

STREAMLYNE TIP SHEET

SEARCHING FOR A PD

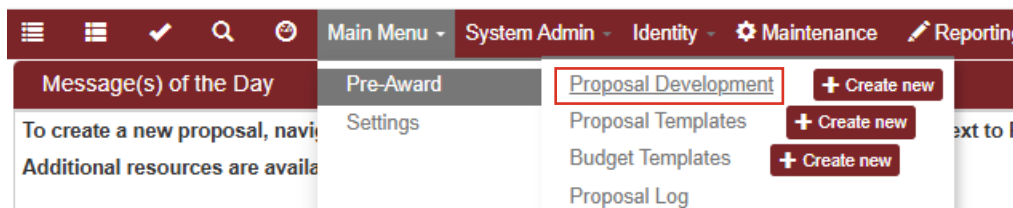
SEARCHING FOR A PROPOSAL DOCUMENT (PD) IN STREAMLYNE

If you have access to a PD (you are a Key Person, Initiator, Aggregator, or have review access due to the units included on the PD), you may need to locate a PD when it is no longer in your Action List.

To search for a PD in Streamlyne

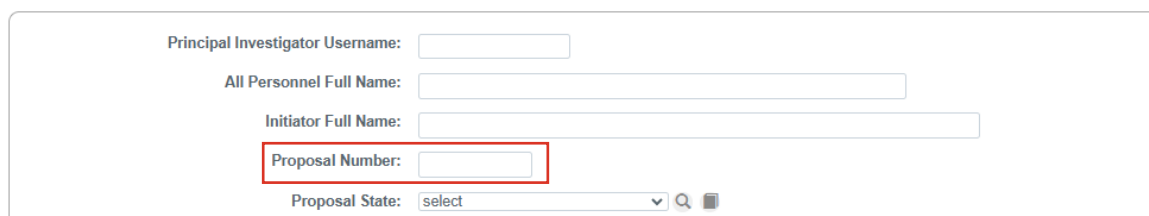
1. Go to the Main Menu
2. Pre-Award
3. Proposal Development

IOWA STATE
UNIVERSITY

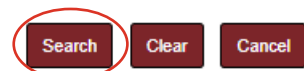


4. In Development Proposal Lookup, enter the Proposal Number (PD #). If you have forgotten the PD #, you can also use other search criteria found on this page. If searching by another criteria, remember to use a Wild Card (* %) when the full name or other search term may not be known. For example, when searching for Jonathan Smith in Personnel Full Name, search *Smith*. The more criteria used, the narrower your search results will be.

Development Proposal Lookup

A screenshot of the 'Development Proposal Lookup' form. The form has several input fields: 'Principal Investigator Username', 'All Personnel Full Name', 'Initiator Full Name', 'Proposal Number', and 'Proposal State'. The 'Proposal Number' field is highlighted with a red box. The 'Proposal State' field is a dropdown menu with 'select' as the current value. There are search and refresh icons to the right of the 'Proposal State' dropdown.

5. After entering the Proposal Number (or other search criteria), enter Search.



6. Any records matching your search criteria will now show up below if you scroll down.
7. The records generated will have several Action options, depending on your privileges in the system. Not all of these options detailed below will be available.
 - a. Edit- if this PD is not yet in Workflow, elements can still be edited

HELP EMAIL: streamlyne@iastate.edu

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

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- b. View – only allows viewing of the PD elements
- c. Copy – if a copy of this original PD is needed to generate a new or updated PD based on the existing PD elements.
- d. Streams – this option will show both the PD and the resulting IP (Institutional Proposal) after the PD has been approved. Either option can be opened for viewing by those with access.

Actions	Proposal Number	Proposal Type	Proposal State	Project Title	Sponsor Code	Sponsor Name	Initiator Username	Principal Investigator	Lead Unit ID
edit view copy streams	34	New	In Progress	Test Title	001044	NIH-NATIONAL INSTITUTES OF HEALTH	schreck1		CALS/AES-BBMB