

# STREAMLYNE TIP SHEET

## APPROVAL OF A PD

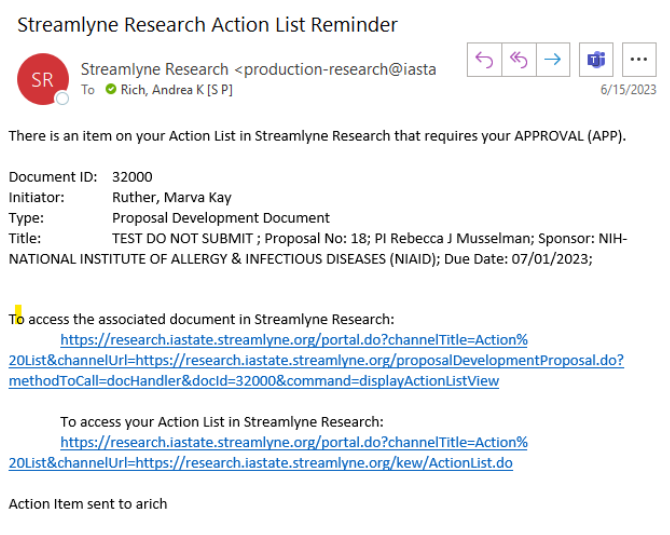
### APPROVAL OF STREAMLYNE PD AS A KEY PERSON, DEPARTMENT OR REPORTING UNIT APPROVER

#### Approving Streamlyne Proposal Document (PD)

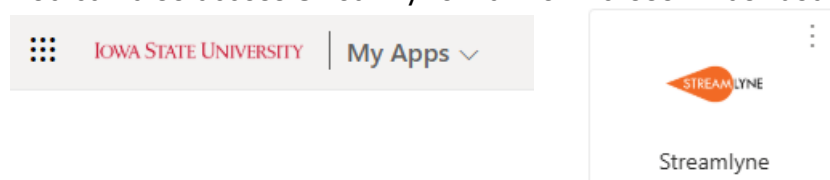
The proposal will route for approvals after OSPA has completed Initial Review (Budget Review) and the proposal is finalized. Please Note: No data entered in the PD can be changed after the proposal is in workflow (attachments can be changed).

#### Accessing Streamlyne PD

Each individual listed (Key Persons) or group member (Departments, Centers or Reporting Units) responsible for approval will receive an email from Streamlyne when an item arrives in their action list. This email message has a link to the PD. Here is an example of the message you will receive:



You can also access Streamlyne via the Microsoft Dashboard. Locate the Streamlyne App and log in.



Once in Streamlyne, this PD will show in your Action List. The red **APP** symbol indicates that this PD is ready for your approval.

| Action List                   |   |
|-------------------------------|---|
| Show                          | <b>APP</b> 4911 34  |
| Proposal Development Document | Cows: Really real. ; Proposal No: 34; PI James M Reecy; Sponsor: NIH-NATIONAL INSTITUTES OF HEALTH; Due Date: 01/27/2023; |
| ENROUTE                       | AGRICULTURAL AND BIOSYSTEMS ENGINEERING - CALS/AES #CALS/AES-ABE  |
| James M Reecy                 | Richter, Nichole Lynne  |
| 03:26 PM 01/18/2023           |   |

HELP EMAIL: [streamlyne@iastate.edu](mailto:streamlyne@iastate.edu)

WEBSITE: <https://www.ospa.iastate.edu/streamlyne>

UPDATED: 12/2024

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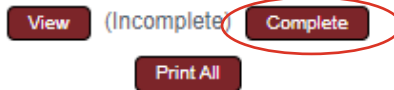
## PI APPROVAL OF PD (CONT.)

### APPROVAL OF STREAMLYNE PD AS A KEY PERSON, DEPARTMENT OR REPORTING UNIT APPROVER

#### Reviewing and Approving a PD

1. Click the Show button next to the APP item in your Action List.
2. Click the Open Proposal button at the bottom of this view (you may need to scroll down).
3. The system will display the document open to the Proposal Summary tab, with the Proposal Summary section expanded. Review the data in the Proposal Summary section.
4. Click on the Budget Summary panel.
5. Click the Show buttons to access and review the summarized budget data.
6. Click on the Key Personnel Panel.
7. For **all Key Persons**, click on the Complete button next to your name, which will take you to the Key Personnel panel. Click on your name and complete the questions in the Proposal Person Certification panel.

#### Proposal Person Certification



8. Click the View and Show buttons to access and review the summarized personnel data. Review the remaining sections – Special Review, Custom Data, Questions, Attachments, and keywords – by clicking the section headers to access the summarized data.
9. Once the proposal has been reviewed, click on the button at the bottom of the screen associated with the action to be taken. Most often the action will be to Approve.
  - a. DO NOT select *Not Approved*. This will delete this PD. If any part of this PD needs corrected prior to your approval, Return for Revision will return it to the Initiator for any desired edits.

