

STREAMLYNE TIP SHEET

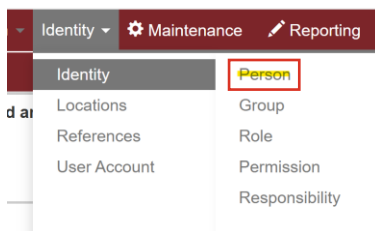
HOW TO ADD AFFILIATE FACULTY

TIPS FOR FINDING & ADDING AFFILIATES TO PROPOSALS AND HOW THEY CAN APPROVE

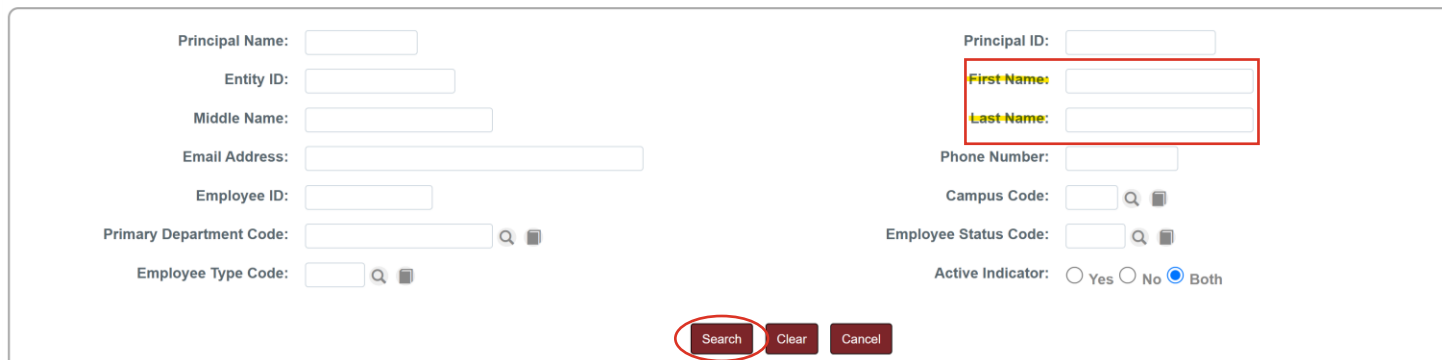
This Tip Sheet is for anyone working on a PD where an Affiliate Faculty member will be serving as a Co-PI or Key Person. In order to ensure the personnel are correctly added to the proposal and have the ability to do the proper approvals, please follow the steps below.

How to find Affiliates in Streamlyne

1. Verify that the person has approved Affiliate status before you begin by contacting your Unit's HR Partner.
2. To search for the person in Streamlyne, use the address book and search using their first and/or last name.



Person Lookup

A screenshot of the 'Person Lookup' form in Streamlyne. The form contains several input fields: Principal Name, Entity ID, Middle Name, Email Address, Employee ID, Primary Department Code, Employee Type Code, Principal ID, First Name, Last Name, Phone Number, Campus Code, Employee Status Code, and Active Indicator. The 'First Name' and 'Last Name' fields are highlighted with a red box. At the bottom of the form, there are three buttons: 'Search', 'Clear', and 'Cancel'. The 'Search' button is circled in red.

- a. Affiliates who were in Affiliate status before Streamlyne implementation will have an “aa0” (please note this is a zero and not a capital “o”) prior to their standard Principal Name (first letter of first name followed by their whole last name). The Principal Name will be used when it comes time for them to sign into SL to approve the proposal.
 - i. For example, if John Smith was an affiliate prior to SL implementation, his username will appear as “aa0jsmith”.

STREAMLYNE TIP SHEET

HOW TO ADD AFFILIATE FACULTY

TIPS FOR FINDING & ADDING AFFILIATES TO PROPOSALS AND HOW THEY CAN APPROVE

- b. Affiliates who were active, regular employees/faculty in Streamlyne when it was implemented on campus in Summer 2023 but have since transitioned to Affiliate status will retain their original Net ID as their Principal Name (even if it doesn't follow the standard format).

Employee Type Code:

Active Indicator: Yes No Both

| Actions | Principal ID | Principal Name | Name | Entity ID | Campus Code | Primary Department Code | Employee ID |
|---------|--------------|----------------|------|-----------|-------------|-------------------------|-------------|
|---------|--------------|----------------|------|-----------|-------------|-------------------------|-------------|

- c. If you are unable to find your Affiliate and have confirmed that they have Affiliate status, please send an email to streamlyne@iastate.edu.
3. Go ahead and add the person to the proposal under Key Personnel as you normally would.

How Affiliates sign off in Streamlyne

1. Affiliates will need to sign off on the proposal like all other Key Personnel on the project. In order for them to login to Streamlyne, they will need to use the Principal Name you found for them in the previous step.
2. They should sign in using the Microsoft Dashboard and the Streamlyne application and select the Local login option. For the password, they should use their normal ISU Dashboard password.

Welcome to Streamlyne. Please select your log-in method.

←

3. If their password will not work to gain them access into Streamlyne, please have them contact streamlyne@iastate.edu to have their password reset.
4. Once into the system, they will complete their Personal Proposal Certification like all regular Key Personnel. If questions, please consult the [Tip Sheet – Approval of PD](#).