

STREAMLYNE TIP SHEET

PI APPROVAL OF PD

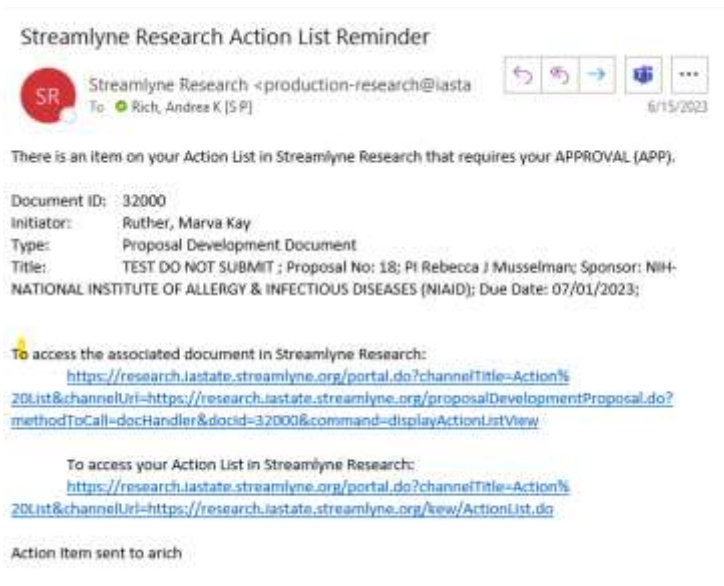
APPROVAL OF STREAMLYNE PD AS PI, CO-PI OR KEY PERSONNEL

Approving Streamlyne Proposal Development (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). PI, Co-PIs and Key Personnel will receive the proposal at the same time.

Accessing Streamlyne PD

Each individual listed on the proposal 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 Okta and log in to see your action list, shown here:

View	APP	34	34	Proposal Development Document	Cows: Really real ; Proposal No: 34; PI James M Reacy; Sponsor: NIH-NATIONAL INSTITUTES OF HEALTH; Due Date: 01/27/2023;	ENROUTE	AGRICULTURAL AND BIOSYSTEMS ENGINEERING - CALS/AES #CALS/AES-ABE	James M Reacy	Richter, Nichole Lynne	03:26 PM 01/18/2023
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HELP EMAIL: streamlyne@iastate.edu

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

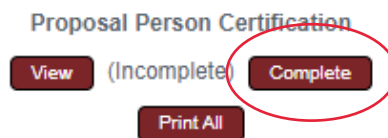
UPDATED: 07/2023

STREAMLYNE TIP SHEET PI APPROVAL OF PD (CONT.)

APPROVAL OF STREAMLYNE PD AS PI, CO-PI OR KEY PERSONNEL (CONT.)

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.
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.



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.

