Effort** to indicate the amount of effort that the person will expend during the project period.
  - 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.
- Select the **Period Type** from the dropdown list. This allows you to label the line, but salary calculations are not affected.
  - Click the Calculate button to calculate the **Requested Salary** and **Calculated Fringe**. [Calculate](#)
  - Repeat Steps 1 through 6 until detail records are created for all project personnel in the budget period.
  - Click the Details button to view a pop-out window of this person's salary details. [Details](#)
  - Click the Delete button if this person's record was added in error. [Delete](#)

## Personnel Tab > Personnel Detail Section > Object Code Subsection > Object Code Details Subsection

**Hide** Faculty Salaries Tenured - On Details

Budget Category: Senior Personnel # of Person(s): 2

Unrecovered F&A: 0.00 Cost Sharing: 0.00

Apply Inflation? ☒ On/Off Campus ☒

Submit Cost Sharing? ☒

Budget Justification Notes:  Group Description:

- From within the Object Code subsection, click the Show button to expand the Object Code Details subsection.

**Personnel Detail (Period 1)**

Add Details

\* Person \* Object Code Name Group Action

Select select select --or-- (new group) Add

**Hide** Faculty Salaries Tenured - On

	Person	* Start Date	* End Date	% Effort	% Charged
1	Biochemistry Professor - AA000	07/01/2021	06/30/2022	10.00000	10.00000
	Period Type: Calendar	Requested Salary: 10,000.00	Calculated Fringe: 2,700.00		
		Obligated Salary: 0.00	Obligated Fringe: 0.00		
			Calculate Sync to Requested Salary Details Delete		
2	Pediatrics Professor - AA000	07/01/2021	06/30/2022	20.00000	20.00000
	Period Type: Calendar	Requested Salary: 26,000.00	Calculated Fringe: 7,020.00		
		Obligated Salary: 0.00	Obligated Fringe: 0.00		
			Calculate Sync to Requested Salary Details Delete		
<b>Totals:</b>		Requested Salary: 36,000.00	Calculated Fringe: 9,720.00		
		Obligated Salary: 0.00	Obligated Fringe: 0.00		

**Show** Faculty Salaries Tenured - On Details

2. Review the details for the expense item(s).

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

If the defaulted values should be altered for this Object Code Group, continue to the next step.

3. If you would like to change the **Budget Category** associated with this expense, click the arrow next to the field and select a more appropriate value from the dropdown list.

**Note** The **Unrecovered F&A** field displays the underrecovery 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. To indicate that the item's cost share amount should not be submitted to the Sponsor, uncheck the **Submit Cost Sharing?** box.

6. Budget Justifications for all other cost line items can be consolidated to form a budget justification narrative using the Budget Justification Consolidation feature on the Budget Actions tab.

Record any justification notes for the salary costs in the **Budget Justification** note field.

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

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.

7. The **On/Off Campus** checkbox defaults to the status maintained for this Object Code unless All On or All Off campus has been set in the Parameters page.

If On/Off Campus has been set to Default on the Parameters tab, you have the option to reverse the status for this line item. Check or uncheck the box as necessary.

8. Click the Save button at the bottom of the screen to save your changes. 

## Personnel Tab > Personnel Detail Section > Object Code Subsection > Object Code Details Subsection > Rate Class Subsection

<div>Hide</div> Rate Classes				
Rate Class	Rate Type	Apply Rate?	Rate Cost	Rate Cost Sharing
MTDC	MTDC (DSS Eligible)	<input checked="" type="checkbox"/>	32,131.00	0.00
Employee Benefits	Research Rate	<input checked="" type="checkbox"/>	12,420.00	0.00
Employee Benefits	EB on LA	<input checked="" type="checkbox"/>	0.00	0.00
Vacation	Vacation on LA	<input checked="" type="checkbox"/>	0.00	0.00
MTDC - AWARD	MTDC	<input checked="" type="checkbox"/>	10,442.00	0.00

- From within the Object Code subsection, click the Show button to expand the Rate Class subsection. 

Show
- The rate classes configured for this Object Code at your institution will be listed along with the calculated amounts.  
  
Uncheck any **Apply Rate** checkboxes to remove one or more rates from the Object Code Group's salary cost calculations.
- Click the Save button at the bottom of the screen to save your changes. 

Save

## Personnel Tab > Calculate Current Period



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

Calculate Current Period

## Personnel Tab > Personnel Detail Section > Object Code Subsection > Object Code Details Subsection > Apply to Later Periods


Once all details for a Personnel Object Code Group have been entered for the first period, those details can be copied to subsequent periods. This streamlines data entry when budget periods will have similar personnel costs.

If you are working with a multi-period budget, follow the steps below. Otherwise, skip to the next section.

1. From within the Object Code subsection that you wish to copy, click the Show button to expand the Object Code Details subsection. 
2. Click the Apply to Later Periods button to copy the Object Code Group to all subsequent periods. 

**Result** The personnel details for this Object Code Group will be copied to all additional budget periods, applying inflation as appropriate. The copied personnel details can be edited or deleted in subsequent budget periods as necessary.

**Note** You must click Show and then click the Apply to Later Periods button for each Object Code Group that you wish to apply to future periods.

3. Click the Save button at the bottom of the screen to save your changes. 


## Updating the Non-Personnel Tab


All non-personnel expenses in the budget are managed on the Non-Personnel tab.

### Non-Personnel Tab > Budget Overview Section

Click the tab header to access the Non-Personnel tab.




For a multi-period budget, note that the tab view defaults to the first budget period. To work with a different budget period, click the dropdown list next to the **Budget Period** field and select the date range with which you wish to work. Then, click the Update View button to update the data on the page. 



View: Full Detail



The view also defaults to Full Detail. This is the appropriate view for data entry. Later, 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 from the dropdown list. Then, click the Update View button to condense the data on the page. 

Budget Overview (Period 1)

The Total Cost Limit has been exceeded.

Budget Overview (Period 1)

Period 1 Start Date 07/01/2018

Period 1 End Date 06/30/2019

Direct Cost 102,551.00

F&A Cost 12,842.00

Total Sponsor Cost 115,393.00

Budget Amount 0.00

Obligated Amount 0.00

Unrecovered F&A 0.00

Cost Sharing 0.00

Streamlyne Research will display the page with the Budget Overview section expanded. This section displays the Award's cumulative budget totals, which will be updated each time costs are added to the Non-Personnel tab in the processes that follow.

## Non-Personnel Tab > Equipment Section

Equipment

Equipment

Add:

\* Object Code Name

Description

Change Amount

Obligated Amount

Action

select

0.00

Add

1. Click on the section header to expand the Equipment section.

Equipment

2. Click the arrow next to the **Object Code Name** field, and then select the expense description from the dropdown list.

The options that display in this list will be specific to your institution.

select  
Equipment - Not MTDC  
Equipment Rental - Not MTDC  
Fabricated Equipment - Not MTDC  
Reactor Use

3. Enter a description of the expense in the **Description** field.

4. Enter the total cost for this particular expense in the **Change Amount** field.

5. Click the Add button to complete the action.

Add

6. Repeat Steps 2 through 5 until all equipment expenses are recorded.

7. If you added an expense in error, click the corresponding Delete button to remove the line.

Delete

**Result** Streamlyne Research will add each expense to the budget and make the expense Line Item Details section available for editing.

1	Equipment - Not MTDC 421818	electroencephalogram equipment	1	30,000.00	0.00	Delete
---	--------------------------------	--------------------------------	---	-----------	------	--------

Total Amount for Equipment - Not MTDC: 30,000.00

Show Line Item Details

## Non-Personnel Tab > Equipment Section > Line Item Details Subsection

Hide Line Item Details

* Start Date	07/01/2018	Unrecovered F&A	0.00
* End Date	06/30/2019	Cost Sharing	0.00
Apply Inflation?	No	On/Off Campus	<input checked="" type="checkbox"/>
Budget Category	Equipment	Submit Cost Sharing?	<input checked="" type="checkbox"/>
Budget Justification Notes			

- Click the Show button to expand the Line Item Details subsection. Show Line Item Details
  - Review the details for this expense item.  
  
If the defaulted values for this expense are appropriate for this Award 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.
  - Update the **Start Date** for the expense if it should not be the same as the Budget Period Start Date. Enter this in MM/DD/YYYY format or click the calendar icon to select a date.
  - Update the **End Date** for the expense if it should not be the same as the Budget Period End Date. Enter this in MM/DD/YYYY format or click the calendar icon to select a date.
  - 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 line item level.
- Note** For Non-Personnel costs, inflation is applied only when items are copied by Object Code from Budget Period 1 to subsequent periods.
- If you would like to change the **Budget Category** associated with this expense, click the arrows next to the field and select a more appropriate value from the dropdown list.

- Budget Justifications for all other cost line items can be consolidated to form a budget justification narrative using the Budget Justification Consolidation feature on the Budget Actions tab.

Record any justification notes for the expense in the **Budget Justification** note field.

**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 Award Budget is less than the Institute Rate, and the item's Object Code is configured to apply inflation.

- If your institution will be contributing to this expense, enter the dollar amount in the **Cost Sharing** field.

- The **On/Off Campus** checkbox defaults to the status maintained for this Object Code unless All On or All Off campus has been set in the Parameters page.

If **On/Off Campus** has been set to Default on the Parameters tab, you have the option to reverse the status for this line item. Check or uncheck the box as necessary.

- 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.

Save

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

The Rate Classes subsection displays the Rate Class, Rate Type, the default application, the calculated cost, and calculated cost sharing for the line item, if applicable. Features in this section allow you to adjust or remove individual rates at the expense item level.


Rate Classes						
Rate Class	Rate Type	Apply Rate?	Rate Cost Override	Rate Cost	Rate Cost Sharing	Obligated Amount
<div> <div>Hide</div> <div>Sync To Period Cost Limit</div> <div>Sync To Period Direct Cost Limit</div> </div>						

- Click the Show button to expand the Rate Class subsection.
- Review the data displayed in each column.
- The **Apply Rate?** checkbox setting matches the configuration at the Object Code level. If necessary, check or uncheck **Apply Rate?** checkbox to remove the default setting.

Show

Rate Classes

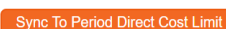


4. If necessary, edit the **Rate Cost** amount and/or **Rate Cost Sharing** amount for this expense within this budget period only.
5. Click the Sync To Period Cost Limit to automatically generate this cost amount based on the Period Cost Limit entered on the Parameters tab. 

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.

6. Click the Sync to Period Direct Cost Limit to automatically generate this cost amount based on the Period Direct Cost Limit entered on 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.

7. Click the Save button at the bottom of the screen to save your changes.



### **Non-Personnel Tab > Equipment Section > Line Item Details Subsection > Rate Classes Subsection > Apply to Later Periods Button**

Once all details for the Equipment Rate Classes have been entered for the first period, those details can be copied to subsequent periods. This streamlines data entry when budget periods will have similar equipment costs.

If you are working with a multi-period budget, follow the steps below. Otherwise, skip to the next section.




1. From within the Rate Classes subsection for the expense that you wish to copy, click the Apply to Later Periods button to copy the equipment expense to all subsequent periods.



**Result** The details for this line item will be copied to all additional budget periods, applying inflation as appropriate. The copied expense details can be edited or deleted in subsequent budget periods as necessary.

## Non-Personnel Tab > Travel Section

The screenshot shows the 'Travel' section header with a dropdown arrow. Below it is a table with the following columns: 'Object Code Name' (with a search icon), 'Description' (with a plus icon), 'Change Amount' (with a value of 0.00), 'Obligated Amount', and 'Action' (with an 'Add' button). The 'Add' button is orange and located at the end of the first row.

1. Click on the section header to expand the Travel section. 
2. Click the arrows next to the **Object Code Name** field and select the expense description from the dropdown list.
3. Enter a description of the expense in the **Description** field.
4. Enter the total cost for this particular expense in the **Change Amount** field.
5. Click the Add button to complete the action. 
6. Repeat Steps 2 through 5 until all travel expenses are recorded.
7. If you added an expense in error, click the corresponding Delete button to remove the line. 

**Result** Streamlyne Research will write each expense to the budget and make the Line Item Details section available for editing.

## Non-Personnel Tab > Travel Section > Line Item Details Subsection

The screenshot shows the 'Line Item Details' subsection. It includes a 'Hide' button and several input fields: 'Start Date' (07/01/2018), 'End Date' (06/30/2019), 'Budget Category' (Travel - Domestic), and 'Budget Justification Notes'. There are also checkboxes for 'Apply Inflation?' (checked), 'On/Off Campus' (checked), and 'Submit Cost Sharing?' (checked). The 'Unrecovered F&A' and 'Cost Sharing' amounts are both 0.00.

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 Award Budget, repeat Steps 1 and 2 for all other travel expense items.

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

3. Update the **Start Date** for the expense if it is not the same as the Budget Period Start Date. Enter this in MM/DD/YYYY format or click the calendar icon to select a date.
4. Update the **End Date** for the expense if it is not the same as the Budget Period End Date. Enter this in MM/DD/YYYY format or click the calendar icon to select a date.
5. 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 line item level.

**Note** For Non-Personnel costs, inflation is applied only when items are copied by Object Code from Budget Period 1 to subsequent periods.

6. If you would like to change the **Budget Category** associated with this expense, click the arrows next to the field and select a more appropriate value from the dropdown list.
7. Budget Justifications for all other cost line items can be consolidated to form a budget justification narrative using the Budget Justification Consolidation feature on the Budget Actions tab.

Record any justification notes for the expense in the **Budget Justification** note field.

**Note** The **Unrecovered F&A** field displays the underrecovery amount calculated by the system for this expense item. **Unrecovered F&A** is calculated when the Applicable F&A Rate for the Award Budget is less than the Institute Rate, and the item's Object Code is configured to apply inflation.

8. If your institution will be contributing to this expense, enter the dollar amount in the **Cost Sharing** field.

9. The **On/Off Campus** checkbox defaults to the status maintained for this Object Code unless All On or All Off campus has been set in the Parameters page.

If **On/Off Campus** has been set to Default on the Parameters tab, you have the option to reverse the status for this line item. Check or uncheck the box as necessary.

10. 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. Save

## Non-Personnel Tab > Travel Section > Line Item Details Subsection > Rate Class Subsection

The Rate Classes subsection displays the Rate Class, Rate Type, the default application, the calculated cost, and calculated cost sharing for the line item, if applicable. Features in this section allow you to adjust or remove individual rates at the expense item level.


<span>Hide</span> Rate Classes					
Rate Class	Rate Type	Apply Rate?	Rate Cost	Rate Cost Sharing	Obligated Amount
Employee Benefits	EB on LA	<input checked="" type="checkbox"/>	0.00	0.00	0.00
Vacation	Vacation on LA	<input checked="" type="checkbox"/>	0.00	0.00	0.00
MTDC - AWARD	MTDC	<input checked="" type="checkbox"/>	200.00	0.00	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.
- The **Apply Rate?** checkbox setting matches the configuration at the Object Code level.  
If necessary, check or uncheck **Apply Rate?** checkbox to remove the default setting.
- If necessary, edit the **Rate Cost** amount and/or **Rate Cost Sharing** amount for this expense within this budget period only.
- Click the Sync To Period Cost Limit to automatically generate this cost amount based on the Period Cost Limit entered on 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.

6. Click the Sync to Period Direct Cost Limit to automatically generate this cost amount based on the Period Direct Cost Limit entered on 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.

7. Click the Save button at the bottom of the screen to save your changes. 

### Non-Personnel Tab > Travel Section > Line Item Details Subsection > Rate Classes Subsection > Apply to Later Periods Button

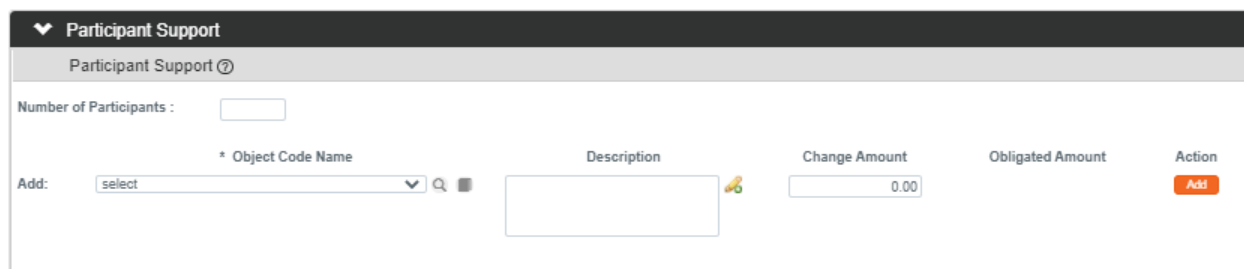
Once all details for the Travel Rate Classes have been entered for the first period, those details can be copied to subsequent periods. This streamlines data entry when budget periods will have similar travel costs.

If you are working with a multi-period budget, follow the steps below. Otherwise, skip to the next section.

1. From within the Rate Classes subsection for the expense that you wish to copy, click the Apply to Later Periods button to copy the travel expense to all subsequent periods. 

**Result** The details for this expense line item will be copied to all additional budget periods, applying inflation as appropriate. The copied expense details can be edited or deleted in subsequent budget periods as necessary.

### Non-Personnel Tab > Participant Support Section



The screenshot shows a web form titled "Participant Support" with a dropdown arrow. Below the title is a sub-header "Participant Support" with a help icon. The form contains a "Number of Participants" field. Below this is a table with columns: "Object Code Name", "Description", "Change Amount", "Obligated Amount", and "Action". The "Object Code Name" column has a dropdown menu with "select" and a search icon. The "Change Amount" column has a text input field with "0.00". The "Action" column has an "Add" button.

1. Click on the section header to expand the Participant Support section.

➤ Participant Support

2. Enter the **Number of Participants** for the project associated with the Award.

3. Click the arrow next to the **Object Code Name** field and select the expense description from the dropdown list. Sample values are shown here.

select

- Cost Part Rel Programs - Not MTDC
- Participant costs - subsistence
- Participant costs - Tuition
- Stipends - Not MTDC
- Travel - Not MTDC
- 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

4. Enter a description of the expense in the **Description** field.
5. Enter the total cost for this particular expense in the **Change Amount** field.
6. Click the Add button to complete the action. Add
7. Repeat Steps 3 through 6 until all participant expenses are recorded.
8. If you added an expense in error, click the corresponding Delete button to remove the line. Delete

**Result** Streamlyne Research will write each expense to the budget and make the Line Item Details section available for editing.

## Non-Personnel Tab > Participant Support Section > 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 ☒

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 Award 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. Update the **Start Date** for the expense if it is not the same as the Budget Period Start Date. Enter this in MM/DD/YYYY format or click the calendar icon to select a date.
4. Update the **End Date** for the expense if it is not the same as the Budget Period End Date. Enter this in MM/DD/YYYY format or click the calendar icon to select a date.
5. 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 line item level.


**Note** For Non-Personnel costs, inflation is applied only when items are copied by Object Code from Budget Period 1 to subsequent periods.

6. If you would like to change the **Budget Category** associated with this expense, click the arrows next to the field and select a more appropriate value from the dropdown list.
7. Budget Justifications for all other cost line items can be consolidated to form a budget justification narrative using the Budget Justification Consolidation feature on the Budget Actions tab.

Record any justification notes for the expense in the **Budget Justification** note field.

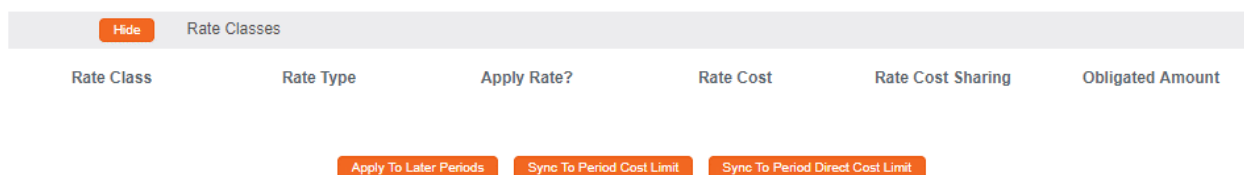
**Note** The **Unrecovered F&A** field displays the underrecovery amount calculated by the system for this expense item. **Unrecovered F&A** is calculated when the Applicable F&A Rate for the Award Budget is less than the Institute Rate, and the item's Object Code is configured to apply inflation.



8. If your institution will be contributing to this expense, enter the dollar amount in the **Cost Sharing** field.
9. The **On/Off Campus** checkbox defaults to the status maintained for this Object Code unless All On or All Off campus has been set in the Parameters page.  
  
If **On/Off Campus** has been set to Default on the Parameters tab, you have the option to reverse the status for this line item. Check or uncheck the box as necessary.

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


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

The Rate Classes subsection displays the Rate Class, Rate Type, the default application, the calculated cost, and calculated cost sharing for the line item, if applicable. Features in this section allow you to adjust or remove individual rates at the expense item level.



1. Click the Show button to expand the Rate Class subsection.  
2. Review the data displayed in each column.
3. The **Apply Rate?** checkbox setting matches the configuration at the Object Code level.  
If necessary, check or uncheck **Apply Rate?** checkbox to remove the default setting.



4. If necessary, edit the **Rate Cost** amount and/or **Rate Cost Sharing** amount for this expense within this budget period only.

5. Click the Sync To Period Cost Limit to automatically generate this cost amount based on the Period Cost Limit entered on 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.




6. Click the Sync to Period Direct Cost Limit to automatically generate this cost amount based on the Period Direct Cost Limit entered on 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.
7. Click the Save button at the bottom of the screen to save your changes. 

**Non-Personnel Tab > Participant Support Section > Line Item Details Subsection > Rate Classes Subsection > Apply to Later Periods Button**

Once all details for Participant Support Rate Classes have been entered for the first period, those details can be copied to subsequent periods. This streamlines data entry when budget periods will have similar participant costs.

If you are working with a multi-period budget, follow the steps below. Otherwise, skip to the next section.

1. From within the Rate Classes subsection for the expense that you wish to copy, click the Apply to Later Periods button to copy the participant support expense to all subsequent periods. 

**Result** The details for this expense line item will be copied to all additional budget periods, applying inflation as appropriate. The copied expense details can be edited or deleted in subsequent budget periods as necessary.



## Non-Personnel Tab > Other Direct Section

The Other Direct section is used to record custom expense items not covered in other sections.

1. Click on the section header to expand the Other Direct section.

➤ Other Direct

2. Click the arrow next to the **Object Code Name** field and select the expense description from the dropdown list. Sample values are shown here.

3. Enter a description of the expense in the **Description** field.

4. Enter the total cost for this particular expense in the **Change Amount** field.

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

6. Repeat Steps 2 through 5 until all other expenses are recorded.

7. If you added an expense in error, click the corresponding Delete button to remove the line. **Delete**

**Result** Streamlyne Research will write each expense to the budget and make the Line Item Details section available for editing.

## Non-Personnel Tab > Other Direct Section > Line Item Details Subsection

Hide

Line Item Details

\* Start Date

07/01/2018

\* End Date

06/30/2019

Apply Inflation?

☒

Budget Category

Duplicating

Budget Justification Notes

Unrecovered F&A 0.00

Cost Sharing

0.00

On/Off Campus

☒

Submit Cost Sharing?

☒

- Click the Show button to expand the Line Item Details subsection.
 

Show

Line Item Details
  - Review the details for this expense item.
 

If the defaulted values for this expense are appropriate for this Award 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.
  - Update the **Start Date** for the expense if it is not the same as the Budget Period Start Date. Enter this in MM/DD/YYYY format or click the calendar icon to select a date.
  - Update the **End Date** for the expense if it is not the same as the Budget Period End Date. Enter this in MM/DD/YYYY format or click the calendar icon to select a date.
  - 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 line item level.
- Note** For Non-Personnel costs, inflation is applied only when items are copied by Object Code from Budget Period 1 to subsequent periods.
- If you would like to change the **Budget Category** associated with this expense, click the arrows next to the field and select a more appropriate value from the dropdown list.
  - Budget Justifications for all other cost line items can be consolidated to form a budget justification narrative using the Budget Justification Consolidation feature on the Budget Actions tab.
 

Record any justification notes for the expense in the **Budget Justification** note field.

**Note** The **Unrecovered F&A** field displays the underrecovery amount calculated by the system for this expense item. **Unrecovered F&A** is calculated when the Applicable F&A Rate for the Award Budget is less than the Institute Rate, and the item's Object Code is configured to apply inflation.

8. If your institution will be contributing to this expense, enter the dollar amount in the **Cost Sharing** field.

9. The **On/Off Campus** checkbox defaults to the status maintained for this Object Code unless All On or All Off campus has been set in the Parameters page.

If On/Off Campus has been set to Default on the Parameters tab, you have the option to reverse the status for this line item. Check or uncheck the box as necessary.

10. To indicate that the item's cost share amount should not be submitted to the Sponsor, uncheck the **Submit Cost Sharing?** box.

11. Click the Save button at the bottom of the screen to save your changes. Save

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

The Rate Classes subsection displays the Rate Class, Rate Type, the default application, the calculated cost, and calculated cost sharing for the line item, if applicable. Features in this section allow you to adjust or remove individual rates at the expense item level.

Hide Rate Classes

Rate Class	Rate Type	Apply Rate?	Rate Cost	Rate Cost Sharing	Obligated Amount
Employee Benefits	EB on LA	<input checked="" type="checkbox"/>	0.00	0.00	0.00
Vacation	Vacation on LA	<input checked="" type="checkbox"/>	0.00	0.00	0.00
MTDC - AWARD	MTDC	<input checked="" type="checkbox"/>	20.00	0.00	0.00

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


1. Click the Show button to expand the Rate Class subsection. Show Rate Classes

2. Review the data displayed in each column.

3. The **Apply Rate?** checkbox setting matches the configuration at the Object Code level.


If necessary, check or uncheck **Apply Rate?** checkbox to remove the default setting.

4. If necessary, edit the **Rate Cost** amount and/or **Rate Cost Sharing** amount for this expense within this budget period only.

5. Click the Sync To Period Cost Limit to automatically generate this cost amount based on the Period Cost Limit entered on 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.

6. Click the Sync to Period Direct Cost Limit to automatically generate this cost amount based on the Period Direct Cost Limit entered on 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.

7. Click the Save button at the bottom of the screen to save your changes. 

### **Non-Personnel Tab > Other Direct Section > Line Item Details Subsection > Rate Classes Subsection > Apply to Later Periods Button**

Once all details for Other Direct Rate Classes have been entered for the first period, those details can be copied to subsequent periods. This streamlines data entry when budget periods will have similar costs.

If you are working with a multi-period budget, follow the steps below. Otherwise, skip to the next section.

1. From within the Rate Classes subsection for the expense that you wish to copy, click the Apply to Later Periods button to copy the Other Direct Expenses to all subsequent periods. 

**Result** The details for this expense line item will be copied to all additional budget periods, applying inflation as appropriate. The copied expense details can be edited or deleted in subsequent budget periods as necessary.

## 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.

Calculate Current Period

## 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, refer back to [Parameters Tab > Generate All Periods Button](#) to copy all Period 1 data to subsequent periods. Then, continue to the next process.

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

## Summary Tab

If you wish to override the system-calculated fringe and unrecovered F&A totals, refer back to the [Summary Tab > Manually Overriding Calculated Fringe and Total F&A Costs](#) section for instruction on overriding these values.

## Distribution & Income Tab

Use the Distribution & Income tab to allocate cost share amounts or unrecovered F&A amounts to specific accounts, and to allocate any income generated by the project.

## Distribution & Income Tab > Cost Sharing Section

▼

Cost Sharing (2)

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"/>	<button>Add</button>
1	<input type="text" value="1"/>	<input type="text" value="0.00"/>	<input type="text"/>	<input type="text" value="9,667.50"/>	<button>Delete</button>
2	<input type="text" value="2"/>	<input type="text" value="0.00"/>	<input type="text"/>	<input type="text" value="0.00"/>	<button>Delete</button>
Total Allocated:				\$9,667.50	
Unallocated:				\$567.50	

Cost Sharing Summary

Period 1: 07/01/2018 - 06/30/2019:

\$10,235.00

Period 2: 07/01/2019 - 06/30/2020:

\$0.00

Total Cost Sharing:

\$10,235.00

Reset to Default

Recalculate

- Click the tab header on the left-hand menu to access the Distribution & Income tab.
- If cost share amounts were generated at any step in the budget creation, the number of cost share transactions that require allocating will appear in between the parentheses of the Cost Sharing section header.

If one or more cost share amounts require allocation, or if you would like to manually enter cost share amounts, click the section header to access the Cost Sharing section.

Otherwise, skip to the next process.

**Note** If you would like to add new cost share amounts, perform the following steps on the **Add:** line.

If you would like to update cost share amounts, perform the following steps on lines prepopulated with dollar values.

- Add or update the **Project Period** field with the budget period number during which the cost share will be generated.
- If cost share percentage is being tracked for the Award, add or update the percentage as a value between 0.01 and 99.9 in the **Percentage** field.
- Add or update the account that will be charged with the cost share in the **Source Account** field.



6. Add or update the dollar amount of the cost share in the **Amount** field.
7. If you performed the previous steps on the **Add:** line, click the Add button to complete this action. Add  
  
Alternatively, if you performed the previous steps on pre-existing lines, click the Save button to save your changes. Save
8. Repeat Steps 3 through 7 until all cost share amounts are added and allocated.
9. If you added an item in error, then click the corresponding Delete button to remove the line. Delete
10. Click the Recalculate button to generate a new Cost Sharing Total. Recalculate
11. If you would like to reset the cost sharing amounts to the default values, click the Reset to Default button. Reset to Default
12. Click the Save button again to record your changes. Save

## Distribution & Income Tab > Unrecovered F&A Section

▼

Unrecovered F&A (4)

Unrecovered F&A Distribution List ⓘ

	Fiscal Year	Applicable Rate	Campus	Source Account	Amount	Actions
Add:	<input type="text"/>	<input type="text"/>	<input type="text" value="Select"/>	<input type="text"/>	<input type="text" value="0.00"/>	<span>Add</span>
1	<input type="text" value="2019"/>	<input type="text" value="5.00"/>	<input type="text" value="Yes"/>	<input type="text"/>	<input type="text" value="0.00"/>	<span>Delete</span>
2	<input type="text" value="2019"/>	<input type="text" value="5.00"/>	<input type="text" value="No"/>	<input type="text"/>	<input type="text" value="0.00"/>	<span>Delete</span>
3	<input type="text" value="2020"/>	<input type="text" value="5.00"/>	<input type="text" value="Yes"/>	<input type="text"/>	<input type="text" value="0.00"/>	<span>Delete</span>
4	<input type="text" value="2020"/>	<input type="text" value="5.00"/>	<input type="text" value="No"/>	<input type="text"/>	<input type="text" value="0.00"/>	<span>Delete</span>
Total Allocated:					\$0.00	
Unallocated:					\$13,018.93	

Unrecovered F&A Summary

Period 1: 07/01/2018 - 06/30/2019:	\$6,431.00
Period 2: 07/01/2019 - 06/30/2020:	\$6,587.93

Reset to Zero
Recalculate

1. If unrecovered F&A amounts were generated at any step in the budget creation, the number of transactions that require allocating will appear in between the parentheses of the Unrecovered F&A section header.




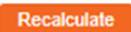


If one or more unrecovered amounts require allocation, or if you would like to manually enter these amounts, click the section header to access the Unrecovered F&A section.

➤ Unrecovered F&A (4)

Otherwise, skip to the next process.

**Note** If you would like to add new unrecovered F&A amounts, perform the following steps on the **Add:** line.

If you would like to update the amounts, perform the following steps on lines prepopulated with dollar values.

2. Add or update the fiscal year during which the underrecovery will be generated in **Fiscal Year** field.
3. Add or update the unrecovered F&A rate as a value between 0.01 and 99.9 in the **Applicable Rate** field.
4. Add or update the on- or off-campus indicator in the **Campus** field by selecting Yes for on-campus or No for off-campus.
5. Add or update the account that will be charged with the underrecovery in the **Source Account** field. This is generally an internal account code that you will enter as free-text.
6. Add or update the dollar amount of the underrecovery in the **Amount** field.
7. If you performed the previous steps on the **Add:** line, click the Add button to complete this action. 
- Alternatively, if you performed the previous steps on preexisting lines, click the Save button to save your changes. 
8. Repeat Steps 3 through 7 until all unrecovered F&A amounts are added and allocated.
9. If you added an item in error, click the corresponding Delete button to remove the line. 
10. Click the Recalculate button to generate a new Unrecovered F&A Total. 
11. If you would like to reset the unrecovered F&A amounts to the default values, click the Reset to Default button. 
12. Click the Save button again to record your changes. 

## Distribution & Income Tab > Project Income Section




▼ Project Income (0)

Income Details ⓘ

Add:

Income Summary ⓘ

Period 1 Income:	0.00
Period 2 Income:	0.00
Total Income:	0.00

1. If the project is engaged in activities that generate income, click the section header to expand the Project Income section.  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 dropdown list.
3. Enter the dollar amount generated for the period in the **Income** field.
4. Enter a brief description of the activities that generated 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 your changes. 

## Budget Actions Tab

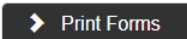

Click the tab header on the left-hand menu to access the sections on the Budget Actions tab.



## Budget Actions Tab > Print Forms Section

The screenshot shows a web interface for the 'Print Forms' section. At the top, there is a dark header with a dropdown arrow and the text 'Print Forms'. Below this is a light gray bar with three tabs: 'Print Forms' (selected), 'Print Budget Comments', and 'Actions' (with a question mark icon). The main area contains a table with 7 rows of budget reports. Each row has a checkbox for 'Print Budget Comments' and an orange 'Print' button.

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

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

## Budget Actions > Budget Justification Section

The screenshot shows the 'Budget Justification' section. It has a dark header with a dropdown arrow and the text 'Budget Justification'. Below is a light gray bar with the text 'Budget Justification' and a question mark icon. The main area has two columns: 'Last Updated Timestamp' and 'Updated By' on the left, and 'Justification Text' on the right. The 'Justification Text' column contains a large text input area. At the bottom, there is an orange button labeled 'Consolidate Expense Justification'.

Last Updated Timestamp	Updated By	Justification Text
		<div></div>

[Consolidate Expense Justification](#)

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

> Budget Justification

Consolidate Expense Justification

Save

## Budget Actions Tab > Data Validation Section

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

Turn On Validation

1. Click the header to access the Data Validation section.
2. Click the Turn On Validation button.

> Data Validation

Turn On Validation

**Note** Streamlyne Research 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 Award Budget is finalized.

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

1 error(s) found on page.

×

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

3. Streamlyne Research 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 Research returns to the document section where the problem resides.  
Make your corrections now.

Fix

5. Repeat Steps 3 and 4 as many times as necessary to resolve all errors.


### **Budget Actions > Ad Hoc Recipients**


For information on how to use this common function, please refer to the **NEW USER MANUAL: Navigation, the Action List, and Common Document Elements**, Ad Hoc Recipients Section.

### **Award Actions > Route Log**

For information on how to use this common function, please refer to the **NEW USER MANUAL: Navigation, the Action List, and Common Document Elements**, Route Log Section.

### **Budget Actions > Submitting an Award Budget**

Once all the Award Budget data is entered and validated, click the Submit button to save the changes and route the document through your institution's workflow—if one is in place for Award Budget processes. 

If your institution does not require workflow approvals for Award Budgets, clicking Submit is sufficient to make the budget eligible for posting. 

### **Budget Actions > Posting an Award Budget**

Once an Award Budget has been submitted and approved (if necessary), the Status will update to To Be Posted.

Click the Post Budget button to post the budget to your institution's financial system. The Award Budget's Status will update to Posted. 

In order to create subsequent Award Budgets for an Award, you must make sure existing Award Budgets have either been Cancelled or Posted.

### **Budget Actions > Toggle Budget Status**

The Toggle Budget Status button allows you to make the Award Budget ineligible for posting to your financial system. 

Once an Award Budget is in To Be Posted Status, click the Toggle Budget Status button to switch the Status from To Be Posted to Do Not Post. Click the button again to return the Status to To Be Posted.

## Example Postaward Rebudgeting Scenarios

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### Why should you rebudget?

- When you have spent or will spend money on different expense categories than originally budgeted during the posted obligated period.
- When you have underspent during a posted obligated period and need to carry money forward to subsequent periods.

### When will Streamlyne allow you to rebudget?

- AFTER at least one obligated period has been budgeted and posted.

**Scenario 1:** Simple Rebudgeting for Non-Personnel Expenses

**Scenario 2:** Moving Money Off a Personnel Line

**Scenario 3:** Rebudgeting an Award with Automatic Carry-Forward with Increment or No Cost Extensions



## Scenario 1: Simple Rebudget for Non-Personnel Expenses

In this scenario, the goal is to move money from one expense to another without making any changes to the obligated amounts or dates. There is no change to project period dates or to obligated amounts.

This scenario walks you through the steps to create the new Rebudget.

### Prerequisite

- In order to rebudget, there must be at least one budget already in place with a status of Posted.

### Create the New Budget Version

Please note that any relevant screen shots appear immediately before the text that corresponds to that step.

- 1.) Within the Award, click on the **Budget Versions** tab.

Budget Versions (000234-00001A:)								
Budget Versions ⓘ								
	* Name	Version #	Direct Cost	F & A	Total	Award Budget Type	Budget Status	Actions
Add:	Rebudget Period 1							New
Hide	Period 1	1	71,612.90	28,387.10	100,000.00	New ▾	Posted ▾	Open Copy

- 2.) Create a new **Name** for this rebudget and click the **New** button to add a new budget version.

Hide	Rebudget Period 1	2	0.00	0.00	0.00	Rebudget ▾	In Progress ▾	Open	Copy
Award Version		1	F&A Rate Type: MTDC						
Cost Sharing:		0.00	Last Updated: Jun 28, 2021 12:38:47 PM						
Unrecovered F&A:		0.00	Last Updated By: admin						
Comments:									

- 3.) The system will create a new budget version with an **Award Budget Type** of Rebudget. Click **Open**.

4.) In the **Budget Overview** section of the **Parameters** tab, the system requires you to enter comments on all rebudgets. Please enter a description of the reason for the rebudget as shown above. In this example, travel that was originally to occur in a future period will occur instead in the current period.

5.) In the **Budget Periods & Totals** section of the **Parameters** tab, the system displays the original budget start and end dates from the previously posted budget version. If you anticipate needing to use the **Sync to Period Cost Limit** or **Sync to Period Direct Cost Limit** buttons during the rebudgeting process, be sure to enter any Cost Limits now. In this example a Cost Limit of \$100,000.00 has been entered.

6.) Click on the **Non-Personnel** tab.

▼ Other Direct (1 line item)

Other Direct ⓘ

	* Object Code Name	Description	Change Amount	Obligated Amount	Action
Add:	<input type="text" value="select"/>	<input type="text"/>	<input type="text" value="0.00"/>		<button>Add</button>
1	Materials and Services 420226	Misc Lab Supplies	<input type="text" value="-1000"/>	26,301.80	<button>Delete</button>

Total Amount for Materials and Services: 26,301.80

Show Line Item Details

- 7.) Navigate to the previously posted expense line that you want to decrease. In this example, our budget originally allocated \$26,301.80 to Materials and Services. Note the \$26,301.80 in the **Obligated Amount** column.

To decrease the Obligated Amount, enter a negative number in the **Change Amount** field. In this example, Materials and Services is decreased by \$1000 by entering '-1000'.

▼ Travel (1 line item)

Travel ⓘ

	* Object Code Name	Description	Change Amount	Obligated Amount	Action
Add:	<input type="text" value="select"/>	<input type="text"/>	<input type="text" value="0.00"/>		<button>Add</button>
1	Travel Expenses 420050	Domestic Travel	<input type="text" value="1,000.00"/>	0.00	<button>Delete</button>

Total Amount for Travel Expenses: 1,000.00

Show Line Item Details

- 8.) Next, move the money to a new expense line by navigating to an existing expense, or by selecting a new object code. Enter a positive value in the **Change Amount** field. Make sure to click the **Add** button if the object code line is newly added to the rebudget. In this example, a Travel Expenses line was added for \$1000.

## Verify the Changes in the Summary

Summary			
Summary			
		back	next
		Period 1 01/01/2021 - 12/31/2021	Total
Personnel	Edit		
show	Salary	0.00	0.00
show	Fringe	0.00	0.00
show	Personnel F&A	0.00	0.00
show	Calculated Direct Costs	0.00	0.00
Personnel Subtotal		0.00	0.00
Non-Personnel	Edit		
show	Equipment	0.00	0.00
show	Travel	1,000.00	1,000.00
show	Other Direct	(1,000.00)	(1,000.00)
show	Non-Personnel F&A	0.00	0.00
show	Calculated Direct Costs	0.00	0.00
Non-Personnel Subtotal		0.00	0.00
Totals			
TOTAL DIRECT COSTS		0.00	0.00
TOTAL F&A COSTS		0.00	0.00
TOTAL COSTS		0.00	0.00

- 9.) Click on the **Summary** tab to see the debits and the credits from your previous transactions.

## Finalize and Post

- 10.) Finalize this version by clicking on the **Budget Actions** tab, then clicking the **Submit** button.

Would you like to update all Award Budget Cost Limits before submitting? Updating limits will require you to change your budget.

Yes

No

- 11.) The system may display this warning to ensure that you have entered any appropriate Cost Limits. Since in this example we have already done so, click No.

return to award

Document was successfully submitted.

Budget Versions

Parameters

Rates

Summary

Personnel

Non-Personnel

Distribution & Income

Budget Actions

> Print Forms

> Budget Justification

> Data Validation

> Route Log

Toggle Budget Status

Post Budget

Cancel

Close

12.) Click the **Post Budget** button to trigger the integration and complete the process.

## Scenario 2: Moving Money Off a Personnel Line

In this scenario, we will show you how to manipulate **Percent Effort/Percent Charged** to rebudget to move money off a Personnel line item.

This section assumes that you are already familiar with creating new Rebudget version, including entering **Comments** on the **Parameters** tab and setting any period **Cost Limits**.

### Create the Budget Version

- 1.) Within the Award, click on the **Budget Versions** tab.
- 2.) Create a new **Name** for this rebudget and click the **New** button.
- 3.) The system will create a new budget version with an **Award Budget Type** of Rebudget. Click **Open**.
- 4.) In the **Budget Overview** section of the **Parameters** tab, the system requires you to enter a description of the changes on all rebudgets. Please enter a description of the reason for the rebudget in the **Comments** field.
- 5.) In the **Budget Periods & Totals** tab, the system displays the original budget start and end dates from the previously posted budget version. If you anticipate needing to use the **Sync to Period Cost Limit** or **Sync to Period Direct Cost Limit** buttons, be sure to enter these now.

### Modify Personnel Amounts

- 6.) Click on the **Personnel** tab.
- 7.) Click on the line item that you wish to decrease in the **Personnel Detail** panel. If it is a multi-period rebudget, be sure you're starting off in the correct period.
- 8.) Double-check that the **Base Salary** from the previously posted budget has correctly carried forward to the **Rebudget**.

**Hide** Faculty Salaries Tenured - On

	Person	* Start Date	* End Date	% Effort	% Charged
1	Biochemistry Professor - AA000	07/01/2021	06/30/2022	-2.00000	-2.00000
	Period Type: Calendar	Requested Salary: -2,000.00	Calculated Fringe: (540.00)	<b>Calculate</b> <b>Sync to Requested Salary</b> <b>Details</b> <b>Delete</b>	
		Obligated Salary: 0.00	Obligated Fringe: 0.00		
<b>Totals:</b>		Requested Salary: (2,000.00)	Calculated Fringe: (540.00)		
		Obligated Salary: 0.00	Obligated Fringe: 0.00		

**Hide** Faculty Salaries Tenured - On Details

Budget Category: Senior Personnel # of Person(s): 1

Unrecovered F&A: 0.00 Cost Sharing: 0.00

Apply Inflation? ☒ On/Off Campus ☒

Submit Cost Sharing? ☒

Budget Justification Notes:  Group Description:

**Show** Rate Classes

9.) If an individual's effort is decreasing for the period, decrease the obligated amount by entering negative percent values into the **% Effort** and **% Charged** fields, then click **Calculate**. You can see from the above simple example that this decreased the **Requested Salary** as well as the **Calculated Fringe** amounts.

10.) Alternatively, if you wish to decrement the **Personnel** line by a specific dollar amount, click the **Sync to Requested Salary** button to access the widget. This widget will reverse engineer to the necessary percentages.

**Personnel Budget Sync to Requested Salary**

Personnel Budget Details - Biochemistry Professor

Effective Period : 07/01/2021 to 06/30/2022

% Effort : 0.00000

% Charged : 1.50000

Requested Salary : 1,500.00

**Calculate** **Set % Charged** **Close**

11.) In the **Requested Salary** field, enter the dollar amount you wish you wish to convert to effort based on the entered **Base Salary** within the **Effective Period**, and click **Calculate**.

12.) Highlight and right-click > Copy the percentage in the **% Charged** field, then click **Close**. We will convert this percentage to a negative number in the next step.

Hide

Faculty Salaries Tenured - On

1	Person Biochemistry Professor - AA000	* Start Date 07/01/2021	* End Date 06/30/2022	% Effort -1.50000	% Charged -1.50000
	Period Type Calendar	Requested Salary -1,500.00	Calculated Fringe (405.00)	Calculate	Sync to Requested Salary
		Obligated Salary 0.00	Obligated Fringe 0.00	Details	Delete
Totals:		Requested Salary (1,500.00)	Calculated Fringe (405.00)		
		Obligated Salary 0.00	Obligated Fringe 0.00		

Hide

Faculty Salaries Tenured - On Details

Budget Category  
Senior Personnel

# of Person(s)  
1

Unrecovered F&A  
0.00

Cost Sharing  
0.00

Apply Inflation?  
☒

On/Off Campus  
☒

Submit Cost Sharing?  
☒

Budget Justification  
Notes

Group Description

Show

Rate Classes

- 13.) Paste the copied percentage into the **% Effort** field, and force your cursor to add a '-' in front of the percentage to make the value negative.
- 14.) Right-click > Copy that negative value into **% Charged**, then click **Calculate**. **Requested Salary**, **Calculated Fringe**, and all associated rates will decrease proportionally.
- 15.) Next, add those funds to any line in the budget as needed.

## Verify the Changes in the Summary

- 16.) Click on the **Summary** tab to see the debits and the credits from your transactions.

## Finalize and Post

- 17.) Finalize this version by clicking on the **Budget Actions** tab, then clicking the **Submit** button.
- 18.) The system may display a warning to ensure that you have entered any appropriate Cost Limits. Since in this example we have already done so, click No.
- 19.) Click the **Post Budget** button to trigger the integration and complete this process.





- 11.) If the anticipated amount is also increasing, please enter this amount in the **Anticipated Change** field.
- 12.) Click the **Add** button to include the transaction.
- 13.) Click the **Submit** button at the bottom to indicate the transaction is Final.
- 14.) Click the **Return to Award** button in the upper left.

## Create the Budget Version

- 1.) Within the Award, click on the **Budget Versions** tab.
- 2.) Create a new **Name** for this budget and click the **New** button. One suggestion might be 'Rebudget Period 1 with New Period 2', etc.
- 3.) The system will create a new budget version with an **Award Budget Type** of New. Click **Open**.
- 4.) In the **Budget Overview** section of the **Parameters** tab, the system requires you to enter a description on all budgets that affect posted periods. Please enter a description the high-level changes in the **Comments** field.

Budget Periods & Totals

Budget Periods

Actions	#	Period	Start Date	Period End Date	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit
Add					0.00	0.00	0.00	0.00	0.00	0.00	0.00
Delete	1		01/01/2021	12/31/2021	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Delete	2		01/01/2022	12/31/2022	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Totals

Budget Change:	01/01/2021	12/31/2022	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Previous Budget:			\$ 100,000.00	\$ 71,612.90	\$ 28,387.10	\$ 0.00	\$ 0.00	
Budget Total:	01/01/2021	12/31/2022	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	

Recalculate

- 5.) In the **Budget Periods & Totals** section, start off by clicking the **Default Periods** button to populate all obligated periods as per your completed Time and Money document.
- 6.) If preparing a summary budget, you can now enter your new obligated direct and indirect costs in the new period in the **Budget Periods and Totals** section.
- 7.) If preparing a detailed budget, click on the detailed budget section (**Personnel** or **Non-Personnel**) you'd like to edit first and then move to the appropriate next steps.

Period Total:\$0.00	Budget Total:\$0.00	Budget Period: 1: 01/01/2021 - 12/31/2021 ▼	View: Full Detail ▼	Update View
---------------------	---------------------	---	---------------------	-------------

- 8.) Personnel: Select **Personnel** on the left. Select the appropriate **Budget Period** at the very top of the page and then click the **Update View** button

Enter any personnel costs. Steps are detailed in the [Updating the Personnel Tab](#) section.

Period Total:\$0.00	Budget Total:\$0.00	Budget Period: 1: 01/01/2021 - 12/31/2021 ▼	View: Full Detail ▼	Update View
---------------------	---------------------	---	---------------------	-------------

- 9.) Non-Personnel: Select **Non-Personnel** on the left. Select the appropriate **Budget Period** at the very top of the page and then click the **Update View** button.

Enter any non-personnel costs. Steps are detailed in the [Updating the Non-Personnel Tab](#) section.



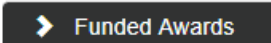

## Finalize and Post

- 10.) Once you've entered your budget details or summary budget for your new period, finalize this version by clicking on the **Budget Actions** tab, then clicking the **Submit** button.
- 11.) The system may display a warning to ensure that you have entered any appropriate Cost Limits. Since in this example we have already done so, click No.
- 12.) Click the **Post Budget** button to trigger the integration and complete this process.

## Unlinking an IP from an Award

To remove the linked Institutional Proposal from the Award, you must edit Institutional Proposal document by removing the Award ID from the IP. This will break the connection between the Institutional Proposal and the Award. Specifically, the Institutional Proposal will no longer appear under the Current Funding Proposals section in the Award, but no Award data will be modified. Any changes necessary within the Award will need to be done manually.

Funded Awards				
Funded Awards ?				
Award ID	Award Version	Proposal Version	Account ID	Actions
000042-00001A	1	3	123141	<input type="checkbox"/>
Unlock Selected			Select All Deselect All	

1. Navigate to the Institutional Proposal by using the IP Lookup function at Main Menu > Pre-Award > Institutional Proposal.
2. Once you have accessed the IP document, click on the Edit button at the bottom of the Institutional Proposal tab to open the IP for editing. 
3. Click the tab header on the left-hand menu to access the Institutional Proposal Actions tab. 
4. Click on the header to expand the Funded Awards section. 
5. Click the checkbox to select an individual award to unlink from the IP or use the Select All and Deselect All buttons to select awards.
6. Click on the Unlock Selected button to unlink the IP from the award(s) selected. 

**Note** If the IP is unlinked from all awards, the **Status** of the IP will change from Funded to Pending.