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## **Navigation, the Action List, and Common Document Elements**

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## Introduction

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### Common Elements

This manual provides a reference to all the common elements of Streamlyne Research. Though there are certain exceptions in the general rules presented here, this document will be a good companion to all of your future learning as you dig into each module's functionality. For the purposes of eliminating redundancy, content provided in this manual will not be referenced again in other documents.

### A Stepwise Approach

Subsequent guides are specific to each module. The guides are intended to demonstrate the depth and breadth of Streamlyne's functionality to new users who would otherwise be unproductive in an unfamiliar system. To achieve this end, the processes are broken down into manageable chunks with the steps to each process laid out sequentially. By practicing the steps and experimenting in the application at the detail level, you will gain the knowledge you need to design high-level processes that will meet your institution's unique needs.

When a term or document name specific to Streamlyne is referenced in the text, the term will appear in a larger font to match the font used in the application. When a process step requires you to fill in a specific field, this field's name will appear **larger and in bold**.

### Every Installation Is Different

Streamlyne Research is highly configurable. During the implementation process at your institution, your Streamlyne partners will lead you through analysis sessions to identify which features you would like to use, which values you would like to change to reflect your institution's terminology, and which features you will skip altogether.

Given this, the processes detailed in this document are representative of general practices and do not necessarily represent the exact manner in which your institution will choose to use the application.

Let's begin!

## Navigating in Streamlyne Research

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Navigating in Streamlyne Research is straightforward and intuitive. This section will walk you through the basic screen components to ensure you can easily find what you need to be productive.

### Logging In

UNC has implemented a single sign-on (SSO) portal for you to log on to the application as you would many other UNC systems.

1. Open a browser window.

**Note** Streamlyne Research is compatible with the two most recent versions of Chrome, Safari, Firefox, and Internet Explorer.

2. Type the URL, [research.unco.streamlyne.org](http://research.unco.streamlyne.org), for UNC's Streamlyne Research website and hit <Enter>.

**Note** If you are on campus and logged into a UNC computer, you will automatically be logged into the UNC Streamlyne Research website.

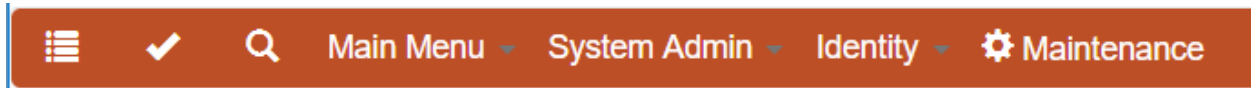
3. If requested, enter your **UNC Email** and **Password**, and then click the Sign in button.

**Note** UNC students must use their student [@bears.unco.edu](mailto:@bears.unco.edu) email account when logging in.




### The Action List

If your login is successful, Streamlyne Research will route you to the Action List. The Action List is the jumping-off page for all Streamlyne functionality. The Action List occupies the center of the page. Each line on the Action List represents a pending workflow item, requiring some sort of action from you. Because of its importance, we gave the Action List its own section: [Mastering Actions & the Action List](#).


## The Menu Bar



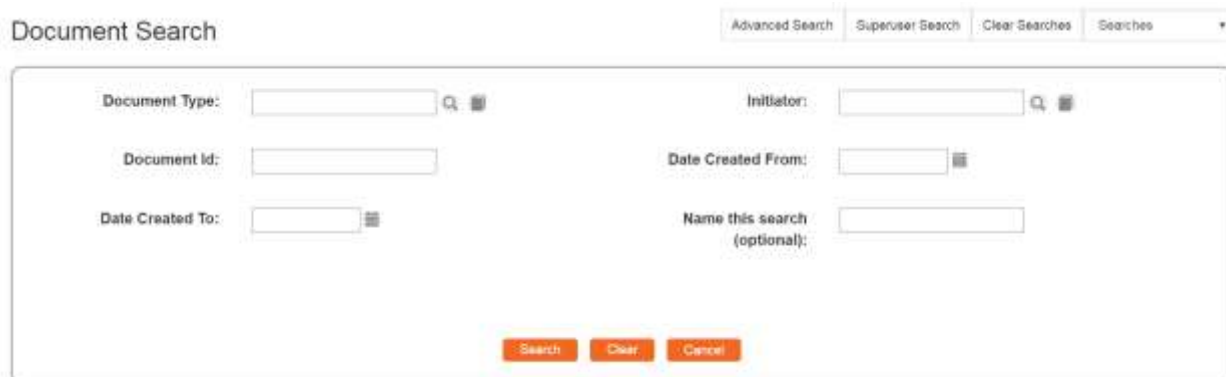
The Menu Bar remains fixed to your primary Streamlyne Research tab regardless of where you are in the application. This is your primary means of navigation in the application.

- Click the List button  to return to the Portal Page and Action List at any point.
- When you complete an action, the item is moved to the Outbox. Click the Outbox button  to review all items on which you have taken action.
- Click the Magnifying Glass  to access the Document Search function.

### More On Document Search

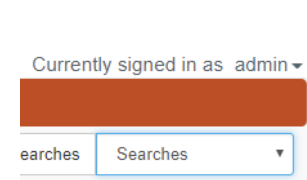
As previously stated, clicking the Magnifying Glass  from the Menu Bar accesses the Document Search function. This is a handy tool for general access to specific documents, or for auditing changes to Maintenance Documents.

To find any specific document, enter as much information as possible into the search fields, and then click the Search button. Streamlyne Research will display the search results immediately below the window, allowing you drill into each document by clicking the hyperlinked document numbers.

The image shows a 'Document Search' form. At the top right, there are four buttons: 'Advanced Search', 'Superuser Search', 'Clear Searches', and 'Searches' with a dropdown arrow. The main form area contains several input fields: 'Document Type:' with a search icon and a list icon; 'Document Id:'; 'Date Created To:' with a list icon; 'Initiator:' with a search icon and a list icon; 'Date Created From:' with a list icon; and 'Name this search (optional):'. At the bottom of the form are three buttons: 'Search', 'Clear', and 'Cancel'.

- Click the magnifying glass to access the full list of Document Types available in Streamlyne. See Appendix A for the full list of Document Types. This kind of search can be useful when you would like to see all the changes made to a specific document.


- To search for documents based on the username of the person who created a document, (not necessarily the same person who performed the last update), click the magnifying glass to search for and select the username of the Initiator.
- If you know the specific Document ID you would like to search for, enter it into the Document Id field. A Document ID is the unique identifier assigned to every document created in the system. A Document ID will never be assigned twice. For example, a given Proposal Development document may be assigned a Prop Dev ID of 120 with a Document ID of 5469. The story told by these numbers is: this is the 120<sup>th</sup> Proposal Development document saved to the database, and the 5,469<sup>th</sup> document created in the system. Note that you cannot search for module-specific identifiers within the Document Search window.
- The Date Created From and Date Created To fields can be used together to get a specific date range, or individually. Enter data in MM/DD/YYYY format, or click the calendar icon to search for and select a date value.
- If you would like to reference this search later, enter a brief word or phrase in the Name This Search field. To find this search later, click the dropdown labeled Searches in the upper righthand corner of the page.



## The Dropdown Menus

### Main Menu

The Main Menu is the place from which all transactional work is completed. The options on the menu will change based on the permissions of the signed-on user; only modules that a user has access to will appear on her or his menu.

- Initiate a new document directly from any of the below options by hovering over the Main Menu Option and clicking the Plus Sign  next to the desired document type.

A user with permissions to access all modules would see the following options:



Main Menu Option	Submenu Option	Description
Pre-Award	Proposal Development	This module is a collaborative proposal submission module with budget generation, complex approval workflow, and full functionality to support S2S transmissions to Grants.gov. Each Proposal Development (PD) document represents an auditable record of a completed submission.
Pre-Award	Proposal Log	This is a simple proposal tracking module for proposals that either bypass the standard process or for use at institutions that do not require the full Proposal Development module. This module is more limited than PD but also more flexible.
Pre-Award	Institutional Proposal	Each Institutional Proposal (IP) represents a single competition. There can be many-to-one relationships between PDs and IPs. All changes or updates that occur post-submission but before award are recorded on the IP document. These updates include changes to personnel, special review status, intellectual property issues, proposal status, etc. An IP is a versioned document with auditable history to changes made over time.
Negotiations	Negotiations	Each Negotiation document serves as a record of all activities with a given counterparty as specific terms are worked out. A Negotiation document can be linked to another document within Streamlyne, or it can function as a stand-alone record if unrelated to sponsored research activities.
Post-Award	Award	A Streamlyne Award is a versioned document that serves as a living electronic representation of your current agreement with a sponsor. The Award module includes iterative detailed budgeting, award hierarchies for parent-child project relationships, deliverable scheduling, and more. Integrations from Streamlyne to your institution's financial system will likely come out of this module.
Post-Award	Subaward	The Subaward module is a versioned document that serves as a living electronic representation of your current agreement with a subrecipient. This module generates FDP Subrecipient Templates.
Post-Award	Award Report Tracking	The Award Report Tracking feature is intended to facilitate the tracking, notification, and escalation of deliverables required under the terms of an Award.

Main Menu Option	Submenu Option	Description
IRB	IRB Protocols	The IRB Protocol module facilitates the collection, review, and phased execution of human subjects research, to include full support for new protocols, amendments, renewals, continuations, deviation reporting, online reviews, as well as the generation and tracking of all formal and informal correspondence.
IRB	IRB Committee	The IRB Committee module tracks committee composition over time, to include active members, their roles, and their term history. The IRB Committee module further facilitates committee meeting scheduling, meeting agenda generation and correspondence, meeting minutes generation and correspondence, member vote recording, etc. All of these features are tightly integrated to the IRB Protocol module.
IRB	IRB Lookups	The IRB Lookups available from the Main Menu will vary based on the permissions and roles of the signed-on user. For example, an IRB Administrator will have different options than a Principle Investigator.
IACUC	IACUC Protocols	The IACUC Protocol module facilitates the collection, review, and phased execution of animal research, to include full support for new protocols, amendments, renewals, adverse event and deviation reporting, online reviews, as well as the generation and tracking of all formal and informal correspondence.
IACUC	IACUC Committee	The IACUC Committee module tracks committee composition over time, to include active members, their roles, and their term history. The IACUC Committee module further facilitates committee meeting scheduling, meeting agenda generation and correspondence, meeting minutes generation and correspondence, member vote recording, etc. All of these features are tightly integrated to the IACUC Protocol module.
IACUC	IACUC Lookups	The IACUC Lookups available from the Main Menu will vary based on the permissions and roles of the signed-on user. For example, an IACUC Administrator will have more and different lookups options than a Principle Investigator.

Main Menu Option	Submenu Option	Description
Conflict of Interest	Financial Entities	Each Financial Entity document represents a unique Significant Financial Interest (SFI) or significant time investment in an entity other than your institution by an employee of your institution. The threshold criteria and interview responses collected on this form are fully configurable to comply with federal, state, and institutional policies.
Conflict of Interest	Annual Disclosure	On a timetable determined by your institution, the Annual Disclosure collects updated Financial Entity information from each reporter, and prompts him or her to update any self-evaluation of COI between those SFIs and active research projects for that year.
Conflict of Interest	Master Disclosure	The Master Disclosure acts as a master folio that retains a reporter's entire disclosure and Financial Entity history for the life of his or her history in the Streamlyne application.
Conflict of Interest	COI Lookups	The COI Lookups available from the Main Menu will vary based on the permissions and roles of the signed-on user. For example, a COI Administrator will have more and different lookups options than a Principle Investigator.
Settings	Address Book	Depending on your permissions, this menu option will allow you to either search the Address Book, or both search for and create new Address Book records. Address Book records serve one or more of three purposes: to indicate a primary contact within an Organization, to indicate a primary contact within a Sponsor, or to indicate a secondary contact within an Organization, a Sponsor, or both.
Settings	Sponsor	Depending on your permissions, this menu option will allow you to either search the Sponsor table, or both search for and create new Sponsor records. Sponsors are required for all Pre-Award and Post-Award documents, and optional on Protocol documents.
Settings	Organization	Depending on your permissions, this menu option will allow you to either search the Organization table, or both search for and create new Organization records. Organizations, which mostly represent Subrecipients, are conditionally required for Pre-Award and Post-Award documents.

Main Menu Option	Submenu Option	Description
Settings	Person Extended Attributes	Every user has access to his or her own Person Extended Attributes (PEA) record. Some users may have access to edit PEA records for an entire department, or more. These records must be maintained manually over time. These records provide additional HR details beyond those in the Person record in order to populate federal Pre-Award forms or allow a central office to screen investigator demographic data to match with or exclude them from specific opportunities.
Settings	User Preferences	Each user has access to update and maintain her or his own User Preferences, which govern email preferences and Action List preferences.
Settings	Document Locks	This option will only appear to users with system administration privileges. A pessimistic lock occurs when another user has locked a document for editing. Occasionally, the central office will find themselves with a deadline to submit when a proposal preparer has left a document open on his or her machine but is not available to close the document. In order to proceed, the pessimistic lock has to be cleared. From this page, click the Search button to see all pessimistic locks in the system. Click the <a href="#">delete</a> hyperlink next to the item you wish to unlock, and then navigate to the document as usual to finish processing.
Settings	Current & Pending Support	This setting allows the user to run the current and pending reports. These are reports that reflect effort logged for a given person on IPs (pending) and Awards (current).
Settings	Notification Search	The most common application of the Notification Search function is to confirm that notifications were generated and sent appropriately to any given recipient. Enter that recipient's username in the recipient field and click Search to see the results.

## Identity

There is no practical reason that a general system user would need access to edit items on the Identity menu. Hover on the Identity options to reveal the menus for users (Persons), roles, groups, as well as configuration options for References used in user maintenance.

## Logging Out



While it is tempting to terminate your Streamlyne session by clicking the **X** in the corner of your browser window, be sure to protect your data by logging out of the application *before* ending your browsing session.



To log out securely, click on your hyperlinked username on the right-hand side of the Hyperlink Bar, and then click the Logout button.

## Mastering Actions & the Action List

All documents in Streamlyne Research can be routed through both predefined and ad hoc workflows. These workflows govern document acknowledgements, approvals, completion requests, and simple FYI notifications.

When any pending item is routed to you for action, the system notifies you in two ways:







- Via e-mail notifications containing hyperlinks to take you right to the Streamlyne Research document.
- Via the addition of a new item to your Action List.

The information in this section will help you master the functionality of the Action List.

### Elements of the Action List

Action List Refresh Filter

Apply Default NONE ▾





	Action	Id	Type	Title	Route Status	Delegator	Date Created	Group Request	Actions	Log
	ACK	7260	Subaward Invoice	New SubAwardAmountReleased - Invoice example	DISAPPROVED		04:52 PM 01/12/2015			
	COM	13487	Protocol	Protocol - DEMO	SAVED		10:44 AM 04/30/2015			
	COM	15556	IACUC Protocol	IACUC Protocol - IACUC Demo	SAVED		09:12 AM 09/23/2015			
Show	FYI	15606	Notification	Protocol 1507002265 Expedited Approval	FINAL		10:34 AM 09/24/2015		NONE ▾	
Show	APP	19878	Proposal Development Document	PD Co-PI Workflow T; Proposal No: 175; PI: Biochemistry Professor; Sponsor: National Institutes of Health; Due Date: null	ENROUTE		11:46 AM 12/16/2016			
Show	APP	19891	Proposal Development Document	PD with Detailed Bu; Proposal No: 178; PI: Biochemistry Professor; Sponsor: National Science Foundation; Due Date: 01/01/2017	ENROUTE		08:01 AM 12/22/2016			

8 items found, displaying all

[Take Action](#)

## The Action Symbols

Streamlyne Research displays the type of Action required for each item in the second column on your Action List. Consult this table for definition and requirement for each Action symbol:

Symbol	Action	Requirement
	Acknowledge	This item requires your acknowledgement in order for the document to move forward in its process.
	Approve	This item requires that you review the details and make a decision to Approve, Disapprove, or Reject the document's contents.
	Complete	This item requires that you complete one or more sections of the document in order for the document to move forward in its process.
	For Your Information	This item is being routed to you for informational purposes only.

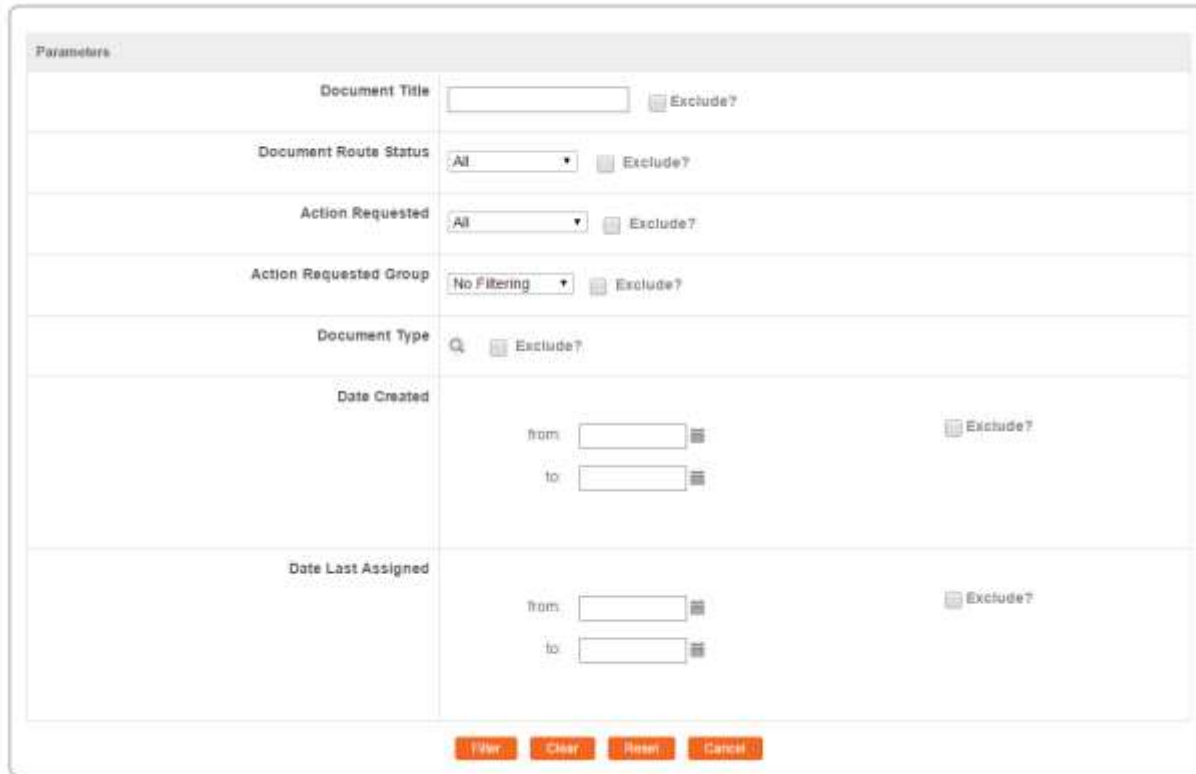
## The Refresh/Filter Buttons

The Refresh button does exactly what you would expect: it reloads the Action List. Click this button when you are actively working your action items to ensure old items fall off and newly generated items are included in the page view.



Click the Filter button to add, edit, or remove filtering criteria to customize your Action List view. When you click the Filter button, Streamlyne Research displays the Action List Filter page, prompting you to enter your filtering parameters, as shown in the following image:

## Action List Filter



Enter your filtering criteria, and then click the Filter button at the bottom of the page to apply the new data parameters to the Action List view.

Remember to remove or update filtering criteria whenever possible to ensure you are not unintentionally hiding new items that require your attention.

### The Show/Hide Button

The Show button appears in first column of the Action List for some items, but not all items. When you click the Show button, Streamlyne Research will display additional data directly on the Action List page.



For some document actions, like Proposal Approvals, Streamlyne Research will also give you the option to access the full document by clicking an Open button. For example, note that the Open Proposal button appears in the detail section of a Proposal Development Action List item, as shown in the following image:



<a href="#">Hide</a>	<b>COM</b>	15544	Proposal Development Document	special review; Proposal No: 107; PI: Pediatrics Professor; Sponsor: National Institutes of Health; Due Date: null	SAVED	10:32 AM 09/11/2015		
----------------------	------------	-------	-------------------------------	--	-------	------------------------	--	--

Project Title:	special review	Dates:	Proposal Due Date:
Proposal No.:	107		Start Date: 09/01/2015
Proposal Type:	New		End Date: 09/30/2015
Activity Type:	Research	Amounts:	Total Direct Cost: \$10,000.00
Sponsor:	National Institutes of Health		Total F&A Cost: \$5,000.00
Lead Unit:	102020		Total All Cost: \$15,000.00
PI:	Pediatrics Professor		

[Open Proposal](#)

For other actions, like Notifications, Streamlyne Research only displays notification content when the Show button is clicked. In these cases, you have the option to take your action by clicking the button in the detail view.

For example, in this screen image, note the FYI button at the bottom of the Notification item:

<a href="#">Hide</a>	<b>FYI</b>	20770	Notification	Negotiation activities are complete.	FINAL	10:02 AM 01/30/2017	NONE	
----------------------	------------	-------	--------------	--------------------------------------	-------	------------------------	------	--

Removal Date: None

Title: Negotiation activities are complete.

Content:

The negotiation is complete.

Negotiation ID: 27  
 Negotiator: GCO Administrator  
 Negotiation Status: Complete  
 Anticipated Project Start Date:  
 Negotiation Start Date: 01/30/2017  
 Negotiation End Date: 01/30/2017  
 Title: Negotiation Document Title  
 Principal Investigator: Biochemistry Professor  
 Lead Unit: Biochemistry (105010)  
 Sponsor: National Institutes of Health (000340)  
 Prime Sponsor: None given. (None given.)

[FYI](#)

To close the document details and return to the action item's summary view, click the



## The ID Column

Every item in your Action List has an identifier listed in the Id column. This Id is the unique, system-generated identifier assigned to every document in Streamlyne Research, also known as the Document Number.

Id

19878




Click the hyperlinked Id to open the corresponding document in a new tab in your browser.

## The Document Data

Summary document data is displayed in the Action List to give you as much information as possible at a glance. This table defines the data displayed in the Document Data columns.

Column Name	Description	
Type	This field describes the document type regardless of whether the document is initiated by a user, such as Proposals and Protocols, or initiated by the system, such as Notifications.	
Title	The <b>Title</b> of the document varies depending on the module from which the document originates. This field will offer additional information on document content.	
Route Status	This field reports the workflow status of each item. Statuses are:	
	ENROUTE	The document is complete and has been submitted for approvals
	SAVED	The document is incomplete and requires completion
	FINAL	No additional action is required on the document, though an event has occurred to trigger a notification
Date Created	This is the date and time that the item was first saved to the database.	
Actions	See <a href="#">FYI Default Actions</a> section.	

Column Name	Description
<p><b>Log</b></p> 	<p>The Log column contains a button to link you to the Route Log for each document. More information on the Route Log can be found in section <a href="#">Route Log</a>.</p> <p>For Notifications, clicking this button will only provide the log for the Notification—not for the parent document for which the notification was generated.</p>

## Mastering Actions

Clearly, any item that appears on your Action List requires input from you in some way. As you become more familiar with the application, you will come across other places outside of the Action List where you will be prompted to take Action of some sort.

This section will describe the two methods for taking Action in Streamlyne Research: Action Buttons and Default Actions.

### Action Buttons

Action Buttons appear throughout Streamlyne Research, in such places as:

- Within the message body of an item on your Action List
- At the bottom of the screen within a document
- In a dedicated section within a document tab





The table that follows describes the function of every Action in Streamlyne Research.

Action Name	Description
Submit to S2S or Submit to Sponsor	<p>These options are specific to Proposal Development documents only. Click this button to send a Proposal Development document directly to the federal Grants.gov system. This system-to-system (S2S) transmittal option is limited to funding opportunities where the sponsoring agency has made this option available.</p> <p>This button appears on the Proposal Actions tab of the Proposal document. Documents can be submitted to the sponsor when the Document Status is Approval Pending.</p>
Submit	<p>Click this button to move a document through workflow to the first/next approver.</p> <p>Once submitted, the document's Route Status updates to ENROUTE until all approvals are complete.</p>
Cancel	<p>Click this button to indicate the document is void and should be disregarded. Note that cancelled documents cannot be modified in any way and will not route for approval.</p>
Close	<p>Click this button to exit a document. Once clicked, the system will prompt you to save any changes before exiting.</p> <p>If you exit a document without first clicking the Close button (by closing the browser tab or session instead), the document will remain locked for editing until you reopen the document and close it properly.</p>
Save	<p>Click this button to commit changes to the database. Once saved, the document will appear on the initiator's Action List and remain there until it is submitted into workflow.</p>
Reload	<p>Click this button to refresh the screen with the most recently saved data. Make sure to save any changes before clicking Reload.</p>

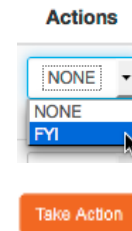
Action Name	Description
Reject	Click this button to return the document to its initiator for modifications. The system will prompt you to enter comments describing the reason for the rejection.
FYI	Click this button to acknowledge an FYI Notification on your Action List.
Acknowledge	Click this button to respond to an Acknowledgement Request on your Action List.
Approve	Click this button to indicate you have judged the business transaction represented on the document to be valid according to your best understanding of your institution's policies and procedures.
Disapprove	Click this button to indicate you have judged the business transaction represented on the document to be invalid according to your best understanding of your institution's policies and procedures. This action effectively cancels the document. The system will prompt you to enter comments describing the reason for your decision.
Blanket Approve	<p>Click this button to indicate two things:</p> <ol style="list-style-type: none"> <li>1. You have judged the business transaction represented on the document to be valid according to your best understanding of your institution's policies and procedures;</li> <li>2. It is appropriate for the document to bypass all regular workflow reviews.</li> </ol> <p>Users who would normally review this item will receive Acknowledgement Notifications instead.</p> <p>Administrator privileges are required to perform this Action.</p>
Route Report	Click the button to open a Route Log for the document in a new browser tab.

## FYI Default Actions

Unlike other Action types, Streamlyne Research allows you to acknowledge FYI Notifications right from the Action List.

**Note:** These options will appear dynamically on the Action List when you have FYI items on the page. If these options are missing from your Action List, it is because you have no FYI items that require attention.

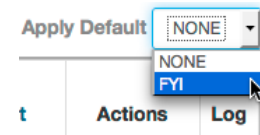
Follow these steps to complete an FYI Action this way:



1. Select FYI from the dropdown list in the Actions column next to any item(s) you wish to acknowledge.
2. Click the Take Action button located at the bottom of the page.

You may also choose to complete FYI Actions en masse. Follow these steps to acknowledge all your FYI Notifications at once:

1. Select FYI from the Apply Default dropdown list located in the upper right-hand corner of the page.
2. Streamlyne Research will update all your FYI Notification Actions to FYI.



Click the Take Action button located at the bottom of the screen to acknowledge all your FYI Actions at once.



## Using the Lookup Functions

Streamlyne Research delivers multidimensional search features called Lookups. Lookups are accessible from the Menu Bar, from the Main Menu, and from within documents. This section will review Lookup functionality.

### Searching Across All Modules

As previously covered, click the magnifying glass on the Menu Bar to access the Document Lookup.

This particular Lookup allows you to search for any document in any Streamlyne Research module, regardless of whether the document is delivered or custom.



### Searching Within A Module



















If you would like to search for a document specific a given module, click the hyperlinked menu option from the Main Menu. Streamlyne Research will

direct you to a Lookup that searches specifically for documents within the module selected.




For example, when you click the [Proposal Development](#) hyperlink from the Pre-Award Menu, Streamlyne Research displays the Proposal Development Lookup, as shown here:

### Proposal Development Lookup

Principal Investigator Username:	<input type="text"/>	Principal Investigator Full Name:	<input type="text"/>
All Personnel Full Name:	<input type="text"/>	Initiator Username:	<input type="text"/>
Initiator Full Name:	<input type="text"/>	Proposal Number:	<input type="text"/>
Proposal Type:	<input type="text" value="select"/>  	Proposal State:	<input type="text" value="select"/>  
Project Title:	<input type="text"/>	Sponsor Deadline Date From:	<input type="text"/> 
Sponsor Deadline Date To:	<input type="text"/> 	Sponsor Code:	<input type="text"/>  
Sponsor Name:	<input type="text"/>  	Prime Sponsor Code:	<input type="text"/>  
Prime Sponsor Name:	<input type="text"/>  	Lead Unit ID:	<input type="text"/>  
Lead Unit Name:	<input type="text"/>  	Award ID:	<input type="text"/>
Grants.gov Opportunity:	<input type="text"/>	Hierarchy Status:	<input type="text" value=""/>
Proposal Document Number:	<input type="text"/>		

Complete as many data elements as necessary to locate your item, and then click the Search button.

### Searching at the Field Level

Whether you are looking for a data element within a document section or trying to narrow down search criteria in a Lookup, you may search for a specific value by clicking the magnifying glass  next to any field.

If a magnifying glass does not appear next to a field, it means that the entries for this field are not limited to a set of configured values, and therefore cannot be accessed using the Lookup function.



## Searching with Wildcards

The asterisk symbol (\*) acts as a wildcard to give you flexibility in searching. Use the wildcard symbol in any field on a Lookup that will accept a hand-keyed value.

For example:

- To search for all employees with a first name that begins with “B”, enter “B\*” into the **First Name** field.
- To search for all Protocols entered in December 2014, enter “12/\*/14” into the **Create Date** field.
- To search for all **Sponsors** with a name that includes the word “cancer,” search for “\*Cancer\*” in the Sponsor Name field.

**Note** It may be necessary for you to experiment with wildcard searches to master this feature. Be aware that the use of multiple wildcards in a single search instance may increase processing times.

## Understanding Common Document Elements

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The electronic documents in Streamlyne Research share common elements across most modules, though exceptions are noted. This section reviews the purpose of each element and describes the steps to complete each section.

### Document Header

Every document in Streamlyne Research has these header details displayed at the top of each page, under the Menu Bar.

**Document Number** : 15137

**Document Status** : SAVED

**Initiator Network Id** : gcoadmin

**Creation Timestamp** : 12:23 PM 08/03/2015

These fields are read-only and include the following information:

- The **Document Number**—a unique, system-generated identifier used in the Document Search function
- The **Initiator Network Id** representing the username of the document's creator
- The **Document Status** representing the state of the document relative to completion, unrelated to Submission Status
- The **Creation Timestamp** marking the date and time the document was initiated

### Document Overview

The Document Overview section appears at the top of all documents. The only potential exception to this is in the Proposal Development module, where Streamlyne Research offers a simple configuration option to prepopulate this section and suppress it from the user interface (UI). The purpose of this section is to allow each institution to craft identifying information according to their own naming conventions, to complement, supplement, or supplant Streamlyne's document identifiers. The data entered here will facilitate easy searching and reporting later on, so make your entry into the **Description** field as meaningful as possible.



1. After initiating the document, enter a short description in the **Description** field.
2. If your institution requires that you include a separate tracking number, perhaps from a paper submission or another electronic system, enter that number into the **Organization Document Number** field.
3. If your institution requires an extended explanation of the purpose of the document, enter this data into the **Explanation** field.

## Notes and Attachments

The Notes and Attachments section provides a place to track supporting content collected during the life of the document. Certain modules, like Proposal Development and Protocol modules, have attachment functionality that is much more complex than that displayed here. This section describes the steps to use simple attachment function common to most modules.



1. Click the header to access the Notes and Attachments section.
2. Enter a short description in the **Note Topic** field.
3. Enter or paste a long description into the **Note Text** field.




- If the content of the note or attachment should be restricted from users with View Only privileges, click the **Restricted** checkbox.

**Note** The **Restricted** option is not included in the Notes section for every module.

- If an external file should be included with the note, click the Browse button to access your operating system's Choose File or File Upload dialog box. Complete this action by following your operating system's prompts.

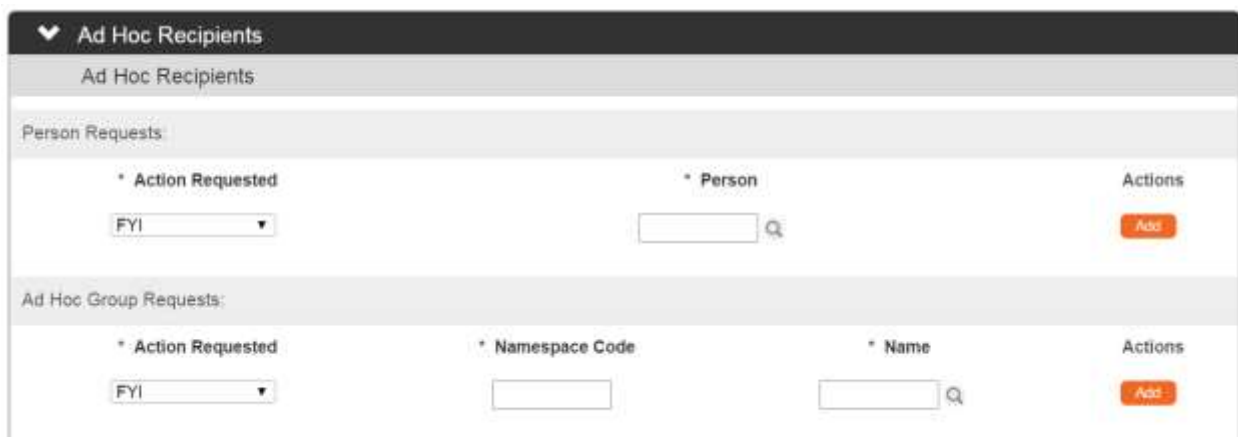
**Note** The **File Upload** option is not included in the Notes section for every module.



- Click the Add button to complete this process. 

## Ad Hoc Recipients

The functionality in the Ad Hoc Recipients section offers the flexibility to include individuals or workgroups in this specific document's workflow who may be outside the predefined routing path. You will find this section included on the Actions tab for any document—like the Award Actions tab, for example.

**Note** If this panel is not visible in the module you are working in, it means that there is no workflow support for that module.



Ad Hoc Recipients			
Ad Hoc Recipients			
Person Requests:			
* Action Requested	* Person		Actions
FYI	<input type="text"/>		
Ad Hoc Group Requests:			
* Action Requested	* Namespace Code	* Name	Actions
FYI	<input type="text"/>	<input type="text"/>	

- Click on header to access the Ad Hoc Recipients section.






2. If the document should be routed to an ad hoc person, click the arrows next to the **Action Requested** field under the **Person Requests** subheader. Click to select the desired action from the list of choices in that dropdown list.



**If you select... Then Streamlyne will...**

FYI	Send the identified recipient an FYI item on their Action List with a link to the associated document. The document will update to FINAL status regardless of the recipient's subsequent action.
Approve	Send the identified recipient an APP item on their Action List that will require an approval before the document status will update to FINAL status.
Complete	Send the identified recipient a COM item on their Action List that will remain on their list until the Submit button is clicked by anyone with access to do so for the document in question.
Acknowledge	Send the identified recipient an ACK item on their Action List that will prevent the document from being updated to FINAL status until the user acknowledges the item.




3. Enter a Person ID in the **Person** field, or click the magnifying glass  to look up this value.
4. Click the Add button to complete the action. 
5. If the document should be routed to an ad hoc workgroup, click the arrows next to the **Action Requested** field under the **Ad Hoc Group Requests** subheader. Select the desired action from dropdown list.
6. Click the Add button to complete the action. 

7. Repeat Steps 2 through 6 as many times as necessary to include all ad hoc recipients.

## Route Log

The Route Log section requires no action from the user. This section simply displays the details and status of each step taken during the life of the document. Note that all usernames or group names that appear in this section are hyperlinked. This is especially useful to see which users are assigned to a given group.

Access the Route Log from the Actions tab of any document or from the Log button on your Action List.

- Use the Refresh button to make sure up-to-the-minute actions are displayed on the page. 
- Click the Show button where available to see additional detail at the workflow item level. 
- Expand the section to see next steps in the configured workflow.
- Enter a short note into the **Action Message** field, and then click the Log Action Message button to add your note to the Actions Taken subsection of the Route Log.   
Super-user privileges are required for this action.

▼ Route Log
refresh

## Route Log

▼ ID: 20764

<b>Title</b>	Proposal; Proposal No: 188; PI: null; Sponsor: National Institutes of Health; Due Date: null		
<b>Type</b>	Proposal Development Document	<b>Created</b>	01:43 PM 01/27/2017
<b>Initiator</b>	Admin, System	<b>Last Modified</b>	02:29 PM 01/27/2017
<b>Route Status</b>	SAVED	<b>Last Approved</b>	
<b>Document Status</b>		<b>Document Status Modified</b>	
<b>Node(s)</b>	Initiated	<b>Finalized</b>	

▼ Actions Taken

Action	Taken By	For Delegator	Time/Date	Annotation
SAVED	Admin, System		01:44 PM 01/27/2017	

▼ Pending Action Requests

Action	Requested Of	Time/Date	Annotation
<span style="background-color: #f4a460; padding: 2px 5px; border-radius: 3px;">close</span> IN ACTION LIST COMPLETE	Admin, System	01:44 PM 01/27/2017	

➤ Future Action Requests

▼ Log Action Message

Action Message

Log Action Message

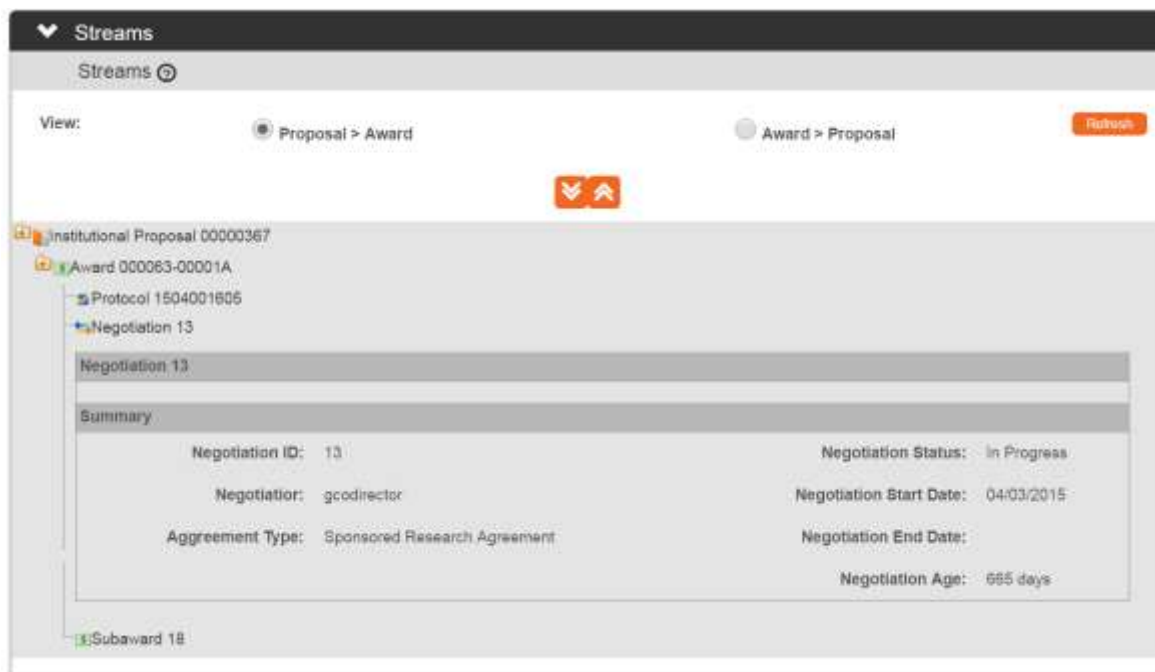
## Streams

Streams gathers and displays document details cross-referenced with all other linked documents. Click the Streams tab header on the left-hand menu to access the page.



The content displayed here is read-only. Use the radio buttons to toggle between Views. Click on the Document Numbers to drill down to the detail level of each document.

Within each document's details, you will be given the option to open the document itself. Click the corresponding Open button to do so.



The screenshot shows the Streams interface with the following elements:

- Streams** (dropdown menu)
- Streams** (refresh icon)
- View:**
  - Proposal > Award
  - Award > Proposal
  - Refresh** (button)
- Document Hierarchy:**
  - Institutional Proposal 0000367
    - Award 000063-00001A
      - Protocol 1504001605
        - Negotiation 13
          - Negotiation 13 (selected)
- Subaward 18

- Summary Table:**

Summary			
Negotiation ID:	13	Negotiation Status:	In Progress
Negotiation:	gcodirector	Negotiation Start Date:	04/03/2015
Agreement Type:	Sponsored Research Agreement	Negotiation End Date:	
		Negotiation Age:	565 days



## Appendix A: Document Types

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This is a list of Streamlyne documents available in the Document Search function.

**Note** Any misspellings in the “Label” field carry forward from the application.

### Identity Management Documents

Id	Name	Label
2998	IdentityManagementReviewResponsibilityMaintenanceDocument	Review Responsibility
2999	IdentityManagementGenericPermissionMaintenanceDocument	Permission
3680	IdentityManagementRoleDocument	Role
3681	IdentityManagementGroupDocument	Group
3682	IdentityManagementPersonDocument	Person

### Transaction Documents

Id	Name	Label
16333	CommonCommitteeDocument	Common Committee Document
16334	IacucProtocolDocument	IACUC Protocol
16335	ProtocolDocument	IRB Protocol
16336	ProposalDevelopmentDocument	Proposal Development Document
16337	AwardDocument	Award
16338	CoiDisclosureDocument	COI Disclosure

Id	Name	Label
16339	InstitutionalProposalDocument	Institutional Proposal
16340	IacucProtocolOnlineReviewDocument	IACUC Protocol Review
16341	BudgetDocument	Budget Document
16342	ProtocolOnlineReviewDocument	IRB Protocol Review
16343	KcMaintenanceDocument	KcMaintenanceDocument
16344	AwardBudgetDocument	Award Budget Document
16345	SubAwardDocument	Subaward
16346	PersonMassChangeDocument	Person Mass Change
16347	NegotiationDocument	Negotiation Document
16348	CommitteeDocument	Committee Document
16349	TimeAndMoneyDocument	Time And Money

## Maintenance Documents: Award Module

Id	Name	Label
16354	SubAwardContactTypeMaintenanceDocument	SubAward Contact Type
16368	ProtocolOnlineReviewStatusMaintenanceDocument	Protocol Review Status Code
16371	ContactTypeMaintenanceDocument	Contact Type
16381	AwardBasisOfPaymentMaintenanceDocument	Award Basis Of Payment
16394	AccountTypeMaintenanceDocument	Account Type

Id	Name	Label
16399	FrequencyBaseMaintenanceDocument	Frequency Base
16406	AwardTemplateContactMaintenanceDocument	Sponsor Template Contact
16414	IacucProtocolOnlineReviewDeterminRecommendMaintenanceDocument	Protocol Review Determination Recommendation Code
16416	AwardAttachmentTypeMaintenanceDocument	Award Attachment Type
16425	IntellectualPropertyReviewRequirementTypeMaintenanceDocument	IP Review Requirement Type
16435	AwardTemplateCommentMaintenanceDocument	Sponsor Template Comment
16438	AwardStatusMaintenanceDocument	Award Status Type
16456	ProtocolOnlineReviewDeterminRecommendMaintenanceDocument	Protocol Review Determination Recommendation Code
16471	ReportClassMaintenanceDocument	Report Class
16474	IntellectualPropertyReviewActivityTypeMaintenanceDocument	IP Review Activity Type
16476	AwardTemplateReportTermMaintenanceDocument	Edit Sponsor Template Reports
16480	AwardMethodOfPaymentMaintenanceDocument	Award Basis Of Payment
16489	AwardTemplateMaintenanceDocument	Sponsor Template
16506	IntellectualPropertyReviewMaintenanceDocument	Intellectual Property Review
16510	AwardTemplateReportTermRecipientMaintenanceDocument	Sponsor Template Report Term Recipient
16514	ReportStatusMaintenanceDocument	Report Status
16519	AwardTypeMaintenanceDocument	Award Type
16525	ReportMaintenanceDocument	Report Type

Id	Name	Label
16538	IacucProtocolOnlineReviewStatusMaintenanceDocument	Iacuc Protocol Review Status Code
16539	IntellectualPropertyReviewResultTypeMaintenanceDocument	IP Review Result Type
16550	AwardTemplateTermMaintenanceDocument	Sponsor Template Report Terms
16569	DistributionMaintenanceDocument	OSP File Copy
16576	CommentTypeMaintenanceDocument	Comment Type
16591	FrequencyMaintenanceDocument	Frequency

## Maintenance Documents: Shared Compliance Configuration

Id	Name	Label
16367	ProtocolAttachmentGroupMaintenanceDocument	Protocol Attachment Group Maintenance Document
16375	ProtocolAttachmentStatusMaintenanceDocument	Protocol Attachment Status Maintenance Document
16376	IacucProtocolActionTypeMaintenanceDocument	IACUC Protocol Action Type
16380	ParticipantTypeMaintenanceDocument	Participant Type
16383	IacucAlternateSearchDatabaseMaintenanceDocument	IACUC Alternate Search Database Maintenance Document
16385	CommitteeDecisionMotionTypeMaintenanceDocument	Committee Decision Motion Type
16386	CoiAttachmentTypeMaintenanceDocument	Coi Attachment Type Maintenance Document
16391	IacucProtocolReferenceTypeMaintenanceDocument	IACUC Protocol Reference Type
16401	ExemptStudiesCheckListMaintenanceDocument	Exempt Studies CheckList Item

Id	Name	Label
16402	IacucProtocolAttachmentGroupMaintenanceDocument	Protocol Attachment Group Maintenance Document
16405	ProtocolSubmissionQualifierTypeMaintenanceDocument	Protocol Submission Qualifier Type Maintenance Document
16413	ProtocolAttachmentTypeMaintenanceDocument	Protocol Attachment Type Maintenance Document
16422	IacucProcedureMaintenanceDocument	Procedure Maintenance Document
16424	ProtocolTypeMaintenanceDocument	Protocol Type Maintenance Document
16426	IacucValidProtoSubTypeQualMaintenanceDocument	IACUC Valid Protocol Submission Type Qualifier
16427	IacucLocationTypeMaintenanceDocument	Location Type Maintenance Document
16428	IacucProtocolSubmissionTypeMaintenanceDocument	IACUC Protocol Submission Type
16429	CommitteeMembershipTypeMaintenanceDocument	Committee Membership Type
16431	IacucProtocolAttachmentTypeGroupMaintenanceDocument	IACUC Protocol Attachment Type Group Maintenance Document
16436	IacucSpeciesCountTypeMaintenanceDocument	Species Count Type Maintenance Document
16442	ProtocolActionTypeMaintenanceDocument	Protocol Action Type
16443	ProtocolStatusMaintenanceDocument	Protocol Status Maintenance Document
16446	IacucProtocolSubmissionQualifierTypeMaintenanceDocument	IACUC Protocol Submission Qualifier Type Maintenance Document
16448	FundingSourceTypeMaintenanceDocument	Funding Source Type
16450	ScheduleActItemMaintenanceDocument	Schedule Act Item Type

Id	Name	Label
16451	IacucProtocolAttachmentStatusMaintenanceDocument	IACUC Protocol Attachment Status Maintenance Document
16462	IacucProcedureCategoryMaintenanceDocument	Procedure Category Maintenance Document
16467	ProtocolAttachmentTypeGroupMaintenanceDocument	Protocol Attachment Type Group Maintenance Document
16490	IacucProtocolContingencyMaintenanceDocument	IACUC Protocol Contingency
16491	ScheduleStatusMaintenanceDocument	Schedule Status
16495	ProtocolReviewTypeMaintenanceDocument	Protocol Review Type
16496	KcAffiliationTypeMaintenanceDocument	IRB Affiliation Type Maintenance Document
16499	IacucProtocolReviewerTypeMaintenanceDocument	IACUC Protocol Reviewer Type
16501	IacucProtocolOnlineReviewDeterminTypeRecommendMaintDocument	IACUC Protocol Review Determination Type Recommendation Code
16507	ProtocolSubmissionStatusMaintenanceDocument	Protocol Submission Status
16508	IacucPainCategoryMaintenanceDocument	Pain Category Maintenance Document
16517	ProtocolSubmissionTypeMaintenanceDocument	Protocol Submission Type
16527	ProtocolReviewerTypeMaintenanceDocument	Protocol Reviewer Type
16528	IacucProtocolTypeMaintenanceDocument	IACUC Protocol Type
16530	IacucSpeciesMaintenanceDocument	Species Maintenance Document
16531	ProtocolReferenceTypeMaintenanceDocument	Protocol Reference Type
16536	ProtocolContingencyMaintenanceDocument	Protocol Contingency

Id	Name	Label
16541	IacucProtocolReviewTypeMaintenanceDocument	IACUC Protocol Review Type
16543	MembershipRoleMaintenanceDocument	Membership Role
16548	IacucProtocolStatusMaintenanceDocument	IACUC Protocol Status Maintenance Document
16554	IacucProtocolAttachmentTypeMaintenanceDocument	IACUC Protocol Attachment Type Maintenance Document
16555	AttachmentsEntryTypeMaintenanceDocument	Attchments Entry Type
16557	IacucProtocolProjectTypeMaintenanceDocument	IACUC Protocol Project Type
16560	CommitteeTypeMaintenanceDocument	Committee Type
16561	IacucProtocolAffiliationTypeMaintenanceDocument	IACUC Affiliation Type Maintenance Document
16563	IacucProcedureCategoryCustomDataMaintenanceDocument	IacucProcedureCategoryCustomData Maintenance Document
16566	IacucPersonTrainingMaintenanceDocument	IACUC Person Training Maintenance Document
16581	IacucExceptionCategoryMaintenanceDocument	Exception Category Maintenance Document
16586	IacucLocationNameMaintenanceDocument	Location Name Maintenance Document
16590	ExpeditedReviewCheckListMaintenanceDocument	Expedited Review CheckList Item
16593	MinuteEntryTypeMaintenanceDocument	Minute Entry Type

## Maintenance Documents: Foundational Configuration

Id	Name	Label
16358	SponsorMaintenanceDocument	Sponsor
16369	SchoolCodeMaintenanceDocument	School Code
16379	IacucResearchAreasMaintenanceDocument	Report Area
16382	UnitAdministratorTypeMaintenanceDocument	Administrator Type
16430	SponsorFormsMaintenanceDocument	Sponsor Form
16441	FinEntitiesDataGroupMaintenanceDocument	Financial Entity Data Group Maintenance Document
16453	TrainingMaintenanceDocument	Training
16487	FinEntitiesDataMatrixMaintenanceDocument	Financial Entity Data Matrix Maintenance Document
16511	ValidRatesMaintenanceDocument	Valid Rates
16516	SponsorHierarchyMaintenanceDocument	Sponsor Hierarchy
16522	SponsorTypeMaintenanceDocument	Sponsor Type
16523	PersonTrainingMaintenanceDocument	Person Training Maintenance Document
16549	Coeus Sub Module Maintenance Document	Streamlyne Research Sub Module
16559	ResearchAreasMaintenanceDocument	Report Area
16568	CoeusModuleMaintenanceDocument	Streamlyne Research Module
16573	SponsorFormTemplateMaintenanceDocument	Sponsor Form Template
16588	FinIntEntityRelTypeMaintenanceDocument	Financial Interest Entity Relationship Type Maintenance Document



Id	Name	Label
16352	ReportTypeMaintenanceDocument	ReportType Maintenance Document
16355	CustomAttributeDocumentMaintenanceDocument	Custom Attribute Document Maintenance Document
16356	ReportCustomAttributeMaintenanceDocument	ReportCustomAttribute Maintenance Document
16357	CustomAttributeMaintenanceDocument	Custom Attribute Maintenance Document
16359	Questionnaire Usage Maintenance Document	Questionnaire Usage
16360	SubAwardTemplateTypeMaintenanceDocument	Subaward Template Type Maintenance Document
16361	CustRptTypeDocumentMaintenanceDocument	CustRpt Type Document
16362	FinancialIndirectCostRecoveryTypeCodeMaintenanceDocument	Financial Indirect Cost Recovery Type Code Maintenance Document
16363	RateClassTypeMaintenanceDocument	Rate Class Type Maintenance Document
16364	S2sProviderMaintenanceDocument	S2S Provider
16365	KcKrmsTermFunParamSpecMaintenanceDocument	Krms Term Stored Function Params
16366	MessageOfTheDayMaintenanceDocument	Message Of The Day Maintenance Document
16370	ValidProtoSubTypeQualMaintenanceDocument	Valid Protocol Submission Type Qualifier
16372	QuestionMaintenanceDocument	Question
16373	CoiDisclosureStatusMaintenanceDocument	Coi Disclosure Status Maintenance Document
16374	BudgetCategoryMappingMaintenanceDocument	Budget Category Mapping Maintenance Document

Id	Name	Label
16377	SubAwardAttachmentTypeMaintenanceDocument	Subaward Attachment Type
16378	SpecialReviewApprovalTypeMaintenanceDocument	Special Review Approval Type
16384	KcKrmsTermFunctionMaintenanceDocument	Krms Term Stored Function
16387	PersonSignatureModuleMaintenanceDocument	Person Signature Module Details
16388	BudgetCategoryTypeMaintenanceDocument	Budget Category Type Maintenance Document
16389	CoiReviewerMaintenanceDocument	Coi Reviewer Maintenance Document
16390	ScienceKeywordMaintenanceDocument	Science Keyword
16392	CloseoutTypeMaintenanceDocument	Closeout Type Maintenance Document
16393	FinIntEntityStatusMaintenanceDocument	Financial Interest Entity Status Maintenance Document
16395	SubAwardStatusMaintenanceDocument	Subaward Status Maintenance Document
16396	ProtocolNotificationTemplateMaintenanceDocument	Notification Template
16397	ValidCeJobCodeMaintenanceDocument	Valid Cost Element Job Code
16400	RateClassBaseInclusionMaintenanceDocument	Rate Class Inclusion Maintenance Document
16404	S2sOppFormQuestionnaireMaintenanceDocument	S2S Opportunity Form to Questionnaire Mapping
16407	YnqMaintenanceDocument	YnqMaintenanceDocument
16408	PersonSignatureMaintenanceDocument	Person Signature Details
16409	CoiReviewTypeMaintenanceDocument	Coi Review Type Maintenance Document

Id	Name	Label
16411	IacucProtocolOrganizationTypeMaintenanceDocument	IACUC Protocol Organization Type Maintenance Document
16412	PersonMaintenanceDocument	Person
16415	QuestionCategoryMaintenanceDocument	Question Category
16417	OrganizationMaintenanceDocument	Organization Maintenance Document
16419	OrganizationCorrespondentMaintenanceDocument	Organization Correspondent Maintenance Document
16420	ContactUsageMaintenanceDocument	Contact Usage
16421	ValidCeRateTypeMaintenanceDocument	Valid Cost Element Rate Types Maintenance Document
16423	ValidBasisMethodPaymentMaintenanceDocument	Valid Basis Method Payment Maintenance Document
16432	Questionnaire Questions Maintenance Document	Questionnaire Questions
16433	UnitFormulatedCostMaintenanceDocument	Unit Formulated Cost
16437	Protocol Organization Type Maintenance Document	Protocol Protocol Organization Type
16439	NsfCodeMaintenanceDocument	NSF Code
16440	SubAwardInvoiceMaintenanceDocument	Subaward Invoice
16444	CoiReviewStatusMaintenanceDocument	Coi Review Status Maintenance Document
16445	InvestigatorCreditTypeMaintenanceDocument	Investigator Credit Type
16447	IacucUnitCorrespondentMaintenanceDocument	IACUC Unit Correspondent Maintenance Document
16449	CustReportTypeMaintenanceDocument	CustReport Type MaintenanceDocument

Id	Name	Label
16452	QuestionTypeMaintenanceDocument	Questionnaire Type
16454	CoiStatusMaintenanceDocument	Coi Status Maintenance Document
16455	CitizenshipTypeMaintenanceDocument	Citizenship Type
16457	CustReportDetailsMaintenanceDocument	CustReport Details MaintenanceDocument
16458	CoiNoteTypeMaintenanceDocument	Coi Note Type Maintenance Document
16460	UnitAdministratorMaintenanceDocument	Unit Administrator
16461	ValidIacucProtocolActionCorrespondenceMaintenanceDocument	IACUC Correspondence Generated
16463	Proposal Log Status Maintenance Document	Proposal Log Status Maintenance Document
16464	ValidProtoSubRevTypeMaintenanceDocument	Valid Protocol Submission Review Type
16465	RateClassMaintenanceDocument	Rate Class Maintenance Document
16466	SpecialReviewTypeMaintenanceDocument	Special Review Type
16468	InstituteLaRateMaintenanceDocument	Institute La Rates Maintenance Document
16469	ValidProtocolActionCorrespondenceMaintenanceDocument	Correspondence Generated
16470	RolodexMaintenanceDocument	Address Book
16472	IacucProtocolCorrespondenceTemplateMaintenanceDocument	IACUC Correspondence Template
16475	FormulatedTypeMaintenanceDocument	Formulated Type
16477	ProposalTypeMaintenanceDocument	Proposal Type
16478	IacucOrganizationCorrespondentMaintenanceDocument	IACUC Organization Correspondent Maintenance Document
16479	NotificationModuleRoleMaintenanceDocument	Notification Module

Id	Name	Label
16481	ValidAwardBasisPaymentMaintenanceDocument	Valid Award Basis Payment Maintenance Document
16482	CFDAMaintenanceDocument	CFDA Maintenance Document
16483	IacucProtocolPersonRoleMaintenanceDocument	IACUC Protocol Person Role
16486	ProtocolCorrespondenceTemplateMaintenanceDocument	Correspondence Template
16493	ArgValueLookupMaintenanceDocument	Argument Value
16494	OrganizationTypeListMaintenanceDocument	Organization
16498	BatchCorrespondenceMaintenanceDocument	Batch Correspondence
16500	ValidNarrFormsMaintenanceDocument	Valid Narrative Type - S2S Form
16502	SubAwardFormsMaintenanceDocument	Subaward Forms Maintenance Document
16503	Valid Frequency Base Maintenance Document	Valid Frequency Base Maintenance Document
16504	SubAwardApprovalTypeMaintenanceDocument	Subaward Approval Type Maintenance Document
16505	OrganizationTypeMaintenanceDocument	Organization
16512	CoiRecomendedActionTypeMaintenanceDocument	Coi Recomend Action Type Maintenance Document
16513	IacucValidProtoSubRevTypeMaintenanceDocument	IACUC Valid Protocol Submission Review Type
16515	NoticeOfOpportunityMaintenanceDocument	Notice of Opportunity
16518	TrainingStipendRateMaintenanceDocument	Training Stipend Rate Maintenance Document

Id	Name	Label
16524	ValidProtocolActionActionMaintenanceDocument	Protocol Follow-up Actions Maintenance Document
16526	CoiDispositionStatusMaintenanceDocument	Coi Disposition Status Maintenance Document
16533	CostElementMaintenanceDocument	Cost Element Maintenance Document
16534	QuestionnaireMaintenanceDocument	Questionnaire
16535	CustRptDefaultParmsMaintenanceDocument	CustRpt Default Parms MaintenanceDocument
16537	UnitCorrespondentMaintenanceDocument	Unit Correspondent Maintenance Document
16540	IacucCorrespondentTypeMaintenanceDocument	IACUC Correspondent Type
16542	CostShareTypeMaintenanceDocument	Cost Share Type
16544	CoiDisclosureEventTypeMaintenanceDocument	Coi Event Type Maintenance Document
16545	Proposal Log Type Maintenance Document	Proposal Log Type Maintenance Document
16546	ActivityTypeMaintenanceDocument	Activity Type Maintenance Document
16547	ValidCalcTypeMaintenanceDocument	Valid Calc Types Maintenance Document
16552	RateTypeMaintenanceDocument	Rate Type Maintenance Document
16553	SubAwardCostTypeMaintenanceDocument	Subaward Cost Type Maintenance Document
16556	CoiCommitteeRoleTypeMaintenanceDocument	Coi Committee Role Type Maintenance Document
16558	CorrespondentTypeMaintenanceDocument	Correspondent Type
16562	NotificationTypeMaintenanceDocument	Notification

Id	Name	Label
16565	Proposal Status Maintenance Document	Proposal Status Maintenance Document
16567	IacucProtocolCorrespondenceTypeMaintenanceDocument	IACUC Protocol Correspondence Type
16570	CloseoutReportTypeMaintenanceDocument	Closeout Report Type
16571	RateClassBaseExclusionMaintenanceDocument	Rate Class Exclusion Maintenance Document
16572	WatermarkMaintenanceDocument	Watermark Details
16574	ValidSpecialReviewApprovalMaintenanceDocument	Valid Special Review Approval Maintenance Document
16575	SubAwardCopyRightsTypeMaintenanceDocument	Subaward Copyrights Type Maintenance Document
16577	BatchCorrespondenceDetailMaintenanceDocument	Batch Correspondence Detail
16578	ProtocolPersonRoleMaintenanceDocument	Protocol Person Role
16580	SpecialReviewUsageMaintenanceDocument	Special Review Usage
16582	BudgetCategoryMapMaintenanceDocument	Budget Category Maps Maintenance Document
16583	SubAwardReportTypeMaintenanceDocument	Subaward Report Type
16584	IacucValidProtocolActionActionMaintenanceDocument	IACUC Protocol Follow-up Actions Maintenance Document
16585	FandaRateTypeMaintenanceDocument	F & A Rate Type
16587	ProtocolCorrespondenceTypeMaintenanceDocument	Protocol Correspondence Type
16589	Valid Class Report Freq Maintenance Document	Valid Class Report Frequency Maintenance Document

Id	Name	Label
16592	FinancialObjectCodeMappingMaintenanceDocument	FinancialObjectCodeMapping Maintenance Document
16594	InstituteRateMaintenanceDocument	Institute Rates Maintenance Document
16597	ProposalLogMaintenanceDocument	Proposal Log
2708	CampusMaintenanceDocument	CampusMaintenanceDocument
2709	CampusTypeMaintenanceDocument	CampusTypeMaintenanceDocument
2710	CountryMaintenanceDocument	CountryMaintenanceDocument
2711	CountyMaintenanceDocument	CountyMaintenanceDocument
2712	PostalCodeMaintenanceDocument	PostalCodeMaintenanceDocument
2713	StateMaintenanceDocument	StateMaintenanceDocument
3007	ComponentMaintenanceDocument	Component Maintenance Document
3008	TravelAuthorization	Travel Authorization Document
3009	FiscalOfficerInfoMaintenanceDocument	Fiscal Officer Info Maintenance Document
3679	IdentityManagementDocument	Undefined
3683	TermSpecificationMaintenanceDocument	KRMS Term Specification Maintenance Document
3684	PeopleFlowMaintenanceDocument	PeopleFlowMaintenanceDocument
3685	AgendaMaintenanceDocument	Agenda Maintenance Document
3686	RuleMaintenanceDocument	Rule Maintenance Document
3687	AgendaEditorMaintenanceDocument	KRMS Agenda Editor Maintenance Document



Id	Name	Label
3688	TermMaintenanceDocument	KRMS Term Maintenance Document
3689	ContextMaintenanceDocument	KRMS Context Maintenance Document

## Maintenance Documents: Pre-Award Modules

Id	Name	Label
16353	ResearchTypeMaintenanceDocument	Research Type
16398	DeadlineTypeMaintenanceDocument	Deadline Type
16403	MailTypeMaintenanceDocument	Mail Type
16410	NegotiationAgreementTypeMaintenanceDocument	Negotiation Status
16418	ProposalLocationTypeMaintenanceDocument	Proposal Location Type
16434	NegotiationAssociationTypeMaintenanceDocument	Negotiation Status
16459	NarrativeStatusMaintenanceDocument	Narrative Status
16473	NegotiationActivityTypeMaintenanceDocument	Negotiation Activity Type
16484	MailByMaintenanceDocument	Mail By
16485	S2sRevisionTypeMaintenanceDocument	Revision Type Document
16488	DegreeTypeMaintenanceDocument	Degree Type
16492	BudgetStatusMaintenanceDocument	Budget Status
16497	AbstractTypeMaintenanceDocument	Abstract Type
16509	NegotiationLocationMaintenanceDocument	Negotiation Location

Id	Name	Label
16520	AppointmentTypeMaintenanceDocument	Appointment Type
16521	BudgetCategoryMaintenanceDocument	Budget Category Maintenance Document
16529	NegotiationStatusMaintenanceDocument	Negotiation Status
16532	JobCodeMaintenanceDocument	Job Code
16551	PostSubmissionStatusMaintenanceDocument	Post Submission Status Code
16564	S2sSubmissionTypeMaintenanceDocument	Submission Type Document Type
16579	NarrativeTypeMaintenanceDocument	Narrative Type

## Notification Documents

Id	Name	Label
2023	KualiNotification	Notification
2024	SendNotificationRequest	Send Notification Request