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)

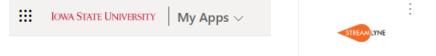
The proposal will route for approvals after OSPA has completed Initial Review (Budget Review) and the proposal is finalized. Please Note: No data entered in the PD can be changed after the proposal is in workflow (attachments can be changed).

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:

Streamlyne Research Action List Reminder
SR Streamlyne Research <production-research@iasta To ● Rich, Andrea K [S P] 6/15/2023</production-research@iasta
There is an item on your Action List in Streamlyne Research that requires your APPROVAL (APP).
Document ID: 32000 Initiator: Ruther, Marva Kay Type: Proposal Development Document Title: TEST DO NOT SUBMIT ; Proposal No: 18; PI Rebecca J Musselman; Sponsor: NIH- NATIONAL INSTITUTE OF ALLERGY & INFECTIOUS DISEASES (NIAID); Due Date: 07/01/2023;
To access the associated document in Streamlyne Research: <u>https://research.iastate.streamlyne.org/portal.do?channelTitle=Action%</u> 20List&channelUrl=https://research.iastate.streamlyne.org/proposalDevelopmentProposal.do? methodToCall=docHandler&docId=32000&command=displayActionListView
To access your Action List in Streamlyne Research: https://research.iastate.streamlyne.org/portal.do?channelTitle=Action% 20List&channelUrl=https://research.iastate.streamlyne.org/kew/ActionList.do
Action Item sent to arich

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



Streamlyne

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

	1	Show	АРР	<u>4911</u>	34	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	E	1
--	---	------	-----	-------------	----	----------	---	---------	---	------------------	------------------------------	------------------------	---	---

HELP EMAIL: streamlyne@iastate.edu

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

UPDATED: 12/2024

IOWA STATE UNIVERSITY Office of Sponsored Programs Administration IOWA STATE UNIVERSITY

IOWA STATE UNIVERSITY Office of Innovation Commercialization

STREAMLYNE TIP SHEET 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 <u>Show</u> 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 <u>Proposal Summary</u> tab, with the <u>Proposal</u> <u>Summary</u> section expanded. Review the data in the Proposal Summary section.
- 4. Click on the **Budget Summary** panel.
- 5. Click the <u>Show</u> buttons to access and review the summarized budget data.
- 6. Click on the <u>Key Personnel</u> Panel.
- For all Key Persons, click on the <u>Complete</u> button next to your name, which will take you to the <u>Key Personnel</u> panel. Click on your name and complete the questions in the <u>Proposal</u> <u>Person Certification</u> panel.



- 8. Click the <u>View</u> and <u>Show</u> 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. One 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 <u>Approve</u>.
 - 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.



HELP EMAIL: streamlyne@iastate.edu

WEBSITE: https://www.ospa.iastate.edu/streamlyne UB

UPDATED: 12/2024

IOWA STATE UNIVERSITY Office of Sponsored Programs Administration IOWA STATE UNIVERSITY FOUNDATION

IOWA STATE UNIVERSITY Office of Innovation Commercialization