

STREAMLYNE TIP SHEET

EXCEL BUDGET

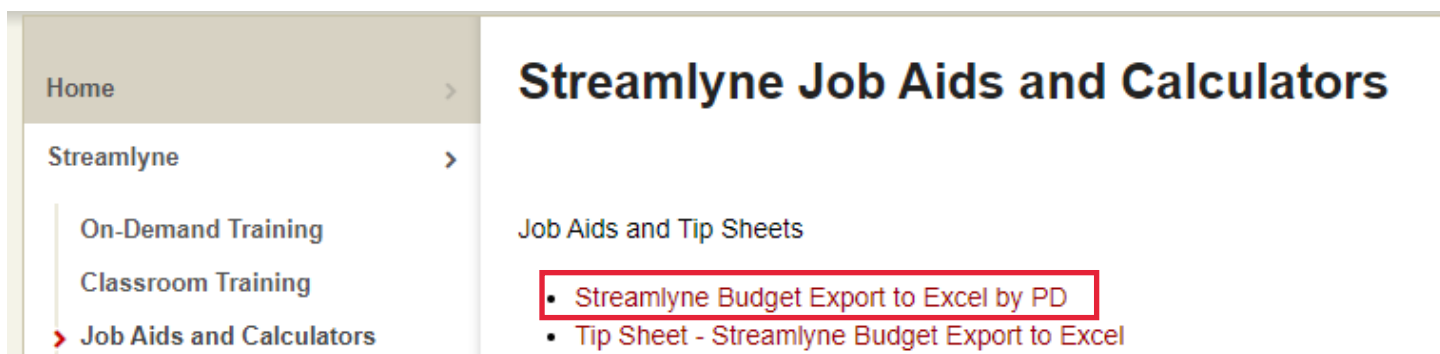
EXPORTING STREAMLYNE BUDGET TO EXCEL

USING THE STREAMLYNE BUDGET EXPORT

To generate an editable Excel budget from Streamlyne, when revisions are needed or to simply record the budget in an Excel format, you will follow these steps.

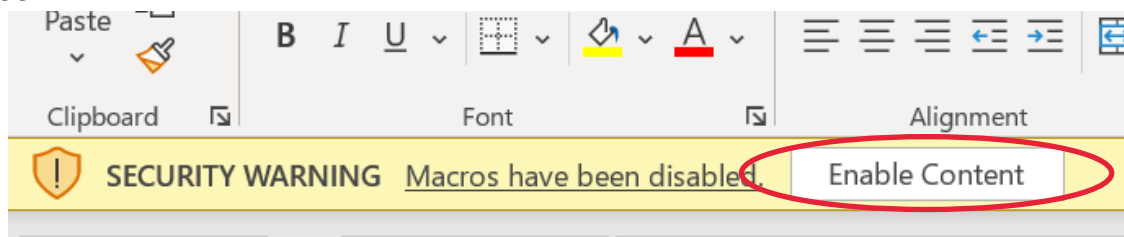
Before starting, make sure you are using **Microsoft 365** (older versions of Excel are not compatible with this process). Go to <https://office365.iastate.edu> in any web browser or search in Software Center for the app and follow installation instructions.

Before starting, make sure you have downloaded the blank *Streamlyne Budget Export to Excel by PD* document from the [OSPA Streamlyne page](#).



You will use this blank one in addition to the Excel document generated in Streamlyne Reports.

When working in the *Streamlyne Budget to Excel by PD* workbook, select **Enable Content** to allow Macros.



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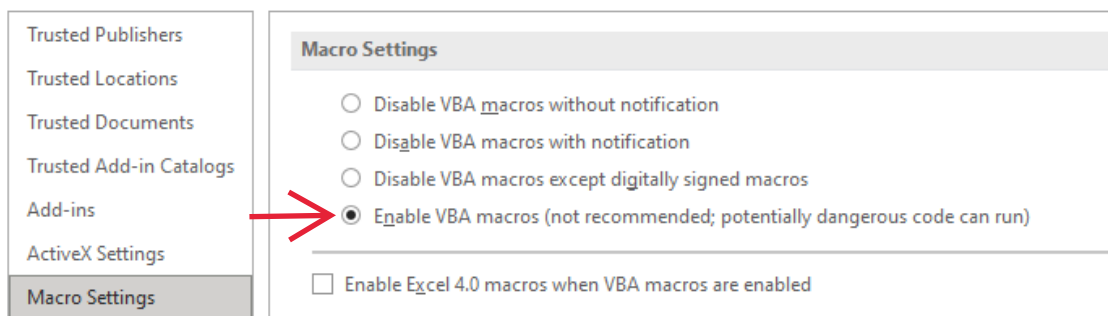
EXCEL BUDGET

EXPORTING STREAMLYNE BUDGET TO EXCEL (CONT.)

Some users or departments have settings that restrict Macros. These steps can be followed to change the Macro settings on your computer.

1. Select the File tab and choose Options
2. Select Trust Center, and then choose Trust Center settings
3. Select Enable VBA Macros

Trust Center



If these steps do not work, or if you find that you do not have privileges to change settings, please contact your IT administrator for support or permission.

To find/retrieve Excel budget information from the existing PD:

- 1) Open Streamlyne
 - a) Open **Reporting tab**
 - b) In the **Search Reports** bar, enter "excel" to search for the correct report
 - c) Check the box next to and use **Launch button** to open "Streamlyne Budget Export to Excel by PD Number-V2"

The image shows the Streamlyne Reports Home dashboard. At the top, there are navigation links for 'Home', 'Reports', and 'Reports Home'. Below that are tabs for 'REPORTS', 'ARCHIVES', and 'DASHBOARDS'. The main content area is titled 'Reports Home' and includes a 'Reporting Dashboard' and 'Manage your Reports' link. On the left, there is a 'Filter Reports' section with a 'Clear Filter' button and a count of 1. The main 'Reports Listing' table has a search bar containing 'excel'. The table has columns for 'Report Title', 'Options', 'Favorite', 'Created by', and 'Last Execute'. The first row shows a report titled 'Streamlyne Budget Export to Excel by PD Number-V2' with a 'Launch' button highlighted in a red box. The 'Created by' field is 'System Administrator' and the 'Last Execute' field is '9:29 AM'. Below the table, there is a note: 'All personnel and non-personnel details by proposal development number specified in the run control.'

HELP EMAIL: streamlyne@iastate.edu

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

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EXPORTING STREAMLYNE BUDGET TO EXCEL (CONT.)

2) Enter the PD # in the search bar and hit **enter**

▼ Runtime Parameters

PROPOSAL NUMBER exactly matches Ignore case

Launch Report

Report Results

Refresh Clear Filter Aggregate Options Summary Only | |

PD #	Budget Period	Budget Period Start Date	Budget Period End Date	CATEGORY TYPE	BUDGET CATEGORY CODE	Budget Category
No items listed						

a) In top right, click **Export Results** button

Streamlyne Budget Export to Excel by PD Number-V2

Report Results

All personnel and non-personnel details by proposal development number specified in the run control.

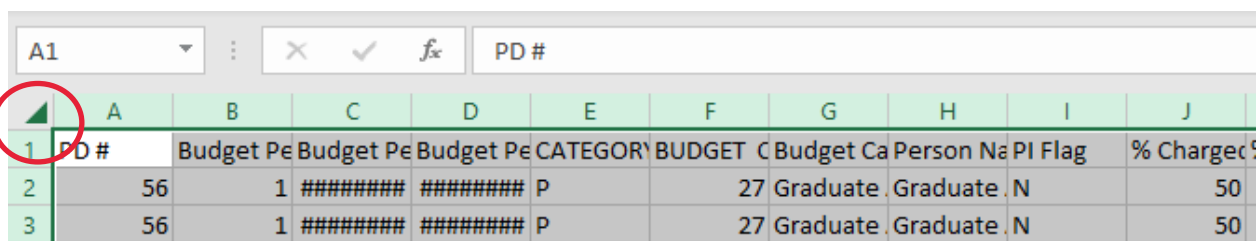


i) Select to export as .csv

➔ Excel Comma-Separated Values (.csv)

ii) Proceed to **Export** and open – with the settings that are automatically generated.

3) Open up exported file, select the entire Excel workbook by using triangle in top, left corner



	A	B	C	D	E	F	G	H	I	J
1	PD #	Budget Pe	Budget Pe	Budget Pe	CATEGOR	BUDGET	C Budget Ca	Person Na	PI Flag	% Charged
2	56	1	#####	#####	P	27	Graduate	Graduate	N	50
3	56	1	#####	#####	P	27	Graduate	Graduate	N	50

To export the SL budget data into **Streamlyne Budget to Excel by PD** workbook.

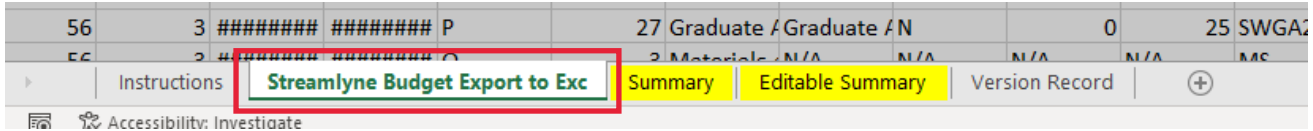
1) Copy and paste excel file into blank Streamlyne budget document **Streamlyne Budget to Excel by PD**

a) Use the **Streamlyne Budget Export to Exc** tab to paste information

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EXCEL BUDGET

EXPORTING STREAMLYNE BUDGET TO EXCEL (CONT.)

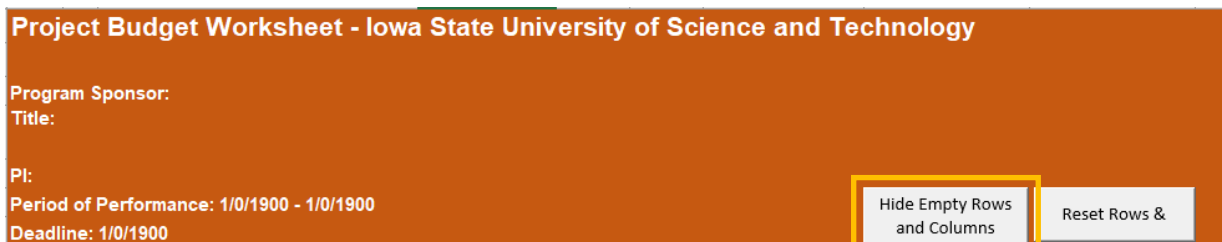


b) Paste the entire amount of copied information by using the triangle in the top, left corner.

2) Move back to **Summary** tab of budget document

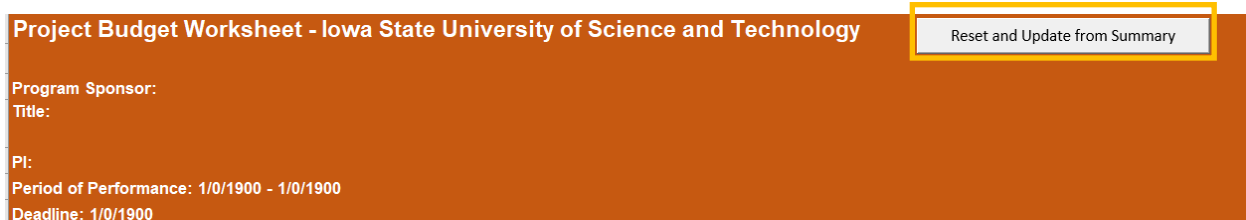
a) Click “**Hide Empty Rows and Columns**” button

b) Confirm that the correct PD number is found in row 9/ column C.



3) If you want to use the **Editable Summary**:

a) Select “**Reset and Update from Summary**” near top right- and confirm that the correct PD number is found in row 9/ column C.



You can now edit this Excel budget as needed and save.